

Client Contacts

The Client Contacts tab was created to easily identify a client’s Emergency, Primary Legal and Primary Family Contact information. The contacts are selected from the client’s Relationship and Address sections. The contact information will be uploaded to DDS as part of the weekly file transmission.

To access the Client Contacts, click the **Contacts** tab from the Primary Consumer Sheet.

The screenshot shows the 'Primary Consumer Information' form for client # 6281160. The 'Contacts' tab is highlighted with a green arrow. The form includes fields for Status, Case Manager, Unit, Birth Date, Birth Place, Client Language, Care Taker Language, County (Physical), County (Legal), Residence Type, Resource #, Diploma/Cert., Client's Cell, Client's Email, Case Monitor Lvl, IPP Freq, Other Contact Freq, Sex, Marital Status, Legal Status, Ethnicity/Race, Client's Occupation, and Client's Work Phone.

The Client Contacts screen will display a list with the name and type of contact associated with the client.

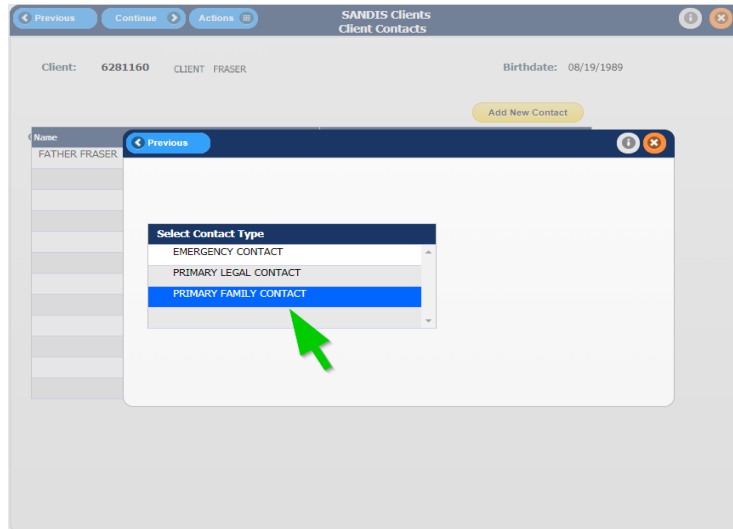
To add a new contact, click the **Add New Contact** button.

The screenshot shows the 'Client Contacts' screen for client # 6281160. The client's name is FRASER and the birthdate is 08/19/1989. A table lists the contacts, with one entry: FATHER FRASER, PRIMARY LEGAL CONTACT. The 'Add New Contact' button is highlighted with a green arrow.

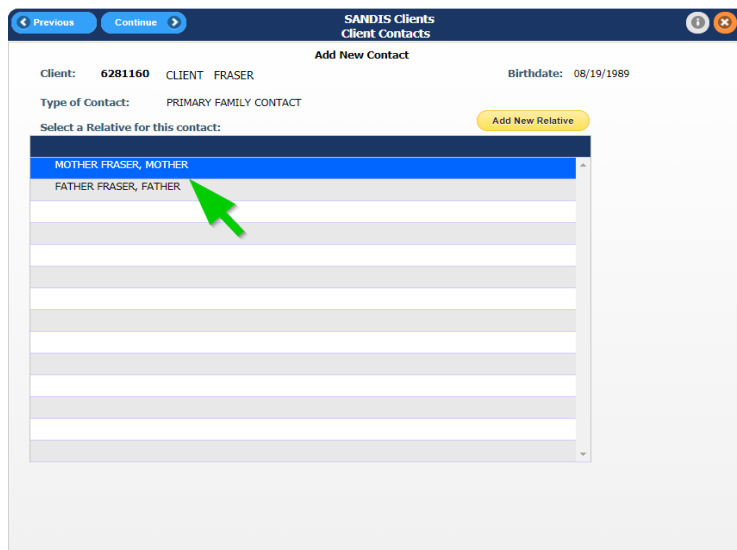
Name	Type of Contact
FATHER FRASER	PRIMARY LEGAL CONTACT

From the pop-up, double click the contact type to add:

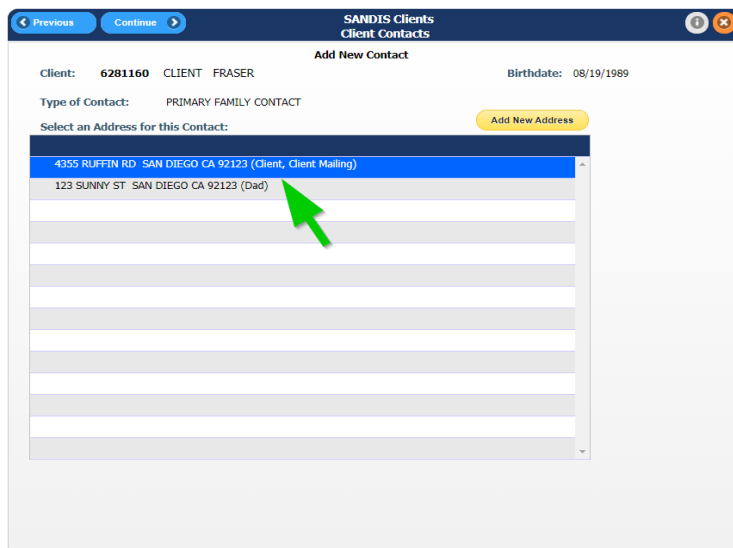
- Emergency Contact
- Primary Legal Contact
- Primary Family Contact




Select the relative by double clicking the contact name from the list.




Select the address for the contact by double clicking the address on the list.



Review the personal and address information of the new client contact. Update the information as needed and then click  to add the consumer contact.

Add a Contact for NCI Surveys

SANDIS will only allow one Primary Family Contact to be selected for the National Core Indicators (NCI) surveys.

To identify a Primary Family Contact for the NCI Surveys, select the Use for NCI Survey check box and then .

Name	Type of Contact
FATHER FRASER	PRIMARY LEGAL CONTACT
MOTHER FRASER	PRIMARY FAMILY CONTACT (NCI)

The selected Primary Family Contact will display the (NCI) flag from the list of client contacts.

Add New Relatives

To add a new relative, click

Add New Relative

SANDIS Clients Client Contacts

Add New Contact

Client: **6281160** CLIENT FRASER Birthdate: 08/19/1989

Type of Contact: EMERGENCY CONTACT

Select a Relative for this contact:

Add New Relative

MOTHER FRASER, MOTHER
FATHER FRASER, FATHER

From the Relationship tab, click

Add Relative

SANDIS - Consumers Relationships

Primary Address Relationship History Supplemental Comments Financial Medical Guardian

Client # **6281160** **FRASER, CLIENT** Birthdate: 8/19/1989

Add Relative

Last	First	M.I.	Relation	UCI#
FRASER	MOTHER		MOTHER	
FRASER	FATHER		FATHER	

Enter the new relative's information and then click

Continue to save the information.

SANDIS - Consumers Relationships

Client # **6281160** **FRASER, CLIENT** Last Updated

Relation to client: 5 Relative's UCI#


Relative's Last Name: FRASER First Name: BROTHER Middle:

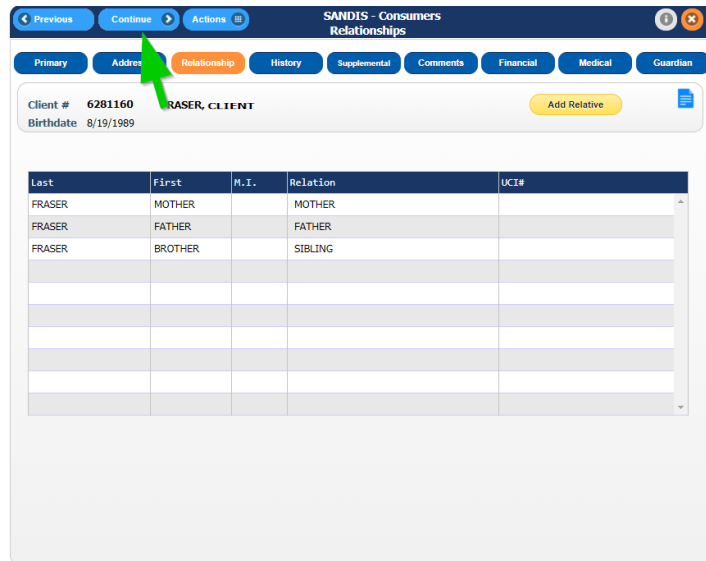
Occupation: FITNESS TRAINER Work Phone: 0 Ext: Resides with Consumer: Legal Guardian: Resides with Consumer: Cell: 619-987-6543 Email: BROTHER.FRASER@EMAIL.COM

Marital Status: 5 Social Security Number: Date of Birth: Place of Birth: Age at Consumers Birth: 0 Total Number of Children: 0

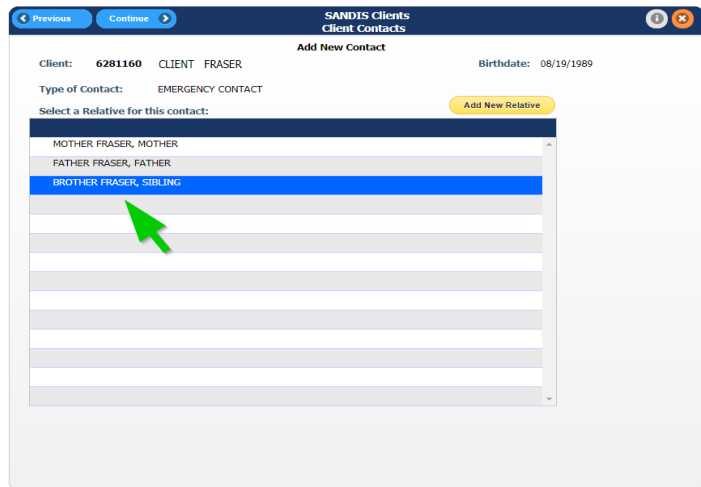
County of Residence: Primary Language: 11

Disabled: Deceased: Military Service: Retired:


From the Relationship tab, click  to select the new relative for the contact.

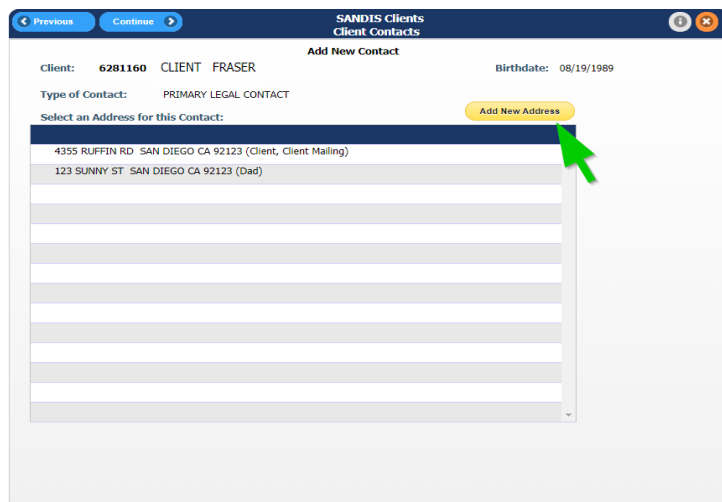


Select the new address for the contact by double clicking the address on the list.

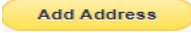



Add New Address

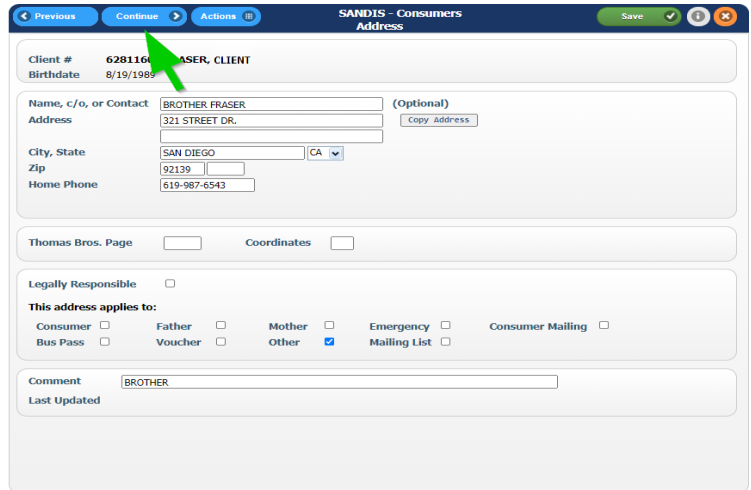
To add a new address, click .

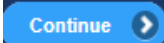


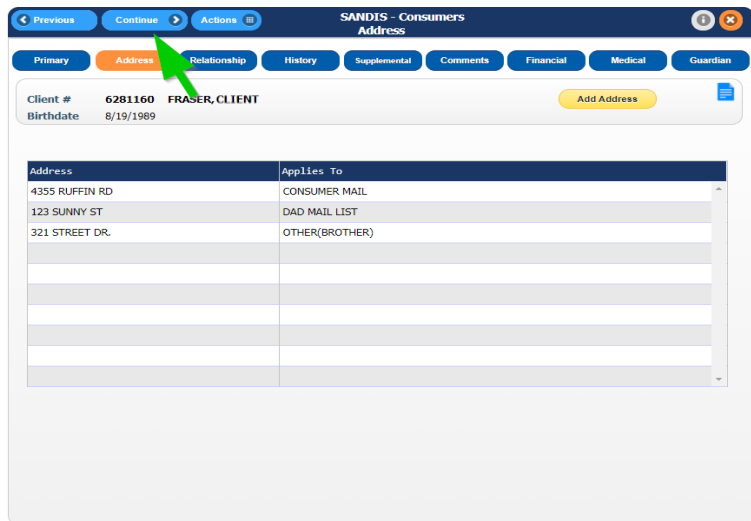
From the Address tab, click



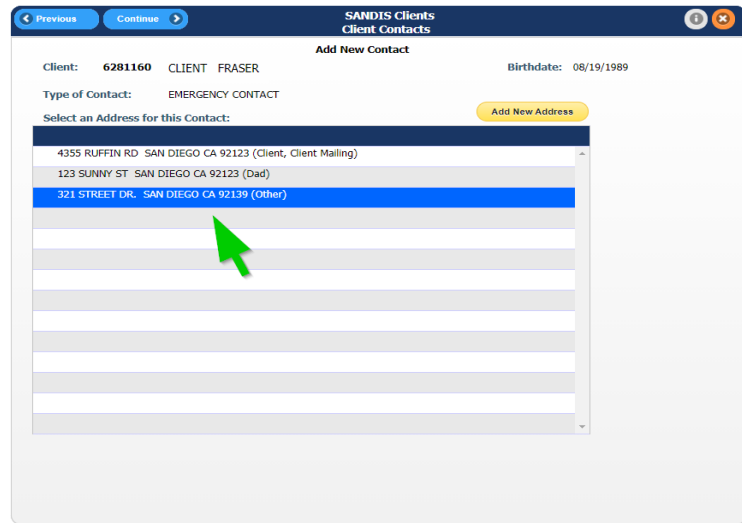
Enter the address information and then click  to save the new address.



From the Address tab, click  to select the new address for the contact.



Select the new address for the contact by double clicking the address on the list.



Updating Client Contacts

Right-click the client contact to perform one of the following options:

- Change Type
- Copy
- Update
- View
- Delete

