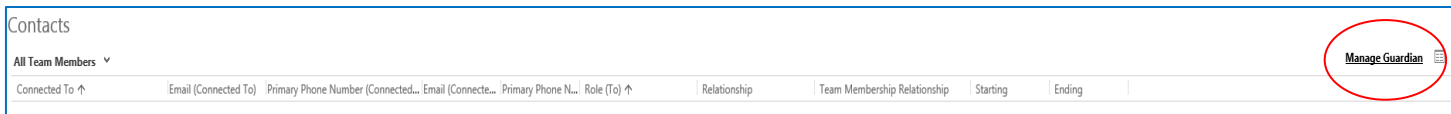


imagineIS – Manage Guardian Command

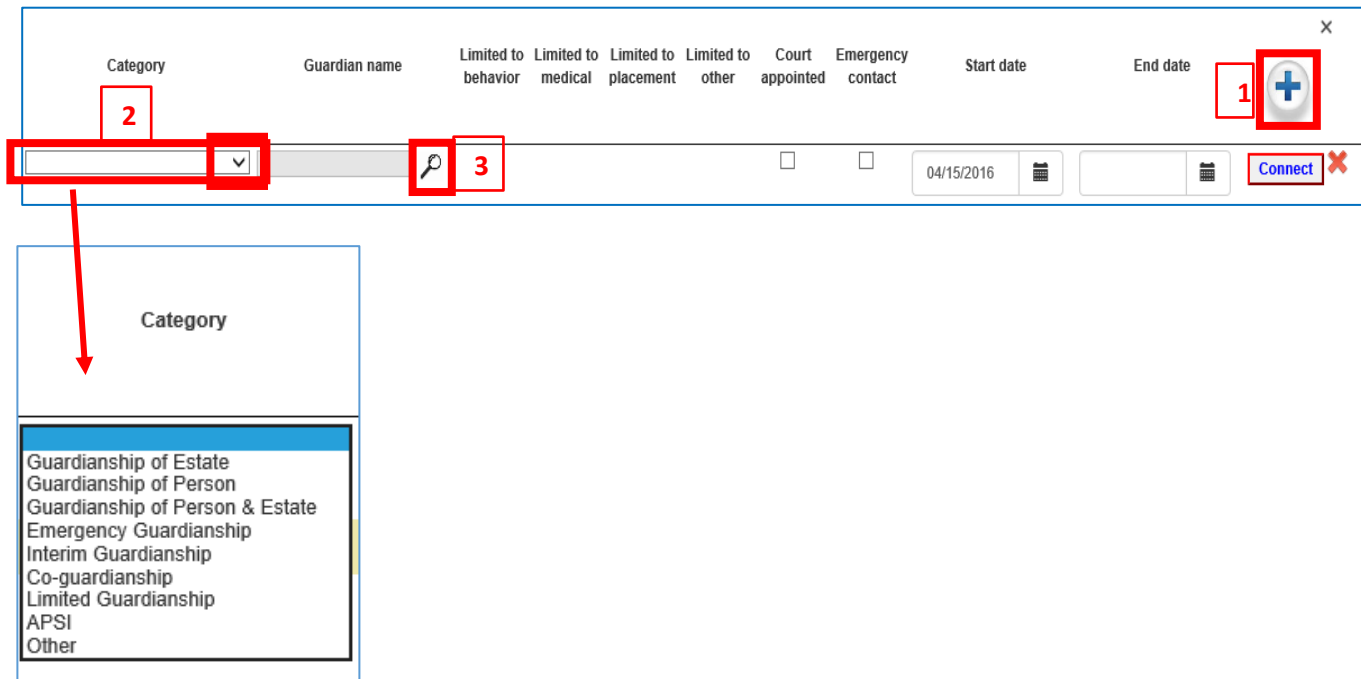
1. Manage Guardians command – new method to enter Guardian connection/s for Individuals

Guardians **must** now be connected and entered for an Individual using the Manage Guardian command instead of the Connect button at the top of the page.

- Open the Individual's Front Page and scroll down to the Contacts section.
- Click on the **Manage Guardians** command on the right side of the Contacts window.



- Click on the Circle '+' to enter a new guardian. (1)
- Click on the down arrow 'v' in the 'Category' field and chose from the dropdown list. (2)
- Click on the magnifying glass '🔍' to open the window to enter the guardian's information. (3)



- Once the Guardian Category is chosen message will display "Please select a contact (must have a mailing address)," this is not an error message. It is a reminder that a mailing address is required for every guardian before it can be connected to the Individual.

- g) 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.

- h) Enter the required information for the guardian.
i) If the guardian will be an **Assigned Team Member** then you must enter an **email address**.
j) Click the **Create** button.

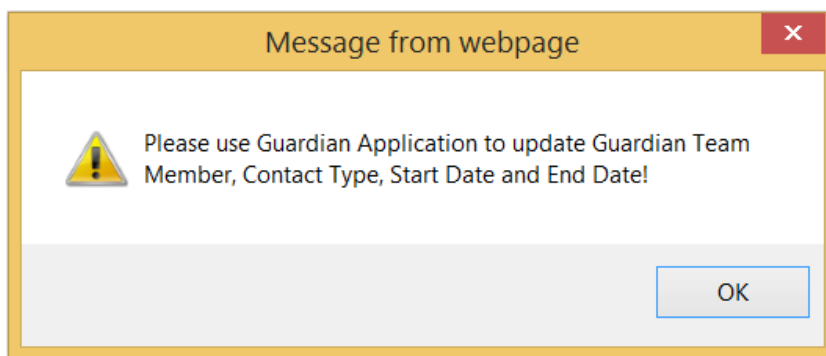
Enter an email address to easily invite the Guardian to the imaginelS Portal while entering their information.

- k) Options related to the guardianship will be available based on the Category chosen will display after creating the guardian's record.
l) The **Start Date** is automatically defaults to the current date but can be changed to a previous or future date as needed.
m) 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 imaginelS Portal.
n) Click the **Connect** button to complete the process.

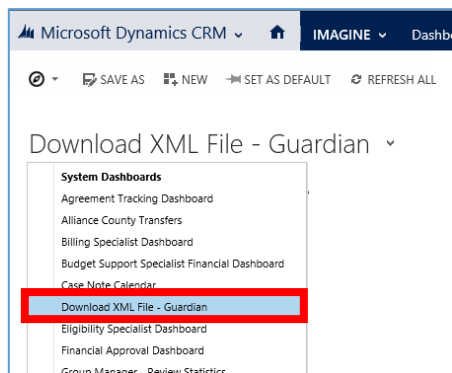
The End Date can be manually entered if a guardianship is terminated. If another guardian (and co-guardian has not been chosen as the category) is entered the system will automatically end date the

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

- o) After refreshing the Individual's Front Page, the Guardian's information will appear in the **Contact** section.
- p) Guardians will automatically be classified as an **Assigned Team Member**.
- q) When **APSI** is chosen as the **Category** no Guardian Name or other information will be entered. APSI will identify the correct representative for the Individual.
- r) All currently connected guardians in imagineIS will remain. Guardians already connected in imagineIS **should not have to be re-entered**.
- s) In imagineIS any changes to an Individual's existing connected guardian/s or the addition of a connected guardian **must be completed using the Manage Guardian command**. An error message will be displayed otherwise.



2. **An XML Guardian download report file is now available from the Dashboard View dropdown and it will generate a report for those counties who need an XML file for a third-party vendor.**



1. Connecting APSI Guardians using the 'Manage Guardians' Command

- Open the Individual's Front Page.
- Scroll Down and open the Contacts sub-menu.
- Click on the Manage Guardian command.

Connected To ↑	Email (Connected To)	Primary Phone Number (Connected... Email (Connecte... Primary Phone N...	Role (To) ↑	Relationship	Team Membership Relationship	Starting	Ending
Emma Guardian	emma.x.guardian...	(740) 555-1212	1 - Family Member		Assigned Team Member	3/9/2016	
James Guardian	James.X.Guardian...		2 - Guardian	1st Emergency Contact...	Assigned Team Member	3/30/2016	
Donna Noble			7 - SSA		Assigned Team Member	3/10/2016	

- If no Guardian is listed in the Manage Guardian window, go to number 7.**
- Click on the End date Calendar icon then chose an End date. The date must be on or after the Start Date.
- Click the Close button. Skip to number

Category	Guardian name	Limited to behavior	Limited to medical	Limited to placement	Limited to other	Court appointed	Emergency contact	Start date	End date
Guardianship	Emma Guardian	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	05/05/2016	

- Click the Plus Sign icon, , to open a new Guardian record line.
- Click on the down arrow in the Category field.

Category	Guardian name	Limited to behavior	Limited to medical	Limited to placement	Limited to other	Court appointed	Emergency contact	Start date	End date
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	05/20/2016	
Co-guardianship	Emma Guardian	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	05/05/2016	05/11/2016

- Choose "ASBI" from the drop down list. When ABSI is selected the Guardian Name field may automatically be filled in. ABSI will control the specific naming the guardian for the Individual.

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

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