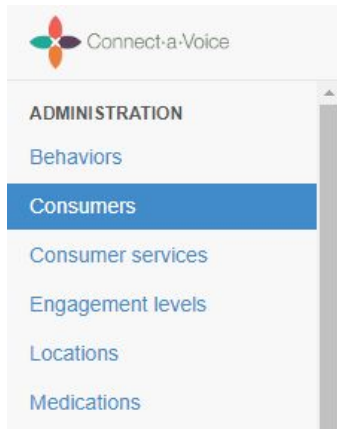


# How to Create a New Consumer

Connect a Voice  
1060 Kingsmill Pkwy  
Columbus, OH 43229



# How to Create a New Consumer




To create a new Consumer, navigate to the “Consumers” section in the left-hand panel.

This section is where you can find and view all of your consumers and their associated information.

In the Consumers section, you’ll see a button that says “+ Add New” at the top. Click this button to create a new Consumer.

Below is a list of information you will need to fill out when creating a new Consumer:

- **Team** - this will be the name of the Team (usually the Provider name) that your consumer belongs to.
- **First Name**
- **Last Name**
- **Middle Name** (optional)
- **Photo** (optional) - this will allow you to upload a photo of the Consumer to display in the mobile app.
- **Description** (optional)
- **Provider ID Number** (required for single-entry imports) - this is a unique number that identifies the Consumer in the system. This is usually the billing number.
- **Location** - select an existing location from the dropdown. If the location does not exist, you can create a new one by clicking 

IMPORTANT: If you do not select an existing location from the dropdown, and add the same location twice, the Consumers will show under two separate location in the app.

## Adding Medications, Behaviors, & Services

To add a new Medication or Behavior, simply click the Add New button

A blue rectangular button with rounded corners containing a white plus sign followed by the text "Add a new Medication".

If there are existing Medications or Behaviors, you can view them by clicking the dropdown arrow



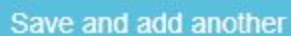
For now, if you need to add Services to your consumer, please contact the Connect a Voice team.

## Saving Your New Consumer

To save the information you entered about the new consumer, simply click the Save button at the bottom of the page.

A blue rectangular button with rounded corners containing a white checkmark followed by the text "Save".

Or if you would like to add another Consumer, you can click the "Save and Add Another" button which will save the current Consumer and bring you back to a blank "Add New

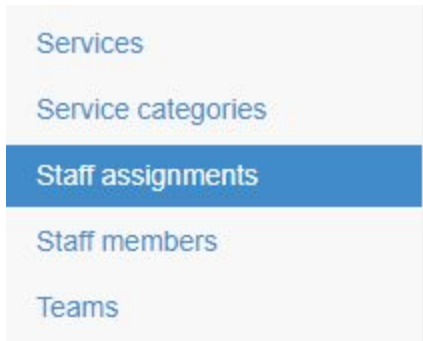
A blue rectangular button with rounded corners containing the text "Save and add another".

Consumer" screen.

## Assigning Consumers to Staff


Before staff can begin using the Connect a Voice app with the new Consumer, staff must be assigned to the Consumer.


You can create this assignment by navigating to the Staff Assignments section in the left-hand panel.



Once in the Staff Assignments section, you can click the “Add New” button at the top, select the Staff Member you want to assign from the dropdown, and then select the new Consumer. You can also type into the search bar to easily search for either person’s name.

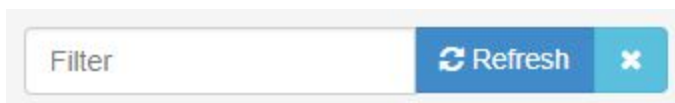
Once both the Staff and Consumer are selected, click “Save” or “Save and add another.” Once this is complete, the Staff Member will be allowed to find the new Consumer in their Connect a Voice mobile app.



**Staff member**    
Required.

**Consumer**    
Required.

## Editing a Consumer

To edit an existing consumer’s information, you can search for them in the Search Bar and locate them in the table.



Once you find them, you can either click the information icon  to view their information or you can click the pencil icon  to edit their information.