

Manage Contacts

Last Modified on 02/09/2023 8:05 am
CST

All contacts for a participant account can be found on the Participant Account Details page. Here, you can manage contact status, add contacts, and update contacts. Contacts can be at one of the following statuses:

- **Payer:** This contact can pay invoices.
- **Other:** This is a non-payer contact.
- **Inactive:** This contact is no longer a payer on the participant account.

Note: Contact details entered on the Participant Account Details page are for accounting purposes only. This information does not affect enrollment data. To update enrollment data, see [Edit Participant Enrollment Information](#).

Click a link below to jump to a specific ic.

In this article:

- [Add Contacts](#)
- [Edit Contacts](#)
- [Set Contacts to Inactive](#)
- [Remove a Contact](#)

Add Contacts

Before you can create invoices for participants, you must first add accounting contacts to the participant account and designate at least one of them as a payer of invoices. This means that the contact can receive and pay invoices for the participant account. If you need to add an agency to a participant account, see [Manage Agencies](#).

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.

Participant Account Details

Marks, Hallie

Contacts +

Montoya, Maria
Guardian
9163458787 **Payer**

Agencies +

Default Rate
\$ 0 per + Save

Contact Details Actions

Name * Maria * Montoya

Phone * Home (916) 345-8787 +

Email jpeters@minutemenu.com

Billing Address
 Use enrollment address

* 5112 Los Banos Blvd.
* Elk Grove CA 95657

Contact Attributes
Role Guardian
 Payer of invoices for participant care
 Authorized to pick up participant

Notifications
Language English

Contact details are for Accounting only. To update enrollment information, click here

Invoices

Received \$60.00 Pending \$0.00 Balance \$190.00 Total \$250.00

	Date	Invoice #	Payer(s)	Status	Amount	Payer Balance	Total Balance
Clear	This Quarter			All Statuses	=		
	01/13/2022	35503973	Montoya, Maria	Partial	\$250.00	\$190.00	\$190.00

Display 3 records Showing 1 to 1 of 1 entries. Previous 1 Next

Credits of Montoya, Maria

Date	Amount	Reason	Credit Amount	Credit Used	Credit Balance
01/13/2022	\$60.00	Credit Used for Invoice 35503973		\$60.00	\$0.00

- Click the drop-down menu at the top of the page and select the participant for whom to add a contact.

Note: Click **Filters** to filter the participants included in the drop-down menu by **Active, Pending, or Withdrawn** status.

- Click **+** in the **Contacts** section to the left.
- In the **Contact Details** section:

Note: If this section does not display, click **∨** to expand it.

- Click **Existing** or **New**. If you select Existing, you can select a contact you've entered previously.

Contact Details Actions

Existing **New**

Name * * *

Phone * Home () - - +

Email

Billing Address
 Use enrollment address

* * *

Save

Contact details are for Accounting only.

Contact Attributes
Role Other
 Payer of invoices for participant care
 Authorized to pick up participant

Notifications
Language

- Click the **Name** boxes and enter this contact's first and last name.
 - Click the **Phone** drop-down menu and select **Home, Mobile, or Work**. Then, enter the phone number in the corresponding box. To add additional contact numbers, click **+**.
 - Click the **Email** box and enter the contact's email address.
 - Click the boxes in the **Billing Address** section and enter the contact's billing address. You can also check the **Use Enrollment Address** box to use the address stored in the participant's enrollment record.
- In the **Contact Attributes** section:
 - Click the **Role** drop-down menu and select **Guardian** or **Other**.

- b. If this contact can pay invoices for the participant account, check the **Payer of Invoices for Participant Care** box.

Note: When you mark a contact as a Payer, you can specify the dollar amount or percentage they pay for care in the Payment Settings section of this page. For more information, see [Manage Payment Settings](#).

- c. If this contact can pick the participant up from care, check the **Authorized to Pick Up Participant** box.
7. In the **Notifications** section, set notification preferences for this participant.
- Click the **Language** drop-down menu and select **English** or **Spanish**.
 - Select the notification type: **Email** or **Text Message**.
8. Click **Save**.
9. If this contact is a Payer, click the **Actions** drop-down menu and select **Send Welcome Letter**. The contact receives an email at the address you specified in **Step 5d**.

The screenshot shows a 'Contact Details' form. On the left, there are fields for Name (Paul Matoya), Phone (Home (916) 345-8787), Email (pmatyoya@email.com), and Billing Address (5112 Los Banos Blvd., Elk Grove, CA 95657). On the right, there are 'Contact Attributes' including Role (Other), checkboxes for 'Payer of invoices for participant care' and 'Authorized to pick up participant', and a 'Notifications' section with a Language dropdown set to English. An 'Actions' dropdown menu is open, showing 'Welcome Email' and 'Statement of Account' options. At the bottom right are 'Remove' and 'Save' buttons. A footer note states 'Contact details are for Accounting only.'

Note: You can customize the welcome letter contacts receive. For more information, see [Customize Accounting Email Templates](#).


[Return to Top](#)

Edit Contacts

You can update contact details at any time. Remember, adding or updating contacts on the Participant Account Details page only updates accounting information for that contact. Enrollment information is not affected.

- From the menu to the left, click **Accounting**.
- Click **Accounts**. The Participant Account Details page opens. The Participant Account Details page opens and displays information for the last participant you viewed.
- Click the drop-down menu at the of the page and select the participant for whom to manage contacts.
- From the **Contacts** section to the left, click the contact to change. The **Contact Details** section displays the

current information for this contact.

Note: If this section does not display, click  to expand it.


5. Click each box in the **Contact Details** section, and enter new information over the existing information.
6. Update your selections in the **Contact Attributes** section, as needed.
7. When finished, click **Save**.

[Return to Top](#)

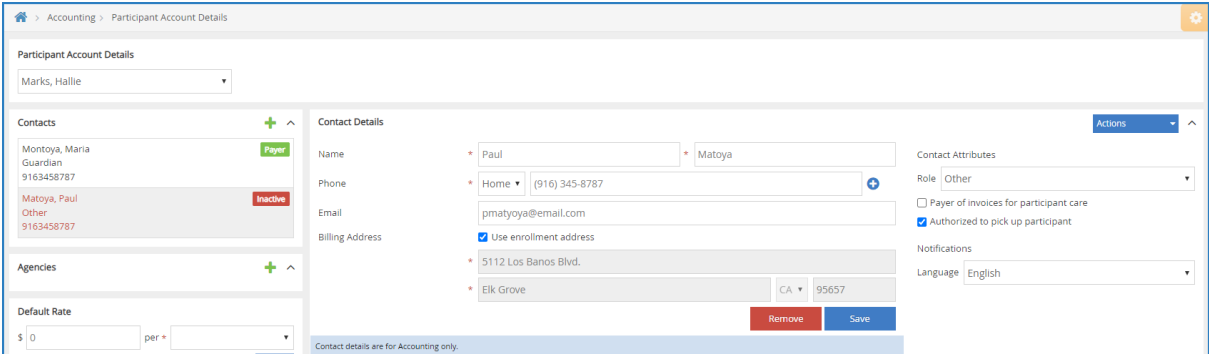
Set Contacts to Inactive

When you set a contact to inactive, it means they are no longer a payer on the participant account. This person is still a contact for the participant, but does not pay invoices.

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the top of the page and select the participant for whom to manage contacts.
4. From the **Contacts** section to the left, click the contact to change. The **Contact Details** section displays the current information for this contact.

Note: If this section does not display, click  to expand it.

5. In the **Contact Attributes** section, clear the **Payer Invoices for Participant Care** box.
6. When finished, click **Save**. The contact is set to inactive status.



The screenshot shows the 'Participant Account Details' page for 'Marks, Hallie'. The 'Contacts' section on the left lists two contacts: 'Montoya, Maria' (Guardian, 9163458787, Payer) and 'Matoyo, Paul' (Other, 9163458787, Inactive). The 'Contact Details' section for Paul Matoyo includes: Name (Paul Matoyo), Phone (Home: (916) 345-8787), Email (pmatyoya@email.com), Billing Address (5112 Los Banos Blvd., Elk Grove, CA 95657), and Contact Attributes (Role: Other, Payer of invoices for participant care: unchecked, Authorized to pick up participant: checked, Notifications: English). A 'Default Rate' section shows \$0 per. 'Remove' and 'Save' buttons are at the bottom right.

[Return to Top](#)

Remove a Contact

To remove an contact from a participant account:

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the of the page and select the participant for whom to remove a contact.
4. In the **Contacts** section, select the agency to remove. Their information displays in the Contact Details section.
5. Click **Remove**.
6. At the **Are You Sure** prompt, click **Yes**. The contact is removed.

[Return to Top](#)