

## **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.	Clio	k o	n the	Configure	e link be	eside the	e I <b>DF</b>	Provider	Config	uration	option o	n the
A	dmi	<b>n</b> ta	b.									

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



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.

PDF Configuration	-					
PDF Configuration - 1						× Remove
* Name	Emergency Data Form					
* PDF Items	Available			Selected		
	Search	Q	Add All	Search	Q	Remove All
	Attached Files		+	Residential Address		-
	Active Medications		+	Mailing Address		-
	Team Members		+	Individual Details		-
	Involved Staff		+	ID Numbers		-
	Case Manager		+ .	Medical Information		
Enable Landscape View						
Show SSN						
PDF Configuration - 2						+ Add
PDF Configuration - 3						+ Add

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 * Name	Emergency Data Form					× Remove
* PDF Items	Available			Selected		
	Search	Q	Add All	Search	Q	Remove All
	Attached Files		+	Residential Address		-
	Active Medications		+	Mailing Address		
	Team Members		+	Individual Details		-
	Involved Staff		+	ID Numbers		-
	Case Manager		+ .	Medical Information		
Enable Landscape View	۵					
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 IDF- Medical PDF Items Available Selected Q Add All Q Search Search Remove All Residential Address ÷ Active Diagnoses Mailing Address + \_ Assessment List ID Numbers ÷ Active Medications \_ Behavior ÷ Active Allergies \_ Guidelines ÷ Medical Information \_ --Enable Landscape View ✓ Show SSN

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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**.