The Individual Data Form (IDF) helps you maintain essential information about individuals you support. The form contains information about an individual's identification, contacts, medical data and insurance. The IDF works as follows:

**Creating New IDFs**

Only Provider Administrators (PA) at an agency can enter new individuals into the Therap system by creating a new Individual Data Form (IDF). They do not need any additional user roles to do so. To create an IDF, PAs need to login to their ‘–adm’ account and click on the Create New Individual Data Form link in the Individual area on their FirstPage. Detailed instructions on how to create an IDF can be found in the Quick Guide: Create New IDF. Once an IDF has been created, it is given an ‘In Prep’ status and users with the appropriate roles are able to find it in their Worklist.

**Submitting IDFs for Approval**

To submit an IDF for approval, users will need an IDF Submit role. A submitters Worklist may contain forms with ‘In Prep’, and ‘Returned’ states. Once IDFs are submitted, they are given a ‘Pending Approval’ status and placed on the IDF Approve list. For details on how to submit and IDF, please see the Quick Guide: Submitting an IDF.

Upon submission, the status of an IDF changes in the following way:

- ‘In Prep’ status changes to ‘Pending Approval’.
- ‘Updating’ status changes to ‘Pending Update Approval’.
- ‘Returned’ status changes to ‘Pending Approval’.
- ‘Returned to Updater’ status changes to ‘Pending Update Approval’.

**Approving IDFs**

Once an IDF has been submitted, users with the IDF Approve role will find them on their Approve list. They will be able to edit, approve and return these forms as they see fit. When an IDF is approved, it is given the ‘Approved’ status and is taken out of the Approve list. Details on how to approve an IDF can be found in the Quick Guide: Approving an IDF.

**Updating IDFs**

Users with the IDF Update role are able to update IDFs in the ‘Approved’, ‘Updating’ and ‘Returned to Updater’ states. Once you are done making the necessary changes to an IDF, you need to submit these reports for approval. These IDFs are then given the ‘Pending Update Approval’ status. Users with the IDF Approve role will find these under the IDF Approve link and may also return these to users with the IDF Update role for further editing.

When updating an IDF, a copy of the information previously entered appears below each of the fields. This is to allow you to view the information being updated against the already approved information. Learn more about updating IDFs from the Quick Guide: Updating an IDF.
Viewing IDFs

Users with the **IDF View** role will be able to view IDFs in the 'Read Only' format. They will be unable to make any changes to the IDFs.

Deleting/Deactivating IDFs

IDFs cannot be deleted or removed from the system. However, an Individual may be deactivated by a Provider Administrator.

Searching for IDFs

Users are able to use the **Search** link to locate approved IDFs or forms that they want to work on.

Individual Contact Report

This report contains a list of all individuals and their contacts among other information. This report is generated in Excel format so that agencies can save it for future reference or for printing it out.

Emergency Data Forms

A subset of the data from an approved **IDF** is automatically extracted and placed in an **Emergency Data Form (EDF)** for an individual. EDFs are essentially non editable. With the proper authorization, you will be able to view and print an EDF and be notified when changes have been made to any data on the form.