Manage Contacts

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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**.

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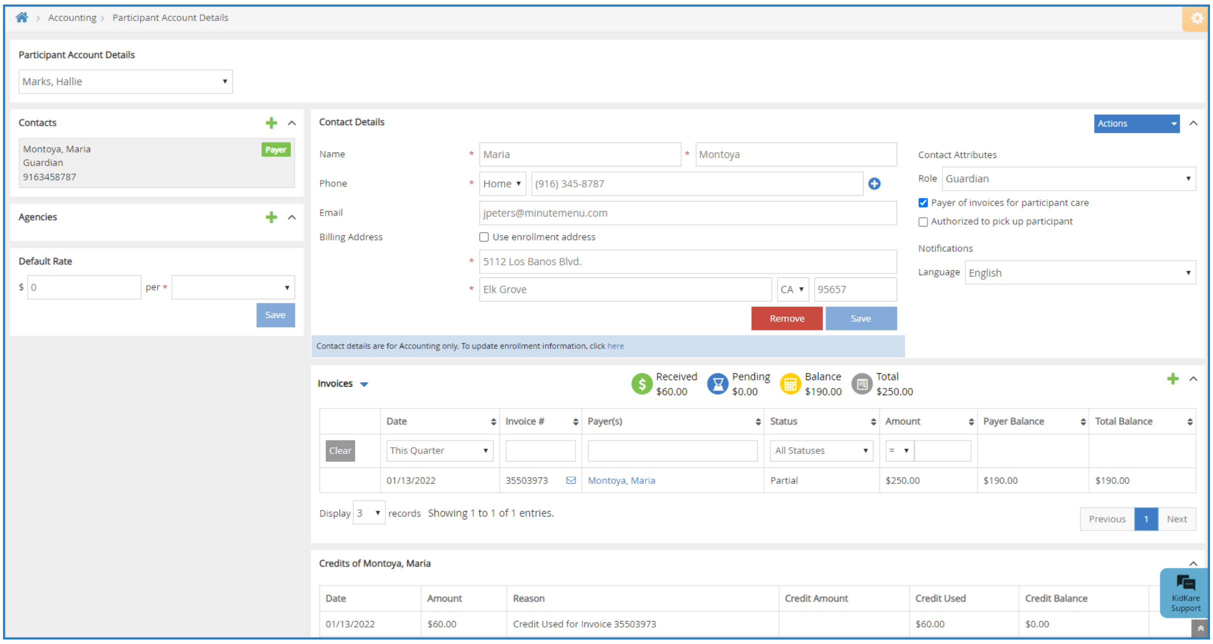
Add Contacts

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.



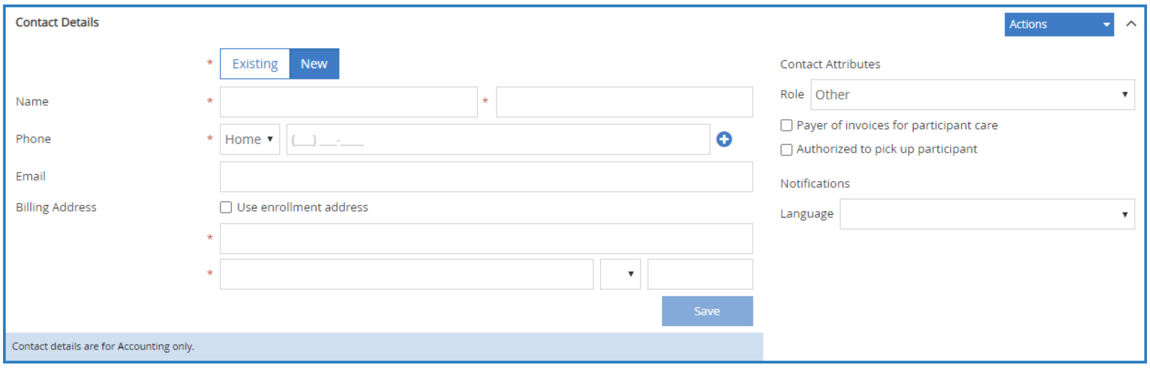
3. Click the drop-down menu at the of the page and select the participant for whom to add a contact.

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**Note:** Click **Filters** to filter the participants included in the drop-down menu by **Active**, **Pending**, or **Withdrawn** status.

4. Click ➕ in the **Contacts** section to the left.
5. In the **Contact Details** section:

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

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



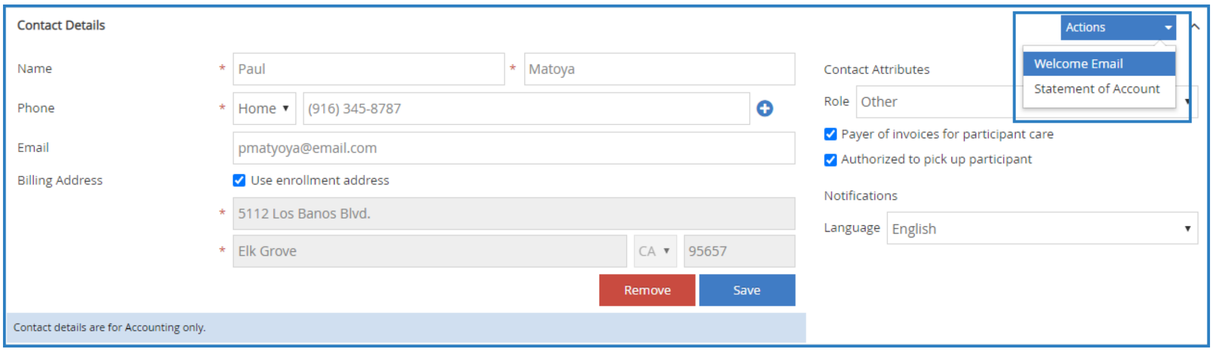
   b. Click the **Name** boxes and enter this contact's first and last name.
   c. Click the **Phone** drop-down menu and select **Home**, **Mobile**, or **Work**. Then, enter the phone number in the corresponding box. To add additional contact numbers, click ⊕.
   d. Click the **Email** box and enter the contact's email address.
   e. 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.
6. In the **Contact Attributes** section:
   a. 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.
   a. Click the **Language** drop-down menu and select **English** or **Spanish**.
   b. 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**.



> **Note:** You can customize the welcome letter contacts receive. For more information, see **Customize Accounting Email Templates**.

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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.

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 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. 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**.

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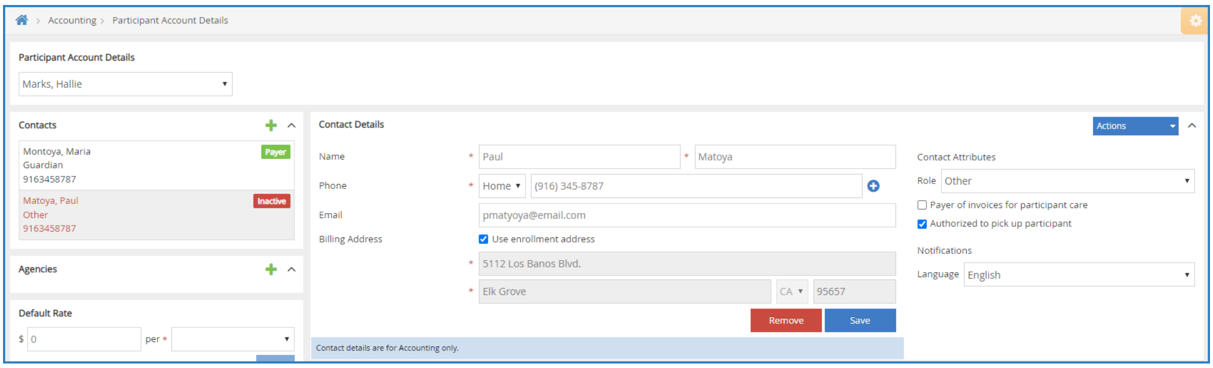
Set Contacts to Inactive

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 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.



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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.

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