

Create Contact List

From guardian, parent, relatives to advocate and employers can be added to an individual's contact list.

1. From Dashboard click on the **Admin** tab

To Do	Care	
Individual	T-Log	New Search Archive
Health	Case Note	New Search Archive Bulk PDF
Agency	General Event Reports (GER)	New Search
Billing	GER Resolution	New Unaddressed GERs Open Resolutions Open Investigations Search
Admin	Witness	Search
Agency Reports	Event Summaries	View
Individual Home Page	ISP Data	New Search Report Search Report Dashboard
Settings	Staff Action Plan	New Search Review Archive
	ISP Program	New Search Acknowledgement Report

2. Click on the **New** link beside **Contact**.

Care

Individual Demographics	List Search Custom Fields
Individual Intake	New Pending Admission Notes Import from Excel Search Imported Excel
Enrollment	By Program By Individual Import from Excel Search Imported Excel
Contact	New List Import from Excel Search Imported Excel

3. Select an individual from the **Individual Search** page.

Individual Search

The first 200 records are shown here. Please use the search page to find a specific set of records.

15 Records

Form ID	Individual	Social Security Number	Medicaid Number	Medicare Number	Status All	Birth Date	Case Status	Entered By	Admitted By	Last Updated By	Admission Date	Individual ID Number	Time Zone
IDF-DEMOTPHL-K6N4NJAZSMULC	Aacharya, Manab				Admitted			Bajagain, Mahesh / Train the Trainer	Bajagain, Mahesh / Train the Trainer	Akter, Amina / Academic Coordinator	07/01/2020		Asia/Manila
IDF-DEMOTPHL-LDG4NEHZT833Q	Abdur, Rahman				Admitted	04/02/1997		Afreen, Sonia / Assistant Teacher	Afreen, Sonia / Assistant Teacher	Afreen, Sonia / Assistant Teacher	11/30/2022		Asia/Manila
IDF-DEMOTPHL-J9M4JSPWUMULF	Abraham, Isaac				Admitted	02/01/2011	Active	Hossain, Anwar / Supervisor	Hossain, Anwar / Supervisor	Rahman, Imran / Academic Coordinator-IE	01/02/2020		Asia/Manila
IDF-DEMOTPHL-M4V4NDKWR8335	Abraham, Kevin				Discharged			Akter, Amina / Academic Coordinator		Rahman, Imran / Academic Coordinator-IE			Asia/Manila
IDF-DEMOTPHL-K9V4NHPZDMUL3	Abraham, Paul				Admitted	05/17/2010		Rahman, Imran / Academic Coordinator-IE	Rahman, Imran / Academic Coordinator-IE	Akter, Amina / Academic Coordinator	01/03/2020		Asia/Manila
IDF-DEMOTPHL-LB84NDYW2833S	Activities, Academic				Pending Admission			Rahman, Imran / Academic Coordinator-IE		Rahman, Imran / Academic Coordinator-IE			Asia/Manila
IDF-DEMOTPHL-H7R4NGBY2MULH	Afreen, suha				Admitted			Hossain, Anita / Academic Supervisor	Rahman, Imran / Academic Coordinator-IE	Rahman, Imran / Academic Coordinator-IE	06/01/2022		Asia/Manila
IDF-DEMOTPHL-L4B4MTAYEMULT	Ahmed, Alicia				Admitted	05/05/1981		Akter, Amina / Academic Coordinator	Ibrahim, Amit / Supervisor	Ibrahim, Amit / Supervisor	12/22/2022		Asia/Manila
IDF-DEMOTPHL-M9J4N76ZY842Y	Ahmed, Anindita				Pending Admission			Akter, Amina / Academic Coordinator					Asia/Manila
IDF-DEMOTPHL-J5B4NLVZTMULT	Ahmed, Ashik				Admitted	03/01/2010		Hossain, Anwar / Supervisor	Hossain, Anwar / Supervisor	Ibrahim, Amit / Supervisor	03/01/2017		Asia/Manila
IDF-DEMOTPHL-H7Q4NG7ZRMUL	Ahmed, Imran				Admitted	05/01/2010		Ibrahim, Amit / Supervisor	Ibrahim, Amit / Supervisor	Iqbal, Prattyay / Therap Admin	01/01/2019		Asia/Manila
IDF-DEMOTPHL-L7R4NMZ2MMULS	Ahmed, Karim				Discharged			Ibrahim, Amit / Supervisor		Rahman, Imran / Academic Coordinator-IE			Asia/Manila
IDF-DEMOTPHL-J4C4NHL2SMULG	Ahmed, Md Farhan				Admitted	02/01/2010		Ibrahim, Amit / Supervisor	Hossain, Mariam / Special Educator	Hossain, Mariam / Special Educator	10/16/2022		Asia/Manila

Showing 1 to 15 of 200 entries

Previous
1
2
3
4
5
...
14
Next

 Excel Exports

Cancel

Users may also click on the **Contact List** link at the bottom of an individual's **Individual Demographic Form** (IDF).

Address List	Advance Directives	Album	Allergy Profile
Assessment List	Attached Files	Case Status	Contact List
Custom Fields	Default Individual Program	Diagnosis List	Guardian List
Health Profile	Individual Details	Individual Home Page	Individual Status History
Insurance	Pending Admission Notes	Program Enrollments	Shared Contact List
Team Members			

4. **Individual Contact** page will appear. Enter the **First Name**, **Last Name**, and **Relationship To Individual** fields. Users may also enter **Comments** and the **Address** section of the page.

Fields mark with **Red Asterisk (*)** are required and must be filled in.

Individual Contact New

Individual Niloy Chowdhury

→ * First Name	<input type="text" value="Marium"/>	→ * Last Name	<input type="text" value="Chowdhury"/>
Middle Name	<input type="text" value="Anita"/>	Agency	<input type="text"/>
→ * Relationship To Individual	<input type="text" value="Parent"/>		
Emergency Contact	<input checked="" type="radio"/> Yes <input type="radio"/> No	Mailing Contact	<input checked="" type="radio"/> Yes <input type="radio"/> No
Comments	<input type="text" value="Mrs. Marium is Niloy's mother who is also listed as his emergency contact."/>		
	About 2926 characters left		

Guardian

Is Guardian ☐

Address

Attention or in care of	<input type="text"/>	<input checked="" type="checkbox"/> Same as Residence Address
Address	<input type="text" value="House# 73/4, Road # 86, Bashundhara R/A"/>	<input type="text"/>
Street 1		Street 2
<input type="text" value="Dhaka"/>	<input type="text" value="State"/>	<input type="text" value="1510"/>
City	State	Zip Code
		<input type="text" value="Bangladesh"/>
		Country
Primary Phone	<input type="text" value="01122334455"/>	<input checked="" type="checkbox"/> Same as Primary Residence Phone
Extension	<input type="text"/>	
Secondary Phone	<input type="text" value="01122334455"/>	<input checked="" type="checkbox"/> Same as Primary Residence Phone
Extension	<input type="text"/>	
Additional Phone	<input type="text"/>	
Extension	<input type="text"/>	
E-mail	<input type="text"/>	
		Fax Number <input type="text"/>
		Web Address <input type="text"/>

Mailing Address

Attention or in care of	<input type="text"/>	<input checked="" type="checkbox"/> Same as Address
Address	<input type="text" value="House# 73/4, Road # 86, Bashundhara R/A"/>	<input type="text"/>
Street 1		Street 2
<input type="text" value="Dhaka"/>	<input type="text" value="State"/>	<input type="text" value="1510"/>
City	State	Zip Code
		<input type="text" value="Bangladesh"/>
		Country
Primary Phone	<input type="text" value="01122334455"/>	
Extension	<input type="text"/>	
Secondary Phone	<input type="text" value="01122334455"/>	
Extension	<input type="text"/>	
Additional Phone	<input type="text"/>	
Extension	<input type="text"/>	
		Fax Number <input type="text"/>

Cancel Back

Save

5. Click on the **Save** button at the bottom of the page.

Cancel

Back

Save

6. A success message will show up at the top of the screen.

Contact 'Marium Chowdhury' has been successfully saved for individual 'Niloy Chowdhury'