

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	Ca	ire		
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		
	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		
Jottings	ISP Program	New Search Acknowledgement Report		

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

c	are
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

Person-Centered. Data-Driven.

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.

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
DF-DEMOTPHL- (6N4NJAZSMULC	Aacharya, Manab				Admitted			Bajagain, Mahesh / Train the Trainer	Bajagain, Mahesh / Train the Trainer	Akter, Amina / Academic Coordinator	07/01/2020		Asia/Manila
DF-DEMOTPHL- DG4NEHZT833Q	Abdur, Rahman				Admitted	04/02/1997		Afreen, Sonia / Assistant Teacher	Afreen, Sonia / Assistant Teacher	Afreen, Sonia / Assistant Teacher	11/30/2022		Asia/Manila
DF-DEMOTPHL- 9M4JSPWUMULF	Abraham, Isaac				Admitted	02/01/2011	Active	Hossain, Anwar / Supervisor	Hossain, Anwar / Supervisor	Rahman, Imran / Academic Coordinator- IE	01/02/2020		Asia/Manila
DF-DEMOTPHL- M4V4NDKWR8335	Abraham, Kevin				Discharged			Akter, Amina / Academic Coordinator		Rahman, Imran / Academic Coordinator- IE			Asia/Manila
DF-DEMOTPHL- (9V4NHPZDMUL3	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
DF-DEMOTPHL- .B84NDYW2833S	Activities, Academic				Pending Admission			Rahman, Imran / Academic Coordinator- IE		Rahman, Imran / Academic Coordinator- IE			Asia/Manila
DF-DEMOTPHL- H7R4NGBY2MULH	Afreen, suha				Admitted			Hossain, Anita / Academic Supervisor	Rahman, Imran / Academic Coordinator- IE	Rahman, Imran / Academic Coordinator- IE	06/01/2022		Asia/Manila
DF-DEMOTPHL- .484MTAYEMULT	Ahmed, Alicia				Admitted	05/05/1981		Akter, Amina / Academic Coordinator	lbrahim, Amit / Supervisor	Ibrahim, Amit / Supenvisor	12/22/2022		Asia/Manila
DF-DEMOTPHL- M9J4N76ZY842Y	Ahmed, Anindita				Pending Admission			Akter, Amina / Academic Coordinator					Asia/Manila
DF-DEMOTPHL- I5B4NLV2TMULT	Ahmed, Ashik				Admitted	03/01/2010		Hossain, Anwar / Supenisor	Hossain, Anwar / Supervisor	Ibrahim, Amit / Supervisor	03/01/2017		Asia/Manila
DF-DEMOTPHL- H7Q4NG72RMUL	Ahmed, Imran				Admitted	05/01/2010		lbrahim, Amit / Supervisor	Ibrahim, Amit / Supervisor	lqbal, Prattay / Therap Admin	01/01/2019		Asia/Manila
DF-DEMOTPHL- .7R4NMZZMMULS	Ahmed, Karim				Discharged			lbrahim, Amit / Supervisor		Rahman, Imran / Academic Coordinator- IE			Asia/Manila
DF-DEMOTPHL- NC4NHLZSMULG	Ahmed, Md Farhan				Admitted	02/01/2010		Ibrahim, Amit / Supenvisor	Hossain, Mariam / Special Educator	Hossain, Mariam / Special Educator	10/16/2022		Asia/Manila

2 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 0

* First Name	Marium			Chowdhury	
Middle Name	Anits		Agency		
	Anita				
 Relationship To Individual 	Parent	•			
nergency Contact	⊙ Yes () No		Mailing Contact	• Yes O No	
Comments	Mrs. Marium is Niloy's	s mother who is also listed as his	emergency contact.		
	About 2926 characters	left		- Ai	
dian					
Is Guardian	0				
ess					
ntion or in care of			Same as Residence A	ddress	
Address	Hoursell 72/4 David 4	96. Dashundhara DiA			
	Street 1	eoo, bashundhara koa	Street 2		
	ingenere Transport	1			
	City	State	1510 Zip Code	Country	
Brimany Bhone			Sama az Brimani Basi	danat Share	
Frimary Frione	01122334455	Extension	Same as Primary Resi	Jence Phone	
Secondary Phone	01122334455	Extension	Same as Primary Resid	dence Phone	
Additional Phone		Extension	Fax Number		
E-mail			Web Address		
ng Address					
ntion or in care of			Same as Address		
Address					
	Street 1	r oo, dashurionara N/A	Street 2		
	City	State Y	7in Code	Bangladesh •	
Driman: Disas					
Primary Phone	01122334455	Extension			
Secondary Phone	01122334455	Extension			
		C Protection	Fax Number		
Additional Phone		EXTENSION			



5. Click on the ${\bf Save}$ button at the bottom of the page.



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

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