

# STATE OF NORTH DAKOTA

## CAMPUS COMMUNITY CREATE BIO/DEMO RECORD TRAINING MANUAL

VERSION 8.0

# Disclaimer

---

Written by MAXIMUS-ERP Solutions Group, May 2004.

This training manual is considered to be proprietary and confidential and may not be reproduced for any reason other than stated below without prior written consent of MAXIMUS-ERP Solutions Group.

# Exclusion

---

This training manual has been prepared exclusively for the State of North Dakota PeopleSoft Project. Information contained within this document may be used by the State of North Dakota for the sole purpose of personnel training. Additional manuals may be reproduced and edited as needed for training. All other uses are prohibited without prior written consent from MAXIMUS-ERP Solutions Group.

**Copyright © 2004 MAXIMUS-ERP Solutions Group, Inc. All Rights Reserved.**

## TABLE OF CONTENTS

<b>CREATE BIO/DEMO RECORD .....</b>	<b>1</b>
Overview .....	1
Objectives .....	2
Create Bio/Demo Record Business Process Flow .....	3
Walkthrough – Create Bio/Demo Record .....	4
General Information .....	4
Create a New Bio/Demo Record .....	5
Personal Data .....	6
Name .....	6
View Names .....	7
Marital Status .....	7
National ID .....	7
Biographic Information .....	8
Visa/Permit Data Detail .....	9
Visa/Permit Data .....	10
Visa/Permit History .....	10
Citizenship Detail .....	11
Citizenship Passport .....	11
Passport Information .....	11
Phone Detail .....	12
Phone Numbers .....	12
Email Address Detail .....	13
Email Addresses .....	13
Ethnicity .....	14
Ethnicity Detail .....	14
Veteran Data .....	14
Addresses .....	15
Address Type .....	15
Address History .....	15
Seasonal Address Data .....	17
Walkthrough – Languages .....	18
Walkthrough – Relationships .....	20
Legacy Information .....	22
Communication Recipient .....	22
Joint Communication Management .....	23
Walkthrough – Religious Preference .....	24
Walkthrough – Emergency Contacts .....	25



Walkthrough – Names..... 27  
Name Type ..... 28

## CREATE BIO/DEMO RECORD

### OVERVIEW

Biographic/Demographic data is personal data that distinguishes one individual from another. The most basic of this information is a person's name, address, gender, marital status, and date of birth. With the bio/demo data pages, you can enter and track an individual's various telephone numbers and addresses, and you can maintain data about the individual's ethnicity, visa and permits, citizenship and passports, languages, relationships, religious preference, emergency contacts, and work experience.

To add an individual to your system, create a bio/demo record for that individual. When you enter data and save the record, the system assigns the next available sequential ID to that individual and adds the record to your database.

Before adding an individual the Search/Match process should be run to determine if a record already exists for that individual.

**Important!** When you add an individual to your database and save the new value, the system performs an automatic search to determine if a duplicate record already exists. This automatic search uses the search/match criteria established by your institution. It notifies you that a duplicate is detected, but it does not give you the opportunity to identify the duplicates. You will want to use the Search/Match feature to help detect and identify duplicates.

Appropriate security needs to be given to those who add, maintain and update the records, especially the Student Name, National ID, and Campus ID.

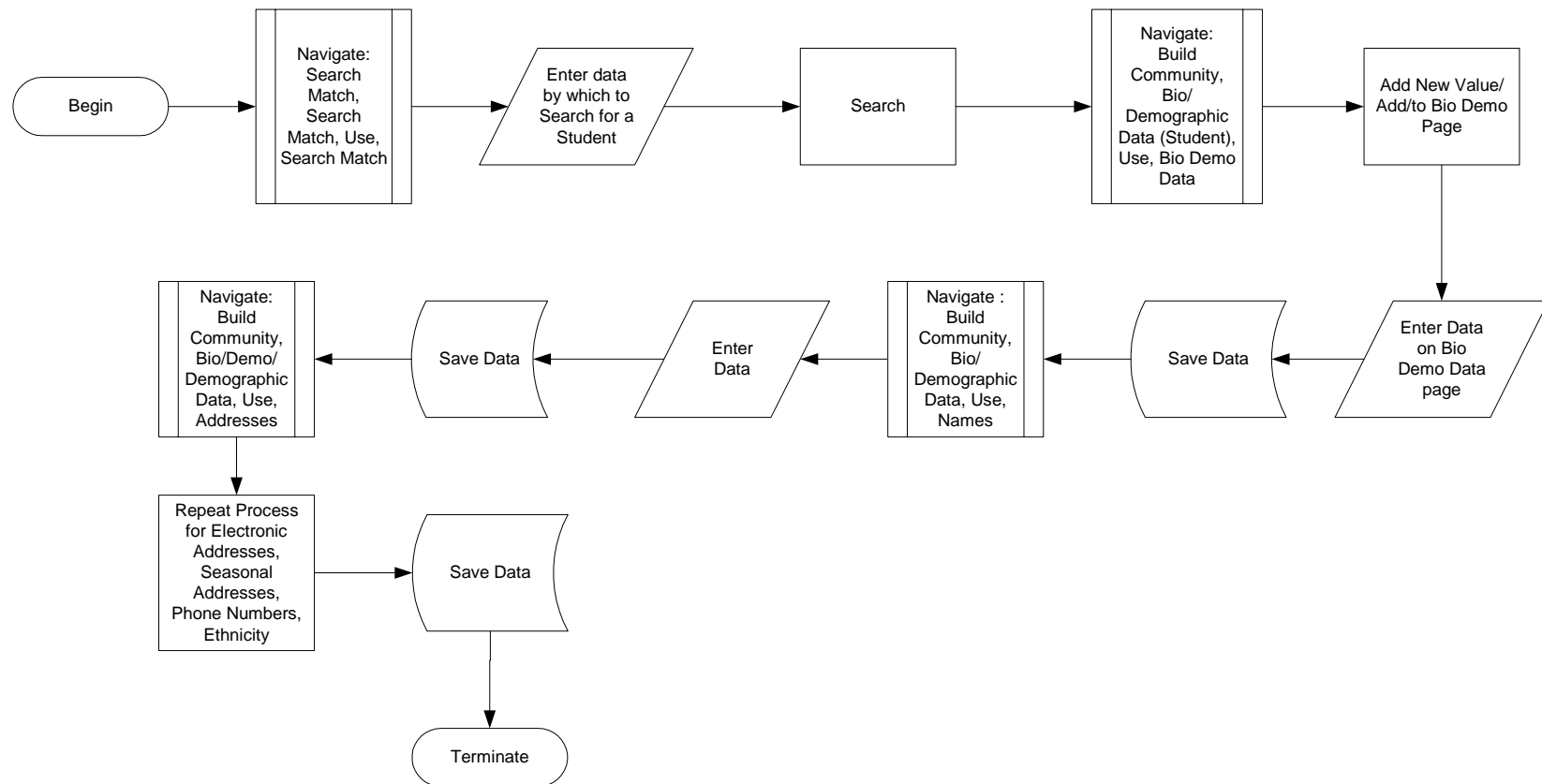
## OBJECTIVES

After completing this section, you will be able to:

1. Add a new student or employee

## CREATE BIO/DEMO RECORD BUSINESS PROCESS FLOW

This business process creates a biographic/demographic record for student.



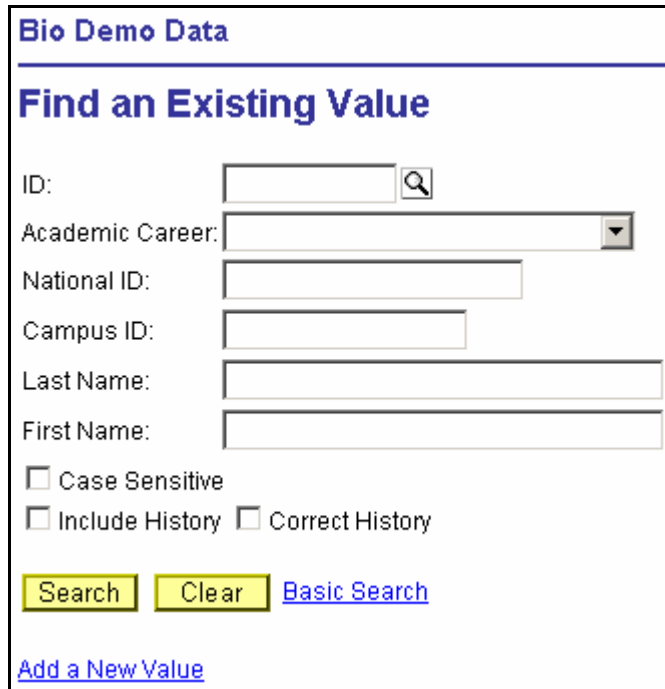
## WALKTHROUGH – CREATE BIO/DEMO RECORD

### GENERAL INFORMATION

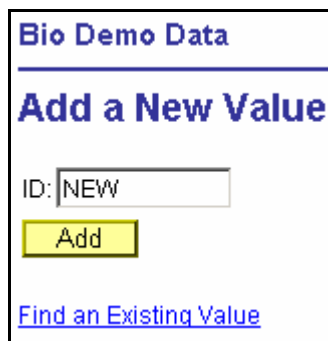
1. The system runs an automatic search based on the entered data and the specified search match criteria. The search determines if a record for this individual already exists. If a record with this data does not already exist, the system assigns the next available unique ID to the record and adds it to your database.
2. If the system finds an existing record with the data, it displays the **“Potential Duplicate Found”** warning message. You have the option of clicking **OK** to add the individual or clicking **Cancel** to investigate further. **It is strongly recommended that you click Cancel at this point and investigate further. A few minutes saved here can cause severe problems for you or another office later. As a courtesy to your own office and to other offices, take the time to investigate prior to creating a potential duplicate record.**
3. Once you have **Saved** data, you will need to select the **Correct History** mode to continue entering or modifying the effective-dated data entered on your person.
4. Prior to adding an individual, please refer to the chapter on Search Match to determine if a record already exists for the individual before adding one. This is a process you will need to do each time you enter a new student/employee in order to prevent duplicate records.

## CREATE A NEW BIO/DEMO RECORD

1. **NAVIGATION:** Build Community, Bio/Demographic Data (Student), Use, Bio Demo Data

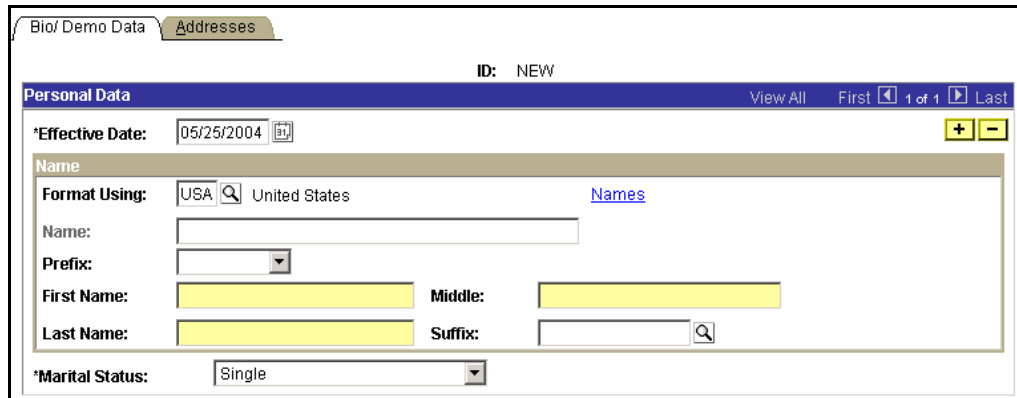


2. Click the [Add a New Value](#) link. The ID will be populated with “New”.



3. **Warning: DO NOT overwrite the word NEW in the ID Field.** If you overwrite the word NEW in the ID field (EmplID) on the Bio Demo Data-Add a New Value search page, and manually enter an ID for the new person, **you will disrupt the autonumbering sequence** included with your system. Your system administrator will need to intervene to correct the situation.
4. Click [Add](#).

5. The **Bio Demo Data** page is displayed.
6. \* Indicates a required field.



Bio/Demo Data Addresses

ID: NEW

Personal Data View All First 1 of 1 Last

\*Effective Date: 05/25/2004

Name

Format Using: USA United States [Names](#)

Name:

Prefix:

First Name:  Middle:

Last Name:  Suffix:

\*Marital Status: Single

## PERSONAL DATA

1. **Effective Date:** Enter the date when required data (name and marital status) are or will become effective.

## NAME

1. **Format Using:** The defaulted country is USA. Click on the icon to change the country.
2. **Name:** When entering the individual to your database for the first time, this field is empty and unavailable.
3. **Prefix:** Select the title, from the Prefixes page, (Mr, Ms, Mrs, or Dr) that should precede this individual's name.
4. **First Name:** Enter the individual's first name.
5. **Middle:** Enter the individual's middle name or initial.
6. **Last Name:** Enter the individual's last name.
7. **Suffix:** Select the appropriate degree or title, from the Suffixes page, that should follow this individual's name, for example: Esq, MD, PhD, Jr, or Sr.

## VIEW NAMES

8. Click on [Names](#) to view name information.
9. The **Names** page will be displayed.

10. Click the **OK** button to return to the previous screen.

## MARITAL STATUS

1. Select the **Marital Status** from the drop box. Select the marital status for this individual from the list of possible values:
  - a. Common-Law
  - b. Divorced
  - c. Head-of-Household
  - d. Married
  - e. Separated
  - f. Single
  - g. Unknown
  - h. Widowed

## NATIONAL ID

1. **Country:** Enter or confirm the country of this individual’s national ID. If the individual has more than one national ID, you can add them here.
2. **NID Type:** Enter the national ID type associated with the country for this individual.
3. **National ID:** Enter the individual’s national ID number. Enter the number **without** spaces or dashes. When you exit the field, the system formats the number, based on the country and NID type selected.
4. **Primary:** Select to indicate that this is the primary national ID number that the system should use for this individual. You must indicate a primary national ID. **If a student has more than one National ID, the U.S. Social Security Number must be checked as the primary ID.**

## BIOGRAPHIC INFORMATION

Biographic Information

\*Gender:    
 Military Status:    
 \*Date of Birth:   [Birth Information](#)  
 Campus ID:   Disabled  
[Visa/Permit Data](#)   [Citizenship](#)   [Phone](#)   [Email Address](#)

1. **Gender:** Indicate the individual’s gender (Male, Female, or Unknown).
2. **Date of Birth:** Enter the individual’s date of birth.
3. **Birth Information:** Click [Birth Information](#) .
4. The **Birth Information Detail** page is displayed.

**Birth Information Detail**

Birth Location:

Birth Country:

Birth State:

- a. Enter the **Birth Location** if known.
- b. Select the **Birth Country** from the lookup list of possible values.
- c. Select the **Birth State** from the lookup list of possible values.
- d. When you have finished entering all of the birth information, click the **OK** button. The previous panel is displayed.

5. **Military Status:** Indicate the individual’s military status, for example: Active Reserve, No Military Service, or Post-Vietnam Era Veteran. (See NDUS Common Bio-Demo Hand Book for status definitions.)
6. **Campus ID:** This field cannot be entered on this screen. This is the common NAID from the legacy system. This number is the link between the legacy system and Connect ND.
7. **Disabled:** Select to indicate that the individual is disabled. For the U.S., selecting this field typically means that official documentation has been issued by the state or federal government proclaiming that the individual is disabled, affording them certain privileges and requiring that your institution complies with requirements of the federal Americans with Disabilities Act (ADA) on their behalf.

## VISA/PERMIT DATA DETAIL

Use the Visa/Permit Data Link to enter pertinent information about the student. This tab is generally used for International Students as their country of residence is different and they are on a student visa.

1. Click [Visa/Permit Data](#) at the bottom of the Biographic Information section on the page.
2. The **Visa/Permit Data Detail** page is displayed.

The screenshot shows a web form titled "Visa/Permit Data Detail". It has a blue header bar with "Visa/Permit Data" and navigation links "View All", "First", "1 of 1", and "Last". Below the header are several sections:

- Country:** A text input field with a search icon and a "+" "-" button.
- \*Type:** A text input field with a search icon.
- Classification:** A text input field.
- Get Supporting Documents:** A yellow button.
- Visa / Permit History:** A section with a blue header and navigation links "View All", "First", "1 of 1", and "Last". It contains several fields:
  - \*Effective Date:** A date field with a calendar icon, containing "05/05/2004" and a "+" "-" button.
  - Number:** A text input field.
  - \*Status:** A dropdown menu.
  - \*Status Date:** A date field with a calendar icon, containing "05/05/2004" and a "+" "-" button.
  - Duration:** A text input field followed by a "Months" dropdown menu.
  - Issue Date:** A date field with a calendar icon.
  - Date of Entry into Country:** A date field with a calendar icon.
  - Expiration Date:** A date field with a calendar icon.
  - Issuing Authority:** A text input field.
  - Issue Place:** A text input field.
- Supporting Documents Needed:** A section with a blue header and navigation links "View All", "First", "1 of 1", and "Last". It contains a table:
 

*Sup Doc ID	Description	Request Date	Date Received
1			

At the bottom of the form are "OK" and "Cancel" buttons.

## VISA/PERMIT DATA

1. **Country:** Select the country of residence by clicking on the dropdown list.
2. **Type:** Select the type of Visa from the dropdown list.

## VISA/PERMIT HISTORY

This information should be available as supplied by the individual or visible from documents provided by the individual.

1. **Effective Date:** Enter the date when the visa or permit is effective or the date when the information should become effective in your database.
2. **Number:** Enter the issuance number from the individual's official visa or permit.
3. **Status:** Enter the status (Applied, Granted, Renewal, or Renewed) of the official visa or permit. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
4. **Status Date:** Enter the date of the status. The default status date is the system's current date. You can override this date.
5. **Duration:** Specify the length of time during which the visa or permit is valid. Enter the number in the first field and specify the period, Days, Months, Terms, or Years in the second field. Values for this field are delivered with your system as translate values. You can modify these translate values.
6. **Issue Date:** Enter the date of issuance from the individual's official visa or permit.
7. **Date of Entry Into Country:** Enter the official date when the individual entered your institution's country.
8. **Expiration Date:** Enter the date when this individual's visa or permit will expire. The system calculates the expiration date based on the specified duration and the date of entry into the country. You can override the system-calculated date.
9. **Issuing Authority:** Enter the name of the agency or authority that issued the official visa or permit.

10. **Issue Place:** Enter the name of the location where the official visa or permit was issued
11. Click **OK** when finished to return to the Bio/Demo Data page.

## CITIZENSHIP DETAIL

1. Click [Citizenship](#) at the bottom of the Biographic Information section on the page.
2. The **Citizenship Detail** page is displayed.

## CITIZENSHIP PASSPORT

1. **Country:** Specify the country of the individual's citizenship.
2. **Citizenship Status:** Specify the status (for example, Native, Naturalized, or Alien Permanent) of this individual's citizenship in the specified country. These status values are from the Citizen Status Table page.

## PASSPORT INFORMATION

1. **Passport Number:** Enter the number from the individual's official passport.
2. **Issue Date:** Enter the official issuance date stamped on the passport.
3. **Expiration Date:** Enter the official expiration date stamped on the passport.
4. **Country:** Specify the country where the passport was issued. Additional location fields appear based on the country that you select,

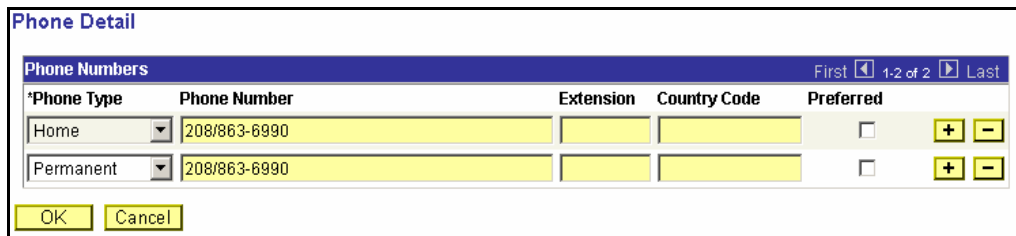
so that you can provide additional location details, for example **City** and **State** or **Province**.

5. **Authority:** Enter the name of the agency or authority that issued the passport.
6. **Comment:** Enter comments to further describe the individual’s citizenship, passport, or nature of the issuance of the passport.
7. Click **OK** when finished to return to the Bio/Demo Data page.

## PHONE DETAIL

Information that you enter here is the same as the data you enter on the Phone Numbers page. When you enter data here and then return to and save the Bio/Demo Data page, the system updates the same data on the Phone Numbers page.

1. Click [Phone](#) at the bottom of the Biographic Information section on the page.
2. The phone detail page is displayed.




Phone Numbers					First	1-2 of 2	Last
*Phone Type	Phone Number	Extension	Country Code	Preferred			
Home	208/863-6990			<input type="checkbox"/>	+ -		
Permanent	208/863-6990			<input type="checkbox"/>	+ -		

OK Cancel

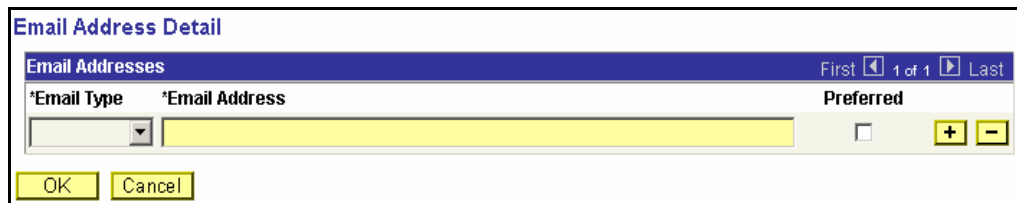
## PHONE NUMBERS

1. To add **Phone** information press the **+** on the right.
2. **Phone Type:** Select the phone type from the list of possible values:
  - a. Fax
  - b. Home
  - c. Mailing
  - d. Main
  - e. Other
  - f. Pager 1
  - g. Pager 2
  - h. Parent
  - i. Permanent



- j. Telex
  - k. Work
3. **Phone Number:** Enter the telephone number, including area code, for this individual.
  4. **Extension:** Enter the individual’s direct extension, if any.
  5. **Country Code:** Enter the country code, if required to complete the call.
  6. **Preferred:** Select to indicate this is the individual’s preferred phone number—the one to use first when contacting this individual. An individual may have only one preferred phone number
  7. To **insert additional phone numbers** click on the Insert Row button  and repeat the steps above to add the additional phone numbers.
  8. Click **OK** when finished to return to the Bio/Demo Data page.

## EMAIL ADDRESS DETAIL

1. Click [Email Address](#) at the bottom of the Biographic Information section on the page.
2. The **Email Address Detail** page is displayed.





The screenshot shows a window titled "Email Address Detail". Inside, there is a table with the following structure:

Email Addresses			First	1 of 1	Last
*Email Type	*Email Address	Preferred			
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	 		

At the bottom of the window are "OK" and "Cancel" buttons.

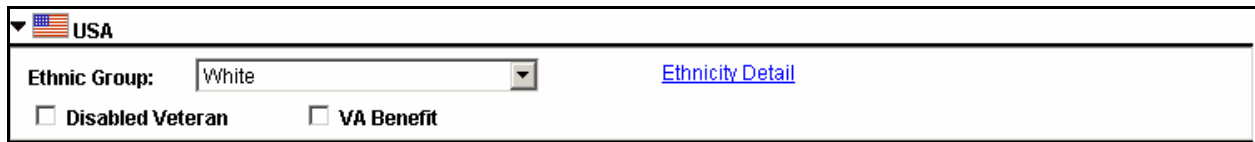
## EMAIL ADDRESSES

1. To add **Email Addresses** information press the  on the right side of the screen.
2. **Email Type.** Select the type (Home, Business, Mailing) that describes this email address. (See NDUS Common Bio-Demo Hand Book for address definitions.)
3. **Email Address.** The individual’s email address.
4. **Preferred.** When selected, indicates this is the individual’s preferred email address-the one to use first when contacting this individual.
5. To insert additional email address, click on the insert row button  and repeat the steps to add the additional email addresses.

6. Click **OK** when finished to return to the Bio/Demo Data page.

## ETHNICITY

Information that you enter here is the same as the data you enter on the Ethnicity page. When you enter data here, and then return to and save the Bio/Demo Data page, the system updates the same data on the Ethnicity page.



USA

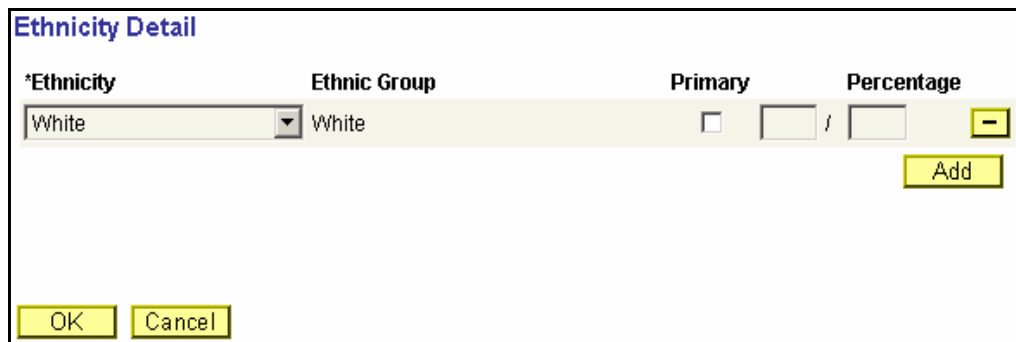
Ethnic Group:  [Ethnicity Detail](#)

Disabled Veteran  VA Benefit

1. **Ethnic Group.** This is the federally mandated group that includes the individual’s ethnicity designation. Specify the student’s ethnicity. If no ethnicity is specified, “White” will default.

## ETHNICITY DETAIL

1. Click [Ethnicity Detail](#) at the bottom of the Biographic Information section on the page.
2. The **Ethnicity Detail** page is displayed.



*Ethnicity	Ethnic Group	Primary	Percentage
<input type="text" value="White"/>	White	<input type="checkbox"/>	<input type="text"/> / <input type="text"/> <input type="button" value="-"/>

3. You can view or adjust the percentages, enter additional ethnicity rows, and assign the primary ethnicity. Ethnicity details are optional. There is no linkage between the federally mandated ethnic group and the additional details you enter on the Ethnicity Detail page.

## VETERAN DATA

1. **Disabled Veteran:** Click on Disabled Veteran check box if that applies.
2. **VA Benefit:** Click on VA Benefit check box if that applies.

## ADDRESSES

1. Click on the **Addresses** tab.
2. The **Addresses** panel is displayed.

## ADDRESS TYPE

1. **Address Type:** Specify address type by clicking on down arrow to see drop down menu items. (See NDUS Common Bio-Demo Hand Book for address definitions and usage.)

## ADDRESS HISTORY

1. **Country:** The country whose address format should be used for this individual.
2. **Effective Date:** Specify student's past, present, and future address information. **Warning:** You should enter only present and future effective dates for addresses. **Do not** enter backdated effective dates.
3. Click **Copy** to other address types link. The quick address panel is displayed and you can copy the address information you have on this panel and Create Update Address Types by checking the boxes.

ID:

Address		Create/Update Address Types
<b>Address Type:</b> Home		
<b>Effective Date:</b> 05/05/2004	<b>Status:</b> Active	
<b>Country:</b> USA United States		
<b>Address 1:</b>		
<b>Address 2:</b>		
<b>Address 3:</b>		
<b>City:</b> Meridian		
<b>State:</b> ID Idaho		
<b>Postal:</b> 83642		
<b>County:</b>		
<input type="button" value="Copy"/> <input type="button" value="Cancel"/>		

**\* Active address exists**  
[Explain](#)

- Click **Copy**, processing will take place and you will be returned to the Address panel of the Bio Demo Data.

ID:

View All First 1 of 2 Last

\*Address Type: Home

View All First 1 of 3 Last

\*Effective Date:

\*Status:

Country:   United States

Address 1:

Address 2:

Address 3:

[Copy to other address types](#)

Address Linkage

Linkage Type:

Maintain Manually:

Address

Other Data

City:

State:   Idaho

Postal:

County:

- Click on the insert row button **+** and repeat the steps to add the additional addresses.

6. Click **SAVE** to commit your changes to the database.
7. Following the same procedures as identified above for entry of name data, using the “Addresses” panel, you can enter additional addresses for an individual. Please see the NDUS Common Bio-Demo book for name formatting procedures. A dropdown identifies the following as addresses that may be entered into the system:
  - a. **Billing:** Address for billing purposes.
  - b. **Business:** Address used for Fed Ex (et al) deliveries.
  - c. **Campus:** Used by employees to identify campus address.
  - d. **Dormitory:** Student’s current residence hall address.
  - e. **Home:** Street address at which the individual resides.
  - f. **Legal:** Individual’s legal address.
  - g. **Mailing:** Postal address to which correspondence should be sent.
  - h. **Parent:** Parent’s Address.
  - i. **Permanent:** Address for permanent records, usually the hometown.
8. Click **SAVE** to commit your changes to the database.

## SEASONAL ADDRESS DATA

1. **Navigation:** Build Community > Bio/Demographic Data > Use > Seasonal Addresses
2. Use this link to enter seasonal addresses (where to send mail during a Christmas break, a sabbatical etc.) information for the individual.
3. Click on Seasonal Addresses.
4. Use the dropdown to select address type.
5. Click on the Calendar Icon to select the date on which the seasonal address will begin. Start Date.
6. Click on the Calendar Icon to select the date on which the seasonal address will end. End Date.
7. Enter the Country by clicking on the magnifying icon and selecting the appropriate code. If you free-form enter the country, you will need to click on tab to get to the address information.

8. Enter the Address Information. Free fill the information. You may click on the magnify glass icon to select the state information, if appropriate.
9. Click **SAVE** to commit your changes to the database.

## WALKTHROUGH – LANGUAGES

1. **Navigation:** Build Community > Bio/Demographic Data > Use > Languages

**Languages**

**Find an Existing Value**

ID:

Academic Career:

National ID:

Campus ID:

Last Name:

First Name:

Case Sensitive

[Basic Search](#)

2. **Find an Existing Value**
  - a. Enter the values by which you would like to search. ID, Last Name, First Name, or National ID (SSN).
  - b. Click **Search**. A list of values that meet your search criteria will be displayed.
  - c. Click on the student you wish to update.
  - d. The **Languages** page is displayed.

**Languages**

ID:

*Language	Native	Translator	Teacher	Speak	Read	Write	Evaluation Date
SP <input type="button" value="Q"/> Spanish	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	High	High	High	<input type="text"/> <input type="button" value="Q"/> <input type="button" value="-"/>
EN <input type="button" value="Q"/> English	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	High	High	High	<input type="text"/> <input type="button" value="Q"/> <input type="button" value="-"/>

3. You can set up codes for languages. You can then use those codes to indicate which languages an individual can read, speak, or write and to what degree of proficiency.
4. To enter the Language click on the magnifying icon and then the LookUp button. The LookUp button allows you to view Languages by either Accomplishment (a two-digit alpha abbreviation) or by Description (the full name of the language).
5. Click on the appropriate boxes to indicate Native, Translator, and/or Teacher.
6. Use the dropdown to select the level of experience with Speaking, Reading, and Writing.
7. If there was an evaluation date, click on the calendar icon to enter date.
8. To enter additional Languages, click on the Add and following the same instructions.
9. Click **SAVE** to commit your changes to the database.

## WALKTHROUGH – RELATIONSHIPS

1. **Navigation:** Build Community > Bio/Demographic Data > Use > Relationships

**Relationships**

---

**Find an Existing Value**

ID:

Academic Career:

National ID:

Campus ID:

Last Name:

First Name:

Case Sensitive

Include History  Correct History

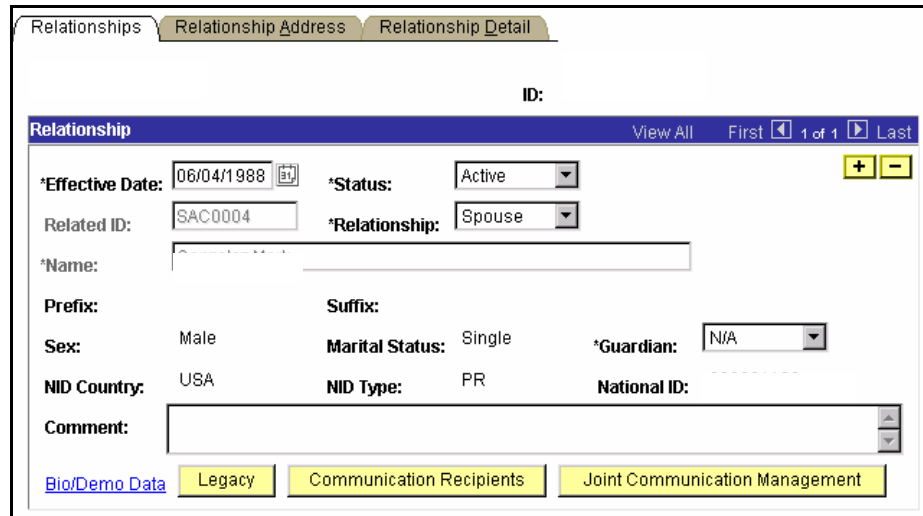
[Basic Search](#)

[Add a New Value](#)

2. **Find an Existing Value**

- a. Enter the values by which you would like to search. ID, Last Name, First Name, or National ID (SSN).
- b. Click **Search**. A list of values that meet your search criteria will be displayed.
- c. Click on the student you wish to update.

d. The **Relationships** page is displayed.



3. Use this page to enter, update, and review information regarding relationships a person has with any person in your database.
4. Click on the calendar icon to enter the Effective Date.
5. The Status button indicates Active.
6. Click on the Magnifying Icon and then the LookUp to choose the related ID. The Name field should pre-populate with the related person's name and other identified characteristics like prefix, suffix, gender, marital status, etc. If the related person is not in your database, the name and bio/demo data fields are available so that you can enter the related person's name and bio/demo data.
7. Use the dropdown to choose Relationship.
8. Use the dropdown to choose the Guardian information. The legal guardianship that describes the status (Guardian, N/A, Other Parent, or Self) of the related person to the primary individual.
9. Comments may be made, if desired. Comments maybe made to further identify or describe the related person or the relationship between the two individuals.
10. Click **SAVE** to commit your changes to the database.

## LEGACY INFORMATION

1. Click the Legacy button to access the **Legacy Information** Page, where you can identify the related person’s legacy relation with your institution.

2. Use the dropdown to choose their Affiliation. Click the calendar icon to choose the To and From Dates. Use the dropdowns to choose the Institution and Academic Programs.
3. Click on the Add and follow the same directions to add another Legacy Relationship or the OK if finished.
4. Click **SAVE** to commit your changes to the database.

## COMMUNICATION RECIPIENT

1. Click the Communication Recipient Page, where you can specify the communications for which a copy should also be sent to the related person.

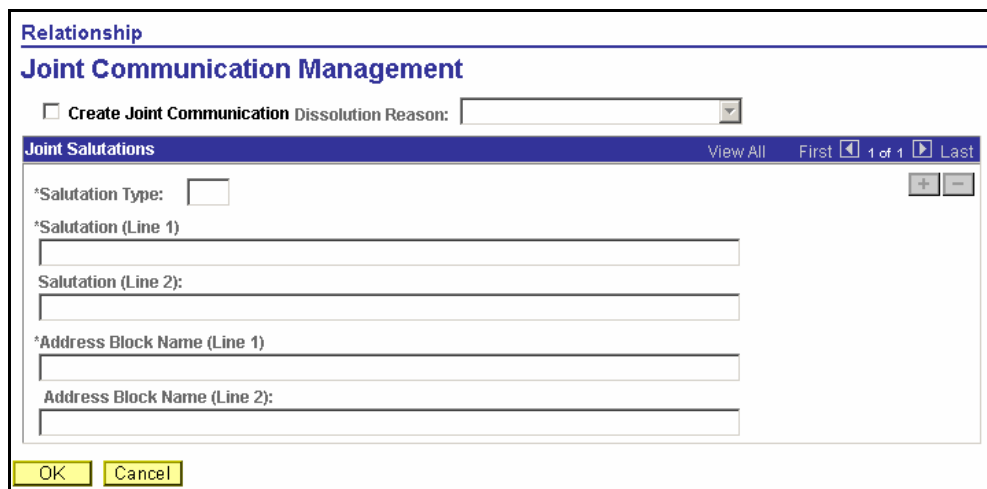
2. Click on the All Communications to indicate the system should generate a copy of all communications to the primary individual for this

related individual. Click on the magnifying icon and then the LookUp to choose the appropriate Letter Code. Click on the Add and follow the same directions to add another Communication or the OK if finished.

3. Click **SAVE** to commit your changes to the database.

## JOINT COMMUNICATION MANAGEMENT

1. Click on the Joint Communication Management page to create joint communications between two related individuals and establish how their names should appear in the address and salutation. You can also use this page to dissolve joint communications for these individuals.



The screenshot shows a web form titled "Relationship" with a sub-header "Joint Communication Management". At the top, there is a checkbox labeled "Create Joint Communication" followed by a "Dissolution Reason:" dropdown menu. Below this is a section titled "Joint Salutations" with a "View All" link and pagination controls showing "1 of 1". The form contains several input fields: "\*Salutation Type:" with a dropdown, "\*Salutation (Line 1):" and "Salutation (Line 2):" with text boxes, and "\*Address Block Name (Line 1):" and "Address Block Name (Line 2):" with text boxes. At the bottom, there are "OK" and "Cancel" buttons.

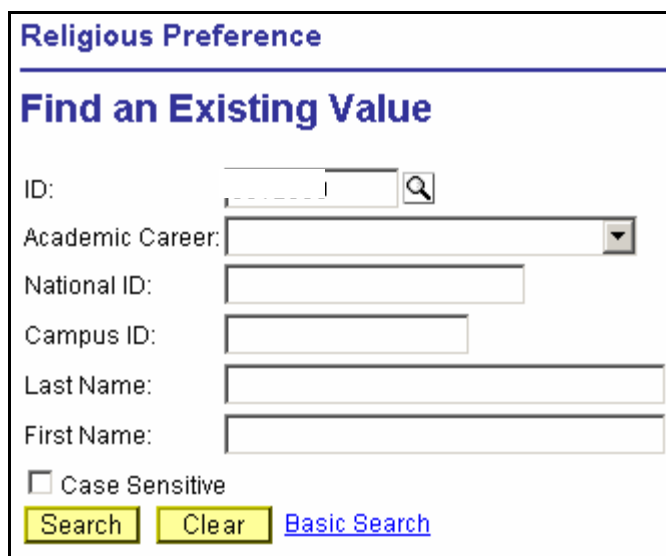
2. Check the Create Joint Communications box. When selected, it indicates that joint communications should be addressed to both the primary and related individuals, using the salutation information specified on this page.
3. Use the dropdown to choose the Dissolution Reason. When you clear the Create Joint Communication option, or when you inactivate the relationship to stop joint communications for these two individuals, the Dissolution Reason field becomes available. You can enter the reason (Deceased Partner, Divorce, Per Request, and so on) for dissolving the joint communications.
4. Salutation Type. The type of salutation, from the Joint Salutation Type Table page, that the system should use for joint communications to these Ids.

When you select a salutation type, the system displays the individuals' names in the Salutation and Address Block Name fields, based on the default formats associated with that salutation type. The default formats are designed to reduce data entry; however always validate that the information is correct.

5. Click on the + and follow the same directions to add another Communication or the OK if finished.
6. Click **SAVE** to commit your changes to the database.

## WALKTHROUGH – RELIGIOUS PREFERENCE

1. **Navigation:** Home > Build Community > Bio/Demographic Data > Use > Religious Preference



The screenshot shows a web form titled "Religious Preference" with a sub-header "Find an Existing Value". The form contains the following fields and controls:

- ID:** A text input field with a search icon to its right.
- Academic Career:** A dropdown menu.
- National ID:** A text input field.
- Campus ID:** A text input field.
- Last Name:** A text input field.
- First Name:** A text input field.
- Case Sensitive**
- Search** (button), **Clear** (button), and [Basic Search](#) (link).

2. **Find an Existing Value**
  - a. Enter the values by which you would like to search. ID, Last Name, First Name, or National ID (SSN).
  - b. Click **Search**. A list of values that meet your search criteria will be displayed.
  - c. Click on the student you wish to update.

d. The **Religious Preference** page is displayed.

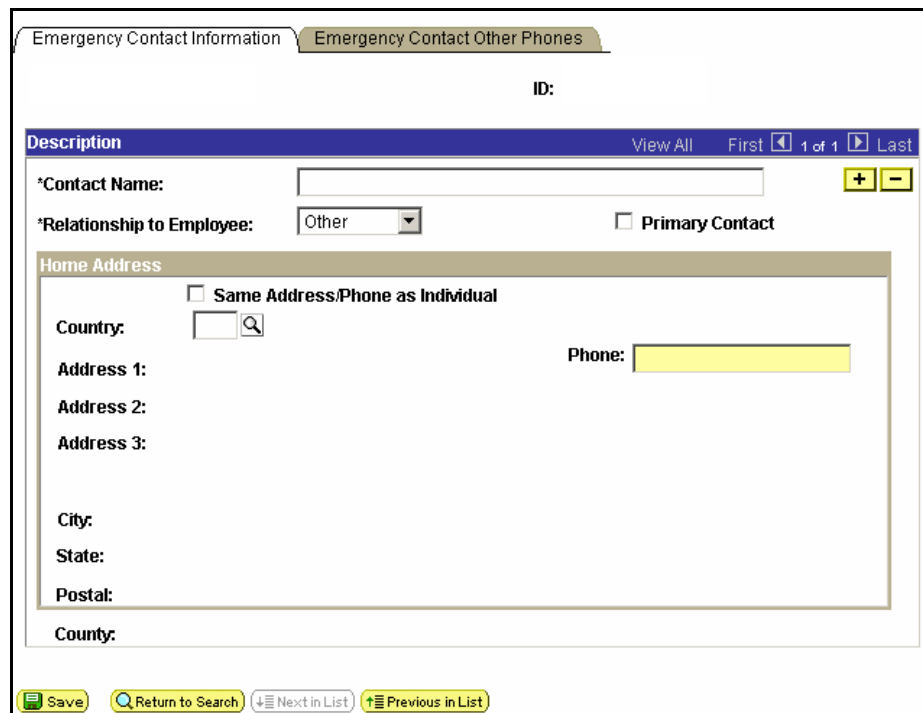
3. **Religious Preference.** Select the religion that the individual reports to be his or her preference.
4. Click **SAVE** to commit your changes to the database.

## WALKTHROUGH – EMERGENCY CONTACTS

1. **Navigation:** Home > Build Community > Bio/Demographic Data > Use > Emergency Contacts

2. **Find an Existing Value**
  - a. Enter the values by which you would like to search. ID, Last Name, First Name, or National ID (SSN).

- b. Click **Search**. A list of values that meet your search criteria will be displayed.
- c. Click on the student you wish to update.
- d. The **Emergency Contacts** page is displayed.



3. Enter the name of the person in the Contact Name field.
4. Use the dropdown to choose the Relationship to Employee.
5. The Primary Check Box is Checked if this person is the primary emergency contact.
6. The Same Address/Phone Box is Checked if this person's address and phone are the same.
7. Enter the Country by clicking on the Magnifying glass icon and selecting the appropriate code. If you free form fill the country, you will need to click on tab to get to the address information.
8. Enter the Address and Phone Number Information.
9. Click the + and follow the same directions to add another Phone Number.
10. Click **SAVE** to commit your changes to the database.

## WALKTHROUGH – NAMES

**Do not** delete names. Keep a history of all name changes. Only individuals with the appropriate security may execute updates for student names.

1. **Navigation:** Home > Build Community > Bio Demographic Data > Use > Names

**Names**

---

**Find an Existing Value**

ID:

Academic Career:

National ID:

Campus ID:

Last Name:

First Name:

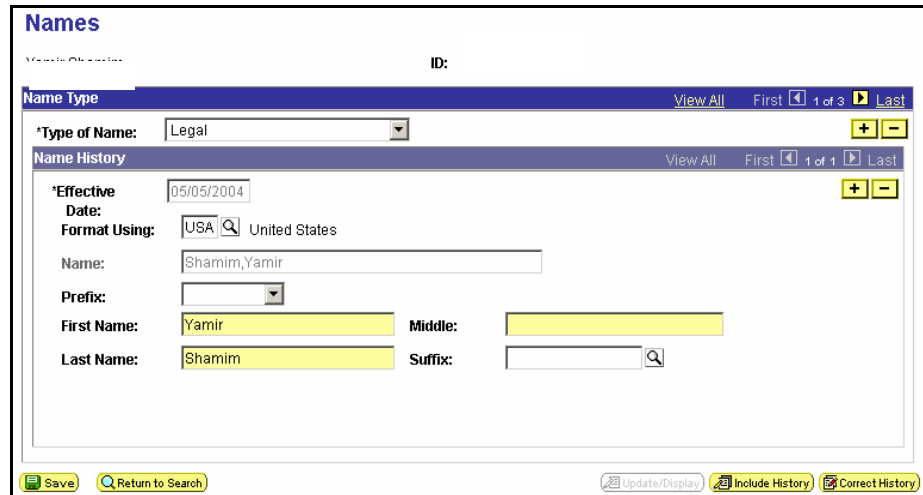
Case Sensitive

Include History  Correct History

[Basic Search](#)

2. **Find an Existing Value**
  - a. Enter the values by which you would like to search. ID, Last Name, First Name, or National ID (SSN).
  - b. Click **Search**. A list of values that meet your search criteria will be displayed.
  - c. Click on the student you wish to update.

d. The **Names** page is displayed.



## NAME TYPE

1. Specify Type of Name by clicking on the down arrow to see drop down menu of name types that may be selected.
  - a. **Degree.** Name to be submitted for graduation
  - b. **Father.** Name of father or male legal guardian
  - c. **Former 1:** Former Name
  - d. **Legal:** Legal name to be used on transcript and other legal documentation-requires legal documentation to change.
  - e. **Maiden:** Birth name of anyone whose legal name is different.
  - f. **Mother:** Name of mother or female legal guardian.
  - g. **Preferred:** Name by which student/faculty/staff prefers to be addressed.
  - h. **Primary:** Required. Name used for HR as printed on the social security card and other value documentation.
2. Use Effective Date Field, to specify the student's past, present, future name information.
3. Enter the details regarding the student's name.
4. Click on the insert row button **+** and repeat the steps to insert the name.
5. Click **SAVE** to commit your changes to the database.