

Manage Contacts

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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 [Manage Child Contacts](#).

Click a link below to jump to a specific topic.

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

Alistair Therin

Contacts

- Fiona Therin, Guardian, (817) 852-3698, Payer
- Maric Therin, Other, 8175557777, Payer

Agencies

- Jess State, 5121234567, Agency Payer

Payment Settings

Percentage: \$ Amount

Fiona Therin: \$ 150

Maric Therin: \$ 150

Jess State: \$ 150

If the invoice total exceeds the amounts listed above, what should happen?

Apply charges to Maric Therin

Default Rate: \$ 10 per Hour

Contact Details

Name: * Fiona * Therin

Phone: * Home (817) 852-3698

Email: ftherin@thedastime.com

Billing Address: * 123 Ft Worth Dr, Argyle, TX 76226

Contact Attributes: Role: Guardian

☒ Payer of invoices for participant care

☐ Authorized to pick up participant

Notifications: Language: English

Invoices

Received \$0.00, Pending \$0.00, Balance \$400.00, Total \$400.00


	Date	Invoice #	Payer(s)	Status	Amount	Payer Balance	Total Balance
Clear	This Quarter			All Statuses			
	01/07/2022	10083	Fiona Therin, Maric Therin, Jess State	Unpaid, Unpaid, Unpaid	\$150.00, \$150.00, \$100.00	\$150.00, \$150.00, \$100.00	\$400.00

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

Credits of Fiona Therin

No credits are associated with this contact.

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

Note: Click  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.

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If the invoice total exceeds the amounts listed above, what should happen?

Apply charges to Maric Therin

Default Rate: \$ 10 per Hour

Contact Details

Name: * *

Phone: * Home () - () - ()

Email:

Billing Address: * *

☐ Use enrollment address

Contact Attributes: Role: Other


☐ Payer of invoices for participant care

☐ Authorized to pick up participant

Notifications: Language:

Save

Contact details are for EasyPay only.

- 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.
 - 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 5c**.


Note: You can customize the welcome letter contacts receive. For more information, see [Customize 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.

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. 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](#)

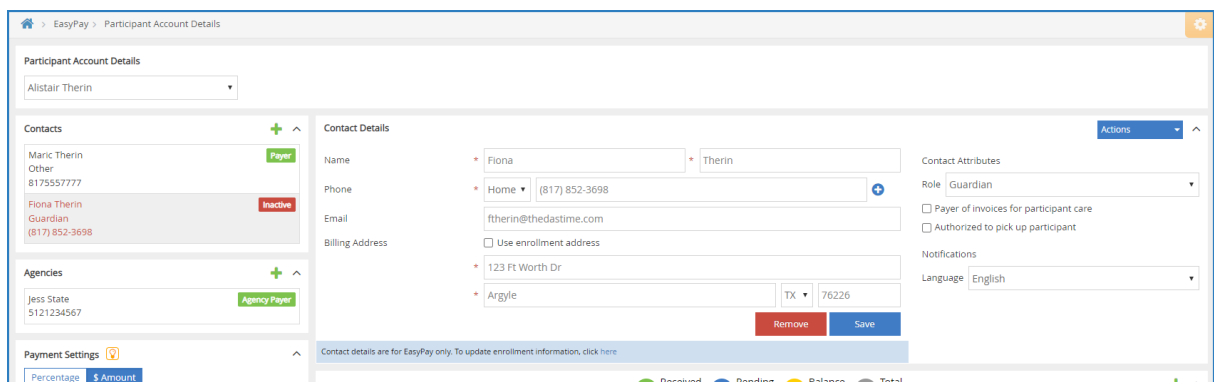
Set Contacts to Inactive

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.

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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 **Pays Invoices for Participant Care** box. The contact is set to Inactive status.



6. When finished, click **Save**.

[Return to Top](#)

Remove a Contact

To remove a 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 top 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](#)