Client Contacts

The Client Contacts program allows users to identify designated contacts for the client as an emergency, primary legal, or primary family contact.

| From the primary consumer screen, select the Contacts tab. | SAUDS - Clients Swww Primary (Letter Information Primary (Letter Information Primary (Letter Information T Client # TEST21 BACH JOHANN Last Updated 2/01/2014 Status 2 Case Manager DBP OBP SHERVL TESTADO Unit SANDECO Birth Date 00/21/1990 Age 032 Sex F Elient # TEST21 BACH Lost Updated 2/01/2014 Status 2 Sex F QUARTERLY Unit SANDECO Birth Place SAN DECO Client Language 1 I ENGLISH Care Taker Language 1 ENGLISH Ethnicity/Race 8 County (Physical) 22 Sav SAN DECO County (Legal) Residence Type SUPPORTED LIVING Residence Type SUPPORTED LIVING Resource # C Opiloma/Cert. NA Olient''s Cell Client''s Occupation< |
|--|---|
| | Acions SANDIS Clients |
| To update an already existing | Client TEST22 LUDWIG BEETHOVEN Birthdate 09/21/1990 |
| To update an already existing contact, right-click to open the | Client TEST22 LUDWIG BEETHOVEN Birthdate 09/21/1990 Add New Center News of Contacts |
| To update an already existing contact, right-click to open the menu. | Client TEST22 LUDWIG BEETHOVEN Birthdate 09/21/1990 Add New Conta Name Type of Contact Name Change Type Change Type Change Type Cov |
| To update an already existing contact, right-click to open the menu. The menu provides various options | Client TEST22 LUDWIG BEETHOVEN Birthdate 09/21/1990 Add New Contacts Add New Contacts Name Type of Contact Change Type Change Type Contact Contact Contact Contact Contact Contact Contact Contact Contact Copy Update View Delete |
| To update an already existing contact, right-click to open the menu. The menu provides various options to modify an existing record or to | Client China Contacts Client TEST22 LUDWIG BEETHOVEN Birthdate 09/21/1990 Add New Contact Nume Type of Contact Type of Contact (NCI) NUME FRIMARY FAMILY CONTACT (NCI) Change Type ROLLOVER BEETHOVEN PRIMARY LEGAL CONTACT Copy Update User Delete |
| To update an already existing contact, right-click to open the menu. The menu provides various options to modify an existing record or to view, print, copy or delete the | Client TEST22 LUDWIG BEETHOVEN Birthdate 09/21/1990 Add New Contact Name Type of Contact Change Type OHMAN MOZART PRIMARY FAMILY CONTACT (NCI) Change Type ROLLOVER BEETHOVEN PRIMARY LEGAL CONTACT Change Type Update View Delete |



On the next screen, a table will display that lists the client's contacts.

To add a new contact, click on the Add New Contact button.

A window listing the different types of contacts will open.

- Emergency Contact
- Primary Legal Contact
- Primary Family Legal
 Contact

To select a contact, double-click on the selection or right-click and click select.

After a contact type has been selected, the next screen will display the client's relative information. This information is derived from the relationship tab of the client's record.

To select a relative, double-click on the selection or right-click and select.



Actions



| Previous | SANDIS Clients Client Contacts | |
|---------------------------------------|-----------------------------------|------------------|
| | Add New Contact | |
| Client TEST21 JOHANN BACH | | |
| Birthdate 09/21/1990 | | |
| Type of Contact: PRIMARY FAMILY CONTA | ACT | |
| Select a Relative for this contact: | | Add New Relative |
| Relatives On File | | |
| SARAH BACH, MOTHER | | * |
| JOHN BACH, FATHER Select | - leg | |
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If a relative is not listed, click on the Add New Relative button and follow the on-screen prompts.

Once the contact has been selected, the next screen will list addresses that have been added to the client's record.

To select an address, double-click on the selection or right-click and click select.

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Add New Relat

If the appropriate address is not listed on this screen, click on the Add New Address button and follow the onscreen prompts.

| Add New Contact Client TEST21 JOHANN BACH Birthdate 09/21/1990 Type of Contact: PRIMARY FAMILY CONTACT Select an Address for this Contact: Add New Address Oddess Code NIDDEN NES AD: EL CAJON CA 92019 (Client) S888 RUFFIN RD. SAN DIEGO CA 92123 (Other) | Previous | SANDIS Clients Client Contacts | 0 |
|---|-------------------------------------|-----------------------------------|-----------------|
| Client TEST21 JOHANN BACH Birthidate 09/21/1990 Type of Contact: RUMARY FAMILY CONTACT Select an Address for this Contact: defesses on File 2024 HIDDEN MESA RD EL CAJON CA 92019 (Client) 8888 RUFFIN RD. SAN DIEGO CA 92123 (Other) | | Add New Contact | |
| Birthdate 09/21/1990 Type of Contact: PRIMARY FAMILY CONTACT Select an Address for this Contact: Add New Address addresses on File 2024 HIDDEN MESA RD EL CAJON CA 92019 (Client) 8888 RUFFIN RD. SAN DIEGO CA 92123 (Other) | Client TEST21 JOHANN B | ACH | |
| Type of Contact: PRIMARY HMILY CONTACT Select an Address for this Contact: dessess on file 2024 HIDDEN MESA RD EL CAJON CA 92019 (Client) 8888 RUFFIN RD. SAN DIEGO CA 92123 (Other) | Birthdate 09/21/1990 | | |
| Select an Address for this Contact: ddresses On #110 2024 HIDDEN MESA RD EL CAJON CA 52019 (Client) 8888 RUFFIN RD. SAN DIEGO CA 92123 (Other) | Type of Contact: PRIMARY FA | MILY CONTACT | |
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| 8888 RUFFIN RD. SAN DIEGO CA 92123 (Other) | 2024 HIDDEN MESA RD EL CAJON | CA 92019 (Client) | |
| | 8888 RUFFIN RD. SAN DIEGO CA 9 | 2123 (Other) | |
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Client

Birthdate 09/21/1990

Select a Relative for this contact: Relatives On File SARAH BACH, MOTHER

JOHN BACH, FATHER

TEST21 JOHANN BACH

Type of Contact: PRIMARY FAMILY CONTACT

0 SANDIS Client Client Contacts Save 🕕 😢 Maintain Contacts Once the address has been TEST21 JOHANN BACH Client Birthdate 09/21/1990 selected, the client contact's Type of Contact: PRIMARY FAMILY CONTACT OUse for NCI Survey Use for ESC Survey Personal Information Update Information Relative Name: SARAH BACH information can be reviewed. Relationship: MOTHER Primary Language: ENGLISH Legal Guardian: N Resides with Client: Y Work Phone: 888-888-8888 Ext: Cell Phone: 0 Carrier: Email: BACH.S@TEST.COM Preferred Method of Notification: To update information or address, Address Update Address click on the Update Information button or the Contact Name: Address: 2024 HIDDEN MESA RD City: EL CAJON, CA 92019 City: Phone#: 123-456-2222 _____button, and follow the on-This address applies to: Client Comment: screen prompts. SANDIS Clients Client Contacts Previo uo 🜔 🕑 Save 🕕 🔞 😢 If the contact is a Primary Family TEST21 JOHANN BACH Contact, on the same screen, the Birthdate 09/21/1990 Type of Contact: PRIMARY FAMILY CONTACT Use for NCI Survey Use for ESC Survey Personal Information contact can be identified to receive Relative Name: SARAH BACH Relationship: MOTHER the NCI Survey. Primary Language: ENGLISH Legal Guardian: N Resides with Client: Y Work Phone: 888-888-8888 Ext: Cell Phone: Carrier: To indicate that the contact will Email: BACH.S@TEST.COM Preferred Method of Notification: R receive the survey, click on the \Box . Address Update Address Contact Name: 2024 HIDDEN MESA RD Address: City: EL CAJON, CA 92019 123-456-2222 Phone#: This address applies to: Client Note: SANDIS will only allow one Primary Family Comment Contact to be selected for the NCI Surveys.

If the contact is a **Primary Legal Contact**, note that users can enter more than one legal contact, but each record must be a different individual.





If the contact is an **Emergency Contact**, on the same screen, the contact can be identified to receive Everbridge notifications.

To indicate that the contact will receive an Everbridge notification, click on the Ouse for Everbridge.

When reviewing and/or editing the record is complete, click on the save button to confirm any changes and exit the record.

| | | Client Contacts | |
|---|--|--|---|
| | | Change Contact Type | |
| ent TEST21 | JOHANN BACH | | |
| thdate 09/21/199 | 0 | | |
| Type of Contact: | EMERGENCY CONTACT | Use for Everbridge | Use for ESC Survey |
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| | | Personal Information | Update Information |
| Relative Name | SARAH BACH | | |
| Relationship: | MOTHER | | |
| Primary Langu | age: ENGLISH | | |
| Legal Guardia | n: N Resides with | Client: Y | |
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| Email: | BACH.S@TEST.COM | Carrier | |
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| | | Address | Update Address |
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| Phone#: | 123-456-2222 | | |
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