

Adding a Guardian


Scroll down to bottom of IDF (Make sure you are in the State Oversight account when accessing the Individual Demographic Form)

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



Modules

▶ Case Note

▼ Document Storage

NewListSearch

▶ Individual Plan

▶ Individual Plan Agenda

▶ Personal Focus Worksheet

▶ Referral

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

testt testt Admitted

Home

Profile

Plans

Case Status

About Me

ISP Programs

No isp programs found to display

Click “Add New Contact”

Contact List

Contact list of testt lestit (CC1915F5P-ND)

Filter 15 Records

Form ID	Contact Name	Contact Type	Agency	Residential Phone	Address	E-mail	Mailing Address	Comments	Deleted
CNTCT-CC191ND-NEC4XEPZN4QQL	Granger, Hermione	Guardian							No

Showing 1 to 1 of 1 entry 1

[Add New Contact](#)

[Export to Excel](#)

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

[Address List](#)[Advance Directives](#)[Album](#)[Allergy Profile](#)

[Assessment List](#)[Attached Files](#)[Case Manager](#)[Case Status](#)

[Custom Fields](#)[Default Individual Program](#)[Diagnosis List](#)[Guardian List](#)

[Health Profile](#)[Individual Demographic Form \(IDF\)](#)[Individual Details](#)[Individual Home Page](#)

[Individual Status History](#)[Insurance](#)[Oversight](#)[Pending Admission Notes](#)

[Program Enrollments](#)[Shared Contact List](#)[Team Members](#)

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](#)[Advance Directives](#)[Album](#)[Allergy Profile](#)

[Assessment List](#)[Attached Files](#)[Case Status](#)[Contact List](#)

[Custom Fields](#)[Diagnosis List](#)[Guardian List](#)[Health Profile](#)

[Individual Details](#)[Individual Home Page](#)[Individual Status History](#)[Insurance](#)

[Oversight](#)[Pending Admission Notes](#)[Shared Contact List](#)[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

Relationship
with the
Individual

Legal
Decision
Maker

- Please Select -

- Please Select -
Shared Contact
Contact
User
Other

Guardian

Is Guardian☐

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

- 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	<div>Contact</div>
* Contact	<div>Hermione Granger</div>
Relationship with the Individual	<div>Guardian</div>
Legal Decision Maker	<input type="checkbox"/>

Guardian

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

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

Relationship with the Individual - Please Select -
Han Solo (Guardian)
Hermione Granger (Guardian)
Luke Skywalker (Guardian)

Receive Copy of the Plan
☐ Yes
☐ No

Continue

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

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 (whom is not a guardian), you have a signed ROI. They will be listed under the Profile table of the members Individual Home Page.