



Clients' Contacts Explained



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Professional Contacts Explained

Do you have a question about a medication or treatment of a Client's illness?

Ask one of your **Client's Care Professional Contacts** directly.

By adding Contacts, you have all of your **Care Professional's contact information** for your client right at your fingertips. Like a mobile rolodex, you can include **personnel information** for a doctor, nurse, consultant, social worker or other type of professional (e.g. physical therapist) This way it is easily accessible when needed. You also have the option to **Add a photo** for each contact. This might avoid any confusion about who's who during a visit.

Family members can also **view, add, and edit** Care Professionals on the Client's profile.

Note: Adding a Care Professional does **NOT** invite them to join Carefolk or allow them to see any information about your Client. It is strictly for contact information purposes.

Why Add Contacts?

- ✓ Manage Professional Contacts
- ✓ Saves Time
- ✓ Keeps Contacts All in One Place
- ✓ Family Can Contribute
- ✓ Easy to Find a Doctor's Information

2 Adding a Care Professional's Contact Information

View the Contacts Page

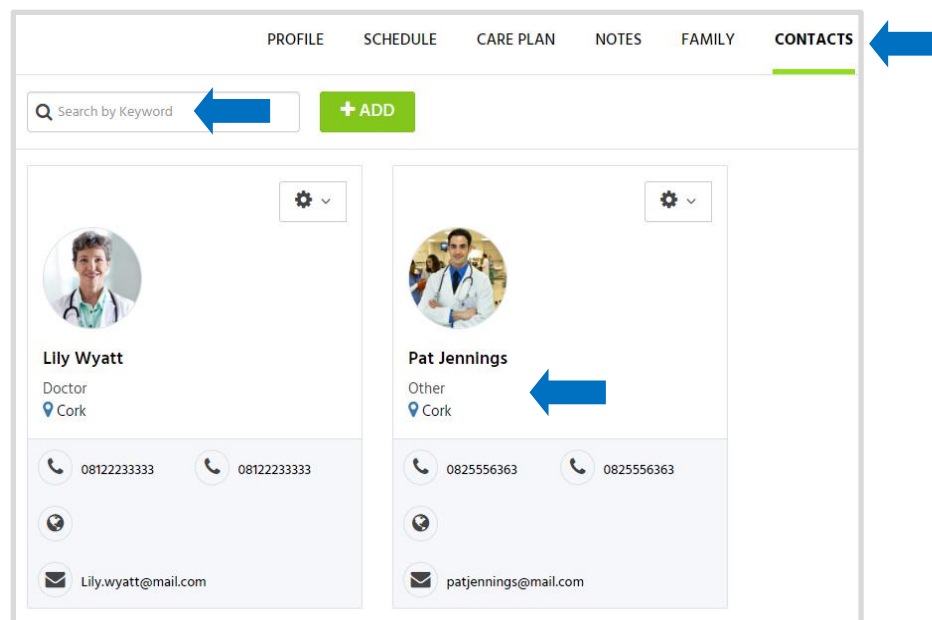
Find Contacts on a Client's Profile

With Contacts, it's easy to see all of your Client's Care Professionals in one place.



To **View all Care Professionals**, navigate to your **Client's Profile** and then **Contacts**.

Browse through all of the contacts or use the search box to type in a **Name**.

From a contact's card, you can see their profession, location, phone number, website and email.



Edit or Remove a Contact

To **Edit** any existing contacts, select  and select **Edit**. Then update the information. When finished select **+Save**. To **Remove** a contact, select  and choose **Delete**.

3 Adding a Care Professional's Contact Information

Add a New Contact



Add a New Contact

Adding a new Care Professional Contact is easy! You or a Family Member can do it. Start by selecting **+Add**.

Upload a Profile image for your new contact if you have one. This makes the Care Professional more easily identifiable.

Then select a **Contact Type** from the dropdown menu.

Then complete their contact information under each heading.

- **First Name and Last Name**
- **Company or Organization**
- **Address**
- **Phone Number**

The screenshot shows a web form titled "Add new Professional Contact". A blue arrow points to the "Contact Type" dropdown menu, which is currently empty. The form includes the following fields:

- Contact Type:** A dropdown menu.
- First Name:** A text input field.
- Last Name:** A text input field.
- Company or Organization:** A text input field.
- Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- Town:** A text input field.
- City:** A text input field.
- Country:** A dropdown menu.
- Phone (Day):** A text input field.
- Phone (Night):** A text input field.
- Email:** A text input field.
- Web site:** A text input field.

At the bottom right of the form, there are two buttons: "Cancel" and a green button labeled "+ SAVE".