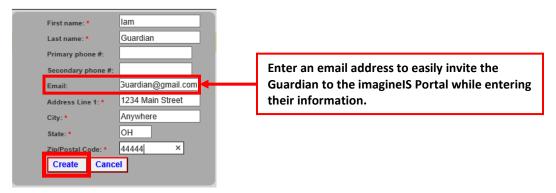
Connecting APSI Guardians using the 'Manage Guardians' Command

- 1. Open the Individual's Front Page.
- 2. Scroll Down and open the Contacts sub-menu.
- 3. Click on the Manage Guardian command.
 - 1. The 'Find Contact' pop-up window will also open, click on the '**New'** button to open the window to enter the contact details for the guardian.



- 2. Enter the required information for the guardian.
- 3. If the guardian will be an Assigned Team Member then you must enter an email address.
- 4. Click the Create button.



- 5. Options related to the guardianship will be available based on the Category chosen will display after creating the guardian's record.
- The **Start Date** is automatically defaults to the current date but can be changed to a previous or future date as needed.
- 7. The <u>Send Invitation</u> checkbox will only be visible **if an email address was entered** in the guardian's demographic information. Click in the box to Send an email invitation to the Guardian to the imaginelS Portal.



8. Click the **Connect** button to complete the process.

