

IDF Provider Configuration - Create/Edit Custom PDF Exports

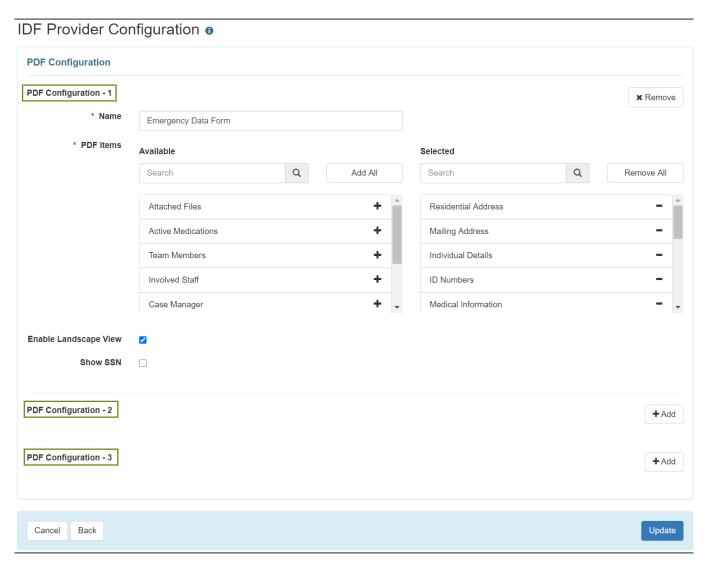
Administrators with the *Provider Setup* administrative role will be able to create custom PDF exports of the **Individual Demographic Form (IDF)** using the **IDF Provider Configuration** feature. Administrators will be able to configure what demographic information should be included in each custom 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 I**DF Provider Configuration** option on the **Admin** tab.

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



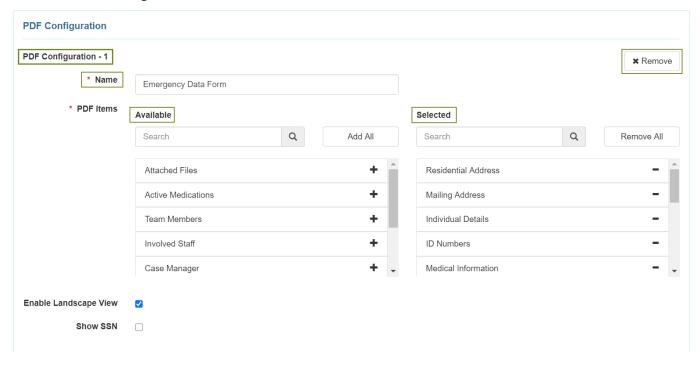
The **IDF Provider Configuration** page will be opened where you can create a maximum of three PDF configurations according to the needs of your agency.



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 6

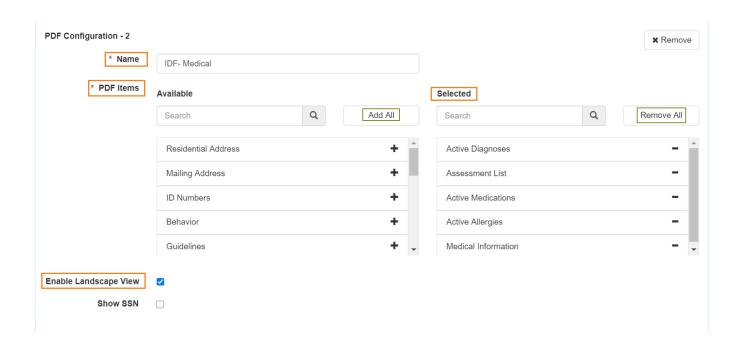


3. To create a new **PDF Configuration**, click on the **+Add** button from either of the available configuration options.



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**





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.



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.