<u>Practice Book – How to share information in VSPS</u>

You can create a practice book in VSPS which can be used to invite other members to the practice and link them so you can see their information and they can see your information. One person needs to create the practice and will be the practice 'manager'. Only that person will be able to invite and link members to each other along with removing members.

Each user that wants to be a member of the practice must have an e-Auth account OR a login.gov account along with a VSPS Profile. See information at the below link regarding the switch from e-Auth to login.gov:

eAuth Notification-Transitioning to the Phase 3 Full Enforcement of Login.gov (usda.gov)

Importers that are linked will be able to see each other's Animal Importations and Animal Import Center Reservations.

Accredited Vets that are linked will be able to see each other's Coggins and CVIs. Vet support staff that are linked to accredited vets will be able to create Coggins and CVI's for the vets they are linked to and submit them to the vet for the vet to Issue or submit to the lab.

<u>To create a Practice Book:</u>

1. Go to Business Profile.
2. Click Practices.
3. Select Create a New Practice.
4. Enter a name for the practice and click Save.
5. In the User Email Address box enter the email address of the person you want to invite. You must use the same email that's on their VSPS user profile. To find the email on your profile: (Personal Profile- My User Profile).
    a. Click Add User.
6. The person you invited needs to log into VSPS.
    a. Go to Business Profile – Practices.
    b. Click Accept next to the invitation.
7. The person that created the practice needs to go back to the practice and click Edit next to the practice.
    a. Under the practice members grid click the link all users check box, then click the green link button to the left. This will link all users to everyone listed so everyone will be able see each other's information.
    b. If you only want to link certain members, click the grayed-out link button next to their name to link them to the specific members.

<u>If you have contacts and horses in your personal book, you can move them to the shared practice book.</u>

<u>To copy the client info to the shared practice book:</u>

1. Go to Business Profile –Address Book.
2. Check the box <u>only</u> next to the personal book and click Search.
3. Check the select all box on the top left of the search results.
4. Under Action select 'copy selected to book'.
5. Under address book select the new practice book.
6. Select Go.
    a. It will give you a green success message and let you know how many contacts have been copied.
    b. Do another search having <u>only</u> the new practice address box checked and search to make sure they all copied.

If you don't want the addresses listed in both your personal book and the new practice book, you can do another search and leave <u>only</u> the personal box checked and search.

1. Check the select all box.
2. Under Action select 'Delete Selected'.
3. Under Address book select 'personal'.

4. Select Go.
5. All contacts from the personal book will be deleted.

<u>To move the horses to the shared practice book:</u>

1. Go to Business Profile – Animals – Find Animal.
2. Next to Animal Species select Equine.
3. Select the box next to personal book and click Search.
4. Once the list comes up click the select all check box on the top left of the search results.
5. In the Select Action box select ‘Move to (practice name)’ and click Submit.
6. It will take you to a page to view animals being moved.
7. Click on Complete Move.
    a. Do another search, selecting the practice name and click Search to verify all the horses are moved to the new practice.