

How to Change Facility Contacts

If a person has a facility PIN number or been assigned access, they will be able to add or delete a contact. If you need to edit your contact information, either contact your local Field Office or delete your existing contact information and create a new contact.

After landing on your dashboard page, select the Facility ID number. This will take you to the Facility Summary page.

Facility ID	Site Name	Status	Payment	Plan Type	MMP Due Date	Assign Access	
[REDACTED]	[REDACTED]	Approved 07/31/2019	chk- 07/31/2019	Short form	08/01/2019	Edit	

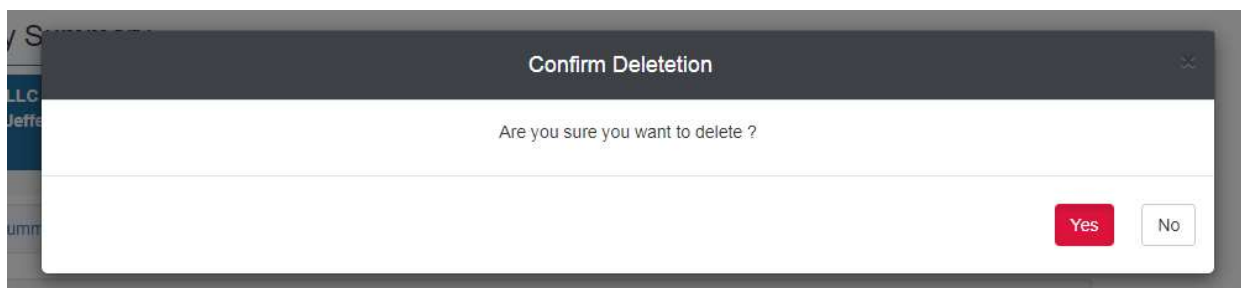
After landing on the Facility Summary page, the first table is the Current Contacts table. This table lists current owners and contacts.

Current Contacts							Add Contact
Name	Role						
[REDACTED]	contact		Link			X	
[REDACTED]	contact		Link			X	
[REDACTED]	owner						

Deleting Contact: To delete a contact, click on the blue 'X.'

Current Contacts							Add Contact
Name	Role						
[REDACTED]	contact		Link			X	
[REDACTED]	contact		Link			X	
[REDACTED]	owner						

A pop up window will be displayed confirming you want to delete the contact. If you select 'yes', the contact will be removed from the table and placed in the historical contact information for the facility. If you select 'no' you will be returned to the Facility Summary page and the contact will remain in the table.



Add Existing Contact: To add a contact, click on the blue 'Add Contact' button.

Current Contacts							Add Contact
Name	Role						
[REDACTED]	contact		Link			×	
[REDACTED]	contact		Link			×	
[REDACTED]	owner						

This will land you on the 'New Contact' page. First type in the contact's name in the 'Existing Contact' search field to see if they are already in the system. The rest of the table will remain grey until the system determines if your contact is existing or new.

Facility Summary [Back to search result](#)

Search Existing Contact Name Here [Search](#)

Business: Title: First Name:

Last Name: Role: Operation Type:

Is Current:

Address1: Address2: City:

State: Zip: Email:

Is Mail Merge: Is Primary:

Phone: Extension: Phone Type:

Is Main:

[Save](#) [Reset](#)

If your contact is already in the system, there will be a table with the option to select the correct contact.

Search Existing Contact Name Here

ContactName	Address	City	Zip	
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Select
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Select
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Select
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Select

After selecting the contact, you will be directed to this table. Fill out the appropriate information from each drop down box and then select save. After saving, the system will take you back to the Facility Summary page.

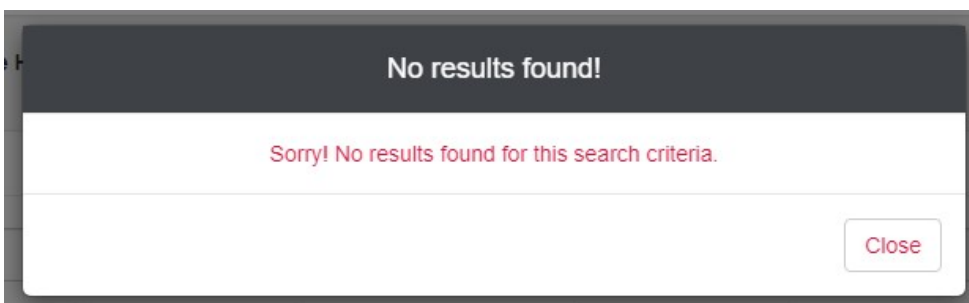
Facility Summary [Back to search result](#)

Business: Yes
Title: --Title--
Name: [REDACTED]
Last Name: [REDACTED]
Role: contact
Operation Type: Confinement
Is Current: Yes

• If you need to edit the owner name, please contact your local field office

Add a New Contact:

When you type in your contact's name and it isn't listed, you will see this message:



Click on the 'Close' button and the previous grey table will allow you to add the appropriate fields to the table. After adding the fields, click Save.

Search Existing Contact Name Here

Business: **Title:** **First Name:**

Last Name: **Role:** **Operation Type:**

Is Current:

Address1: **Address2:** **City:**

State: **Zip:** **Email:**

Is Mail Merge: **Is Primary:**

Phone: **Extension:** **Phone Type:**

Is Main:

- If you need to edit the owner name, please contact your local field office