

APSI guardian instructions

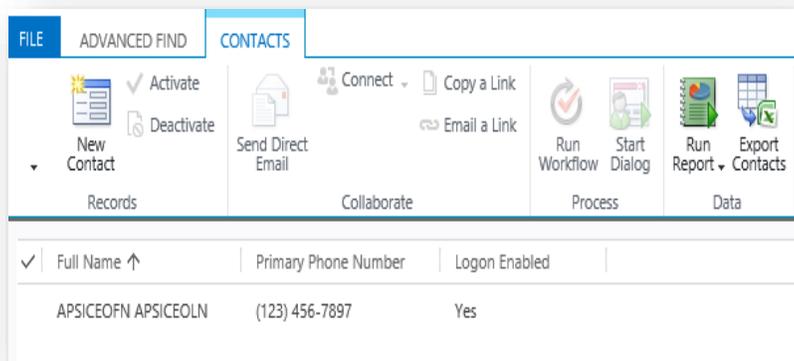
Summary

- DODD has released an update that will affect the way you update your individuals' guardian information.
- All indicated APSI connections that exist in the system currently will be consolidated to an APSI single contact.
- A list of contacts has been sent to you which indicate these contacts were added in our system marked as APSI, but not included under the single APSI connection. Consolidation of these records will allow you oversight of your representatives and a single sign-on for those representatives.

Detail

1. APSI consolidation of existing connections:

All existing APSI connections have been consolidated under a single contact.



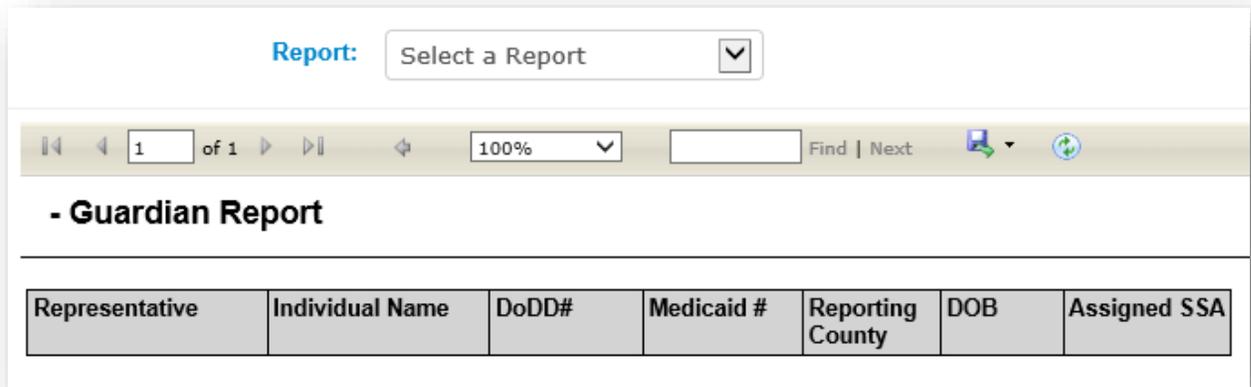
2. Guardian Reports for APSI: Click on the button Guardian Reports



Select the Associated Individuals report:



The format for the report will list the responsible representative with all the associated individuals connected to them.



3. Below on page 3 is a diagram of the Guardian APSI Structure.

