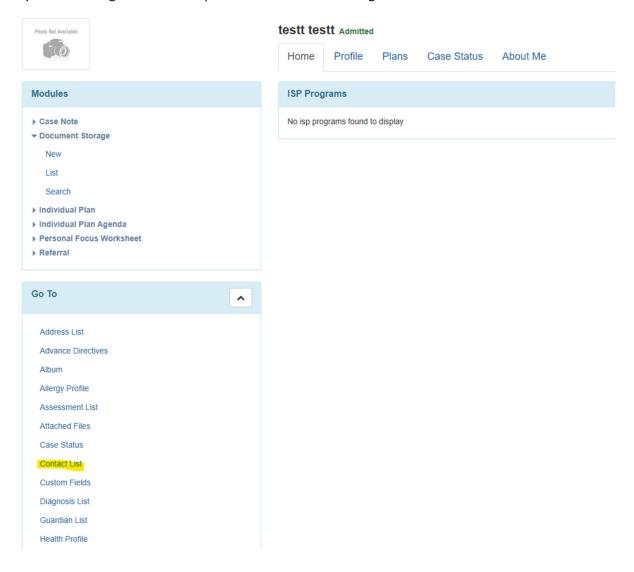
Adding a Guardian

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

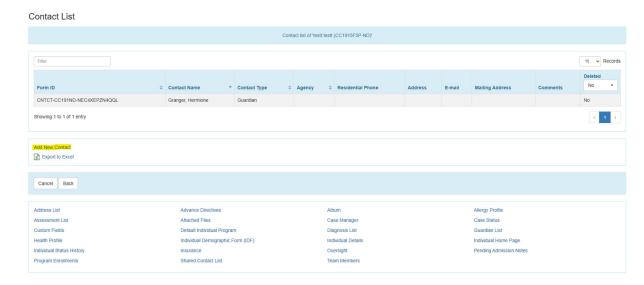
Select "Contact List"



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

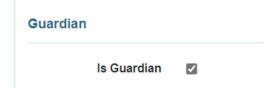


Click "Add New Contact"



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.

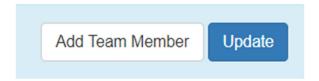


Then click the "save" button. On the next screen click the back to "Form" button. It will show you the Individual Contact information that you just entered in for the guardian.

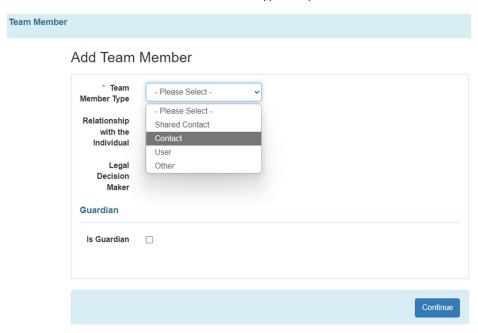
Then scroll down and click on Team Members.



Click "Add Team Member"

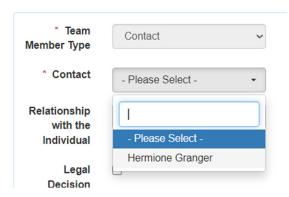


Select "Contact" from the Team Member Type drop down.



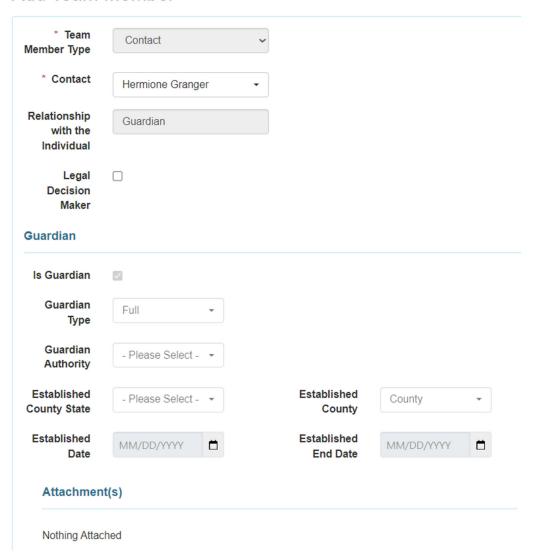
Choose the Contact, you are selecting the contact you just entered to be listed as the member's guardian.

Add Ieam Member



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



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.



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 9 9 **Add Participant** Add from Team - Please Select -Members - Please Select -If Other Han Solo (Guardian) Hermione Granger (Guardian) Relationship with Luke Skywalker (Guardian) the Individual Receive Copy of Yes the Plan O No Continue

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



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.