

## Adults Quick Guide

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### Contact Details - Telephone Numbers and E-mail Address

A person's current **telephone numbers** and **e-mail address** are displayed under a subheading of **Contact details** within **Demographic information** on the **Person summary** screen.

#### Telephone Numbers

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A person's telephone number(s) can be added at the point of person creation or added to their record at a later date as and when the information is known.

A person is likely to have multiple different telephone numbers recorded on their record; these may be current or historic and can include different types of numbers such as home or mobile numbers.

You should only ever edit a telephone number type, or the number itself, if it has been recorded incorrectly.

If the person has changed their telephone number the old number should be ended (so it is still visible as historic information on the record) and the new number recorded.

Historic telephone numbers can be viewed by accessing the **Contact details** screen - either click **Person details > Telephone numbers/E-mail** in the extended sidebar menu or click the **Change** hyperlink against **Contact details** within **Demographic information**.

#### Recording Telephone Numbers

To record telephone numbers, from the **Person summary** screen:

Either,

- Click **Person details > Telephone numbers / E-mail** in the extended sidebar menu

Or,

- Click the **Change** hyperlink against **Contact details** within **Demographic information**

**Note:** The '**Change**' hyperlink will only be visible if contact details (either a telephone number or e-mail address) are already recorded.

The **Contact details** screen will display – ensure you are within the **Telephone numbers** tab

- Click the **Add telephone number** button

The **Add telephone** popup window displays.

- 'Telephone number type', 'Telephone number' and 'From date' are all mandatory.
- 'From date' defaults in as today's date – this can be updated if needed
- 'To date' should only be completed when ending a telephone number.
- 'Note' can be used to record a short note about the telephone number e.g. 'Only call after 9.00am'
- Click the **OK** button

The **Contact details** screen displays.

If there are multiple telephone numbers to record repeat the process by clicking the **Add telephone number** button.

- Click the **Save** button to return to the **Person summary** screen

## Ending and Updating Telephone Numbers

To end or update telephone numbers, from the **Person summary** screen:

Either,

- Click **Person details > Telephone numbers / E-mail** in the extended sidebar menu

Or,

- Click the **Change** hyperlink against **Contact details** within **Demographic information**

The **Contact details** screen will display – ensure you are within the **Telephone numbers** tab

- Click **Edit Pencil** icon 

The **Edit telephone** popup window displays

Edit the fields on the screen as necessary – remember you should only edit the 'Telephone number type' or 'Telephone number' if previously recorded incorrectly.

If the person has changed their telephone number you should end their current number and add a new one.

To end a telephone number you must record a date in the 'To date' field.

- Click the **OK** button

The **Contact details** screen displays.

- Click the **Save** button to return to the **Person summary** screen

## E-mail Address

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A person only ever has one e-mail address recorded on their record.

If a new e-mail address is known the old one will need to be overtyped.

## Recording or Amending an E-mail Address

From the **Person summary** screen,

Either,

- Click **Person details > Telephone numbers/E-mail** in the extended sidebar menu

Or,

- Click the **Change** hyperlink against **Contact details** within **Demographic information**

**Note:** The '**Change**' hyperlink will only be visible if contact details (either a telephone number or e-mail address) are already recorded.

The **Contact details** screen will display – ensure you are within the **E-mail address** tab

Enter or overwrite the text within the 'E-mail address' field.

The E-mail address can also be removed completely if necessary i.e. if the person no longer uses an e-mail account.

- Click the **Save** button to return to the **Person summary** screen