

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.

SANDIS - Clients
Primary Client Information

Primary | Address | Relationship | History | Supplemental | Comments | Financial | Medical | Legal

Main Info | Add'l Info | **Contacts**

Client # TEST21 BACH JOHANN Last Updated 2/01/2014

Status: 2 #2-ACTIVE CLIENT Case Monitor Lvl: Q QUARTERLY
Case Manager: DBP SHERYL TESTADO IPP Freq: A ANNUALLY
Unit: SANDIS DATA BASE Other Contact Freq: CASE LEVEL

Birth Date: 09/21/1990 Age: 032 Sex: F FEMALE
Birth Place: SAN DIEGO Marital Status: S SINGLE
Client Language: 11 ENGLISH Legal Status: 9 UNKNOWN
Care Taker Language: 11 ENGLISH Ethnicity/Race: B OTHER

County (Physical): 37 SAN DIEGO County (Legal): 37 SAN DIEGO
Residence Type: 14 SUPPORTED LIVING Day Program: N NONE OF THE ABOVE
Resource #: Resource #

Diploma/Cert.: N/A Client's Occupation:
Client's Cell: 0 Client's Work Phone: 0
Client's Email:

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 record.

SANDIS Clients
Client Contacts


Client TEST22 LUDWIG BEETHOVEN
Birthdate 09/21/1990

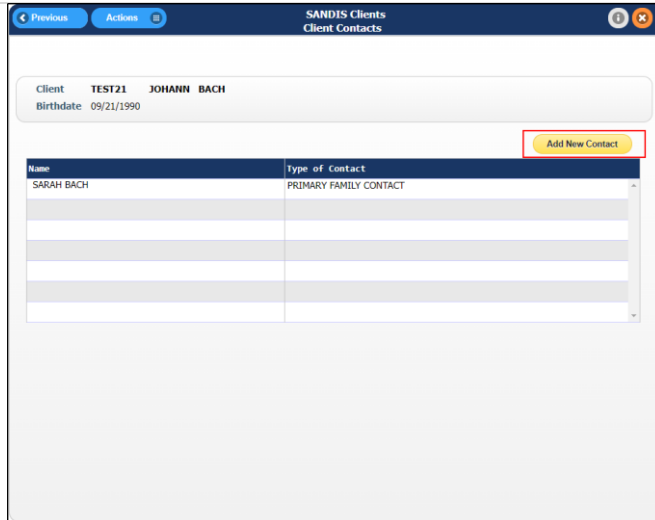
Add New Contact

Name	Type of Contact
JOHAN MOZART	PRIMARY FAMILY CONTACT (NCI)
ROLLOVER BEETHOVEN	PRIMARY LEGAL CONTACT

- Change Type
- Copy
- Update
- View
- Delete

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

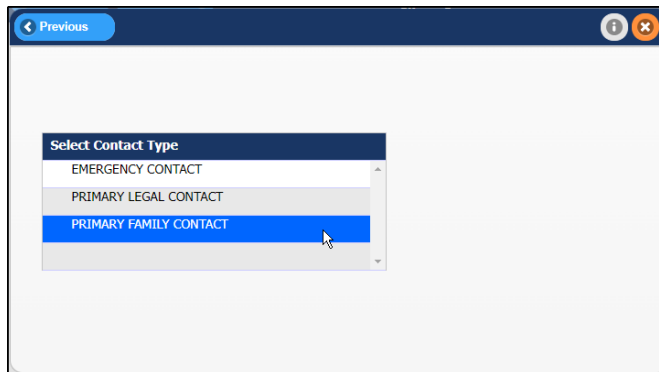
To add a new contact, click on the  button.



A window listing the different types of contacts will open.

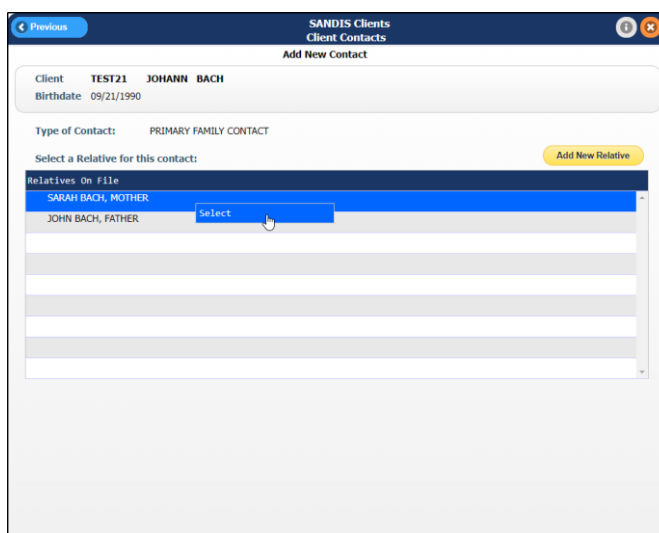
- Emergency Contact
- Primary Legal Contact
- Primary Family Legal Contact

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

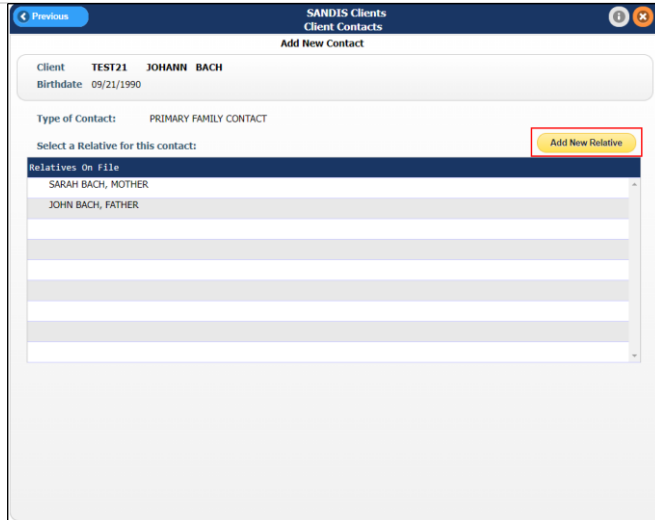


After a contact type has been selected, the next screen will display the client's relative information. This information is derived from the relationship tab of the client's record.

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

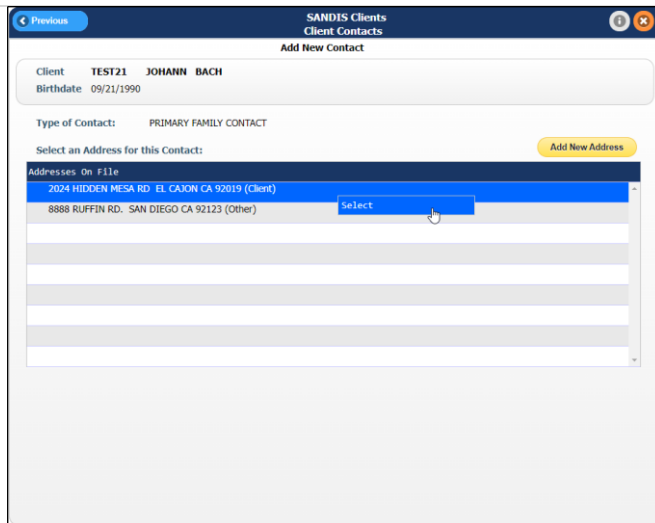


If a relative is not listed, click on the **Add New Relative** button and follow the on-screen prompts.



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.

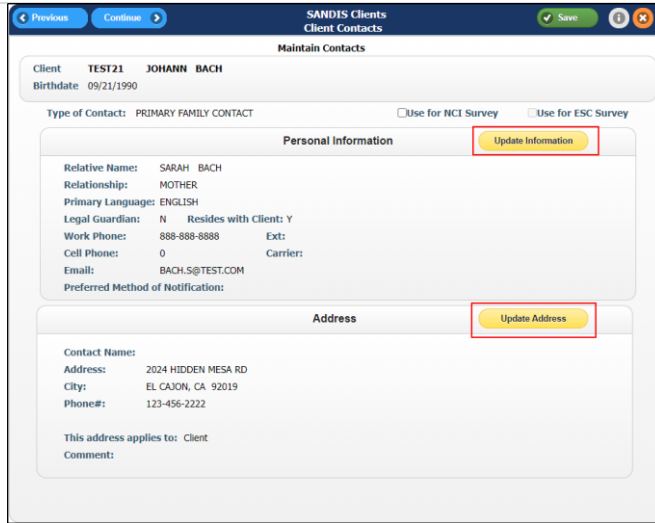


If the appropriate address is not listed on this screen, click on the **Add New Address** button and follow the on-screen prompts.



Once the address has been selected, the client contact's information can be reviewed.

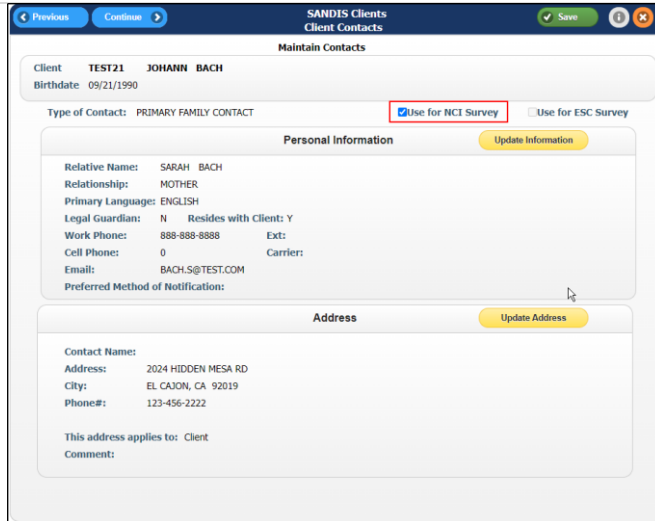
To update information or address, click on the  button or the  button, and follow the on-screen prompts.



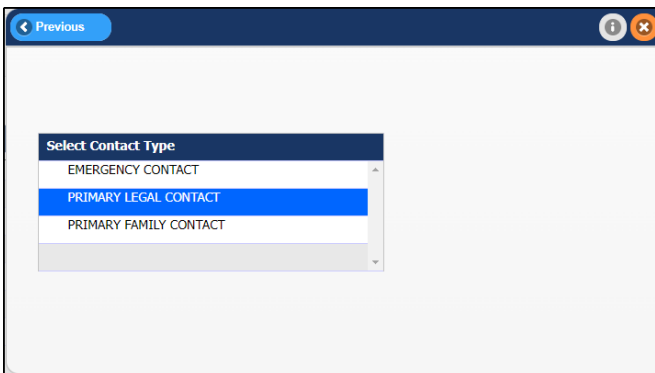
If the contact is a **Primary Family Contact**, on the same screen, the contact can be identified to receive the NCI Survey.

To indicate that the contact will receive the survey, click on the .

Note: SANDIS will only allow one Primary Family 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 **Use for Everbridge** .

SANDIS Clients Client Contacts

Change Contact Type

Client: TEST21 JOHANN BACH
Birthdate: 09/21/1990

Type of Contact: EMERGENCY CONTACT Use for Everbridge Use for ESC Survey


Personal Information Update Information

Relative Name: SARAH BACH
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:

Address Update Address

Contact Name:
Address: 2024 HIDDEN MESA RD
City: EL CAJON, CA 92019
Phone#: 123-456-2222

This address applies to: Client
Comment:

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

SANDIS Clients Client Contacts

Maintain Contacts

Client: TEST21 JOHANN BACH
Birthdate: 09/21/1990

Type of Contact: PRIMARY FAMILY CONTACT Use for NCI Survey Use for ESC Survey

Personal Information Update Information

Relative Name: SARAH BACH
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:

Address Update Address

Contact Name:
Address: 2024 HIDDEN MESA RD
City: EL CAJON, CA 92019
Phone#: 123-456-2222

This address applies to: Client
Comment: