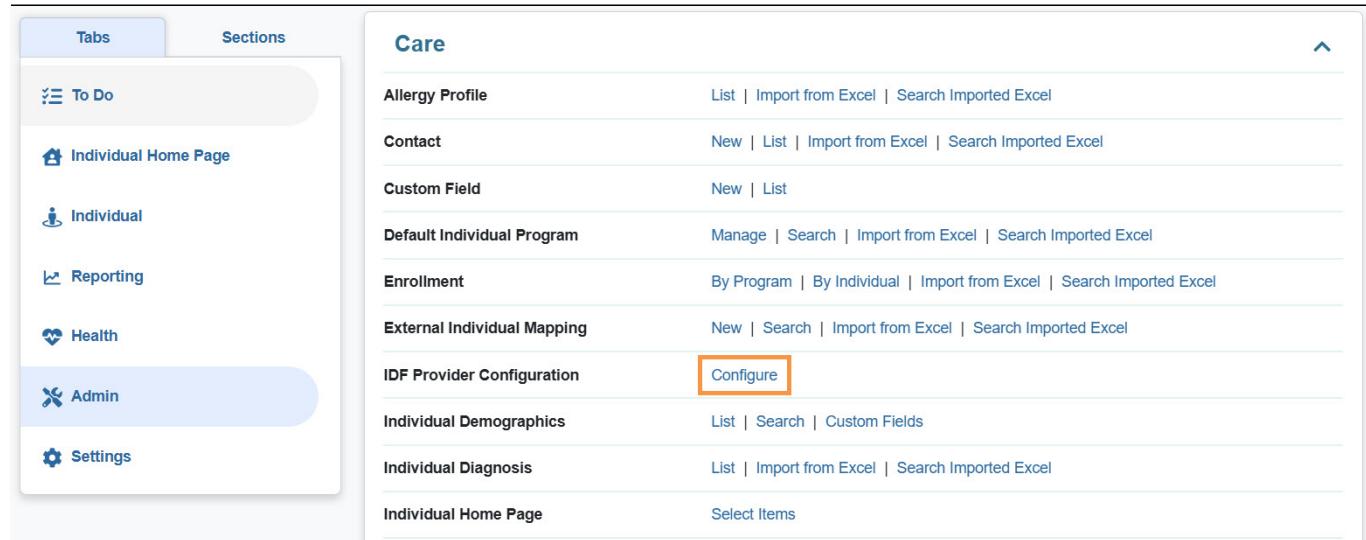


IDF Provider Configuration - Create/Edit Custom PDF Exports

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.



Care	
Allergy Profile	List Import from Excel Search Imported Excel
Contact	New List Import from Excel Search Imported Excel
Custom Field	New List
Default Individual Program	Manage Search Import from Excel Search Imported Excel
Enrollment	By Program By Individual Import from Excel Search Imported Excel
External Individual Mapping	New Search Import from Excel Search Imported Excel
IDF Provider Configuration	Configure
Individual Demographics	List Search Custom Fields
Individual Diagnosis	List Import from Excel Search Imported Excel
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.

IDF Provider Configuration i

PDF Configuration

PDF Configuration - 1

x Remove

* Name	Emergency Data Form																						
* PDF Items <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 45%; vertical-align: top;"> Available <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text"/> Search Q Add All </div> <table border="1" style="width: 100%; border-collapse: collapse; border: none;"> <tr><td style="padding: 2px;">Attached Files</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Active Medications</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Team Members</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Involved Staff</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Case Manager</td><td style="text-align: right; padding: 2px;">+</td></tr> </table> </td> <td style="width: 45%; vertical-align: top;"> Selected <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text"/> Search Q Remove All </div> <table border="1" style="width: 100%; border-collapse: collapse; border: none;"> <tr><td style="padding: 2px;">Residential Address</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Mailing Address</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Individual Details</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">ID Numbers</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Medical Information</td><td style="text-align: right; padding: 2px;">-</td></tr> </table> </td> </tr> </table>		Available <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text"/> Search Q Add All </div> <table border="1" style="width: 100%; border-collapse: collapse; border: none;"> <tr><td style="padding: 2px;">Attached Files</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Active Medications</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Team Members</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Involved Staff</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Case Manager</td><td style="text-align: right; padding: 2px;">+</td></tr> </table>	Attached Files	+	Active Medications	+	Team Members	+	Involved Staff	+	Case Manager	+	Selected <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text"/> Search Q Remove All </div> <table border="1" style="width: 100%; border-collapse: collapse; border: none;"> <tr><td style="padding: 2px;">Residential Address</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Mailing Address</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Individual Details</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">ID Numbers</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Medical Information</td><td style="text-align: right; padding: 2px;">-</td></tr> </table>	Residential Address	-	Mailing Address	-	Individual Details	-	ID Numbers	-	Medical Information	-
Available <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text"/> Search Q Add All </div> <table border="1" style="width: 100%; border-collapse: collapse; border: none;"> <tr><td style="padding: 2px;">Attached Files</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Active Medications</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Team Members</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Involved Staff</td><td style="text-align: right; padding: 2px;">+</td></tr> <tr><td style="padding: 2px;">Case Manager</td><td style="text-align: right; padding: 2px;">+</td></tr> </table>	Attached Files	+	Active Medications	+	Team Members	+	Involved Staff	+	Case Manager	+	Selected <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input style="width: 100%; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px; margin-bottom: 5px;" type="text"/> Search Q Remove All </div> <table border="1" style="width: 100%; border-collapse: collapse; border: none;"> <tr><td style="padding: 2px;">Residential Address</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Mailing Address</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Individual Details</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">ID Numbers</td><td style="text-align: right; padding: 2px;">-</td></tr> <tr><td style="padding: 2px;">Medical Information</td><td style="text-align: right; padding: 2px;">-</td></tr> </table>	Residential Address	-	Mailing Address	-	Individual Details	-	ID Numbers	-	Medical Information	-		
Attached Files	+																						
Active Medications	+																						
Team Members	+																						
Involved Staff	+																						
Case Manager	+																						
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 i

PDF Configuration

PDF Configuration - 1

* Name		* PDF Items		Selected	
Emergency Data Form		<input type="button" value="Available"/> <input type="button" value="Selected"/>		<input type="button" value="Remove"/> <input type="button" value="Remove All"/>	
<input type="button" value="Search"/> <input type="button" value="Add All"/>				<input type="button" value="Search"/> <input type="button" value="Remove All"/>	
<input type="button" value="Attached Files"/> <input type="button" value="+"/>		<input type="button" value="Active Medications"/> <input type="button" value="+"/>		<input type="button" value="Residential Address"/> <input type="button" value="-"/>	
<input type="button" value="Team Members"/> <input type="button" value="+"/>		<input type="button" value="Involved Staff"/> <input type="button" value="+"/>		<input type="button" value="Mailing Address"/> <input type="button" value="-"/>	
<input type="button" value="Case Manager"/> <input type="button" value="+"/>				<input type="button" value="Individual Details"/> <input type="button" value="-"/>	
				<input type="button" value="ID Numbers"/> <input type="button" value="-"/>	
				<input type="button" value="Medical Information"/> <input type="button" value="-"/>	

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

* Name: IDF- Medical x Remove

* PDF Items

Available		Selected	
Search	Add All	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

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

Cancel Back Update

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**.