

# Client Contact Tab

The client record CONTACT tab is a place to record and share a client's contact information (phone numbers and email address). Multiple contact records can be created in a client record, allowing staff members to save contact information for family members, case workers, employers, and other important contacts.

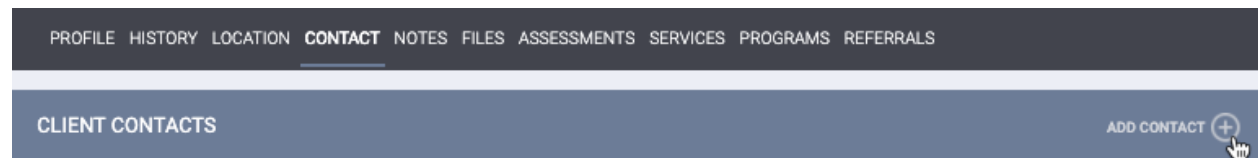
Depending on the [sharing settings](#) of the agency and the staff member's [access role](#), contact information can be shared, edited, and deleted within and across agencies. Individual contact records can also be made private to the agency where they were created, regardless of the agency's sharing settings.

## Notes:

- The CONTACT tab can be enabled or disabled in the agency's [Navigation Profile](#) and a staff member's [Access Role](#).
- The sharing of Contact data is based on an agency's [Location sharing setting](#).

## Creating Contact Records

To create a contact record, click the CONTACT tab within the client record and click ADD CONTACT.



Select an appropriate *Contact Type*. The picklist options for the *Contact Type* field are created by system administrators in [FIELD EDITOR](#). If you select "Client," the client's name will be recorded with the contact record. Any other selection will include a *Name* line to record the contact's name.

## ADD CONTACT

Contact Type	Family Members
Name	
Email	

**Note:** The **Contact Type** picklist contains a "Client Supplied" option that is grayed out. This option is associated with Customer Portal functionality and cannot be selected within Clarity Human Services.


Enter an email address, phone number, or both for the contact. You can turn off the *Active Contact* toggle if the contact is no longer accurate or applicable but should be retained for historical purposes. Turning on the *Private* toggle will make the contact accessible only to staff members within the agency, regardless of agency sharing settings (for more information, see [Making Client Data Private](#)). Select a *Date* to associate with the contact and, if applicable, add a *Note*. Click **SAVE CHANGES**.


After the record is saved, your name and the date the record was created (which may be different from the selected *Contact Date*) will be saved to the record.

## Viewing and Modifying Contact Records

Available Contact records will display in the **CONTACT** tab and include the name of the staff member who created the record and the *Contact Date*. Depending on your access role and the agency's sharing settings, you may have the ability to view, edit, or delete records created by users at other agencies.

To view or edit a record, hover over it from the **CONTACT** tab and click the edit icon.

Contact Type	Name	Phone	Email	Date	
Family Members	John Smith	555-555-5555	john@mail.com	05/07/2020	

If *Location* is set to "Basic Shared" by the creating agency, this option will not be available to staff members at other agencies. If a note is associated with the contact record, you can hover over the  icon to view the text of the note.