Manage Contacts with the Template

You can manage your contacts in eICS using a variety of the procedures below, depending on whether you want to add, update, or remove contacts. To make sure you have the most accurate and up-to-date information, we recommend downloading the template/report before making updates to the list.

For more information about the template/report and the data you need to enter, see the article Contact Template and Report.

To download the template/report

The Contact Template/Report is available from within eICS.

1. Point to **Planning** and, in the menu, click **Contacts**. The *Contacts* page opens.
2. On the upper right, click **Upload Contacts**. The *Upload Contacts* window opens.
3. Click **Download Contact Template**. The template is automatically downloaded according to your browser settings.

To add new contacts

Multiple contacts can be added to your facilities in eICS solution using the Contact Template.

1. Download the Contact Template/Report.
2. Retain the information for existing contacts that you want to keep.
3. On an empty row, enter the new contact's information for each column you want to populate.

   Note:
   - T*o access eICS, a new contact must have a Login Email and must activate their account through the welcome email. For more information, go to* Activate Your Account.
   - To receive text messages from eICS, a new contact must receive the initial text from Juvare and respond Yes to allow Juvare alerts.
4. Save the file in CSV format.
5. Upload the Contact Template/Report.

To change a name

Contacts in the Contact Template/Report are identified by either their Login Email (if they are an internal contact, with access to the eICS solution) or their First Name, Last Name, and Organization (if they are an external contact that does not have access to eICS). As a result, there are two ways to change a name, depending on whether the contact has access to eICS.

1. Download the Contact Template/Report.
2. Locate the contact and, on that row, take one of these actions.

If you want to change the name for an…	Then…
Internal contact,	In the contact's *First Name*, *Last Name*, and/or *Organization* cell, make the changes.
External contact,	a. Select all cells. b. Copy the information. c. Paste the information on a new row. d. On the new row, change the contact's name and/or organization. e. On the original row, clear the contact's *Facility Access*.

3. Save the file in CSV format.
4. Upload the Contact Template/Report.

To change a login email

You can change a contact's login email so that they have access to eICS using a new email.

1. Download the Contact Template/Report.
2. Locate the contact and, on that row, select all cells.
3. Copy the information.
4. Paste the information on a new row.
5. On the new row, enter the contact's new *Login Email*.
6. On the original row, clear the contact's *Facility Access*.
7. Save the file in CSV format.
8. Upload the Contact Template/Report.

To make an external contact into an internal contact

You can change a contact's status, from external to internal, so that they have access to eICS.

1. Download the Contact Template/Report.
2. Locate the contact and, on that row, select all cells.
3. Copy the information.
4. Paste the information on a new row.
5. On the new row, enter the contact's *Login Email*.
6. On the original row, clear the contact's *Facility Access*.
7. Save the file in CSV format.
8. Upload the Contact Template/Report.

To make an internal contact into an external contact

You can change a contact's status, from internal to external, so that they no longer have access to eICS.

1. Download the Contact Template/Report.
2. Locate the contact and, on that row, select all cells.
3. Copy the information.
4. Paste the information on a new row.
5. On the new row, clear the contact's *Login Email*.
6. On the original row, clear the contact's *Facility Access*.
7. Save the file in CSV format.
8. Upload the Contact Template/Report.

To update contact details

Contact information, such as a person's contact email address, and voice and text phone numbers, can be updated through the Contact Template.

1. Download the Contact Template/Report.
2. Locate the contact you want to update and, on that row, clear and/or enter the Contact Emails, Contact Phones Voice, and Contact Phones Text.

   Note:

   - Multiple email addresses and phone numbers can be entered in a single cell.
   - A semicolon must be entered to separate multiple email addresses or phone numbers.
   - Phone numbers must be entered in the international format, with the plus and country code. For example, +14045551234.
   - When updating the contact details for a contact that has more than one row (for example, if the person has more than one Facility Access status) in the CSV file, you must enter the updated contact details on every row.
   - When new email addresses and phone numbers are entered for a contact, all existing addresses and numbers are replaced with the information uploaded in the CSV file.
   - When a text phone number is provided for the first time, a text message is automatically sent asking the contact to give Juvare permission to send text messages. The contact must reply YES to receive further messages from eICS.
3. Save the file in CSV format.
4. Upload the Contact Template/Report.

To add access to new facilities

You can add access to additional facilities for one or more contacts.

1. Download the Contact Template/Report.
2. Locate the contact and select the content on that row across all columns.
3. Copy the information.
4. On an empty row, paste the information to create a duplicate entry.
5. In the *Facility* column, enter the name of the new facility.
6. In the *Facility Access* column, enter the contact's role at that facility.
7. Save the file in CSV format.
8. Upload the Contact Template/Report.

To update contact plan and position assignments

You can update the plan and positions to which contacts are assigned for one or more facilities.

1. Download the Contact Template/Report.
2. Locate the contact you want to update and, on that row, locate the *Plan Positions and Groups*

3. Add, update, or remove the positions and/or groups for this contact.

   Important:

   - You can specify multiple positions and groups for a facility in one cell; however, each position and/or group must be separated by a semicolon.
   - For more information about the position and group names for a facility, go to **Planning** > **Plan Summary**; in the **Summary for** list, select the facility; in the **Plan** list, select the plan; on the left, under *ICS Chart*, review the positions and groups.
4. Save the file in CSV format.
5. Upload the Contact Template/Report.

To remove contacts

Multiple contacts, from one or many facilities, can be removed from your eICS solution using the Contact Template.

1. Download the Contact Template/Report.
2. Locate the contact you want to remove and, on that row, clear the Facility Access information.
3. Save the file in CSV format.
4. Upload the Contact Template/Report.

To upload the template/report

Multiple contacts, from one or many facilities, can be added, updated, and/or removed from your solution when you make changes to the Contact Template/Report and upload it into eICS.

1. Download the Contact Template/Report.
2. Make changes to the template/report according to the procedures in this article.
3. Save the file in CSV format.
4. In eICS, point to **Planning** and, in the menu, click **Contacts**. The *Contacts* page opens.
5. On the upper right, click **Upload Contacts**. The *Upload Contacts* window opens.
6. Click **Select CSV File**. Your file explorer window opens.
7. Navigate to and select the file.
8. Click **Open**. The file is validated.
9. Take one of these actions.
   a. If the file is formatted correctly and/or you do not want to resolve errors at this time, click IMPORT VALID or CANCEL.
   b. If you have errors that you want to resolve immediately, click YOUR FILE_REPORT.CSV. Open the file with your spreadsheet solution, identify the errors, enter the required data in valid format, and repeat steps 3 – 9 until your file is properly validated.