

## 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.

Enter an email address to easily invite the Guardian to the imagineIS Portal while entering their information.

5. Options related to the guardianship will be available based on the Category chosen will display after creating the guardian's record.
6. The **Start Date** is automatically defaults to the current date but can be changed to a previous or future date as needed.
7. The **Send Invitation** 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 imagineIS Portal.

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

Category	Guardian name	Limited to behavior	Limited to medical	Limited to placement	Limited to other	Court appointed	Emergency contact	Start date	End date	
Guardianship of Person	Iam Guardian	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/22/2016		<input type="checkbox"/> Connect <input type="checkbox"/> Send Invitation

The End Date can be manually entered if a guardianship is terminated. If another guardian (and co-guardian has not been chosen as the category) is entered the system will automatically end date the

Click in the 'Send Invitation' box to send an email invitation to Guardian to the Portal