

Adding a Guardian


Scroll down to bottom of IDF

Select "Contact List"

Address List	Advance Directives	Album	Allergy Profile
Assessment List	Attached Files	Case Status	Contact List
Custom Fields	Diagnosis List	Guardian List	Health Profile
Individual Demographic Form (IDF)	Individual Details	Individual Home Page	Individual Status History
Insurance	Oversight	Pending Admission Notes	Shared Contact List

Or if you are looking the member up in the Individual Home Page it is on the left side.

Photo Not Available



testt testt Admitted

[Home](#) [Profile](#) [Plans](#) [Case Status](#) [About Me](#)

Modules

- ▶ Case Note
- ▼ Document Storage
 - New
 - List
 - Search
- ▶ Individual Plan
- ▶ Individual Plan Agenda
- ▶ Personal Focus Worksheet
- ▶ Referral

ISP Programs

No isp programs found to display

Go To ^

- [Address List](#)
- [Advance Directives](#)
- [Album](#)
- [Allergy Profile](#)
- [Assessment List](#)
- [Attached Files](#)
- [Case Status](#)
- [Contact List](#)
- [Custom Fields](#)
- [Diagnosis List](#)
- [Guardian List](#)
- [Health Profile](#)

Click “Add New Contact”

Contact List

Contact list of testt testt (CC1915F5P-ND)

Filter 15 Records

Form ID	Contact Name	Contact Type	Agency	Residential Phone	Address	E-mail	Mailing Address	Comments	Deleted
CNTCT-CC191ND-NEC4XEPZM4QQL	Granger, Hermione	Guardian							No

Showing 1 to 1 of 1 entry 1

[Add New Contact](#) [Export to Excel](#)

[Cancel](#) [Back](#)

- Address List
- Assessment List
- Custom Fields
- Health Profile
- Individual Status History
- Program Enrollments
- Advance Directives
- Attached Files
- Default Individual Program
- Individual Demographic Form (IDF)
- Insurance
- Shared Contact List
- Album
- Case Manager
- Diagnosis List
- Individual Details
- Oversight
- Team Members
- Allergy Profile
- Case Status
- Guardian List
- Individual Home Page
- Pending Admission Notes

Enter the person’s information and select Parent or Guardian as applicable, i.e. phone number, etc.

If the person has legal guardianship, click the “Is Guardian” button in the middle of the page.

Guardian

Is Guardian

Then click the “save” button. On the next screen click the back to “Form” button. It will show you the Individual Contact information that you just entered in for the guardian.

Then scroll down and click on Team Members.

- Address List
- Assessment List
- Custom Fields
- Individual Details
- Oversight
- Advance Directives
- Attached Files
- Diagnosis List
- Individual Home Page
- Pending Admission Notes
- Album
- Case Status
- Guardian List
- Individual Status History
- Shared Contact List
- Allergy Profile
- Contact List
- Health Profile
- Insurance
- Team Members**

Click “Add Team Member”

[Add Team Member](#) [Update](#)

Select "Contact" from the Team Member Type drop down.

Team Member

Add Team Member

* Team Member Type	- Please Select -
Relationship with the Individual	- Please Select - Shared Contact Contact User Other
Legal Decision Maker	
Guardian	
Is Guardian	<input type="checkbox"/>

Continue

Choose the Contact, you are selecting the contact you just entered to be listed as the member's guardian.

Add Team Member

* Team Member Type	Contact
* Contact	- Please Select -
Relationship with the Individual	<input type="text"/> - Please Select - Hermione Granger
Legal Decision	

And it will populate the Guardian field as you have already selected this contact as a Guardian. You will want to make sure that this guardian is the member's Legal Decision Maker. If they are, you need to select the box next to Legal Decision Maker.

Add Team Member

* Team Member Type	<input type="text" value="Contact"/>
* Contact	<input type="text" value="Hermione Granger"/>
Relationship with the Individual	<input type="text" value="Guardian"/>
Legal Decision Maker	<input type="checkbox"/>

Guardian

Is Guardian	<input checked="" type="checkbox"/>		
Guardian Type	<input type="text" value="Full"/>		
Guardian Authority	<input type="text" value="- Please Select -"/>		
Established County State	<input type="text" value="- Please Select -"/>	Established County	<input type="text" value="County"/>
Established Date	<input type="text" value="MM/DD/YYYY"/>	Established End Date	<input type="text" value="MM/DD/YYYY"/>

Attachment(s)

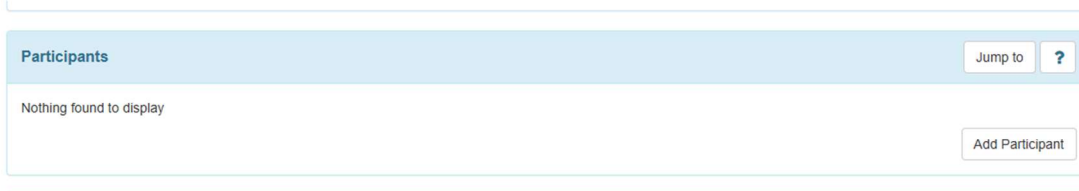
Nothing Attached

Then Click "continue"

Then click "Update"

On the POC scroll down to the section of labeled Participants

Why this step is important, is because it allows for the guardian(s) to be added to the POC. Under Participants on the POC there is a button labeled “Add Participant” This sounds odd, but by selecting that button you are able to add the guardian to the POC.



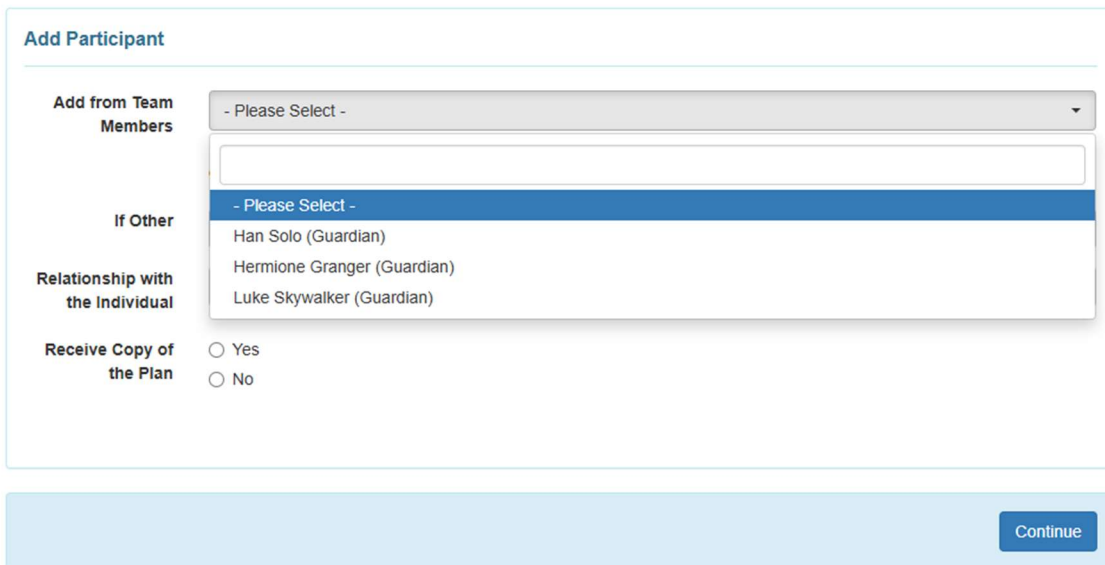
Participants Jump to ?

Nothing found to display

Add Participant

This will bring a pop up that allows you to add Participants to the POC. Select the guardian(s) you want to add. Then click continue. You can do this for each guardian.

Participant ⓘ ⓘ



Add Participant

Add from Team Members - Please Select -

If Other - Please Select -

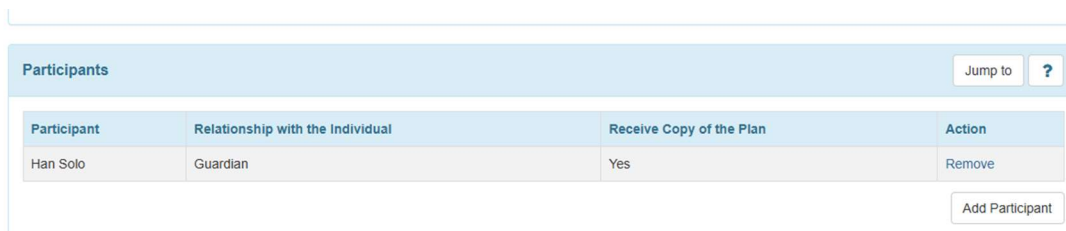
- Han Solo (Guardian)
- Hermione Granger (Guardian)
- Luke Skywalker (Guardian)

Relationship with the Individual

Receive Copy of the Plan Yes No

Continue

It will now list the attached participants (guardians in this case) on the POC.



Participants Jump to ?

Participant	Relationship with the Individual	Receive Copy of the Plan	Action
Han Solo	Guardian	Yes	Remove

Add Participant

Under the Contact List is where you can also list non-guardian member contact information that you wish to save. Make sure that anyone listed here, that you have a signed ROI. They will be listed under the Profile table of the members Individual Home Page.