

## IDF Provider Configuration - Create/Edit Custom PDF Exports

Administrators with the **Provider Setup** administrative role will be able to create custom PDF exports of the **Individual Demographic Form (IDF)** using the **IDF Provider Configuration** feature. Administrators will be able to configure what demographic information should be included in each custom PDF export, and users will then be able to generate PDF from **IDF** and **Individual Home Page** according to the configuration.

1. Click on the **Configure** link beside the **IDF Provider Configuration** option on the **Admin** tab.

To Do	General	
Individual	Provider	Preferences   Password Policy   Archive Preference
Health	User	New   List   Import from Excel   Search Imported Excel   Titles   New Title   Assign External System ID   Self Password Reset
Agency	Program	New   List   Archive   Import from Excel   Search Imported Excel
Admin	Site	New   List   Archive
Agency Reports	IDF Provider Configuration	Configure
Individual Home Page	Individual Home Page	Select Items
Settings		

The **IDF Provider Configuration** page will be opened where you can create a maximum of three PDF configurations according to the needs of your agency.

## IDF Provider Configuration

PDF Configuration

PDF Configuration - 1

✕ Remove

\* Name

Emergency Data Form

\* PDF Items

Available

Search

Q

Add All

Attached Files

+

Active Medications

+

Team Members

+

Involved Staff

+

Case Manager

+

Selected

Search

Q

Remove All

Residential Address

-

Mailing Address

-

Individual Details

-

ID Numbers

-

Medical Information

-

Enable Landscape View

☒

Show SSN

☐

PDF Configuration - 2

+ Add

PDF Configuration - 3

+ Add

Cancel

Back

Update

2. For the **PDF Configuration - 1**, you will find a default configuration named **Emergency Data Form** with these items automatically selected: Residential Address, Mailing Address, Individual Details, ID Numbers, Medical Information, Behavior, Guidelines, Insurance, Program Enrollments, Active Contacts, Active Shared Contacts, Active Allergies, Active Diagnoses, Active Medications and Advance Directives. You can update or remove this configuration if needed.

## IDF Provider Configuration ?

### PDF Configuration

PDF Configuration - 1

✕ Remove

\* Name

\* PDF Items

Available

Attached Files	+
Active Medications	+
Team Members	+
Involved Staff	+
Case Manager	+

Selected

Residential Address	-
Mailing Address	-
Individual Details	-
ID Numbers	-
Medical Information	-

Enable Landscape View

☒

Show SSN

☐

3. To create a new **PDF Configuration**, click on the **+Add** button from either of the available configuration options.

PDF Configuration - 2

+ Add

PDF Configuration - 3

+ Add

4. Enter the desired **Name** of the pdf configuration. Next, select the items you want to include in the PDF export by clicking on the **‘+’ icon** from the available items. You can also click on **Add All** to select all the PDF Items. If you want to print the PDF export in landscape orientation then choose **Enable Landscape View**

PDF Configuration - 2 ✕ Remove

**\* Name**

**\* PDF Items**

Available	Selected
<input type="text" value="Search"/> <input type="button" value="Q"/> <input type="button" value="Add All"/>	<input type="text" value="Search"/> <input type="button" value="Q"/> <input type="button" value="Remove All"/>
<div> <div>Residential Address</div> <div>+</div> </div>	<div> <div>Active Diagnoses</div> <div>-</div> </div>
<div> <div>Mailing Address</div> <div>+</div> </div>	<div> <div>Assessment List</div> <div>-</div> </div>
<div> <div>ID Numbers</div> <div>+</div> </div>	<div> <div>Active Medications</div> <div>-</div> </div>
<div> <div>Behavior</div> <div>+</div> </div>	<div> <div>Active Allergies</div> <div>-</div> </div>
<div> <div>Guidelines</div> <div>+</div> </div>	<div> <div>Medical Information</div> <div>-</div> </div>

**Enable Landscape View** ☒

**Show SSN** ☐

5. After selecting the necessary items, click on the **Update** button at the bottom of the page.

You will find a success message that says successfully updated.

Successfully Updated.

Back to [Form](#)

**Note:** The custom PDF export link(s) can be found under the **PDF & Printable** section of

the both **Individual Demographic Form (IDF)** and **Individual Details** form, and will also be available at the **Display PDF** section of the **Individual Home Page**.