

Shared Contact

Shared Contacts can include Physicians, Pharmacists, Therapists, Specialists, Hospitals etc. and other important contacts.

Users with the **Shared Contact** Administrative Role will be able to create, update, and discontinue Shared Contacts. The entered contacts are available within the organization's Therap account and can be added to the IDF (Individual Demographic Form), scheduled appointments, medication history forms and other places for individuals you are completing documentation for.

Create New Shared Contact

1. Click on the **New** link beside the **Shared Contact** option on the **Admin** tab.



To Do	General	
Individual	Provider	Preferences Password Policy
Health		New List Import from Excel Search Imported Excel
Agency	User	Assign External System ID Self Password Reset
Billing	Title	New List Import from Excel Search Imported Excel
Admin	Program	New List Import from Excel Search Imported Excel
Agency Reports	Site	New List
Individual	Individual Home Page	Select Items
Home Page	Custom Field	New List
Settings	Shared Contact	New List Link Import from Excel
	Shared Contact Type	List

2. On the Shared Contact page, select the Contact Type, and then enter the Organization Name, First Name, Last Name, Specialty, Address, Phone Number and other desired information.

Fields mark with **Red Asterisk (*)** are required and must be filled in.



Shared Contact Active 6

Title	Physiotherapist	First Name	Dr. Jhon
Middle Name		Last Name	Paul
Organization Name	Demo Hospital Phillipines	NPI Number	
* Type	Hospital ▼		
Specialty	Physical Medicine & Rehal ▼		
Primary Address			
Attention or in care of	Lia Patricia		
Address	123 Street		
	Street 1	Street 2	
	Manila	▼ 01234	Philippines •
	City State	Zip Code	Country
Primary Phone	0112423597	Secondary Phone	
Additional Phone		Fax	
Email	jhon.paul@demomail.com	Web Address	
Mailing Address			
Attention or in care of	Lia Patricia	✓ Same as Primary Address	
Address	123 Street		
	Street 1	Street 2	
	Manila State	▼ 01234	Philippines •
	City State	Zip Code	Country
Primary Phone	0112423597	Secondary Phone	
Additional Phone		Fax	
Cancel Back			Save



After entering all the necessary information click on the **Save** button.

3. The **Shared Contact has been Saved** message will be displayed once all the information has been successfully saved.



To create another new Shared Contact, users may click on the **Create New Shared Contact** link.

Update or Discontinue Shared Contacts

1. Click on the **List** link beside the **Shared Contact** option of the Admin tab.

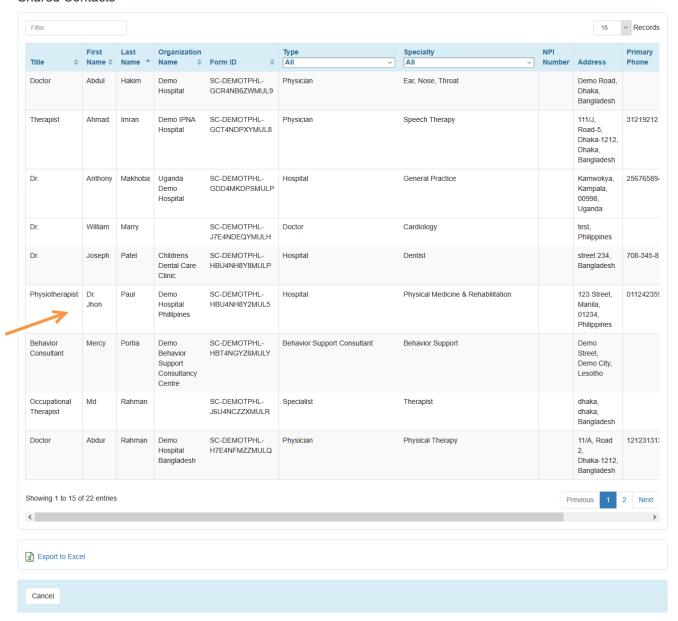


To Do	General	
Individual	Provider	Preferences Password Policy
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Agency Reports	Site	New List
Individual	Individual Home Page	Select Items
Home Page	Custom Field	New List
Settings	Shared Contact	New List Link Import from Excel
	Shared Contact Type	List

2. To select the contact from the $\bf Shared\ Contacts$ page, click on the name of the Shared Contact to be updated or discontinued.



Shared Contacts



Users may filter the list of Shared Contacts by selecting the **Type** or **Specialty**, or by typing the name of the desired contact in the **Filter** box.

3. The **Shared Contact** page will be displayed and users can edit the information for the



contact.

click on the **Update** button to update the Shared Contact, or click on the **Discontinue** button to discontinue the Shared Contact.



Shared Contact Active 9

Title	Physiotherapist	First Name	Dr. Jhon
Middle Name		Last Name	Paul
Organization Name	Demo Hospital Phillipines	NPI Number	
* Туре	Hospital •		
Specialty	Physical Medicine & Rehal ▼		
Primary Address			
Attention or in care of	Lia Patricia		
Address	123 Street		
	Street 1	Street 2	
	Manila State	▼ 01234	Philippines •
	City State	Zip Code	Country
Primary Phone	0112423597	Secondary Phone	
Additional Phone		Fax	
Email	jhon.paul@demomail.com	Web Address	
	Jion.paul@demornali.com		
Mailing Address			
Attention or in care of	Lia Patricia 🗷 S	ame as Primary Address	
Address	123 Street		
	Street 1	Street 2	
	Manila State	▼ 01234	Philippines •
	City State	Zip Code	Country
Cancel Back			Discontinue Update



4. Clicking on the **Update** button will save the changes and show the following success message.

Shared Contact 'Dr. Jhon Paul / Physiotherap	ist (Demo Hospital Phillipines)' has been successfully Updated
Back to Form List	
Actions	
Create New Shared Contact	

Clicking on the **Discontinue** button will show that the Shared Contact has been successfully discontinued.



Note: A Shared Contact can not be discontinued if it has been linked to another Shared contact.



Please see below for error messages! This Shared Contact has Link(s) with the following 1 Shared Contact(s)- Ahmad Imran / Therapist (Demo IPNA Hospital). Please remove the Link(s) first to discontinue this Shared Contact			
Shared Contact Active 9			
Title	Physiotherapist	First Name	Dr. Jhon
Middle Name		Last Name	Paul
Organization Name	Demo Hospital Phillipines	NPI Number	

Once a Shared Contact has been discontinued, it can not be reactivated or used in any forms.