

# 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                | <b>Care</b>                 |  |
| <b>Individual</b>    | 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 |
| <b>Admin</b>         | 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            | Birth Date | Case Status | Entered By                              | Admitted By                             | Last Updated By                         | Admission Date | Individual ID Number | Time Zone   |
|----------------------------|----------------------|------------------------|-----------------|-----------------|-------------------|------------|-------------|---|---|---|----------------|----------------------|-------------|
| IDF-DEMOTPHL-K6N4NAZSMULC  | 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-L484MTAYEMULT | 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)**.

|                                 |  |                                      |   |
|---------------------------------|--|--------------------------------------|---|
| <a href="#">Address List</a>    | <a href="#">Advance Directives</a>         | <a href="#">Album</a>                | <a href="#">Allergy Profile</a>           |
| <a href="#">Assessment List</a> | <a href="#">Attached Files</a>             | <a href="#">Case Status</a>          | <a href="#">Contact List</a>              |
| <a href="#">Custom Fields</a>   | <a href="#">Default Individual Program</a> | <a href="#">Diagnosis List</a>       | <a href="#">Guardian List</a>             |
| <a href="#">Health Profile</a>  | <a href="#">Individual Details</a>         | <a href="#">Individual Home Page</a> | <a href="#">Individual Status History</a> |
| <a href="#">Insurance</a>       | <a href="#">Pending Admission Notes</a>    | <a href="#">Program Enrollments</a>  | <a href="#">Shared Contact List</a>       |
| <a href="#">Team Members</a>    |  |                                      |   |

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**       **\* Last Name**  
 **Middle Name**       **Agency**  
 **\* Relationship To Individual**  
 **Emergency Contact** Yes  No       **Mailing Contact** Yes  No  
**Comments**  
 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**       **Same as Residence Address**  
 **Address**  
 Street 1      Street 2  
     
 City      State      Zip Code      Country  
   **Same as Primary Residence Phone**  
**Primary Phone**      Extension  
   **Same as Primary Residence Phone**  
**Secondary Phone**      Extension  
  **Additional Phone**      Extension  
  **E-mail**      **Fax Number**  
  **Web Address**

**Mailing Address**

**Attention or in care of**       **Same as Address**  
 **Address**  
 Street 1      Street 2  
     
 City      State      Zip Code      Country  
  **Primary Phone**      Extension  
  **Secondary Phone**      Extension  
  **Additional Phone**      Extension  
  **Fax Number**

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



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

