CHAPTER 1

Managing Biographical Information

This chapter provides an overview of biographical information, lists prerequisites, and discusses how to:

- Manage names data.
- Manage addresses and phones data.
- Manage personal attributes information.
- Manage FERPA privacy controls.
- Manage relationships data.
- Enter emergency contact data.
- Track work experience.

Understanding Biographical Information

Personal information is personal data that distinguishes one individual from another. The most basic of this information is a person's biographical data, which includes name, address, gender, marital status, and date of birth.

When you manage many individuals in a database, you want to know and quickly access more than the basic information about them. With the personal information data pages, you can also enter and track an individual's various telephone numbers and addresses (street, email, and uniform resource locator [URL]), 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.

You can enter and maintain different name types for an individual. With effective dating, you can also maintain and review the history of name changes for each type. For example, when the divorced Mrs. Edith Jones advises your institution that she has remarried and changed her last name to Bramowitz, you can maintain her preferred name, Edith Bramowitz; her former name, Edith Jones; and her maiden name, Edith Brown. Departments that need to know when these name changes occurred can determine that by reviewing the history of each name type.

You can also enter and maintain different address types for an individual. For example, you might want to enter an individual's home, business, mailing, and permanent address. You can update these addresses as needed and maintain the address change history. In addition to traditional addresses, many individuals have at least one email or web address and several telephone numbers. You can enter and review electronic addresses and phone numbers in your system. After you enter addresses data, you can run processes to apply or remove seasonal addresses, update linked addresses, and search for a specific address for an individual.

Use the pages described in this chapter to report personal attributes, including the ethnicity of students, staff, and constituents in your campus community. The United States government requires that students must be placed in at least one of a limited number of ethnic groups.

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You can identify the reciprocal individual relationships that your institution wants to track. Reciprocal relationships include spouses, mother and daughter or mother and son, brother and brother or brother and sister, employer and employee, and so on.

You can use reciprocal relationships to associate an individual in your database with another individual inside or outside of your database. When you associate two individuals, you can set up joint communications for them and maintain one joint address to which to send the joint communication. For example, you can set up a joint communication addressed to Mr. and Mrs. Smith.

You can set the system to automatically verify the marital status that you enter on the Biographical Details Data page against the relationship that you select on the Relationships page. To set automatic marital status verification, select the marital status and associated relationship on the Relationship/Marital Status page that you want the system to verify. If the verification determines that the marital status of either individual is not the specified status for that relationship, a warning message appears, suggesting that you update the marital status on the Biographical Details page. For example, if you set the marital status of *Married* and the relationship of *Spouse*on the Relationships/Marital Status page, when you select the relationship of *Spouse* on the Relationships page, the system verifies that the marital status of each individual on the Biographical Details page is *Married.* If the marital status of either individual is different from *Married,* the system displays the warning message.

Note. Some default values for relationships are set on the Installation Defaults - Campus Community page including reciprocal relationships. When the Create Reciprocal Relationship check box is selected on the Installation Default - CC page, the system automatically updates the relationship record for both IDs when you enter and save information on pages in the Relationship component.

You can track which languages an individual can read, speak, or write and to what degree of proficiency. You can also identify the religious preference, if any, reported by an individual and track the religious preferences of your overall campus community. You can also set preferences for the language and method by which an individual wants to receive communications from your institution.

You can enter the names, addresses, and telephone numbers of people to contact when an individual has an emergency situation. You can enter as many contacts and as many phone numbers for each contact as the individual provides or as your institution requires.

You can use U.S. Standard Industry Classification (SIC) and Standard Occupational Classification (SOC) codes to identify and track data about an individual's work experience, including the name of the individual's former employer, employment begin and end dates, and the most current rate of pay.

You can enter or update most basic biographical data about an individual on the Biographical Details page when you create the personal record, or you can access pages described in this section to edit or update specific information. When you save information on the pages described in this section, the system writes it to the relevant maintenance tables and updates the same information on other pages where it appears, including the Biographical Details page. Detailed information about using the Biographical Details page to add or update a person is provided in the *Adding a Person in PeopleSoft Campus Solutions* section of this PeopleBook.

When you license PeopleSoft Campus Self Service, you can also present basic biographical information to students and faculty so that they can view and update their own information, which minimizes the need for your staff to enter and maintain the data.

See Also

lscc, Adding a Person to Your Campus Solutions Database

lsss, Using Self-Service Campus Personal Information

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Prerequisites

Before entering or updating basic biographical data, you must design and set up names, addresses, and other foundational elements of Campus Community. You must also set up basic elements for personal data management.

See Also

lscc, Designing Campus Community

lscc, Setting Up Biographical Information, Setting Up Emergency Contacts Data

Managing Names Data

This section discusses how to:

- Enter name types for an individual.
- View name history.
- (NLD) Enter the name to report for GBA.

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Pages Used to Manage Names Data

Page Name	Definition Name	Navigation	Usage
Names	SCC_NAMES_89	• Campus Community, Personal Information, Biographical, Names • Campus Community, Personal Information (Student), Biographical (Student), Names • Student Recruiting, Student Recruiters, Personal Information, Names • Student Admissions, Application Entry, Personal Information, Names • Student Recruiting, Maintain Prospects, Personal Information, Names	View or create name types and data for an individual.
Name Type History	SCC_NAME_HIST_SEC	Click the Name History link for a name type on an individual's Names page.	View the history of an individual's name type and update or add a new effective date for that name type.
Names (NLD)	SSR_NAMES_NLD	• Personal Information NLD, Student GBA Names NLD • Click GBA Reporting Names in the Netherlands section of the Regional page in the Biographical Details component.	Enter an individual's name to report for GBA.

Entering Name Types for an Individual

Access the Names page (Campus Community, Personal Information, Biographical, Names).

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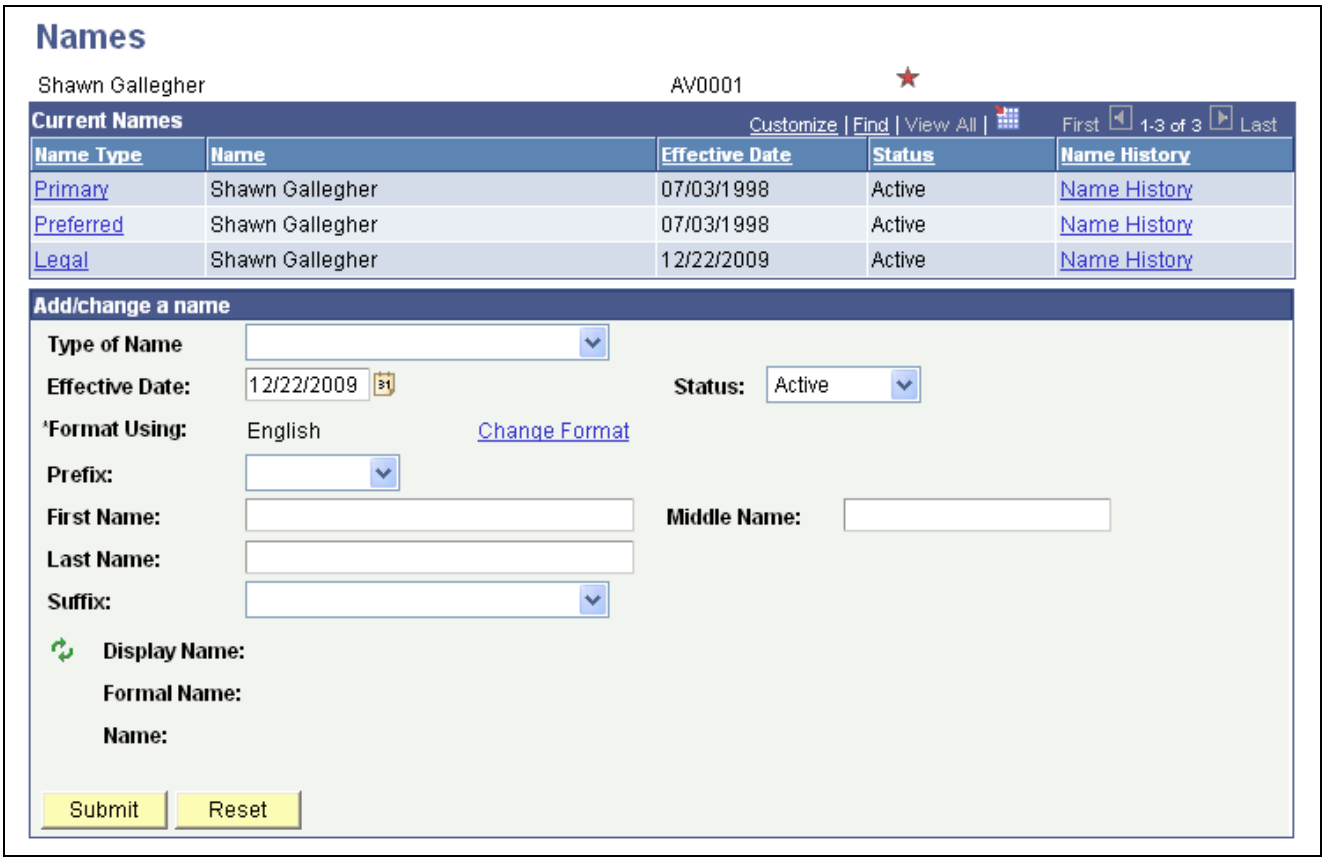

Names page

Warning! You must click Submit to submit data that you enter on the Names page *before* you save the page. Saving the page without first submitting the data will clear the fields for which you entered values and data will be lost.

Current Names

Name Type

Displays the individual's current name types as links.

Click the link to view or update data for an existing name type. The system displays the associated data in the relevant fields.

The system displays the name format with the name fields previously entered for this name type and the Display Name, Formal Name, and Name fields at the bottom of the page, where you can add a new past or future effective-dated row for the name type.

Name

Displays the individual's name as it appears in the default display name format for the selected name type.

Name History

Click to access the Name Type History page, on which you can view the history of the name type.

To update the current name type for the individual, click the Name History link, add a new name row, specify the effective date and name format, and edit the related name fields.

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Add/change a name

Use this area of the page to add or edit name information for the Name Type link that you selected at the top of the page.

Type of Name	Select the type of name, such as *Primary, Preferred, Legal,* or *Maiden,* to add or update for this individual. Values for this field are set up on the Name Type Table page.
Format Using	Displays the name format currently used for this name type.
Change Format	Click to select a different name format to use. Enterable fields appear based on the format that you select. For example, for the English name format, the prefix, first name, middle name, last name, and suffix fields appear. See lscc, Designing Campus Community, Establishing Name Usages, Defining Name Usages.
Display Name, Formal Name, and **Name**	Displays the name formats to use throughout the system. Display Name is the format to use in the heading of person pages. Formal Name contains the individual's first name and last name with prefix. Name displays the name as LastName, Suffix, comma, First Name, Middle Name.
(Refresh)	Click to update the display name formats to reflect any changes made in any of the name fields.
Submit	Click to submit data *before* saving the page. Submitting the data changes the data in the Current Names area so that you can view the changes, and clears all fields in the Add/change a name area. To save the changes to the database, you must click Save.
Reset	Click to clear all fields in the Add/change a Name area, which enables you to re-enter field values.

Viewing Name History

Access the Name Type History page (click the Name History link for a name type on an individual's Names page).

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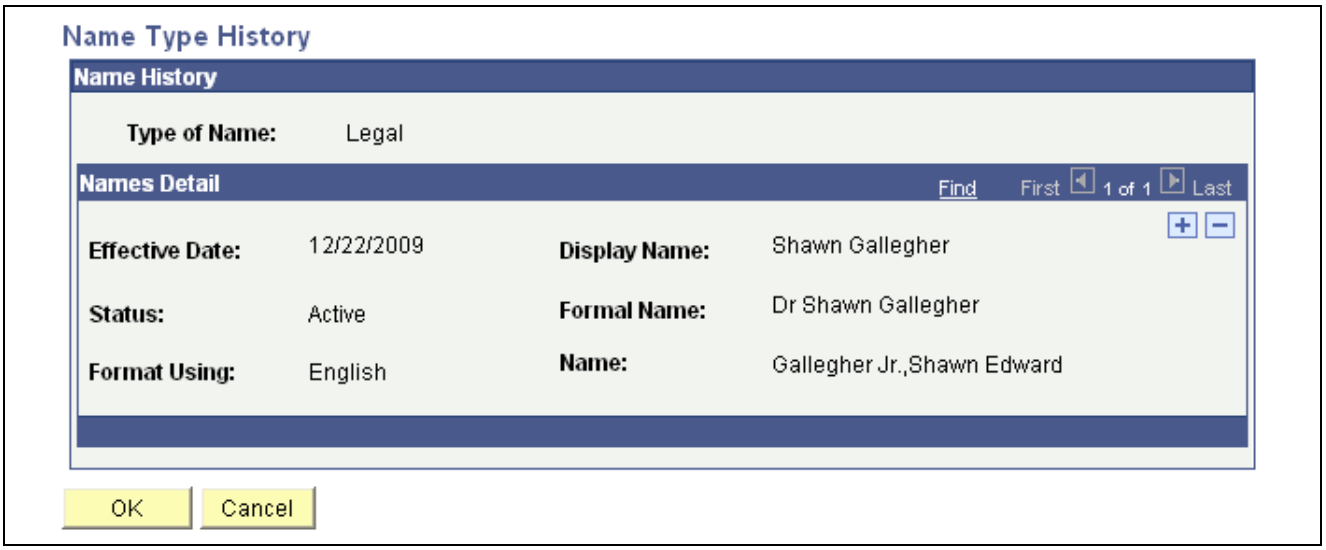
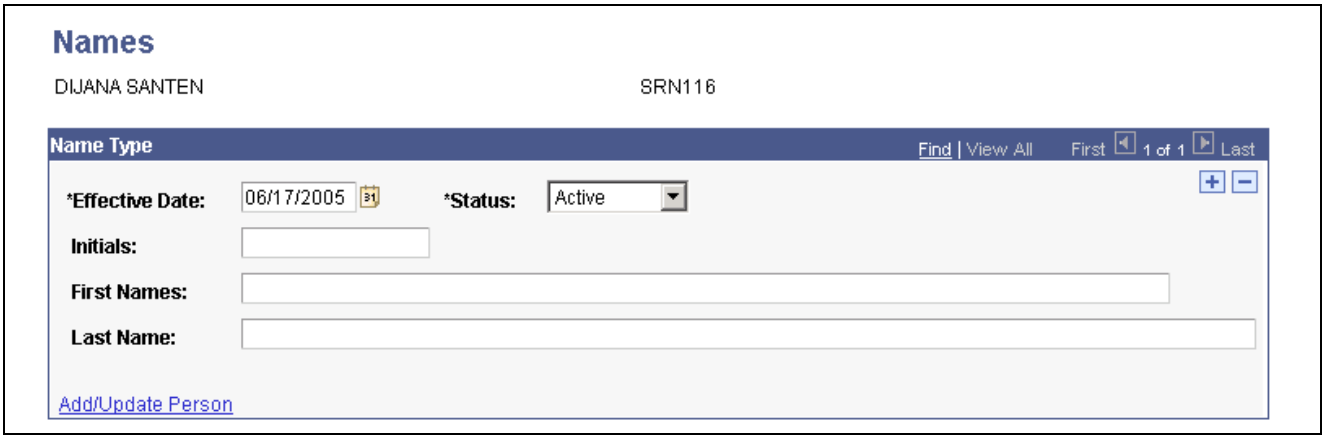


Name Type History page

The system displays the history of the selected name type. You can view or add data as permitted by the mode (add, update/display, include history, or correct history) that you select.

(NLD) Entering the Name to Report for GBA

Access the Names page (Personal Information NLD, Student GBA Names NLD).



Names page

Enter the individual's name to report for GBA.

Managing Addresses and Phone Data

This section provides an overview of managing addresses, lists prerequisites, and discusses how to:

- Enter addresses for an individual.
- Link addresses.
- Enter electronic address data.
- Enter seasonal addresses.

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- Process seasonal addresses.
- Update linked addresses.
- Search for addresses.
- Enter phone data.

Understanding Address Management

Some of your faculty or constituents might routinely relocate and work from a different address. For example, a student might go to his family's ski lodge every winter break or a staff member might volunteer out of state each summer. Using the Seasonal Addresses feature, you can track temporary addresses to stay in contact with individuals while they are away. You enter the individual's seasonal address data with the appropriate begin and end dates. Then you run the seasonal addresses process to apply or remove the address, based on the begin and end dates. You can run the process to apply the seasonal address for a specific individual or you can run it to apply or remove all seasonal addresses between certain start and end dates.

When you update an address for a campus location or organization, the campus location or organization address for individuals linked to that location or organization are not changed in your database until you run the Update Linked Addresses process. When you run the process, the system locates all the individuals with whom that campus location or organization is linked and updates the changed address there as well. For example, when you change an organization's address and run the Update Linked Addresses process, the system locates each of the individuals who are linked to that organization and changes the organization's address.

You can search for addresses for individuals. You can search on address usage, email type, or address type. For example, if you want to send an email message to an individual at his dorm, you can search on the email type of *Dormitory.* If you need to send a billing notice, you can search on the address type of *Billing* or search on the address usage of *Billing.* However, if no address type of *Billing* exists for the individual, you will get no results. If your institution has assigned address usages, use one of the address usage search orders (in this case, Billing, Mailing, Home, Permanent) to have the system search for and find the first appropriate address.

Note. The system searches only on active addresses.

You can view a list of all addresses in your system for an individual, which includes all address types that have been entered for the individual. It also includes the individual's current addresses, any previous addresses that are now inactive, and any addresses that are set to become active in the future.

Prerequisites

Before managing seasonal or linked addresses or before searching for addresses in your system, enter addresses and address types for the individual.

See Also

lscc, Managing Biographical Information, Managing Addresses and Phone Data, Entering Addresses for an Individual

lscc, Managing Biographical Information, Managing Addresses and Phone Data, Entering Electronic Address Data

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Pages Used to Manage Addresses

Page Name	Definition Name	Navigation	Usage
Addresses	SCC_BIO_DEMO_ADDR	• Campus Community, Personal Information, Biographical, Addresses/Phones, Addresses • Contributor Relations, Constituent Information, People, Biographic Information, Addresses	Enter or review an individual's address types and data.
Address History	SCC_ADDR_HIST_SEC	Click the Edit/View Address Detail link for an address type in the Current Addresses area of the Addresses page.	View the history of a specific address type for an individual.
Edit Address	EO_ADDR_XXX_SEC (where XXX = the country code)	• Click the Edit Address link on the Addresses page or the Seasonal Addresses page. • Click the Update Addresses link on the Address History page.	If you access the Edit Address page by clicking Edit Address, enter address data for the specified address type. If you access the Edit Address page by clicking Update Addresses, edit or update any address data associated with the individual.
Electronic Addresses	E_ADDR_PERS	• Campus Community, Personal Information, Biographical, Addresses, Electronic Addresses • Contributor Relations, Constituent Information, People, Biographic Information, Electronic Addresses • Student Recruiting, Student Recruiters, Personal Information, Electronic Addresses • Student Admissions, Application Entry, Personal Information, Electronic Addresses	Enter or review an individual's email address and URL data.
Seasonal Address	CC_ADDR_SEASONAL	Campus Community, Personal Information, Biographical, Addresses, Seasonal Address	Enter a seasonal address for an individual.

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Page Name	Definition Name	Navigation	Usage
Process Seasonal Addresses	RUNCTL_SEASNL_ADDR	Campus Community, Personal Information, Biodemo Processes, Apply Seasonal Addresses	Run the process to apply or remove the designation of *Seasonal Address* to specified addresses in the Current Addresses area of the Addresses and Address History pages.
Address Linkage	SCC_ADDRSA_LNK_SEC	Click the Address Linkagelink in the Edit Address area of the Addresses page or the Address History page.	Link an address type to the location of a campus or an organization.
Update Linked Addresses	RUNCTL_CCADDLINK	Campus Community, Biodemo Processes, Update Linked Addresses	Run the process to update linked addresses throughout your system.
Address Search	ADDRESS_SRCH	• Campus Community, Personal Information, Address Search • Contributor Relation, Constituent Information, People, Biographic Information, View Addresses	Search for a specific address for an individual.
Phone Numbers	PHONE_PERS	Campus Community, Personal Information, Biographical, Addresses, Phones	Enter or review an individual's telephone numbers.

Entering Addresses for an Individual

Access the Addresses page (Campus Community, Personal Information, Biographical, Addresses/Phones, Addresses).

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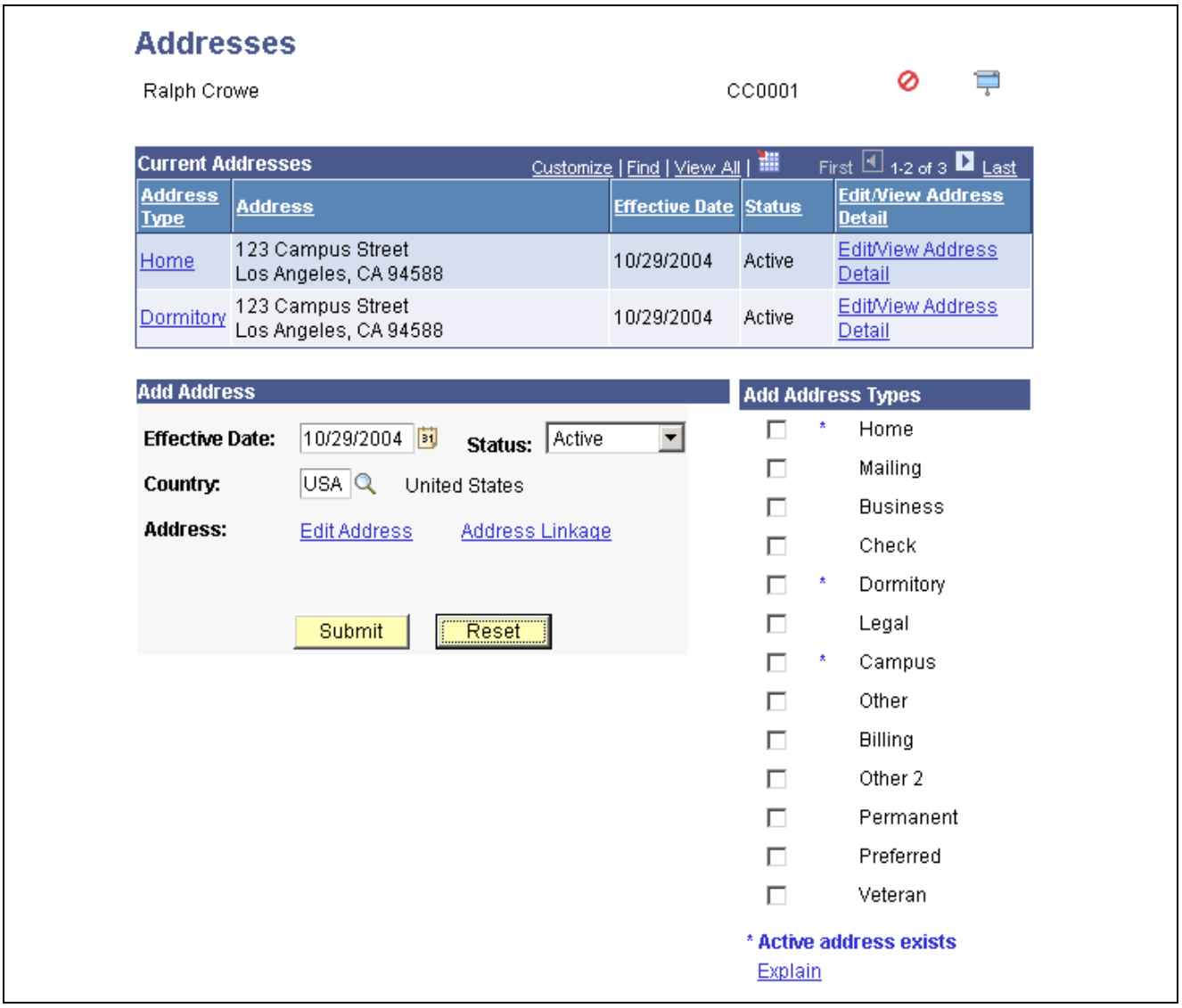

Addresses page

Information that you enter here is the same as the address data that you enter on the Biographical Details page when you create a personal record. When you save the data (either there or here), the system updates the address data in both places.

See lscc, Adding a Person to Your Campus Solutions Database, Adding or Updating Biographical Details Data.

Current Addresses

If the individual has current addresses in the database, this area of the page shows the current address types and the associated data. If the individual does not have a current address, the text *No current addresses exist* appears instead.

Address Type

Displays the individual's current address types as links.

Click the link to view or update data for the address type. The system displays values for the current address in the relevant fields. Displaying the address data enables you to copy it from one address type to another.

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Edit/View Address Detail

Click to access the Address History page, on which you can view the history of the address type.

To update the current address type for the individual, click the Edit/View Address Detail link, add a new address row, specify the effective date and address format, and edit the related fields.

Add Address

Effective Date

Enter the date on which the address is active.

Enter addresses in the chronological order of their effective dates. Enter the earliest dated address first and the future-most dated address last.

See lsfn, Reviewing Installation Setup and System Defaults.

Country

Enter the country code for the address format to use for the individual. The system displays the fields required for that country as defined on the Country Table - Address Format page.

Edit Address

Click to access the Edit Address page, on which you can enter new address data in the specified format.

Address Linkage

Click to access the Address Linkage page, on which you can link an address type to a campus location or organization location.

Add Address Types

A particular address often applies to more than one address type for an individual. For example, an individual's dormitory, campus, and billing addresses might be the same.

To copy the address, effective date, and status from one address type to other address types, select the address types to which to assign the data, click Submit, and then click Save.

Address Type

Click the current address type such as *Dormitory, Campus* or *Billing*, to copy. The system displays the associated address data beneath the Edit Address link in the Add Address area of the page.

To make changes to the data, click Edit address and make the changes.

* (blue asterisk to the left of an address type)

Indicates that the address type exists and that it has a current or future-dated address with a status of *Active*. Be sure that you want to add a new effective-dated row to the existing data before selecting the address type.

Explain

Click to display an explanation of the marks that indicate the successful or unsuccessful creation of an address type.

Note. A green check mark indicates the successful creation of an address type. A red X appears if you try to create an address type that causes effective dates to become out of sync for a specific address type. For example, a red X appears if the address type that you are adding already has an existing duplicate effective date, or when an earlier effective-dated address currently exists for the address type.

Submit

To copy the address data to each of the selected address types, click Submit.

A green check mark appears next to each address type to which the data is successfully copied and the new or updated addresses appear in the Current

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Address area of the page. The addresses are not written to the Addresses Table until you click Save.

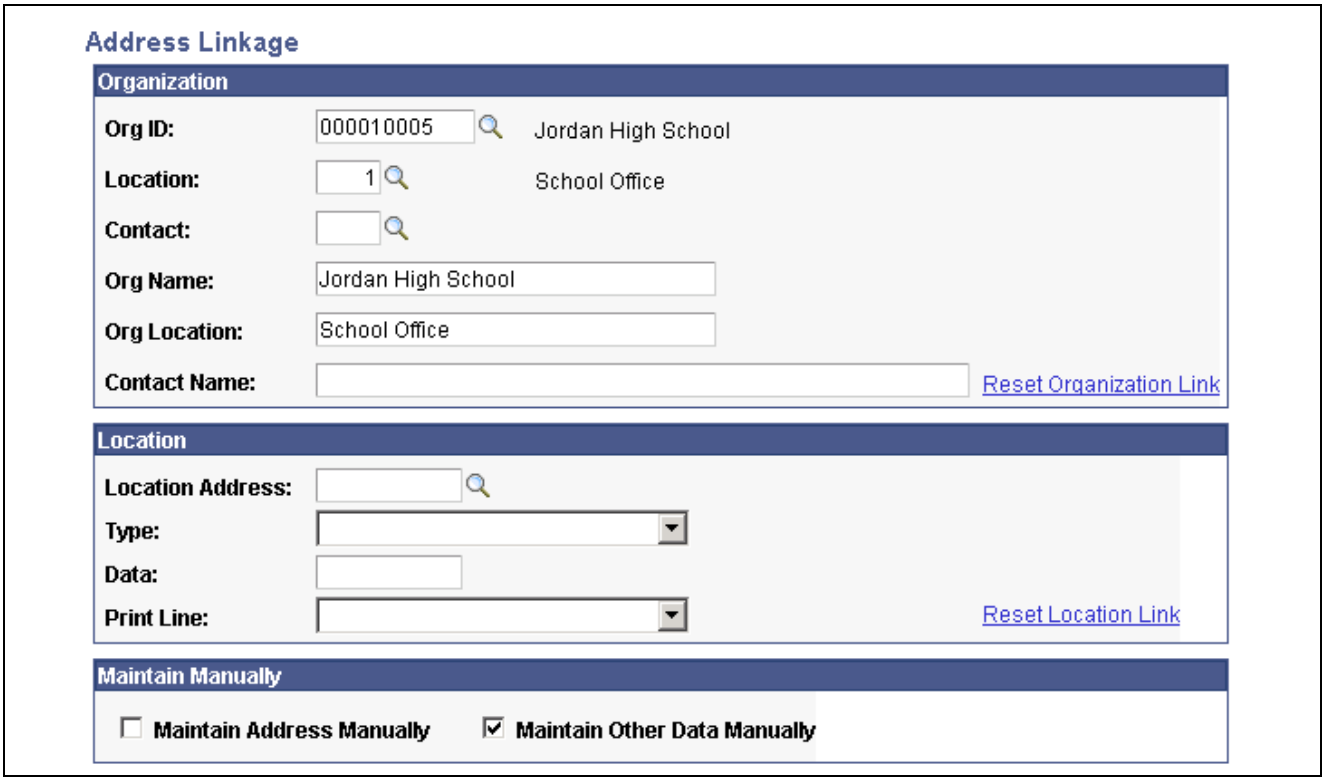
Note. When you create multiple address types from one source address, you can have a mixture of successful and unsuccessful outcomes (green check mark or red X respectively). The data only from successful outcomes appear in the Current Address area.

Edit/View Address Detail Click to access the Address History page, on which you can change the effective date and status for any newly submitted address and address type before you save it. You can also add a new effective-dated row for the selected address type.

Reset Click to clear address information in the Add Address and Add Address Type areas. Doing so enables you to enter different data, either manually or by clicking the Address Type link to copy address data from a current address.

Linking Addresses

Access the Address Linkage page (click the Edit/View Address Detail link for an address type in the Current Addresses area of the Addresses page).



Address Linkage page

This page enables you to specify the addresses to link. It also enables you to set linked data to manual maintenance so that the Update Linked Addresses process (or any other automatic update process) will bypass the information.

Organization

Enter information to identify the organization address to which you want to link.

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Location

Enter information to identify the location address to which you want to link.

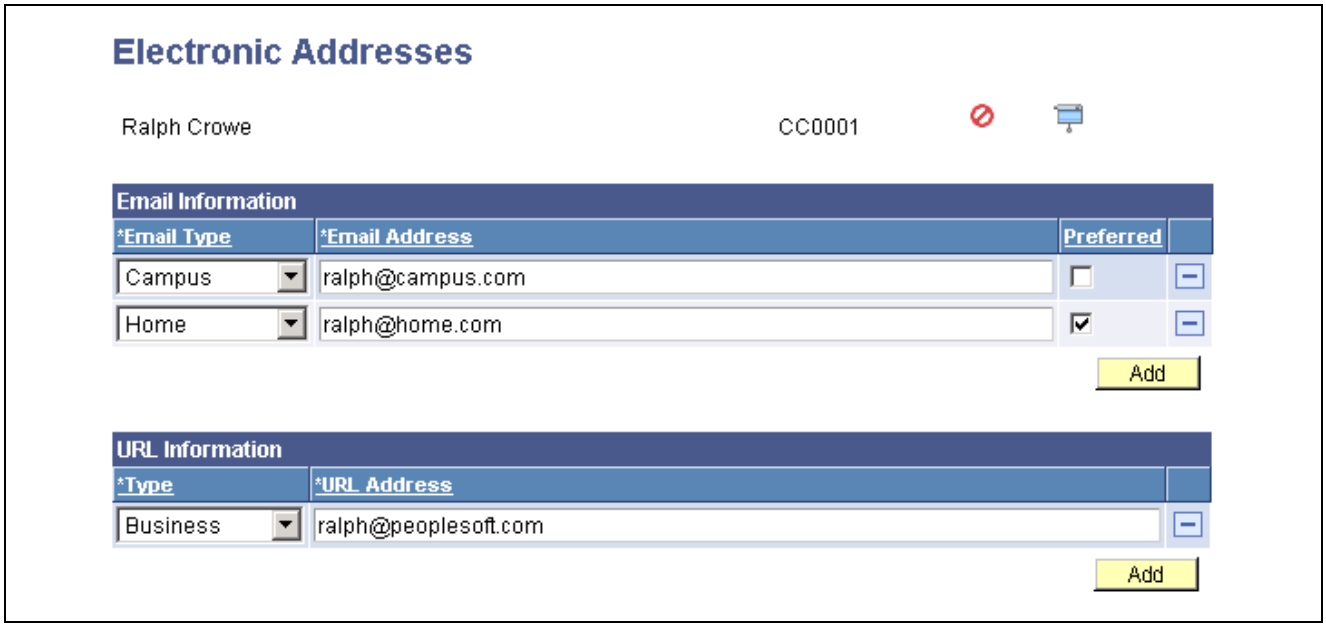
Location Address and **Type**	Enter the location address and specify the address type to which to link.
Data and **Print Line**	Enter address data to print for this location and specify on which address line to print it.

Maintain Manually

Maintain Address Manually	Select to maintain the address manually and have the system bypass it in the update linked addresses process or other automatic update processes.
Maintain Other Data Manually	Select to maintain other data (from Location or Organization page areas) manually and have the system bypass it in the update linked addresses process or other automatic update processes.

Entering Electronic Address Data

Access the Electronic Addresses page (Campus Community, Personal Information, Biographical, Addresses, Electronic Addresses).



Electronic Addresses page

Note. Information that you enter here is the same as the email address data that you enter from the Biographical Details page when you create a personal record. When you save data here, the system updates the same email address data on the Biographical Details page.

See lscc, Adding a Person to Your Campus Solutions Database.

Email Information

Email Type	Select the type, such as *Home*, *Business*, or *Mailing*, that describes this email address.

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Values for this field are delivered with your system as translate values. You can modify these translate values.

Email Address Enter the individual's email address.

Preferred Select to indicate the individual's preferred email address, which is the one to use first when contacting this individual. You may select only one preferred email address for an individual.

For information about preferred email for Notifications,

See PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, Managing Biographical Information, Managing Personal Attributes Information, Entering Notification Preferences

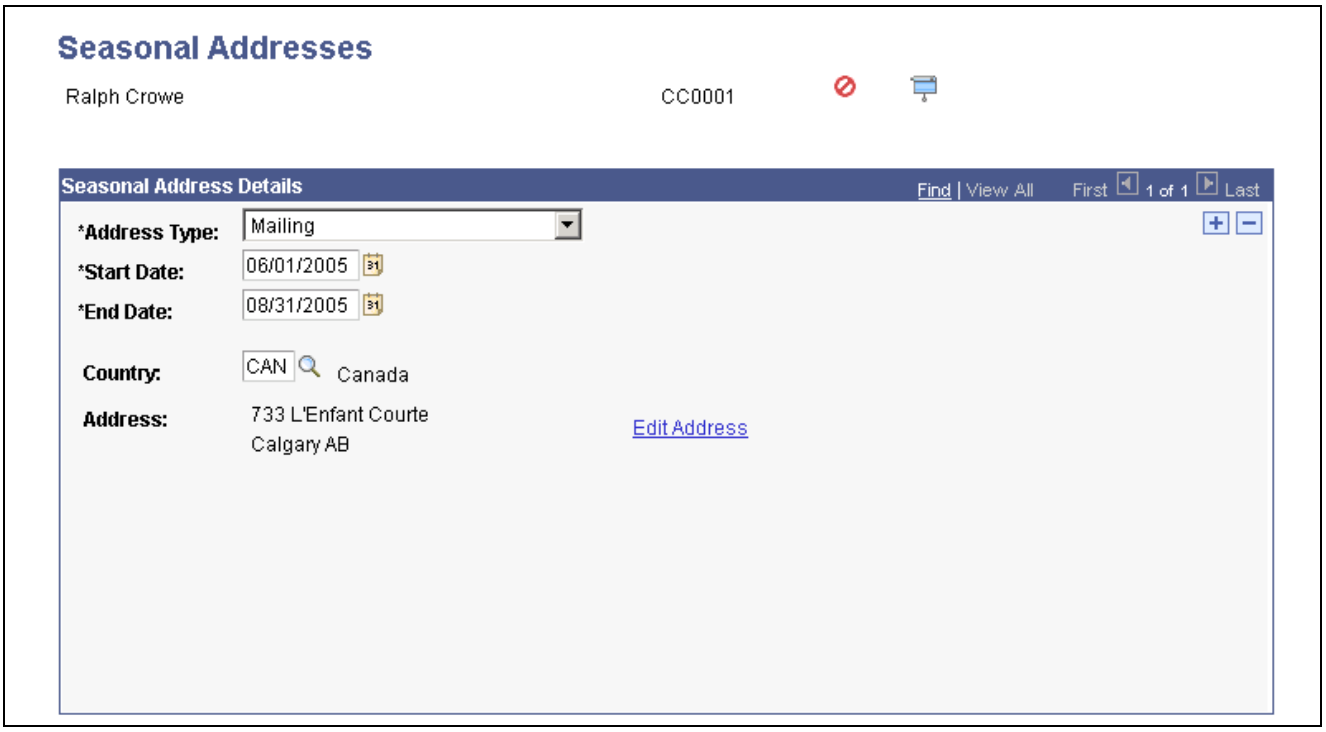
URL Information

Type Select the type (such as *Home*, *Business*, or *Mailing)* that describes this electronic address or URL.

URL Address Enter the individual's URL or home page address.

Entering Seasonal Addresses

Access the Seasonal Addresses page (Campus Community, Personal Information, Biographical, Addresses, Seasonal Address).



Seasonal Addresses page

Address Type Select the type of address that is seasonal for this individual. Only the address types for which the individual has data are available.

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Note. If the main address data for the address type of this seasonal address is removed, an error message is shown similar to "Business Seasonal Address is invalid - no Active Business Address on file. Seasonal Addresses may only be added for active address types." You can recreate the main address information for this address type, select a different address type for the seasonal address, or remove it.

Start Date Indicate the date when the seasonal address begins to apply.

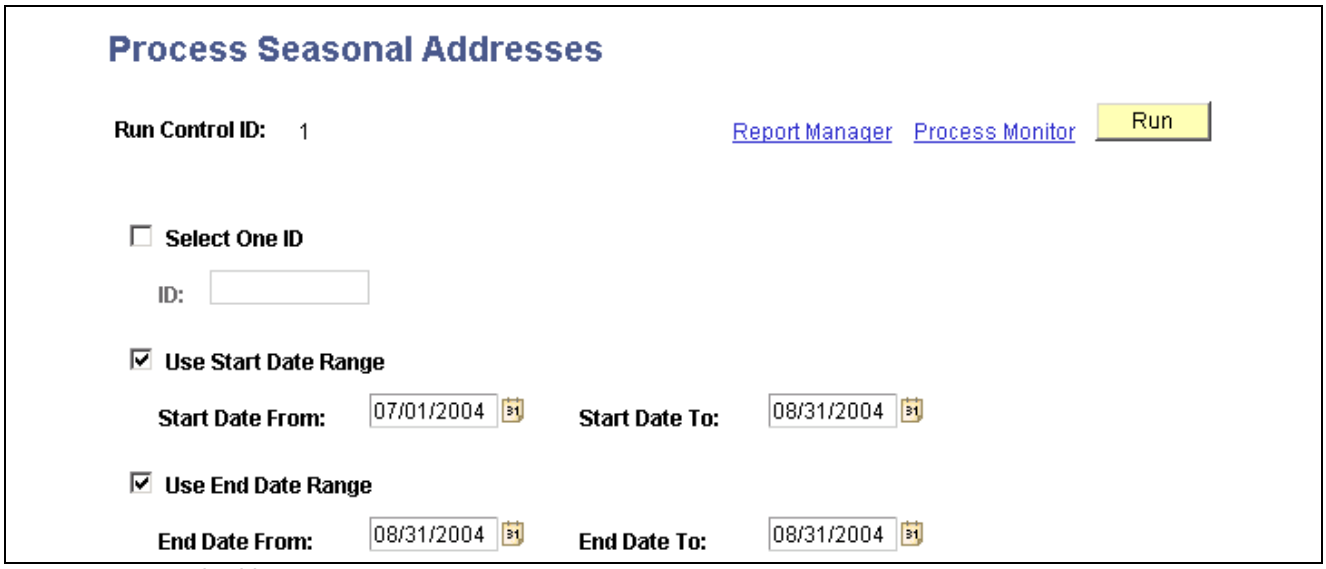
End Date Indicate the date when the seasonal address ceases to apply. When the end date occurs, the system automatically increases the start and end dates by one year and resets the address for the next year.

Country Enter the country formatting to use for this address.

When you exit the Country field, the address fields appear in the format for the selected country as defined on the country Address Format page.

Processing Seasonal Addresses

Access the Process Seasonal Addresses page (Campus Community, Personal Information, Biodemo Processes, Apply Seasonal Addresses).



Process Seasonal Addresses page

Select One ID Select this check box to apply or remove seasonal addresses for one individual only. You must specify the individual's ID in the ID field.

If you do not choose *Select One ID*, the system applies or removes seasonal addresses for all IDs for which seasonal address data exists.

Use Start Date Range Select this check box to indicate that all seasonal addresses beginning within the specified date range should be applied or removed.

Use End Date Range Select this check box to indicate that all seasonal addresses ending within the specified date range should be applied or removed.

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Note. You must enter either a start date range, an end date range, or both. If the individual has multiple seasonal addresses, consider specifying a date range long enough to include all of them in the search.

If you specify only one date in a range, the system limits the search to seasonal addresses that begin or end, respectively, on that specific date.

Updating Linked Addresses

Access the Update Linked Addresses page (Campus Community, Biodemo Processes, Update Linked Addresses).

Update Linked Addresses page

Location Link Select this check box to indicate that the process should update all addresses linked to locations.

Organization Link Select this check box to indicate that the process should update all addresses linked to organizations.

Searching for Addresses

Access the Address Search page (Campus Community, Personal Information, Address Search).

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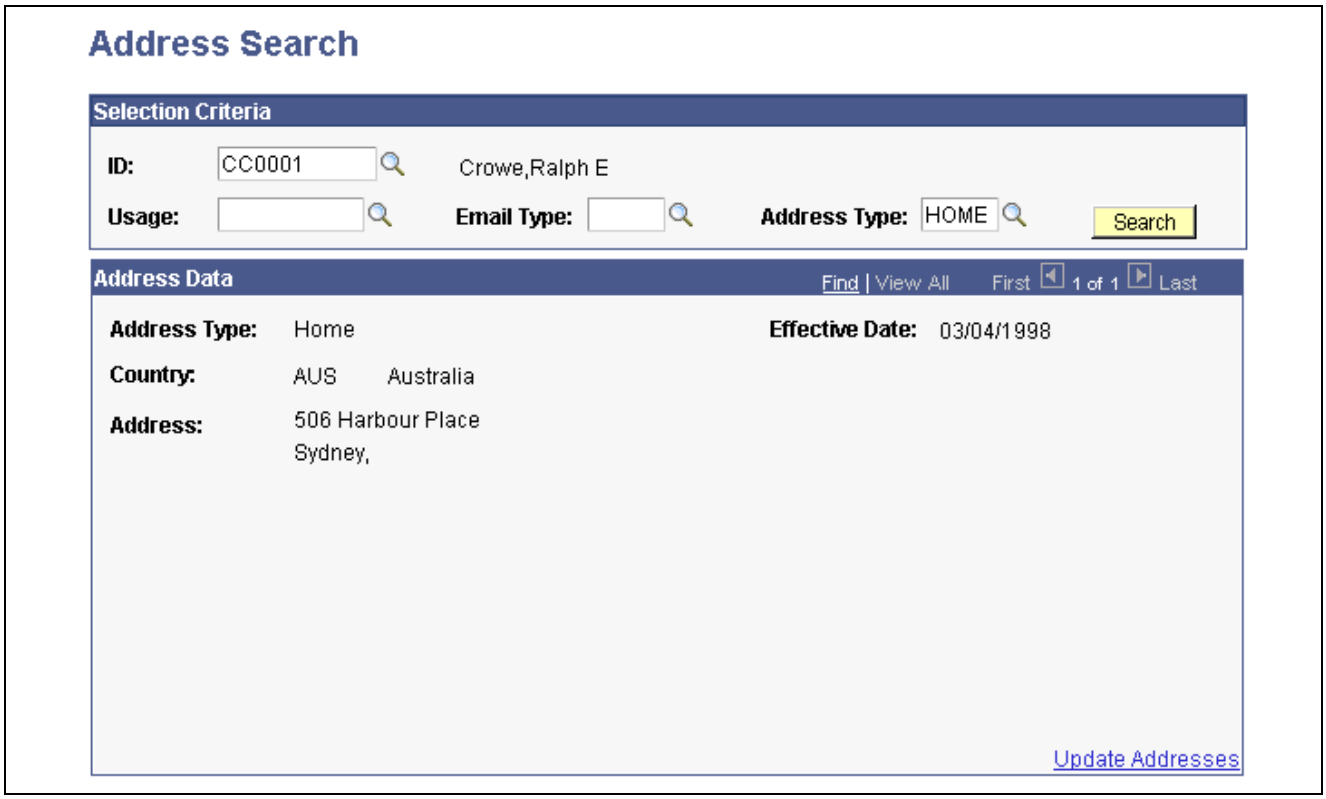

Address Search page

Selection Criteria

ID Enter the ID of the individual whose address you want to find.

Usage Enter the type of address usage or search order for the system to use in the search.

All address usages on the Address Usage page are available.

Email Type Enter the type of email address, if any, for which the system should search, such as *Home*, *Dorm*, or *Business*.

Only the existing email types for this individual are available. If no email data exists for the individual, no email types are available.

Address Type Enter the type of street address for which the system should search, such as *Home*, *Dorm*, or *Business*.

All address types are available. If no data of that type exists for the individual, no results are returned.

Search Click to launch the search.

Address Data

The system displays the search results in this area.

Update Addresses Click this link to access the Addresses page on which you can edit or update any address data associated with the individual.

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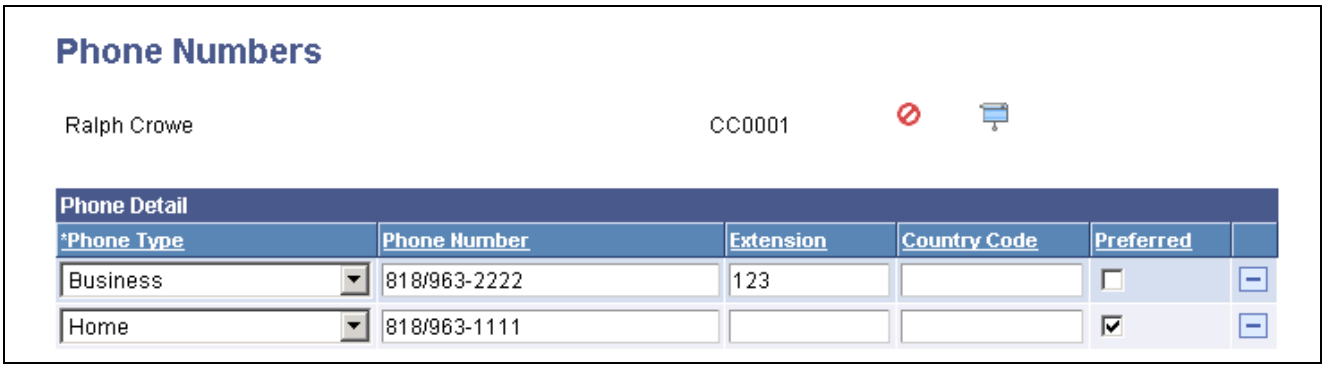
Entering Phone Data

Access the Phone Numbers page (Campus Community, Personal Information, Biographical, Addresses, Phones).



Phone Numbers page

Note. Information that you enter here is the same as the phone number data you enter on the Phone Detail page. When you save data here, the system updates the same phone number data on the Phone Detail page.

Phone Type

Select the type, such as *Home*, *Business*, or *Mailing*) that describes this telephone number.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Phone Number

Enter the telephone number, including area code, for this individual.

Extension

Enter the individual's direct extension, if any.

Country Code

Enter the country code, if required to complete the call.

Preferred

Select to indicate that this is the individual's preferred phone number, and the one to use first when contacting this individual. You can select only one preferred phone number for an individual.

For information about preferred phone for Notifications,

See PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, Managing Biographical Information, Managing Personal Attributes Information, Entering Notification Preferences

Managing Personal Attributes Information

This section provides an overview of the personal attribute deceased label, lists prerequisites, and discusses how to:

- Enter ethnicity information.
- Process ethnicity information updates.
- Enter languages information.
- Enter communication preferences.

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- **Bundle 29**
  New

  Enter notification preferences.
- Enter religious preferences.
- Enter date of death and other decedent data.
- (AUS) Enter student data.

Understanding the Personal Attribute Deceased Label

When an individual dies, you should apply the deceased label to all pages about that individual. Then, when users encounter a page with the word *DECEASED* at the top, they can determine whether to continue or suspend their transactions for that individual.

You can apply the label using either of the following methods. In both methods, when you save the individual's page, the system displays the word *DECEASED* at the top of the pages.

- To display the deceased label and not enter any other decedent data (for example, place of death and death certificate number), assign your institution's deceased service indicator to the decedent.

  The service indicator sets the deceased label to display. You can use this method regardless of whether you know the individual's date of death.
- If you know the individual's date of death, you can enter that date on the Decedent Data page along with other decedent data, and then save the page.

  You can use this method to apply the deceased label *only* if you know the date of death.

For example, you might receive confirmation that Gloria is deceased. You want to apply the deceased label to all pages about her as soon as possible to alert users. However, you have not received a copy of the death certificate or official confirmation of her date of death. Because you do not know when she died, you could assign her your institution's deceased service indicator, which is the one that is set to display the deceased label.

You can verify that the label is applied by accessing any page about the decedent. The word *DECEASED* appears at the top right of the page.

All of the decedent's data remains in your database until your system administrator deletes the decedent's ID.

See Also

lscc, Setting Up Service Indicators

lscc, Managing System IDs, Deleting Individual IDs

Prerequisites

Before you can enter personal attributes data, you must define language codes, and religious preferences codes in your system. Before you can apply and manage FERPA privacy control, you must establish FERPA privacy control fields. Before you can allow students to identify publications for which they release FERPA privacy restrictions, you must set up your institution's publications.

See Also

lscc, Setting Up Biographical Information, Setting Up Personal Attributes

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Pages Used to Manage Personal Attributes Information

Page Name	Definition Name	Navigation	Usage
Ethnicity	ETHNICITY_DETAIL	Campus Community, Personal Information, Biographical, Personal Attributes, Ethnicity	Enter or review an individual's ethnicity data.
Ethnicity Detail Update	SCC_ETH_UPDATE	Campus Community, Personal Information, Biodemo Processes, Ethnicity Detail Update	Process ethnicity-related updates to person records in batch.
Languages	SCC_LANGUAGES	• Campus Community, Personal Information, Biographical, Personal Attributes, Languages • Student Recruiting, Student Recruiters, Personal Information, Languages • Student Recruiting, Maintain Prospects, Personal Information, Languages • Student Admissions, Application Entry, Personal Information, Languages	Enter and track an individual's language abilities.
Communication Preferences	SCC_COMM_PREF	Campus Community, Personal Information, Biographical, Personal Attributes, Communication Preferences	Enter an individual's preferred language and method for receiving communications (applies to communication generated by Comm Gen only).
Notification Preferences **Bundle 29** **New page**	SCC_NTF_PREF	• Campus Community, Personal Information, Biographical, Personal Attributes, Notification Preferences • Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Notification Preferences	Enter an individual's notification preferences.

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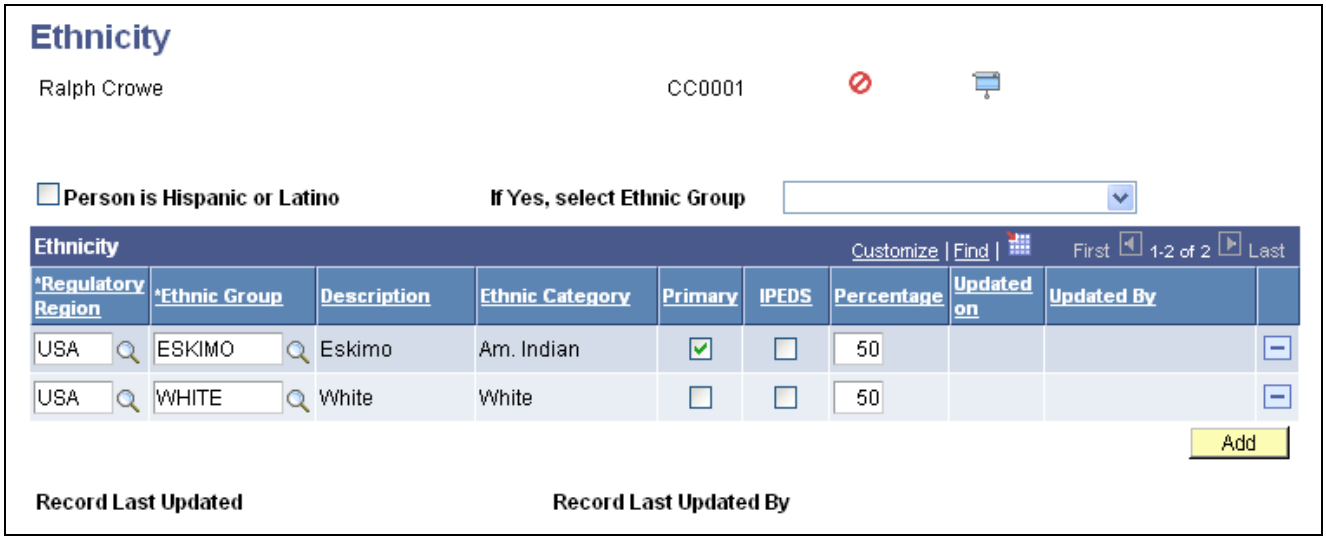
Page Name	Definition Name	Navigation	Usage
Religious Preferences	RELIGIOUS_PREF	• Campus Community, Personal Information, Biographical, Personal Attributes, Religious Preferences • Contributor Relations, Constituent Information, People, Personal Attributes, Religious Preference	Enter data to identify an individual's religious preference.
Decedent Data	SA_DECEASED_DATA	• Campus Community, Personal Information, Biographical, Personal Attributes, Decedent Data • Contributor Relations, Constituent Information, People, Personal Attributes, Decedent Data	Enter the date of death and other data about the decedent.
Student Data AUS	SSR_STDN_DATA_DEST	Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Student Data AUS, Student Data AUS	Enter DEST information regarding a student's prior programs, including values related to TAFE, secondary school, and postgraduate programs.

Entering Ethnicity Information

Access the Ethnicity page (Campus Community, Personal Information, Biographical, Personal Attributes, Ethnicity).



Ethnicity page

For institutions with *USA* as an installed country, the following fields appear for editing:

Person is Hispanic or Latino Select this check box to indicate whether the person is of Hispanic or Latino origin.

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For further information on guidelines for defining if person is Hispanic or Latino, see http://nces.ed.gov/statprog/2002/std1_5.asp.

Note. You must select this check box if a row exists in the grid that indicates Hispanic origin.

If yes, Select Ethnic Group

If you selected the Person is Hispanic or Latino check box, then select an ethnic group code to further refine the person's ethnicity. When you select a value, row changes occur as follows:

- If no value exists in the drop-down list and you select a value that does not currently exist on the record, the system inserts a new row into the grid.
- If a value exists in the drop-down and that value exists in the grid, when you select a new value from the drop-down, the system updates the existing row.
- If a value exists in the drop-down and blank is selected from the drop-down, nothing affects existing rows.
- If the drop-down value is blank and you select a value that already exists in the grid, nothing happens to the existing rows.

Primary

Select this check box to indicate with which ethnic group the person most directly identifies.

IPEDS

Select this check box to indicate that the data has been submitted by a reliable source, such as application data or self service, in response to the IPEDS questions.

The following fields appear for all customers:

Ethnic Group

This field allows you to select multiple ethnic backgrounds.

Click the Add button to add more than one ethnic group.

Ethnic Category

The system populates this field based on the value in the EEO Ethnic Group field for U.S. regulatory region ethnic groups or the Ethnic Category for ethnic groups tracked for other regulatory regions.

For any ethnic group codes with a regulatory region of USA, this field should always map to one of these five races:

- American Indian or Alaska Native.
- Asian.
- Black or African American.
- Native Hawaiian or Other Pacific Islander.
- White.

For further information on guidelines for mapping ethnic group codes to the five races, see http://nces.ed.gov/statprog/2002/std1_5.asp.

See lscc, Setting Up Biographical Information, Setting Up Personal Attributes, Defining Ethnic Groups.

Percentage

Indicate the share of 100 of which this person derives his or her ethnicity. The system displays a warning if you enter an amount over 100.

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Note. Collecting this information is optional.

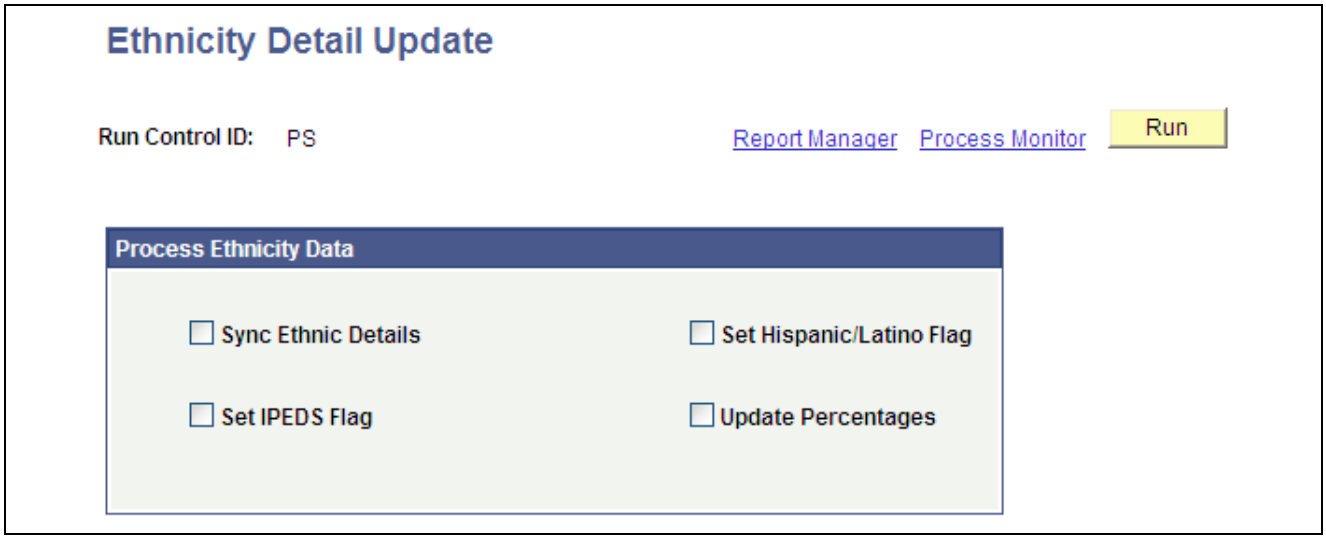
Last Updated, Updated By Indicates when the ethnicity data was last created or changed, and by whom. The system updates these fields when you save the page. The system stores the OPRID of the user and displays the name of the user.

Record Last Updated This field displays the date and time of the most recently added row in the grid.

Record Last Updated By This field displays the name of the last user to update any row of the grid.

Processing Ethnicity Information Updates

Access the Ethnicity Detail update page (Campus Community, Personal Information, Biodemo Processes, Ethnicity Detail Update).



Ethnicity Detail Update page

If your institution chooses not to resurvey your population, you can use the check boxes on this page to update ethnicity record attributes in batch. Select any combination of the four check boxes.

Sync Ethnic Details Select this check box to instruct the system to search for all rows in the DIVERS_ETHNIC table without a corresponding row in ETHNICITY_DTL and add a row, if one does not exist.

Select this check box to instruct the system to search for all rows in ETHNICITY_DTL without a corresponding row in DIVERS_ETHNIC and delete them.

Set IPEDS Flag Select this check box to instruct the system to set the ETHNICITY_DTL.ETH_VALIDATED flag on ethnicity records to "Y", meaning that your institution considers the records valid for IPEDS requirements. The system also updates corresponding audit fields on the record.

Set Hispanic/Latino Flag Select this check box to instruct the system to search for all DIVERS_ETHNIC rows with an EEO Ethnic Category = 3 ’Hispanic’ that are not set to "HISP_LATINO = Y", and set them to "Y." The system also updates corresponding audit fields on the record.

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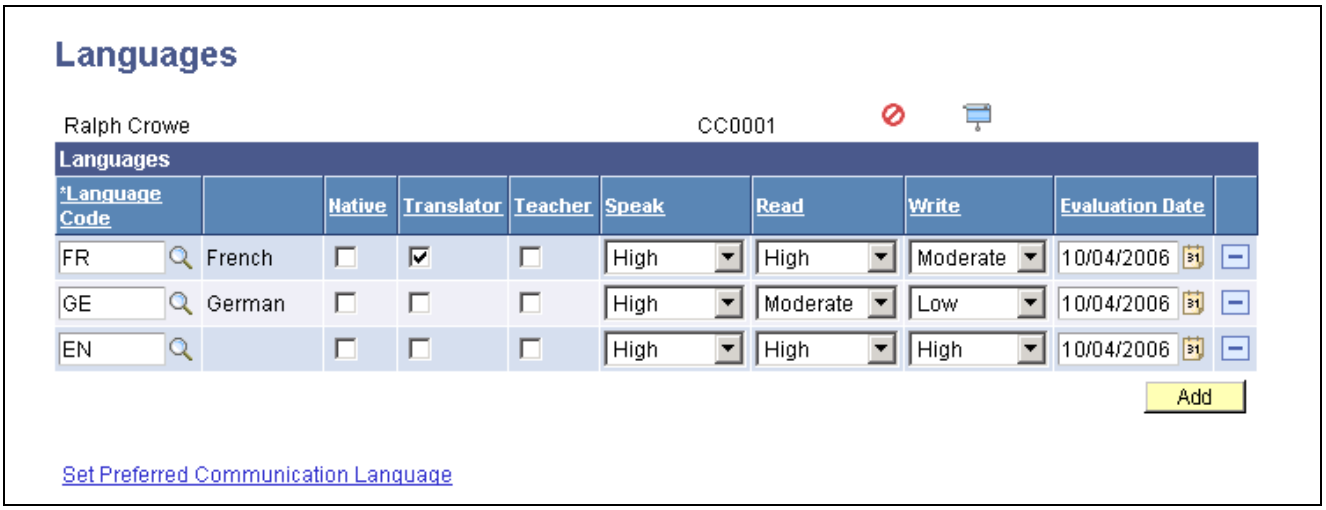
Update Percentages Select this check box to instruct the system to search ETHNICITY_DTL records for fractional ethnicity data (such as 2/5) and convert it to a percentage (such as 40%) or to convert zero percentages to a Numerator = 0 and a Denominator = 100. The system also updates corresponding audit fields on the record.

Click the Run button to initiate the process. Review the results log within Process Scheduler that identifies which option was run and how many records were updated.

Entering Languages Information

Access the Languages page (Student Recruiting, Student Recruiters, Personal Information, Languages).



Languages page

Language Code Enter the language that this individual speaks, reads, or writes.

Native Select this check box to indicate that this is the individual's native or primary language.

Translator Select this check box to indicate that the individual can translate or interpret this language.

Teacher Select this check box to indicate that the individual can teach or has taught this language.

Speak Select the level of proficiency, such as high, medium, or low, with which the individual can speak this language.

Read Select the level of proficiency, such as high, medium, or low, with which the individual can read this language.

Write Select the level of proficiency, such as high, medium, or low, with which the individual can write this language.

Evaluation Date Enter the date on which the individual's levels of proficiency in this language were evaluated, reported, or entered.

Set Preferred Communication Language Appears only if the Support multiple languages check box is selected on the Installation Default - CC (installation default - Campus Community) page.

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Click to transfer to the Communication Preferences page where you can specify the language in which the student prefers to receive communications from you.

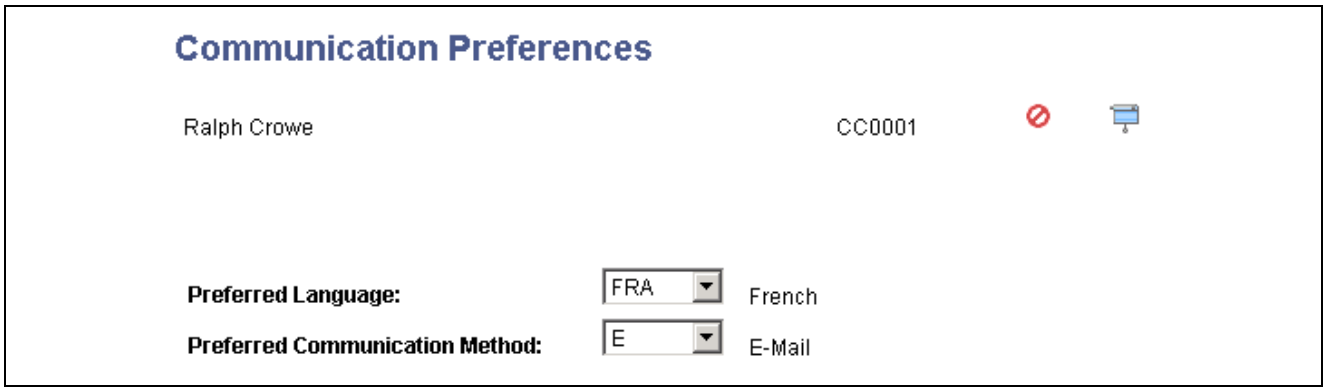
See lscc, Designing Campus Community, Reviewing or Defining Campus Community Installation Settings.

See Also

lscc, Designing Campus Community, Setting Up Campus Community and PeopleSoft Enterprise HRMS Shared Elements, Setting Up Language Codes

Entering Communication Preferences

Access the Communication Preferences page (Campus Community, Personal Information, Biographical, Personal Attributes, Communication Preferences).



Communication Preferences page

If your institution supports multiple languages and multiple methods, you can enter an individual's communication preferences so that the Communication Generation process will produce correspondences to that individual accordingly.

Note. Communication preferences apply to the Communication Generation process only. They do not apply to the Letter Generation process.

Preferred Language

Enter the language in which the individual prefers to receive communications from your institution.

Only the languages that your institution supports and selects on the Installation Default - CC (installation default Campus Community) page are available.

Preferred Communication Method

Enter the method by which the individual prefers to receive correspondence from your institution.

Only the methods that your institution supports and selects on the Installation Default - CC (installation default Campus Community) page are available.

Note. Currently, the Communication Generation process supports only the methods of *Email* and *Letter.*

Entering Notification Preferences

Bundle 29
New

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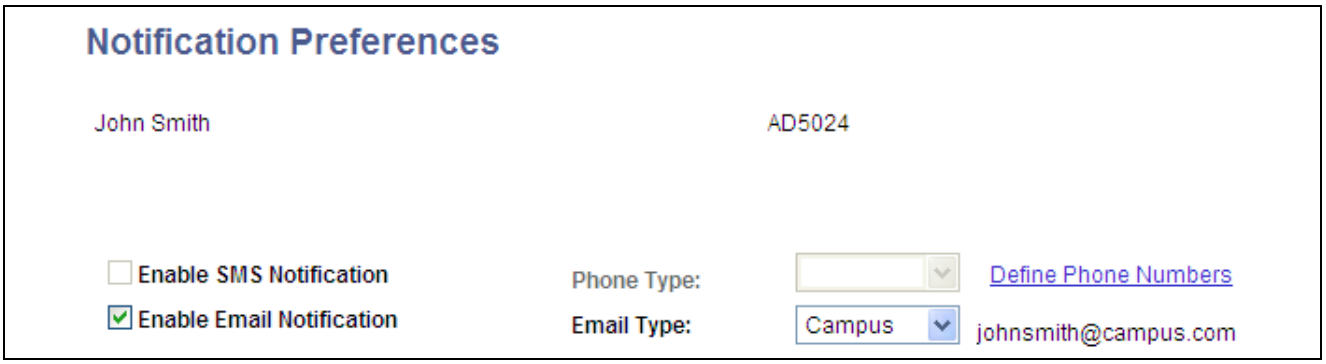
Access the Notification Preferences page (Campus Community, Personal Information, Biographical, Personal Attributes, Notification Preferences).



Notification Preferences page

For information about the Notifications Framework,

See PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, Working with the Notifications Framework

Enable SMS Notification and **Enable Email Notification**

Enable notifications and then select the preferred phone/email type.

Note. The specified phone number must be able to receive SMS or text messages.

If phone or email details do not exist for the person, use the links to access the Phone Numbers page or Electronic Addresses page and add them.

If the preferences on this page differ from those on the Phone Numbers and Electronic Addresses pages, the preferences selected here are always used for notifications (except when overridden on Notification setup).

See PeopleSoft Campus Community 9.0 Fundamentals PeopleBook, Working with the Notifications Framework, Configuring Notification Setup for the Generic Templates

Entering Religious Preferences

Access the Religious Preference page (Campus Community, Personal Information, Biographical, Personal Attributes, Religious Preferences).

Religious Preference page

Religious Preference Select the individual's stated religious preference.

See Also

lscc, Setting Up Biographical Information, Setting Up Personal Attributes, Defining Religious Preference Codes

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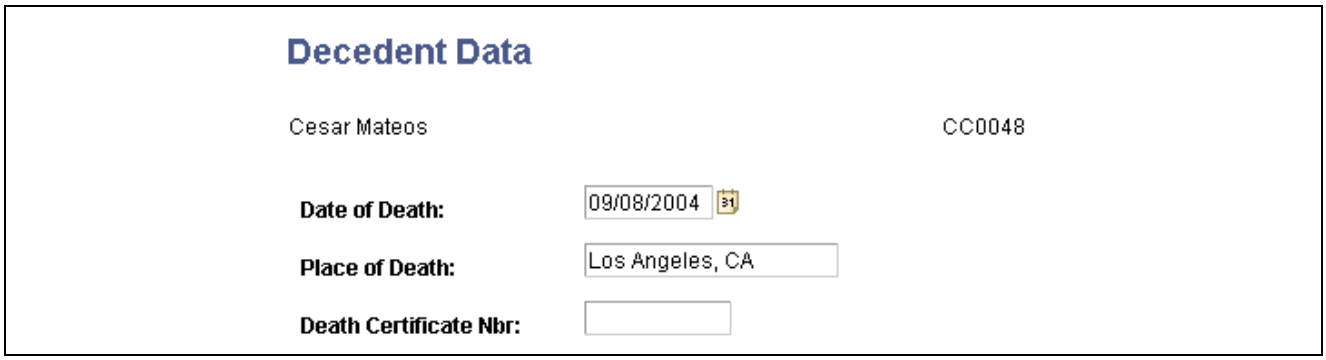
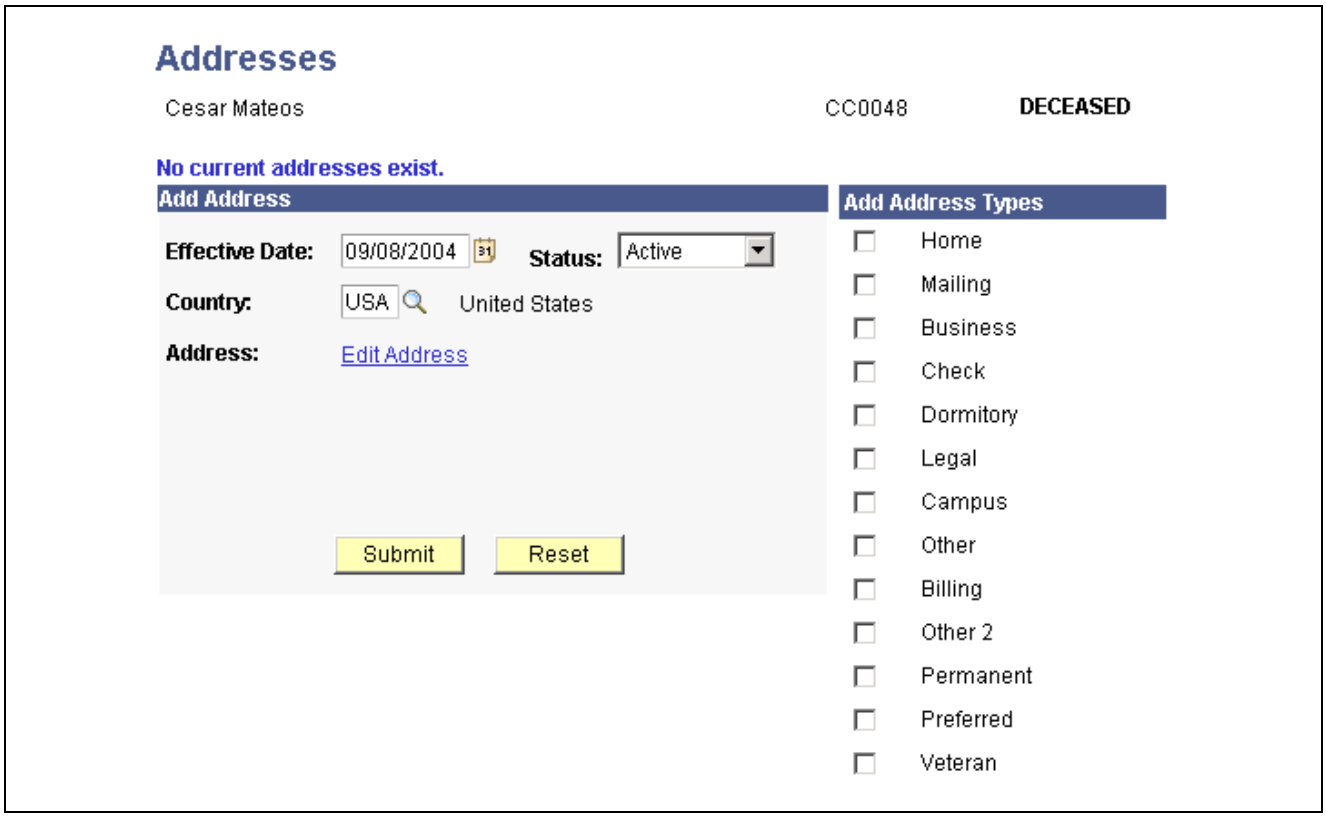
Entering Date of Death and Other Decedent Data

Access the Decedent Data page (Campus Community, Personal Information, Biographical, Personal Attributes, Decedent Data).



Decedent Data page

Note. Only the date of death is required to display the deceased label for the individual throughout your system.



Example of the Addresses page with the Deceased indicator displayed

Date of Death

Enter the individual's date of death. You can enter either the official date of death or the date on which your institution was notified of the death, depending on your institution's requirements.

When you enter a date and save the page, the system displays the word *DECEASED* at the top of pages about this individual throughout your system. If you do not enter a date, the deceased label does not appear.

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Note. If you do not know the date of death, use the Service Indicator page to assign your institution's deceased indicator to this individual.

If, after you enter a date of death and save the Decedent Data page, you decide that you do not want the deceased label to appear on pages for this individual, return to the Decedent Data page, highlight and delete the date, and then save the page with an empty Date of Death field. The deceased label no longer appears.

Place of Death Enter the place (city, state, county, or country) where the individual died.

Death Certificate Number Enter the number from the official certificate of death.

The death certificate number might be required for financial aid reconciliation if the individual is a student, for beneficiary pay out if the individual is an employee, or to receive funds if the individual donated a trust to your institution. Consult your institution's administration.

(AUS) Entering Student Data

Access the Student Data AUS page (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Student Data AUS, Student Data AUS).

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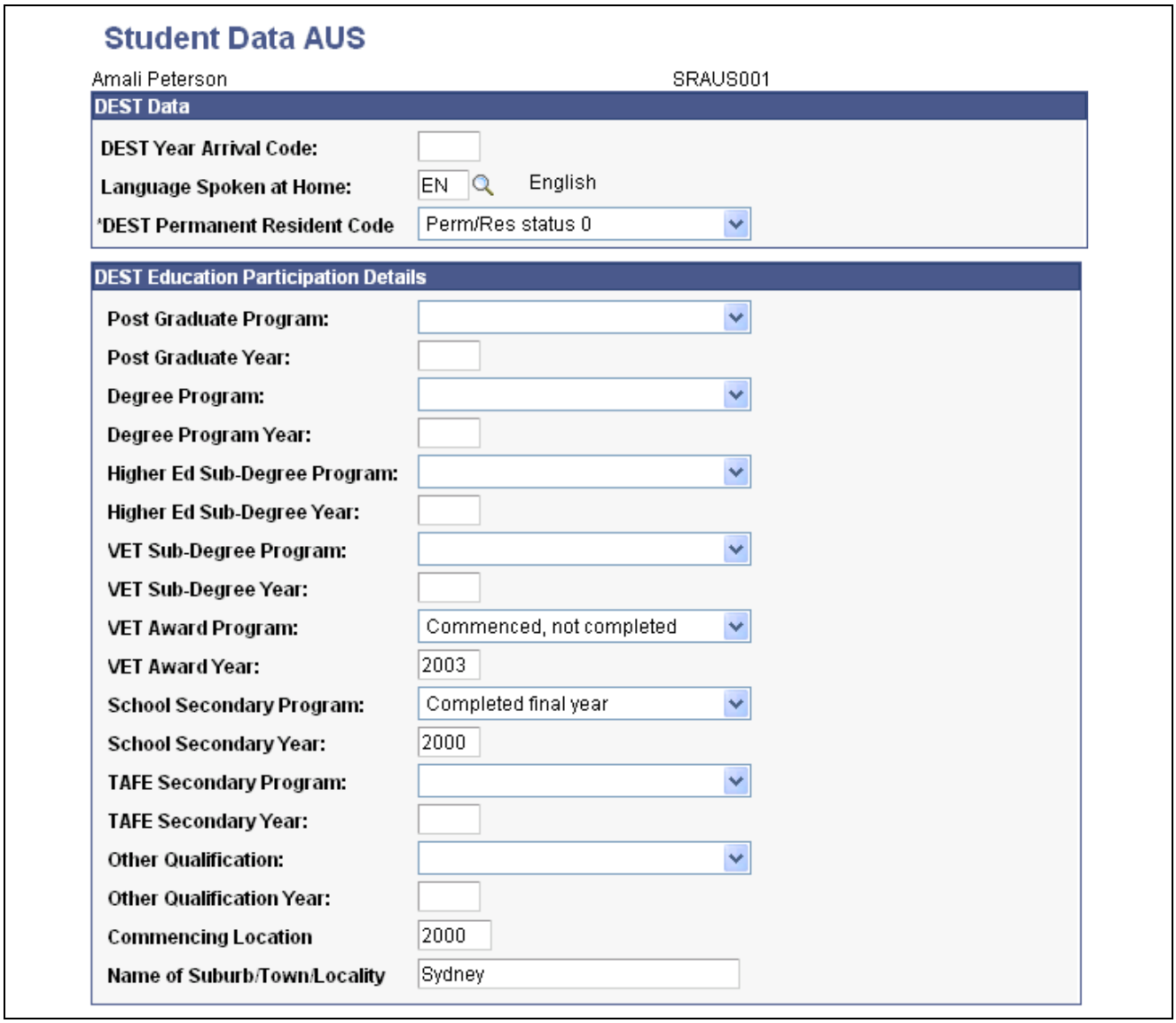

Student Data AUS page

Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) was previously known as DEEWR and before that as DEST. DIISRTE reports require data on students and staff at an institution. The Staff File for DIISRTE is produced using PeopleSoft Human Resources Management System. It is important that the data elements used in the DIISRTE reports be set up and entered properly.

See lssr, (AUS) Setting Up Government Reporting, Setting Up DEEWR Reporting Codes.

See lssr, (AUS) Generating Government Reports.

DEST Data

DEST Year Arrival Code Enter the year that a student, who was not born in Australia, entered Australia. This value is reported in element 347.

Language Spoken at Home Enter the appropriate code to indicate the use of a language other than English at the student's permanent home residence.

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The drop-down list includes any PeopleSoft-defined language codes. The DIISRTE Enrollment Extract process maps your selection to the numeric DIISRTE language code. This value is reported in element 346.

See lssr, (AUS) Setting Up Government Reporting, Setting Up DEEWR Reporting Codes.

DEST Permanent Resident Code

Select the value for reporting in element 390 – Permanent Resident Eligibility for HELP Assistance.

Note. This element is reported as blank in files for the 2009 reporting year and later. It is required for pre-2009 reporting periods, including revisions to those reporting periods.

Refer to DIISRTE's Higher Education Collection Documentation for explanation of the permanent resident codes.

DEST Education Participation Details

Record the status and the last year applicable to each level of education the student has participated in. This data is used to determine the value for elements 493 and 572 if the student is deemed to be a domestic commencing student.

Values for Post Graduate Program, Degree Program, Higher Ed Sub-Degree Program, VET Sub-Degree Program, and VET Award Program are:

Commenced, not completed

Completed all requirements

Never commenced

No information

Not a commencing student

Values for School Secondary Program are:

Completed final year

Did not do final year

No information

Not a commencing student

Values for TAFE Secondary Program are:

Completed such a course

Didn't begin/complete

No information

Not a commencing student

Values for Other Qualification are:

No information

No other qualifications/certs (certifications)

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Not a commencing student

Other qualifications/certs (certifications)

Commencing Location	Enter the Australian postcode of a student's permanent home residence in their last year of secondary school. This value is reported in element 476 if the student is deemed to be a domestic school leaver commencing an undergraduate course.
Name of Suburb/Town/Locality	Enter the name of the suburb, town, or locality applicable to the permanent residence of the student in their last year of secondary schooling. This value is reported in element 486 if the student is deemed to be a domestic school leaver commencing an undergraduate course.
Gender Parent/Guardian 1	Select the gender for the first parent or guardian.
Highest Education Parent/Guardian 1	Specify the highest level of education attained by the parent or guardian. The values presented in this prompt are restricted to those applicable to the gender specified for parent/guardian 1.
Gender Parent/Guardian 2	Select the gender for the second parent or guardian.
Highest Education Parent/Guardian 2	Specify the highest level of education attained by the parent or guardian. The values presented in this prompt are restricted to those applicable to the gender specified for parent/guardian 2.

Managing Relationships Data

This section lists prerequisites and discusses how to:

- Relate one individual to another.
- Identify an individual's legacy relationship to the institution.
- Specify communications for the communication recipient relationship.
- Create joint communications relationships.
- Enter relationship addresses.
- Enter relationship detail data.
- View a list of relationships.
- Identify an individual's relationship with the institution.

See Also

lscc, Managing Communications, Understanding Joint Communications

lscc, Managing Biographical Information, Managing Relationships Data, Identifying an Individual's Relationship with the Institution

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Prerequisites

Before you can enter relationship data, you must define the relationship types for which you want to collect information. To use full relationship functionality, you must also define legacy affiliations, create institutions and academic programs, and create letter codes to identify communications to send to related individuals and set up salutation types to use.

See Also

lscc, Setting Up Biographical Information, Setting Up Individual Relationships

lscc, Setting Up Biographical Information, Setting Up Relations to the Institution

lsfn, Designing Your Academic Structure

lscc, Designing Campus Community, Establishing Salutations, Defining Salutation Types for Joint Communications

lscc, Designing Campus Community, Reviewing or Defining Campus Community Installation Settings

lscc, Setting Up Communications, Defining Letter Codes

Pages Used to Enter Relationships Data

Page Name	Definition Name	Navigation	Usage
Relationships	RELATIONSHIPS	• Campus Community, Personal Information, Biographical, Relationships, Relationships • Contributor Relations, Prospect Management, Relationships, Relationships • Contributor Relations, Constituent Information, People, Relationships, Relationships • Student Admissions, Application Entry, Relationships, Relationships • Student Recruiting, Maintain Prospects, Relationships, Relationships	Enter data to associate one individual with another individual inside or outside of your database.
Legacy Information	LEGACY_SEC	Click the Legacy button on the Relationships page.	Identify a related person's legacy relation with your institution.
Communication Recipient	REL_MLT_RECPNT_SEC	Click the Communication Recipients button on the Relationships page.	Specify the communications for which a copy should also be sent to the related person.

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Page Name	Definition Name	Navigation	Usage
Joint Communication Management	RELATION_SALU_SEC	Click the Joint Communication Management button on the Relationships page.	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.
Relationship Address	REL_ADDR_DTL	• Campus Community, Personal Information, Biographical, Relationships, Relationship Address • Contributor Relations, Prospect Management, Relationships • Contributor Relations, Constituent Information, People, Relationships • Student Admissions, Application Entry, Relationship, Relationships • Student Recruiting, Maintain Prospects, Relationships	Review addresses for the primary individual and for the related individual. If the related person does not have an ID in your system, the Edit Address link is available for you to enter an address for this person. If you use the communication recipient feature, this is also where you select the related individual's address to send a copy letter. Also, if you use the joint communication feature, this is where you select which address (either from the primary or from the related ID's addresses) to which you want to send the joint communications.
Relationship Detail	RELATIONSHIP_DTL	• Campus Community, Personal Information, Biographical, Relationships, Relationship Detail • Contributor Relations, Prospect Management, Relationships • Contributor Relations, Constituent Information, People, Relationships • Student Admissions, Application Entry, Relationships • Student Recruiting, Maintain Prospects, Relationships	Enter information about the related person that is of interest to your institution.
Person-to-Person Summary	RELATIONSHIP_SUMRY	Campus Community, Personal Information, Biographical, Relationships, Person to Person - Summary	View a list of relationships for an individual.

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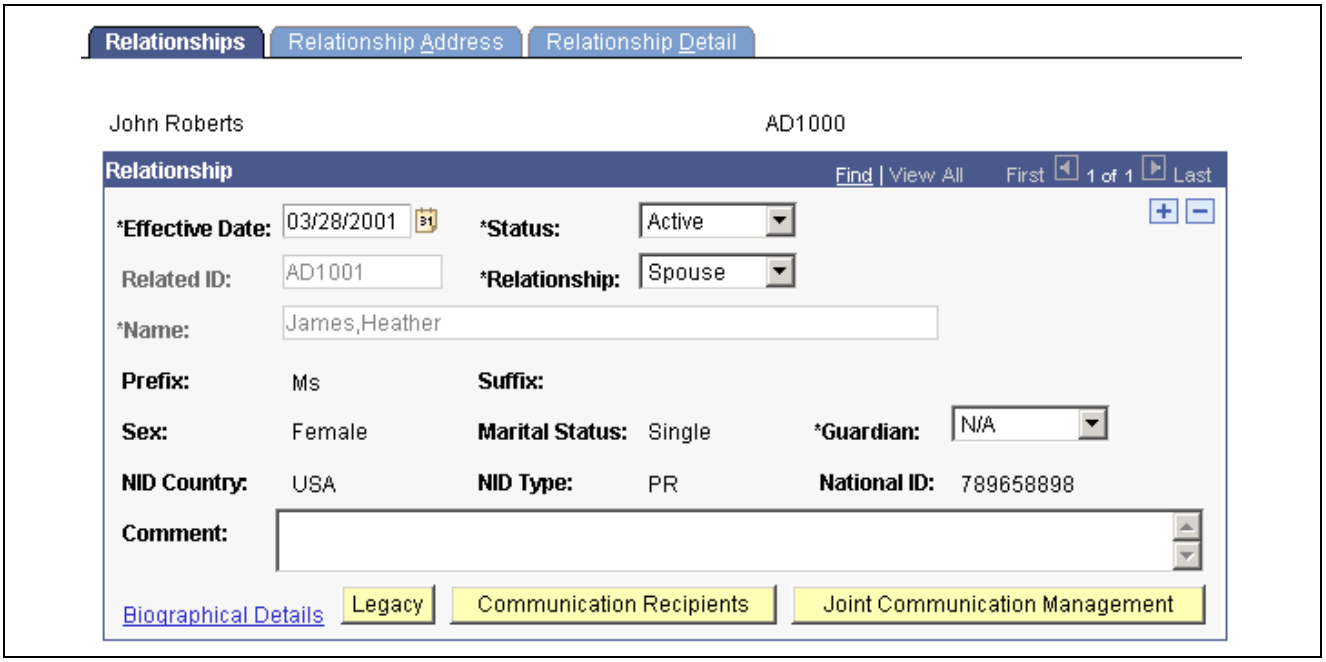
Page Name	Definition Name	Navigation	Usage
Relations with Institution	PERS_INST_REL	• Campus Community, Personal Information, Biographical, Relationships, Relations with Institution • Student Admissions, Application Entry, Relationships, Relations with Institution • Student Recruiting, Maintain Prospects, Relationships, Relations with Institutions	Specify or review an individual's relations to your institution.

Relating One Individual to Another

Access the Relationships page (Campus Community, Personal Information, Biographical, Relationships, Relationships).



Relationships page

You can create the same relationship between the same two people on this page. The system validates the Effective Date and Status of the relationships. As long as the new relationship is not concurrent with the existing, the system does not return an error, allowing you to track remarriages, for example.

Relationship

Related ID

If the related person is in your database, select the related person's ID. When you select the ID, the system displays the related person's biographical data, including the person's name, prefix, suffix, sex, marital status, and primary NID information.

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If the related person is not in your database, the name and biographical data fields are available so that you can enter the related person's name and data.

Note. The Related ID field is available when you are creating the relationship between these individuals for the first time. After you create and save the relationship, when you return to the Relationships page, the system continues to display the related ID and biographical data, but you cannot edit or update it from here. If you need to edit or update the related person's biographical data, click the Biographical Details link at the bottom of the page. You then determine if you need to update information on the Biographical Details page or reconsider the relationship that you are creating.

Relationship

Specify the related person's relationship, such as mother, neighbor, employer, or loan reference to this individual.

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.

Note. If you set up marital status verification on the Relationship / Marital Status page, the system verifies the marital status on the Biographical Details page for each individual against the relationship that you select here. If the marital status of either individual is not the appropriate status for the specified relationship, the system displays a warning message suggesting that you update the marital status for the individuals on the Biographical Details page.

Guardian

Select the legal guardianship that describes the status of the related person to the primary individual. Values are:

Guardian

N/A

Other

Parent

Self

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.

Comment

Enter comments to further identify or describe the related person or the relationship between the two individuals.

Biographical Details

Click to access the Biographical Details page, on which you can view or update the related person's biographical data.

Legacy

Click to access the Legacy Information page, on which you can identify the related person's legacy relation with your institution.

Communication Recipients

Click to access the Communication Recipient page, on which you can specify the communications for which a copy should also be sent to the related person.

Joint Communication Management

Click to access the Joint Communication Management page, on which you can create or dissolve joint communications for these two individuals.

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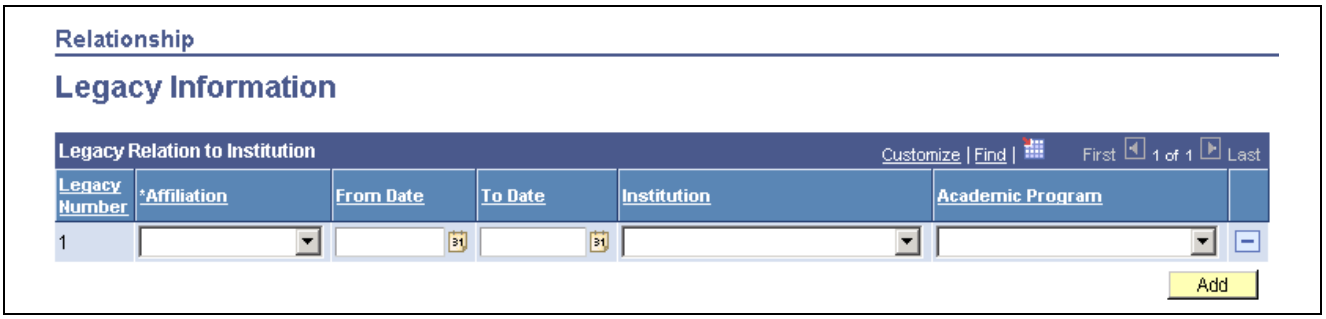
Warning! Individuals can have several relationships in your database; however they can have joint communications with only one of those relationships. For example, you can create a relationship between Gloria Wilson and her husband, Mark Gonzalez, and you can create a relationship between Gloria Wilson and her mother, Maria Wilson. You can then create joint communications with either Gloria and her husband or Gloria and her mother, but you cannot create joint communications for both.

Identifying an Individual's Legacy Relation to the Institution

Access the Legacy Information page (click the Legacy button on the Relationships page).

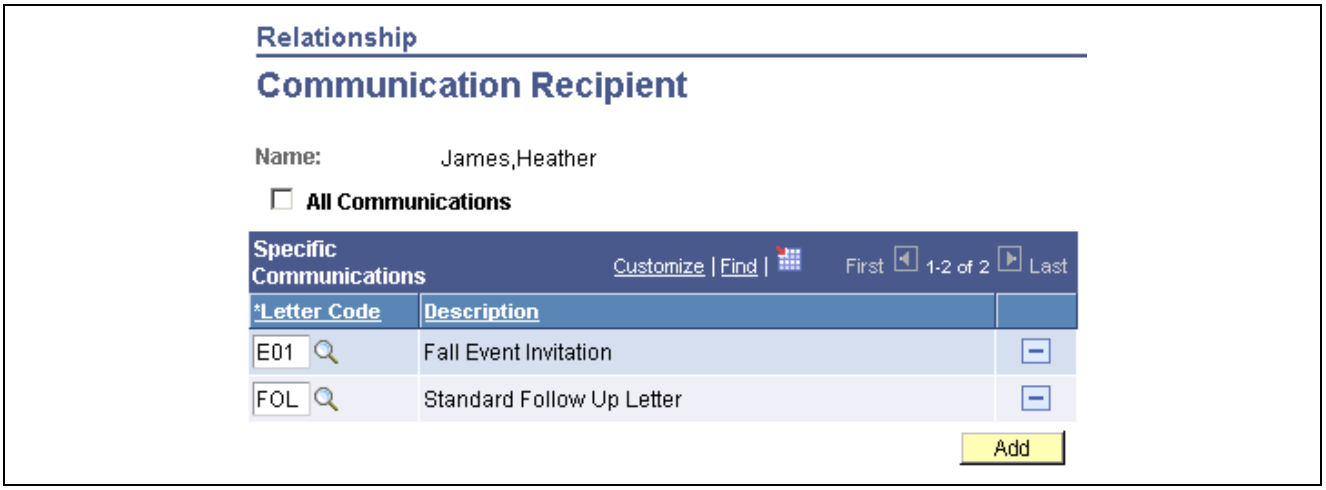


Legacy Information page

See lsav, Setting Up Constituent Data, Defining Person and Organization Relationships.

Specifying Communications for the Communication Recipient Relationship

Access the Communication Recipient page (click the Communication Recipients button on the Relationships page).



Communication Recipient page

You can create letter copies to send to an individual's related IDs. You can create copies of all communications generated for the primary ID or select specific communications to copy. To create the copy letter, you must set up a template with the related ID's name and address. When the letter generation data extract process encounters a letter code that is set to include a copy to the individual's related ID, it extracts the related person's address data from the Relationship Address page.

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Note. For confidentiality purposes, the communication recipients that you set here will not receive copies of communications set to allow joint communications for a relationship, even when you select *All Communications.* This preserves information communicated to Mr. and Mrs. Smith, for example.

All Communications	Select to generate a copy for this related individual of all communications to the primary individual.
Letter Code	Enter the letter codes for the communication to copy. Available letter codes are from the Standard Letter Codes page.

Warning! When an individual has multiple relationships set up with communication recipients, the process extracts data for all of the related IDs. When merging the data into the template, the process lists a maximum of five recipients as receiving a copy. You can create and send copies to more than five recipients, but the letter can list only five, as shown in the following sample letter.

The following graphic provides an example of the CCLTRREC.doc letter that is created for recipients set on the Communication Recipient page:

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PeopleSoft8

July 25, 2001

Ralph E Crowe
506 Harbour Place
Sydney
Australia

This communication has been sent to John Roberts. You are receiving a copy because you either requested to receive a copy or the school has designated you to receive a copy of this type of letter.

Dear John Roberts:

Thanks for your interest in PeopleSoft University! Before we can review your application, we need to receive the following items from you as soon as possible.

If you have any questions about the above items, please feel free to contact the Admissions Office at 888-555-1212. We look forward to reading your completed application!

Sincerely,

Barbara Smith
Admissions Office

cc Joanne Beatrice Allen
cc Julianne Binoche
cc Ralph E Crowe
cc Ted Han

Example of the CCLTRREC.doc letter that is created for recipients set on the Communication Recipient page

Creating Joint Communications Relationships

Access the Joint Communication Management page (click the Joint Communication Management button on the Relationships page).

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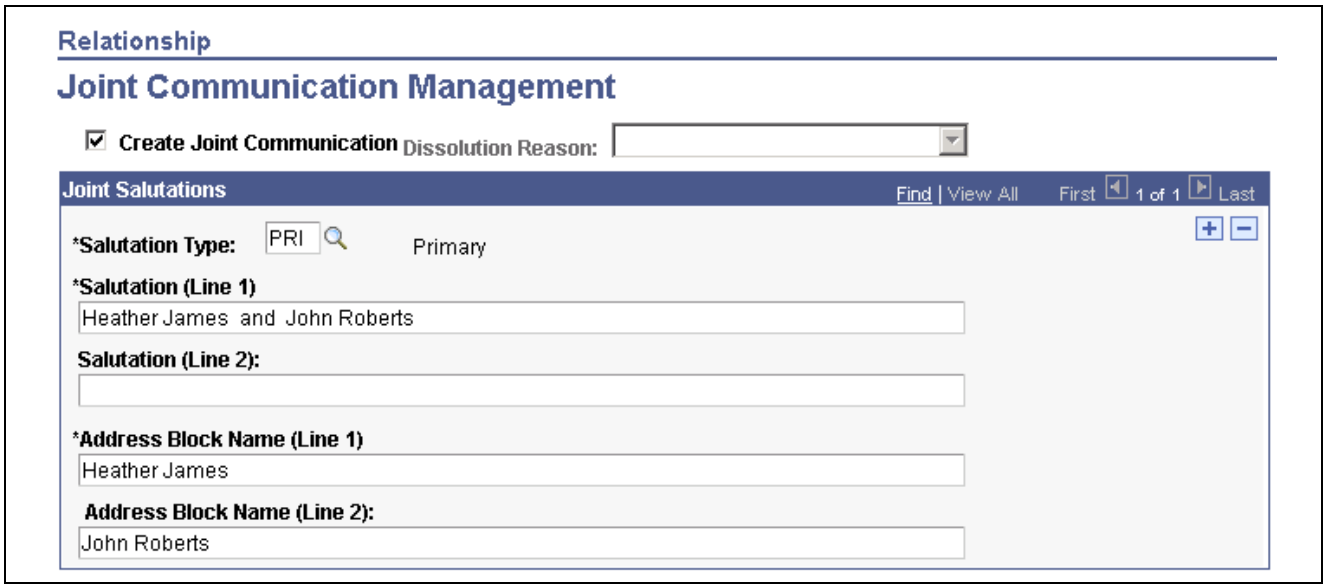

Joint Communication Management page

Create Joint Communication

Select to address joint communications to both the primary and related individuals, using the salutation that you specify on this page.

Dissolution Reason

When you clear the Create Joint Communication check box, or when you inactivate the relationship to stop joint communications for these two individuals, the Dissolution Reason field becomes available, enabling you to enter the reason for dissolving the joint communications. Values include:

Deceased Partner

Divorce

Per Request

Values for this field are delivered with your system as translate values. You can modify these translate values.

Joint Salutations

Salutation Type

Specify the type of salutation, from the Joint Salutation Type Table page, to use for joint communications to these IDs.

When you enter a salutation type, the system displays the individual's 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.

Note. When you select the Create Joint Communication check box, the system displays the default salutation type from the Installation Default – CC page, if you entered one. You can add salutation types, but do not delete the one that you defined as the default value. Use the default value as the lowest level joint usage on the Name Usage page so that when you run the letter generation process, it does not fail due to a lack of salutation type.

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Salutation (Line 1), Salutation (Line 2)	The system displays the names of the two individuals as they will appear in the greeting of the letter according to the default salutation format for the salutation type defined on the Joint Salutation Type Table page. Example values include: *Mr. and Mrs. Smith* or, using two lines: *John Smith* *Mary Fletcher*
Address Block Name (Line 1) Address Block Name (Line 2)	The system displays the names of the two individuals as they will appear in the address of the letter (and envelope or label if applicable) according to the default address block format for the salutation type defined on the Joint Salutation Type Table page. Example values include: *Mr. and Mrs. Smith* or, using two lines: *John Smith* *Mary Fletcher*

Entering Relationship Addresses

Access the Relationship Address page (Campus Community, Personal Information, Biographical, Relationships, Relationship Address).

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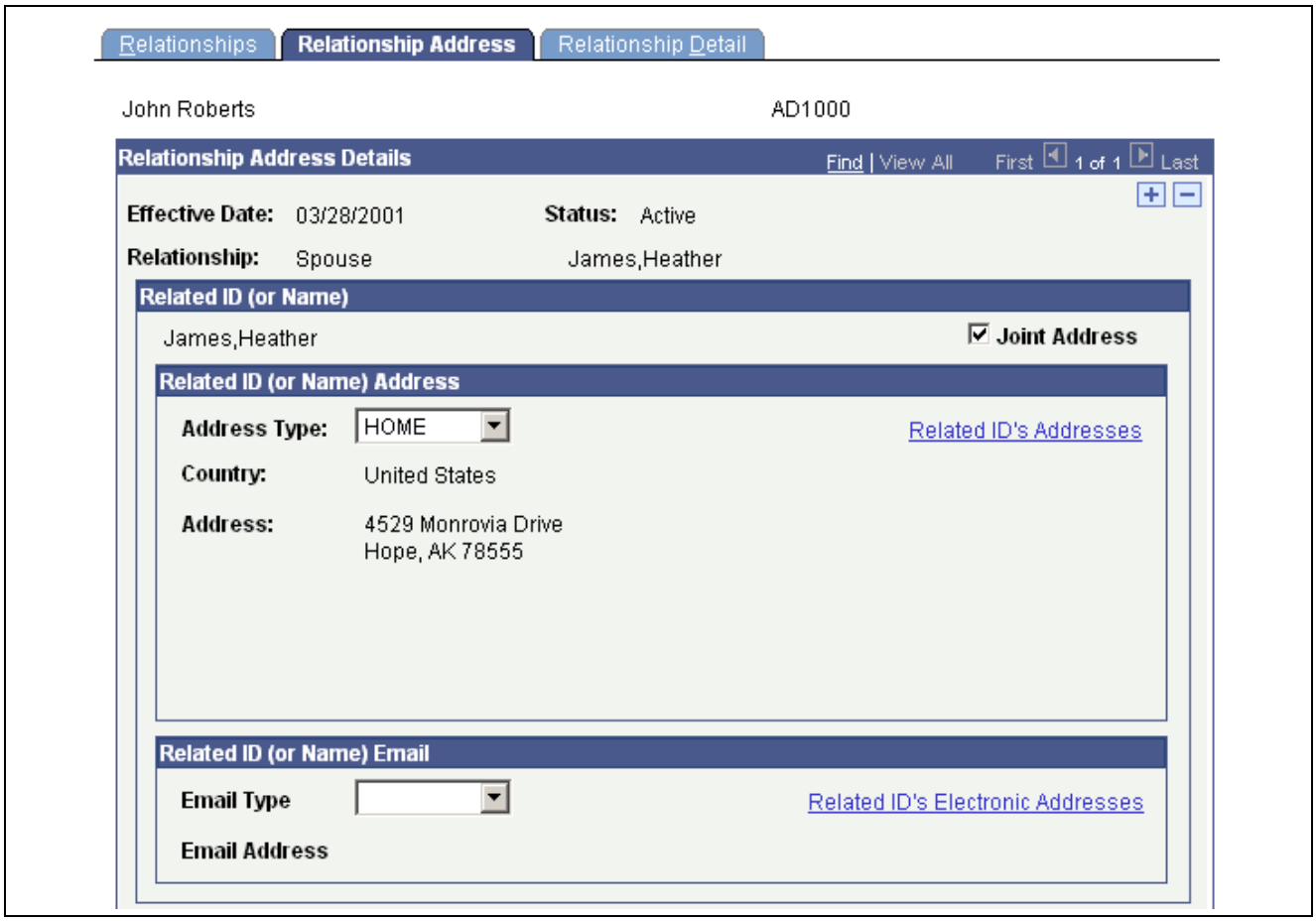
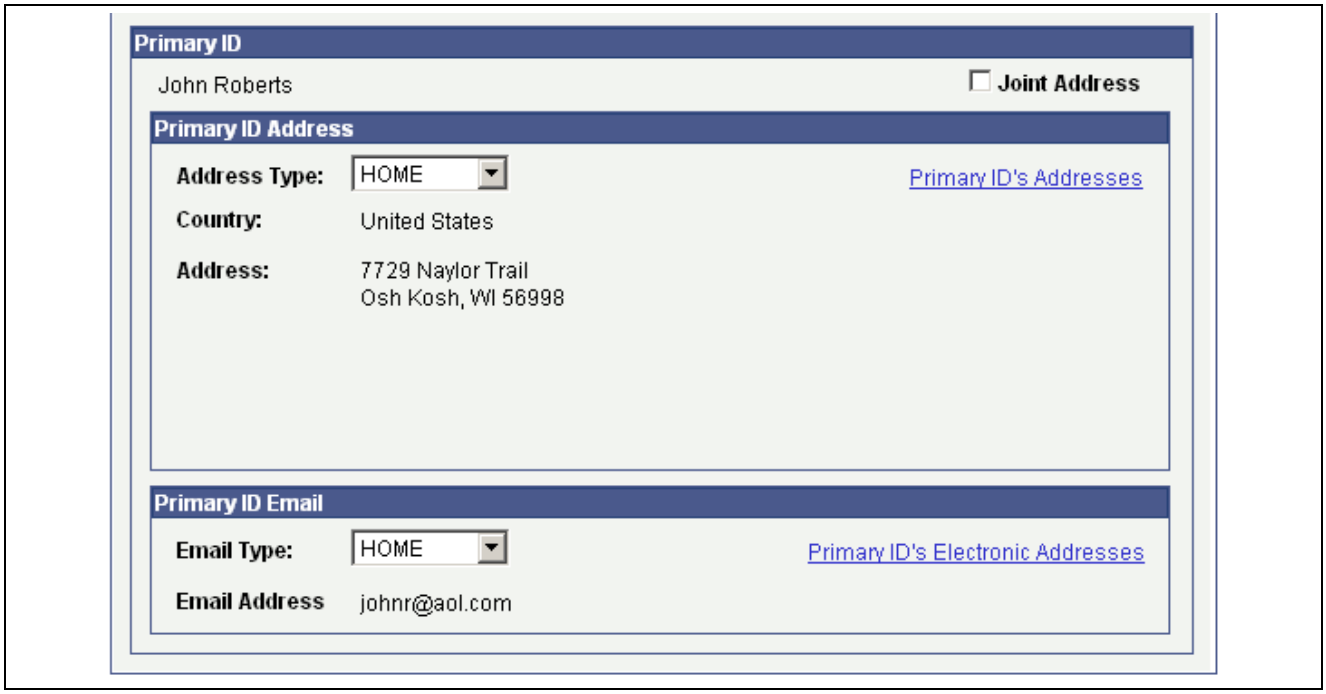


Relationship Address page (1 of 2)



Relationship Address page (2 of 2)

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Related ID (or Name)

Joint Address

Select to send joint communications for these two individuals to this address.

If the related person does not have an ID in your database, this check box is unavailable. For the system to generate a joint communication, the address must be associated with an ID in your system.

For joint communications, you must select either the related individual's address or the primary individual's address as the joint address to use. You cannot select both.

Related ID (or Name) Address

Address Type

Select the address type to use for the related individual in association with this relationship.

If the related person does not have an ID in your database, the Edit Address link becomes available. Click the link to enter the related person's address data.

If the individual has an ID in your database, the system automatically displays the address data for the address type that you select. Only address types that contain data are available.

If you do not select an address type, the default value is the address type selected in the Address For Related ID field on the Installation Default - CC page.

Related ID's Addresses

If the related person has an ID in your database, you can click this link to access the Addresses page where you can view or update the related person's address data.

If the related person does not have an ID in your database, this link is not available.

Related ID (or Name) Email

Email Type

Select the related individual's email address type to associate with this relationship.

Email Address

Enter the related individual's email address.

If the related person has an ID in your database, the email address for the specified email type appears.

If the related person does not have an ID in your database, the field is not available.

Related ID's Electronic Addresses

If the related person has an ID in your database, click this link to access the Electronic Addresses page where you can view or update the related person's email address data.

If the related person does not have an ID in your database, this link is not available.

Primary ID

Joint Address

Select to send joint communications for this relationship to this address.

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For joint communications, you must select either the related individual's address or the primary individual's address as the joint address to use. You cannot select both.

Primary ID Address

Address Type

Select the primary individual's address type to associate with this relationship.

Because the primary individual has an ID in your database, the system automatically displays the address data for the address type that you select. Only address types that contain data are available.

If you do not select an address type, the default value is the address type selected in the Address For Primary ID field on the Installation Default - CC page.

Joint Address

Select to send joint communications for these two individuals to this address.

If you are creating joint communications for this relationship, you can select either the related individual's address or the primary individual's address as the joint address, but you *must* select one of them. You cannot select both.

Primary ID's Addresses

Click this link to access the Addresses page, on which you can edit or update the primary person's address data.

Primary ID Email

Email Type

Select the primary individual's email address type to associate with this relationship.

Email Address

Displays the email address for the email type selected.

Primary ID's Electronic Addresses

Click this link to access the Electronic Addresses page, on which you can view or update the primary person's email address data.

Note. The email addresses that you enter on the Relationship Addresses page are used by the Communication Generation process to send emails to the communication recipients. When no email address is entered, intended recipients will not receive a copy of the communication.

See lscc, Managing Biographical Information, Managing Relationships Data, Entering Relationship Addresses.

Entering Relationship Detail Data

Access the Relationship Detail page (Campus Community, Personal Information, Biographical, Relationships, Relationship Detail).

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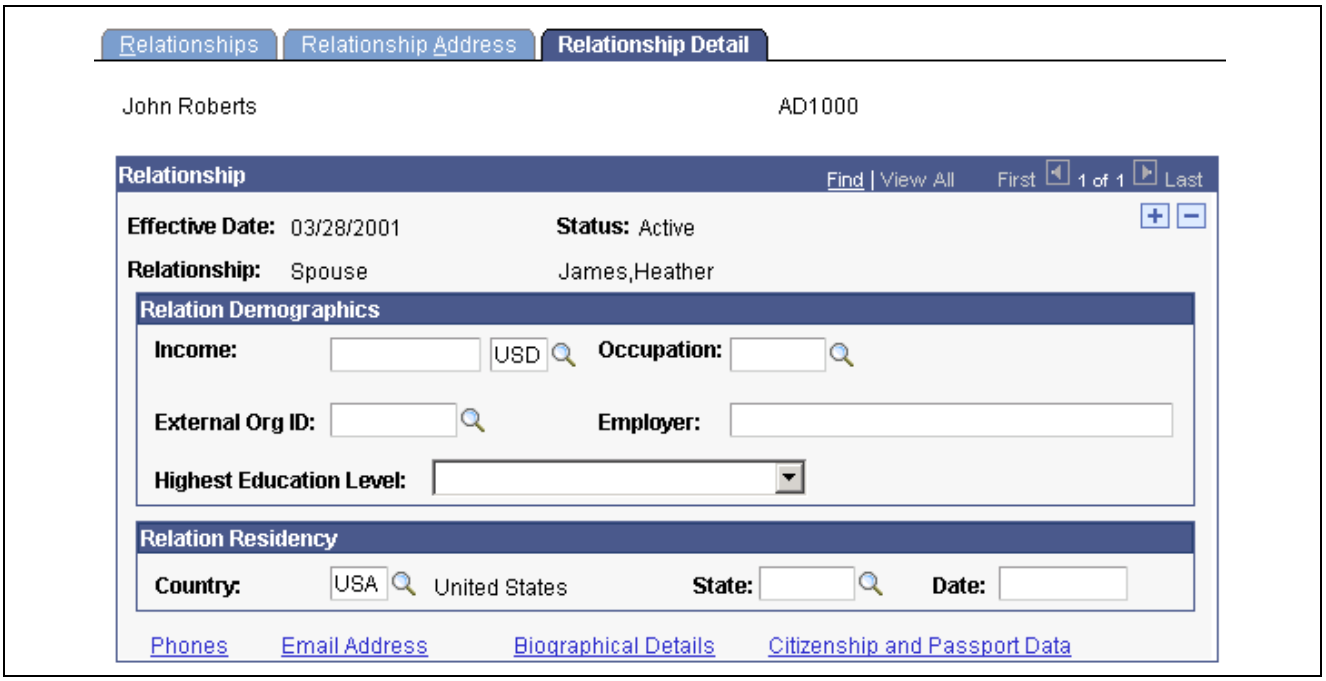

Relationship Detail page

Relation Demographics

For related individuals with or without an ID in your database, enter data in the fields in this area. For a related individual with an ID in your database, you can click the Biographical Details link at the bottom of the page, to review additional information.

Income

Enter the amount of the related individual's income and the currency in which it is expressed. The amount is usually expressed annually, but it can be expressed hourly or monthly.

Occupation

Enter the related individual's occupation, from the Standard Occupation Classification Code page.

External Org ID

If the related person is associated with or employed by an organization that is in your database, identify that organization here.

Employer

The system automatically displays the name of the related person's employer if you selected an employer ID. If the employer does not have an organization ID in your database, you can manually enter the employer's name here.

Highest Education Level

Specify the highest level of education that the related person has achieved.

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.

Relation Residency

Country, State, and **Date**

For related individuals with or without an ID in your database, you must enter the related individual's country, state and date of residency information.

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Daytime Telephone

When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's daytime, evening, and fax telephone numbers.

Email ID

When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's email ID and URL.

Country of Citizenship

When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's country of citizenship and citizenship status based on the Citizen Status Table page.

Links

Phones	Click this link to access the Phone Numbers page, on which you can review or change telephone numbers for the related ID. For a related individual with no ID in your database, manually enter the individual's phone data in the Daytime Telephone section.
Email Address	Click this link to access the Electronic Addresses page, on which you can review or change URLs and email addresses for the related ID. For a related individual with no ID in your database, manually enter the individual's email data in the Email ID section.
Biographical Details	If this related individual has an ID in your database, click this link to access the Biographical Details page, on which you can review or change additional basic data for the related ID.
Citizenship and Passport Date	Click this link to access the Citizenship/Passport page, on which you can review or change additional citizenship and passport data for the related ID. For related individuals without an ID in your database, you must manually enter the related individual's Citizen Country and Citizenship Status.

Viewing a List of Relationships

Access the Person-to-Person Summary page (Campus Community, Personal Information, Biographical, Relationships, Person to Person - Summary) to view a list of an individual's relationships.

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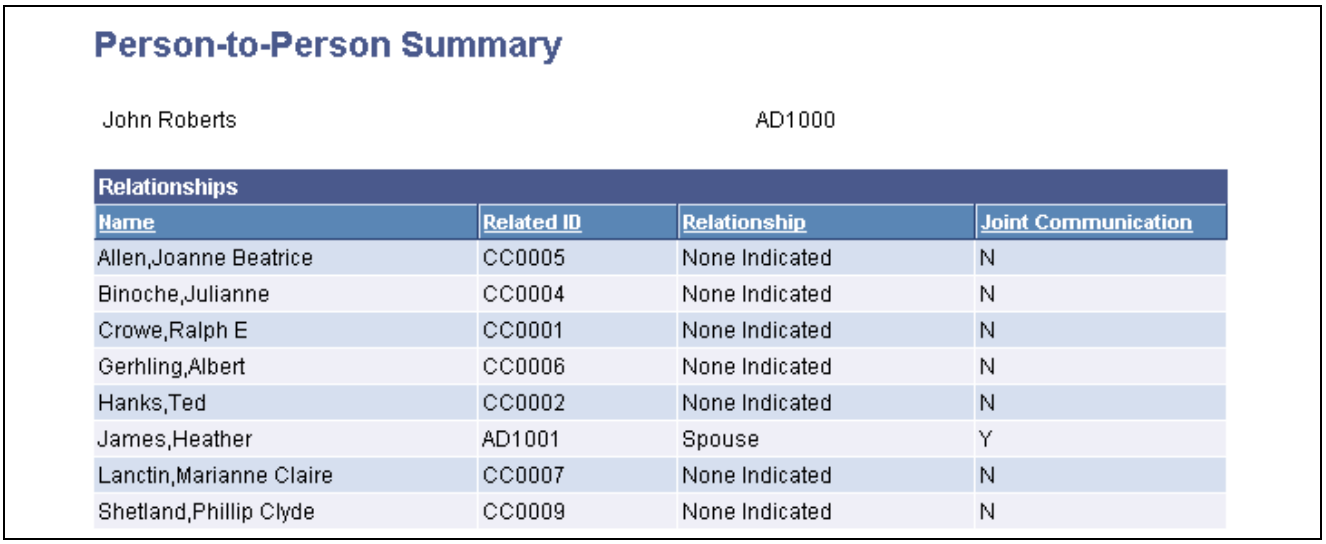


Person-to-Person Summary

John Roberts AD1000

Relationships

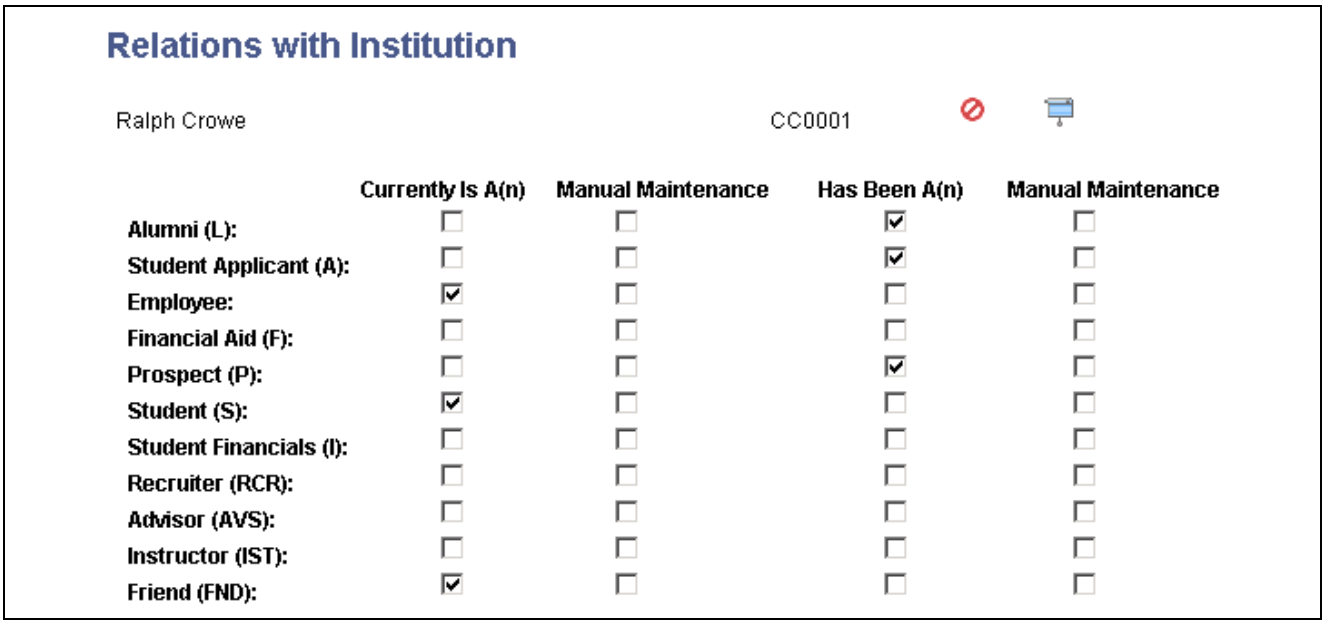
Name	Related ID	Relationship	Joint Communication
Allen,Joanne Beatrice	CC0005	None Indicated	N
Binoche,Julianne	CC0004	None Indicated	N
Crowe,Ralph E	CC0001	None Indicated	N
Gerhling,Albert	CC0006	None Indicated	N
Hanks,Ted	CC0002	None Indicated	N
James,Heather	AD1001	Spouse	Y
Lanctin,Marianne Claire	CC0007	None Indicated	N
Shetland,Phillip Clyde	CC0009	None Indicated	N

Person-to-Person Summary page

The Person-to-Person Summary page is for viewing only. You cannot enter or edit data here. Data that appears here is entered on pages in the Relationships component.

Identifying an Individual's Relationship with the Institution

Access the Relations with Institution page (Campus Community, Personal Information, Biographical, Relationships, Relations with Institution).



Relations with Institution

Ralph Crowe CC0001

	Currently Is A(n)	Manual Maintenance	Has Been A(n)	Manual Maintenance
Alumni (L):	☐	☐	☑	☐
Student Applicant (A):	☐	☐	☑	☐
Employee:	☑	☐	☐	☐
Financial Aid (F):	☐	☐	☐	☐
Prospect (P):	☐	☐	☑	☐
Student (S):	☑	☐	☐	☐
Student Financials (I):	☐	☐	☐	☐
Recruiter (RCR):	☐	☐	☐	☐
Advisor (AVS):	☐	☐	☐	☐
Instructor (IST):	☐	☐	☐	☐
Friend (FND):	☑	☐	☐	☐

Relations with Institution page

Note. PeopleSoft Contributor Relations Solutions uses the abbreviations on this page in the contributor relations search.

See lscc, Searching for Records and Using Search, Match.

Currently Is A(n) Select to indicate that the individual is currently related in this way to your institution.

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Has Been A(n) Select to indicate that the individual has previously been related in this way to your institution.

Manual Maintenance Select to indicate that this relationship (current or past as appropriate) should be maintained manually and not used or changed by mass change or any other automatic process.

Entering Emergency Contact Data

This section discusses how to

- Enter emergency contact data.
- Enter additional phone numbers for the emergency contact.

Pages Used to Enter Emergency Contact Data

Page Name	Definition Name	Navigation	Usage
Emergency Contact Information	SCC_EMERG_CNTCT1	Campus Community, Personal Information, Biographical, Emergency Contacts	Enter an individual's emergency contact data, including the contact's name, addresses, and primary phone number.
Emergency Contact Other Phones	SCC_EMERG_CNTCT2	Campus Community, Personal Information, Biographical, Emergency Contacts, Emergency Contact Other Phones	Enter additional telephone numbers for an emergency contact.

Entering Emergency Contact Data

Access the Emergency Contact Information page (Campus Community, Personal Information, Biographical, Emergency Contacts).

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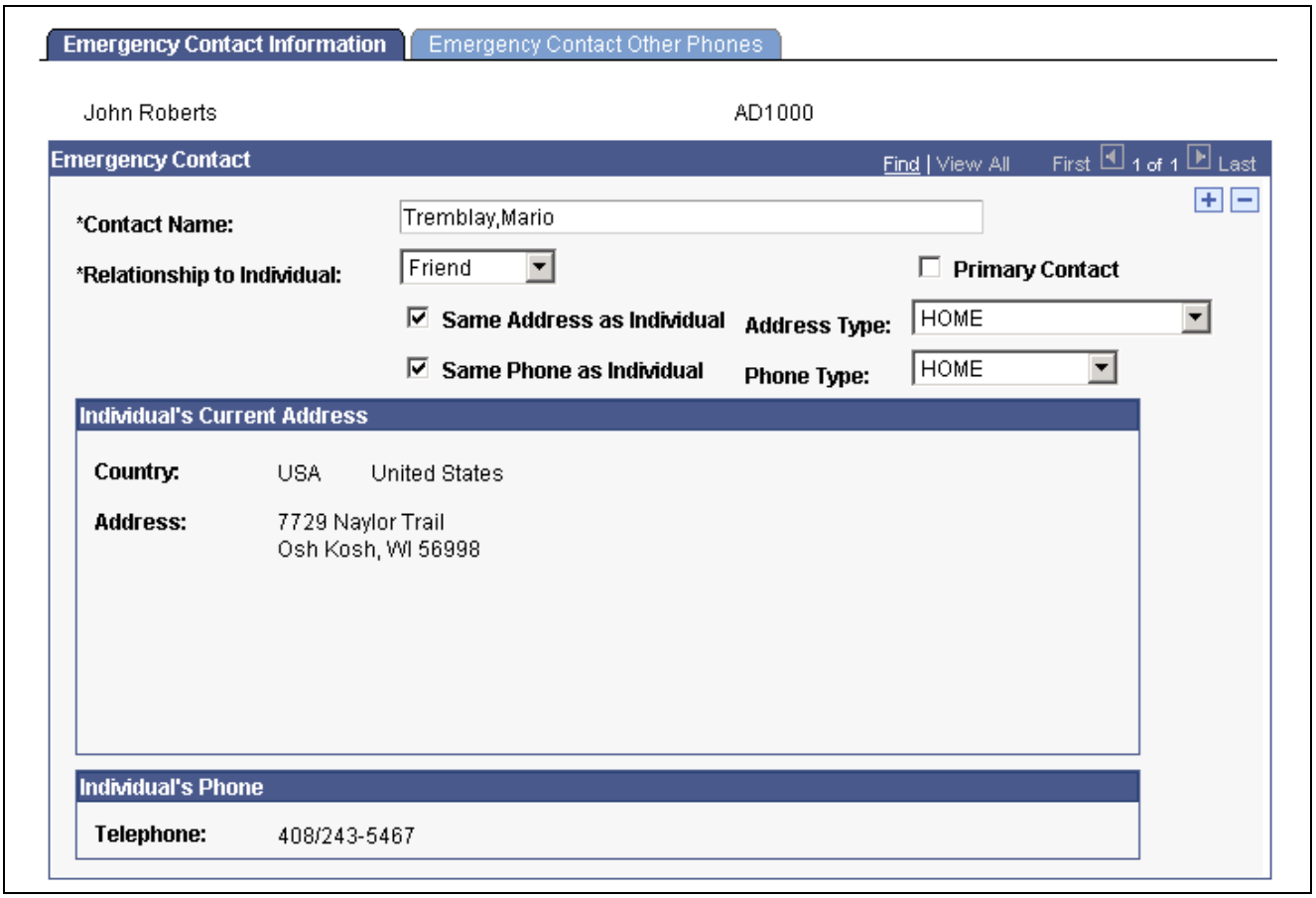

Emergency Contact Information page

Emergency Contact

Contact Name

Enter the name of the emergency contact for this individual.

Relationship to Individual

Select the option that indicates the contact's relationship to the individual at your institution.

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.

Primary Contact

Select to indicate that this is the first person to contact in an emergency. You can enter only one primary contact for an individual.

Same Address as Individual and **Address Type**

Select to indicate that the contact has the same address information as the individual in your database, and then select that individual's address type that is the same as this contact's address type. If it is selected, you do not need to complete any of the address fields. The system displays the correct address data.

Note. If Same Address as Individual is not selected, the address area of the page is titled *Contact Address.* When Same Address as Individualis selected, the title becomes *Individual's Current Address.*

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Same Phone as Individual and **Phone Type**

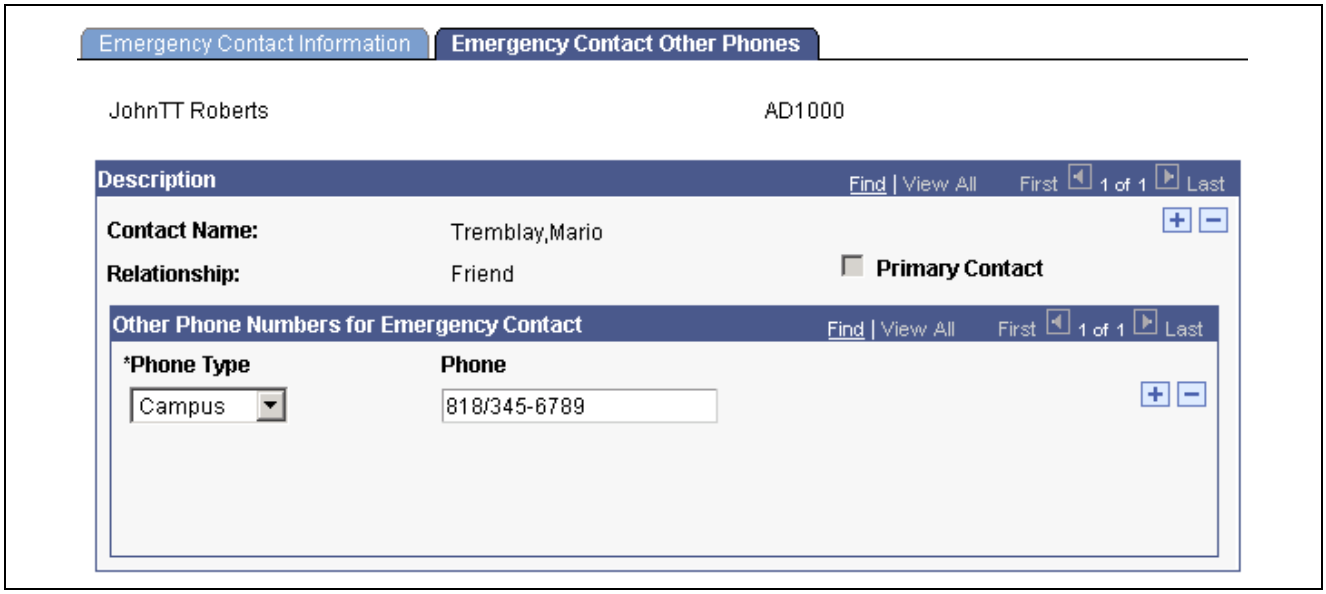
Select to indicate that the contact has the same phone information as the individual in your database, and then select that individual's phone type that is the same as this contact's phone type. If it is selected, you do not need to complete any of the phone fields. The system displays the correct phone data.

An emergency contact can have the same address as the primary individual, but have a different phone number.

Note. If Same Phone as Individual is not selected, the phone area of the page is titled *Contact Phone.* When Same Phone as Individualis selected, the title becomes *Individual's Phone.*

Entering Additional Phone Numbers for the Emergency Contact

Access the Emergency Contact Other Phones page (Campus Community, Personal Information, Biographical, Emergency Contacts, Emergency Contact Other Phones).



Emergency Contact Other Phones page

Other Phone Numbers for Emergency Contact

Phone Type Select the phone type that describes the additional phone number for this emergency contact.

Phone Enter the additional phone number for this emergency contact.

Tracking Work Experience

This section discusses how to enter work experience data.

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Pages Used to Track Work Experience

Page Name	Definition Name	Navigation	Usage
Work Experience	PRIOR_WORK_EXP_SA	• Campus Community, Personal Information, Biographical, Work Experience • Student Admissions, Application Entry, Relationships, Work Experience • Student Recruiting, Maintain Prospects, Relationships, Work Experience • Contributor Relations, Constituent Information, People, Relationships, Work Experience • Student Recruiting, Student Recruiters, Participation and Achievements, Work Experience	Enter data to track an individual's work experience.

Entering Work Experience Data

Access the Work Experience page (Student Recruiting, Student Recruiters, Participation and Achievements, Work Experience).

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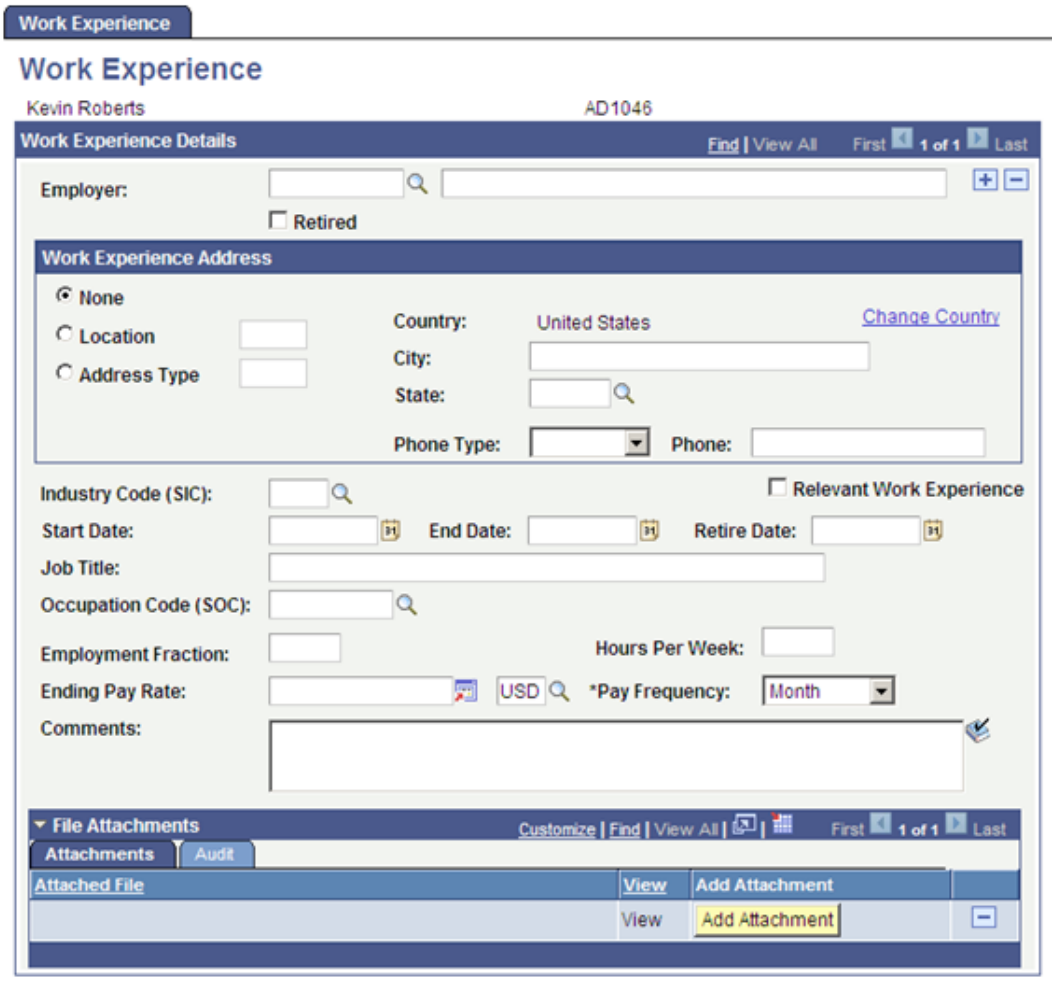

Work Experience page

Work Experience Details

Employer	If the employer is an organization in your database, enter the organization's ID. The system displays the organization name and address. If the employer is not an organization in your database, enter the employer's name and address.
Relevant Work Experience	Select to indicate that the former position is relevant to a current position within your institution or to the career that the individual is seeking.
Retired and **Retire Date**	If the person retired from this employer, select this check box and enter the date on which the individual retired.
Industry Code (SIC) (industry code [Standard Industrial Classification])	Enter the SIC for this position.
Start Date and **End Date**	Enter the dates on which the individual began and ended employment with this employer.
Job Title	Enter the title of the last position that the individual held with this employer.

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Occupation Code (SOC) (occupation code [Standard Occupation Classification])	Select the SOC codes for this position.
Employment Fraction	The fractional amount of full time employment.
Hours Per Week	Enter the number of hours per week that the employee is scheduled to work. Hours per week are particularly important for the recording of the current work commitments in terms of potential impact on study.
Ending Pay Rate	Enter the pay rate and currency at which the individual ended employment.
Pay Frequency	Select the frequency that describes the ending pay rate. The default value is *Month*.
Comments	Enter comments to further describe this work experience.

Attachments

Add Attachment	Click this button to add a file attachment to the page.

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