Shared Contact

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

Centered. Data-Driven.

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	
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 1

Title	Physiotherapist			First Name	Dr. Jhon]
Middle Name				Last Name	Paul]
Organization Nam e	Demo Hospital Phillip	ines		NPI Number)
* Туре	Hospital	•				
Specialty	Physical Medicine & I	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]
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					and the second	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.

Shared Contact 'john Paul / Dr.' has been successfully Saved	
Back to Form	
Actions Create New Shared Contact	

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		
Health		New List Import from 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. To select the contact from the **Shared Contacts** page, click on the name of the Shared Contact to be updated or discontinued.



Shared Contacts

Title \$	First Name ≑	Last Name 🔺	Organization Name \$	Form ID \$	Type All ~	Specialty All ~	NPI Number	Address	Primary Phone
Doctor	Abdul	Hakim	Demo Hospital	SC-DEMOTPHL- GCR4NB6ZWMUL9	Physician	Ear, Nose, Throat		Demo Road, Dhaka, Bangladesh	
Therapist	Ahmad	Imran	Demo IPNA Hospital	SC-DEMOTPHL- GCT4NDPXYMUL8	Physician	Speech Therapy		111/J, Road-5, Dhaka-1212, Dhaka, Bangladesh	3121921
Dr.	Anthony	Makhoba	Uganda Demo Hospital	SC-DEMOTPHL- GDD4MKDPSMULP	Hospital	General Practice		Kamwokya, Kampala, 00998, Uganda	2567658
Dr.	William	Marry		SC-DEMOTPHL- J7E4NDEQYMULH	Doctor	Cardiology		test, Philippines	
Dr.	Joseph	Patel	Childrens Dental Care Clinic	SC-DEMOTPHL- HBU4NH8Y8MULP	Hospital	Dentist		street 234, Bangladesh	708-345-
Physiotherapist	Dr. Jhon	Paul	Demo Hospital Phillipines	SC-DEMOTPHL- HBU4NH8Y2MUL5	Hospital	Physical Medicine & Rehabilitation		123 Street, Manila, 01234, Philippines	0112423
Behavior Consultant	Mercy	Portia	Demo Behavior Support Consultancy Centre	SC-DEMOTPHL- HBT4NGYZ6MULY	Behavior Support Consultant	Behavior Support		Demo Street, Demo City, Lesotho	
Occupational Therapist	Md	Rahman		SC-DEMOTPHL- J6U4NCZZXMULR	Specialist	Therapist		dhaka, dhaka, Bangladesh	
Doctor	Abdur	Rahman	Demo Hospital Bangladesh	SC-DEMOTPHL- H7E4NFMZZMULQ	Physician	Physical Therapy		11/A, Road 2, Dhaka-1212, Bangladesh	1212313
howing 1 to 15	of 22 entries						Pr	revious 1	2 Next
									>
Export to Exc	el								

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 1

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	v	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	v	01234 Zip Code	Philippines - Country	
Cancel Back				Discontinue	Update



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

Back to Form List	
Actions	
Create New Shared Contact	

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

Shared Contact 'Jhon Paul / Dr. (Demo Dhaka Hospital)' has been successfully Discontinued
Back to Form List
Actions
Shared Contact Link Create New Shared Contact

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

		Pe	fierap Global erson-Centered. Data-Driven.
Please see below for e This Shared Contact ha Link(s) first to discontinu	rror messages! s Link(s) with the following 1 Share te this Shared Contact	ed Contact(s)- Ahmad Imran / Therapist (D	emo IPNA Hospital). Please remove the
Shared Contac	Ct Active		
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.