Guardian Profile - Create & Link to Client, View, Edit, or Deactivate

Description: In this topic, the user will learn how to create a guardian profile and link it to a client, or view, edit, or deactivate the guardian profile. Guardian profiles allow a user to be linked to multiple clients to perform client sign-off and view client schedules.

Role Required: Super User

Permission Required: Client Admin

Required Entities Before Creation:

- Cost Center
- Funding Source
- Client Profile

Create Guardian Profile

1. Log into DCI
2. Click **Home** on the main menu
3. Click **Guardians** on the submenu
4. Click **Actions**
5. Select **Add New Guardian.** Complete the form wizard.
    a. Basic Demographics tab:
        i. First Name **(required)**
        ii. Last Name **(required)**
        iii. Address **(required)**
        iv. Time Zone (optional): Select from drop-down
        v. Phone **(required)**
        vi. Alternate Phone (optional)
        vii. Mobile Number (optional): Allows the guardian to receive text notifications after the mobile number has been verified
        viii. Email **(required)**: Must be unique from the client(s) email address
        ix. Cost Center **(required)**
        x. **Profile Reference (optional)
        xi. Click **Next**
    b. Authentication Information tab:
        i. Username **(required)**
        ii. Password **(required)**
        iii. Confirm Password **(required)**
        iv. Pin **(required)**
        v. Status **(required)**: Defaults to active. Select disabled if the guardian is no longer active. Select locked to temporarily prevent the guardian from logging in.
        vi. Click **Next**
        vii. Review Summary tab
        viii. Click **Save** to continue and **Yes** to confirm

Link a Guardian Profile to a Client Profile

Guardians can be linked to clients when the new client profile is created, in the form wizard on the Client Information tab.

1. Log in to DCI
2. Select the **Home** tab on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. **Click anywhere in the client row** to open the Client Details page
6. Click **Actions**
7. Select **Edit Client** from the drop-down menu
8. In the form wizard, select the **Client Information** tab.
9. Begin typing the guardian’s name in the Guardian field and select the **guardian's name** when it appears
10. Click **Save** and **Yes** to confirm

View, Edit, or Deactivate Guardian Profile

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Guardians** on the submenu
4. Enter the guardian's name in the filter and click **Search**
5. **Click anywhere in the guardian row** to open the Guardian Details page
6. Click **Actions**
7. Select **Edit Guardian** from the drop-down menu
8. View and make edits in the Edit Guardian form wizard
    a. To deactivate the guardian profile, change the status to **Inactive** on the basic demographics tab.
9. Click **Save** and **Yes** to confirm

Related articles

- Authorizations - Overview
- Attestation (*EVV) Workflow for Clients and Guardians
- Client - FOB Attestation (*EVV)
- October 2023 Release Notes
- Client - Web Portal & Mobile App Punch Sign-Off