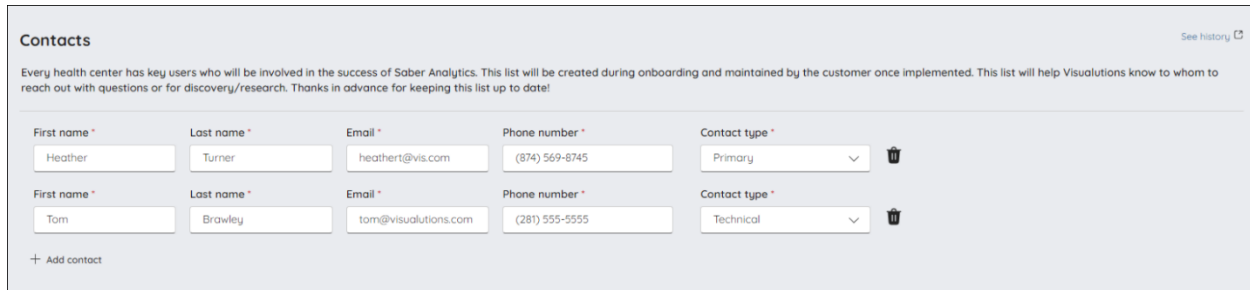


Contacts

The Contacts section enables you to maintain the practice's/company's administrative contacts. Enter the contact individual's first and Last name, email address, and phone number. Visualutions uses this information to streamline contact efforts and for UDS+ report submissions for customers with UDS+.

The **See history link** will route you to the **Admin changes** audit log. Use this to review any changes made to the health center's Contacts.



The screenshot shows a web interface titled "Contacts" with a "See history" link in the top right. Below the title is a descriptive paragraph: "Every health center has key users who will be involved in the success of Saber Analytics. This list will be created during onboarding and maintained by the customer once implemented. This list will help Visualutions know to whom to reach out with questions or for discovery/research. Thanks in advance for keeping this list up to date!". The main area contains a table with two rows of contact information. Each row has columns for First name, Last name, Email, Phone number, and Contact type, followed by a trash icon. The first row shows Heather Turner with email heathert@vis.com and phone (874) 569-8745, with a Primary contact type. The second row shows Tom Brawley with email tom@visualutions.com and phone (281) 555-5555, with a Technical contact type. At the bottom left of the table area is a "+ Add contact" button.

First name *	Last name *	Email *	Phone number *	Contact type *	
Heather	Turner	heathert@vis.com	(874) 569-8745	Primary	
Tom	Brawley	tom@visualutions.com	(281) 555-5555	Technical	

+ Add contact

Adding a Contact

1. Navigate to the **Admin settings**.
2. In the left-hand menu, Click **About Us** and then Click **Contacts**.
3. Click the **+Add contact**.
4. Enter the contact's **First name, Last name, Email address, and Phone number** (Required).
5. Click the **drop-down menu** to select the **Contact type** (Required).
 - **Accounting:** This refers to the health center's financial or accounting representative.
 - **Financial Insights:** This refers to the health center employee who is the primary contact for the Financial Insights product line, if available.
 - **Operations:** This refers to the health center's primary contact for office operations and/or facilities management.
 - **Primary:** This refers to the health center's primary contact for Saber Analytics.
 - **Technical:** This refers to the health center's primary contact regarding IT or technical management.

- **UDS+:** This refers to the health center employee who is the primary and responsible contact for the UDS+ reporting.

The screenshot shows a contact management interface with two contact entries. The first entry is for Heather Turner (heathert@vis.com, (874) 569-8745) with a 'Primary' contact type. The second entry is for Tom Brawley (tom@visualutions.com, (281) 555-5555) with a 'UDS+' contact type. A dropdown menu is open for the second entry, showing options: Accounting, Financial Insights, Operations, Primary (checked), Technical, and UDS+. A yellow arrow points to the 'UDS+' option. There are trash can icons to the right of each contact entry.

6. Click **Save**.

The new contact will now appear on the contact page.

Removing a Contact

1. Navigate to the **Admin settings**.
2. In the left-hand menu, Click **About Us** and then Click **Contacts**.
3. Locate the contact to remove.
4. Click the **trash can icon**.

The screenshot shows the contact management interface with the 'Tom Brawley' contact entry. The 'Contact type' dropdown is set to 'UDS+'. A yellow box highlights the trash can icon to the right of the contact entry.

5. Click **Save**.