

Adding (or modifying) a Prospect Record

Prospect Biographical Details

Description

This script will describe how to use the Biographical Details pages within the Prospect Data component to add a new prospect or to modify biographical data for an existing prospect. **You will, of course, have already determined through Search/Match (see process document CC 000 Search/Match) that the person is not already on the database.**

In our data conversion from ISIS we occasionally saw organizations entered as persons. Don't do this. There is another way to enter external organizations (see process document AR 035)

To ADD a prospect, begin with **Step 1**. This implies the person was not found using Search/Match. To MODIFY a person's record, skip to **Step 5**. This implies a correct match was returned using Search/Match and you are modifying an existing person's record. (See Appendix A for a diagram)

This document describes the first two pages of the Create/Update Prospects component. Since there is background processing involved with data on other pages, for new prospect DO NOT HIT

 **UNITL ALL PAGES ARE COMPLETED!**

Process Steps

Navigation: Student Recruiting > Maintain Prospects > Create/Update Prospects

Step 1: The Prospect Data Search Page

After performing the above navigation, you will be presented with the Prospect Data search page. This page is used to both find existing values and add new values. Having identified that the person you wish to enter does not exist, you must add the person to the database. Do not use this search page to determine if they exist because this search is not as comprehensive as Search/Match (see CC 000). The Prospect Data page is accessible after you click the [Add a New Value](#) link.

Your operator-assigned default values for Institution and Career will appear in the respective text boxes.

Step 3: The Biographical Details Page

After clicking **Add**, the following page will appear:

Notice that an EMPLID has not yet been assigned; it will be assigned when you save.

NEW

Person Information

Effective Date: 12/28/2005 BT

*Format Using: English [Change Format](#)

Prefix:

First Name: William Middle Name: Thomas

Last Name: Riker

Suffix:

Date of Birth: 08/19/1985 BT [Birth Information](#) Campus ID:

Biographical History

Find | View All First 1 of 1 Last

*Effective Date: 12/28/2005 BT + -

*Marital Status: Single As of: BT

*Gender: Male

National ID

Customize | Find First 1 of 1 Last

*Country	*National ID Type	National ID	Primary	
USA	Social Security Number	<input type="text"/>	✓	-

Add

Contact Information

Addresses

Find | View All First 1 of 1 Last

*Address Type: Home

Effective Date: 12/28/2005 BT + -

*Status: Active

Country: USA

Address: [Edit Address](#)

Phone

*Type	Phone	Ext	Country	Preferred	
Home	231-547-2335		usa	✓	-

Add

Email

*Type	*Email Address	Preferred	
Home	willriker@starfleet.gov	✓	-

Add

[Visa/Permit Data](#) [Citizenship](#)

This page is referred to as the **Biographical Details** page. From it you will link to other pages where you will enter other information about the prospect.

3.1 Person Information

3.1.1 On this page, the first field you encounter is **Effective Date**. It will default to today's date. There may be rare exceptions when you will need to backdate, but this should be done sparingly and only by someone who fully understands the consequences of that action since effective dating is such a powerful tool in PeopleSoft.

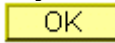
3.1.2 Name

Effective Date: July 31, 2006
Updated: 01/30/2006

The name displayed on this page is the "Primary Name." In most cases it will be the person's legal name, full name, or formal name. Note: Other names can be managed by clicking on the [Names](#) link (described in the *CC002 Names* process document), but you can't go there until you have saved this component...so finish as much of this information as you are able before creating the other names. For new prospects, certain pieces of information are required on the Prospect Career Data and Prospect Program Data pages before you can do a save.

Important Procedural Note: Primary name, displayed throughout the PeopleSoft system and maintained here, is shared with the HR pages and a few parts of Finance database. When primary name is changed by a student office, that office must determine if the student is an employee, and if so, a copy of the new Social Security card (the only acceptable proof) must be sent to the campus HR/Payroll office.

- 3.1.2.1 The **Format Using** field asks for a Country Code to be selected from the lookup list. It defaults to USA, but other country formats are also available and are particularly useful for names of Hispanic or non-western origin. Confirm USA, or enter another country code whose name format should be used for this individual. Entering another country will change the layout of the name fields slightly, but the USA instructions below should still guide you.
- 3.1.2.2 The **Prefix** field is optional. Values are limited to those in the drop-down menu and have been created to reflect both traditional American prefixes as well as those of our significant French-speaking population. Select the title that should precede this individual's name.
- 3.1.2.3 **First Name, Middle and Last Name** are to be entered as completely as they are available. Complete names aid in effective search/match checking and prevent duplicate records. Upper and lower case should be used and middle names should be spelled out if known. If only the middle initial is available, enter it with no period. Enter the name as closely as possible to how the individual provided it regarding capitalization, spacing and punctuation. DO NOT put "Jr," "Sr," etc., in the last name. DO NOT put former or maiden names in parentheses in any part of the name.
- 3.1.2.4 **Suffix** is used primarily to indicate relational position of family members with the same name ("Jr," "Sr," "III" "IV"), but also to allow "Esq" for law school use.
- 3.1.3 **Date of Birth** is entered MMDDYYYY with or without format punctuation. As you tab-out, the field will format and validate the month and date. Birth place information is entered by selecting the [Birth Information](#) link, after which the following Birth Information Detail page will appear:

Enter the **Birth Location** (City) as text, and choose **Birth Country** from the look-up menu (typing USA and CAN will save time here) and then **Birth State**. Click  to return to the Bio Demo Data page.

- 3.1.4 **Campus ID** will not be used by the University of Maine System. However, a field called External System ID (not seen in Search) will be used to store converted "PIDMs," the numbers that relate the record to the ISIS record for conversion and interface purposes.

3.2 Biographical History

This section is effective-dated, for future changes to marital status or gender.

- 3.2.1) **Marital Status** is a required field that will often be “unknown.” There is programming behind this field and changes should be made carefully. “Unknown” is safer than a wrong “married” or “single.” Be sure to put a date in the “As of” date field, if known.
- 3.2.2) **Gender** is required. Make a selection from the drop-down menu.

3.3) National ID

We are finally able to store Social Security numbers without them being ID numbers. This is where SSNs are stored. We are also able to have multiple rows here to store Canadian Social Insurance Numbers (SIN) and other countries’ IDs if needed.

- 3.3.1) **Country** will default to USA and **NID Type** will default to Social Security Number. The **Primary** checkbox is also defaulted to “checked.” Additional rows can be added for other countries. A typical example of an added row would be for our Canadian students for whom we need Social Insurance Numbers to report to their financial aid agencies. Foreign (including Canadian) students often have USA SSNs for work or identification purposes, and that information should be entered here when it is available.

Confirm USA or enter the country of this individual’s national ID. Add additional rows for individuals with multiple National IDs.

- 3.3.2) Fill in the SSN next to **National ID**, typing the numbers without spaces and punctuation. What you have entered will be formatted and validated against a set of rules that disallow certain numbers. You can’t enter 111-11-1111, for example. The Canadian SINS have their own validation routine.


3.4 Contact Information

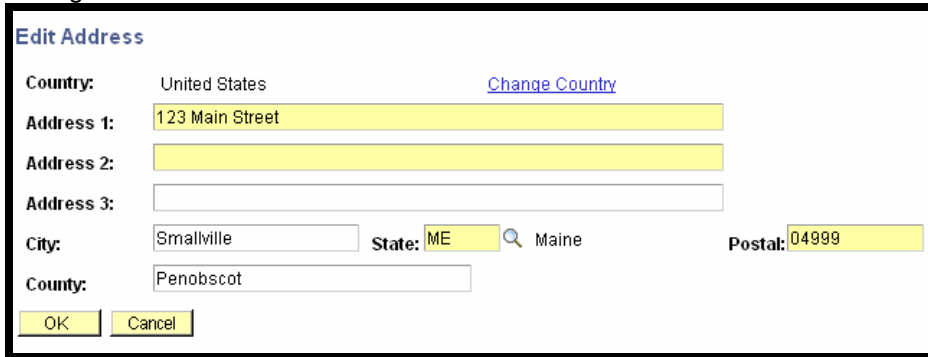
There is quite a bit of information in this section when you consider the pages behind the hyperlinks. Each of the hyperlinked pages has its own process document:

Edit Address	see below
Visa/Permit Data	CC 035
Citizenship	CC 019

- 3.4.1 **Addresses** must be added by clicking on the Edit Address link. Choose the Address Type you wish to add in the Address Type field, confirm the effective date, and click on “Edit Address” to enter an address. Click OK when finished entering the address.

Home	Legal address, prospect address, applied from, primary legal domicile, what’s on the driver’s license
Mailing	Local, temporary, if different from Home
Permanent	Address of origin, first ever reported, populated from Home if blank, never to be changed
Campus	Address physically on the campus, residence hall or office, may be fed from RMS
Billing	Address to which student bills should be sent

- 3.4.2 You can enter an second address by adding a row, , choosing a different address type, and editing the new address.



Edit Address

Country: United States [Change Country](#)

Address 1: 123 Main Street

Address 2:

Address 3:

City: Smallville State: ME Maine Postal: 04999

County: Penobscot

OK Cancel

- 3.4.3 You may continue to [Phones](#) (see process CC 011 Phones) and [Email](#) (see process CC 010 Email addresses) if you need to add phone(s) or email addresses.

- 3.4.4 **Military Status** has delivered values that cannot be modified because there is programming behind them. If appropriate, make a selection from the drop-down menu. This is only for persons who served in the U.S. military.

- 3.4.5 Do not use the **Disabled** checkbox unless further instructions are given to do so. The UMS does not anticipate using it.

3.5 Visa/Permit Data and Citizenship

If you need to add visa or citizenship details for a prospect, follow the links to those pages (see processes CC 035 and CC 019, respectively).

Step 4: The Regional Page


- 4.1 **Ethnic Group and Primary** Select the federally mandated group that includes the individual's ethnic designation; if this is the individual's primary ethnicity, select the Primary check box. You can insert more than one row here if the person reports more than one ethnic group. Follow the Ethnicity Detail link to record the percentage of ethnicity if desired.
- 4.2 **Military Status** Select the value that describes this person's current military status.
- 4.3 **Disabled** Do not use this box. The Ums is not currently planning to track disabilities using this function.
- 4.4 **Disabled Veteran** Select this check box to indicate that the individual is a veteran who was disabled in the line of duty and might be entitled to certain U.S. Veteran's benefits as well as being covered by the ADA.
- 4.5 **VA Benefit(Veterans Administration benefit)** Select this check box to indicate that the individual currently receives veteran benefits from your institution.


The U.S. Veterans Administration requires a hardcopy report of individuals who receive veterans benefits from your institution. When the VA Benefit check box is selected, the system includes this individual when that report is run.

Step 5: Modifying Bio Demo Data for an Existing Person

- 5.1 **Find an Existing Value** – If you were diligent with the Search/Match process to locate this person, you would have clicked Carry ID **Carry ID** and the EMPLID will automatically fill in on the search page pictured below. Verify that the Academic Career is the one you want, and click **Search**.

- 5.2 If you clicked Search, and you get the message “No matching values were found,” it means that the person’s Bio/Demo Data is in the system, but **he/she is not a prospect for this Academic Institution or Career!** To create the prospect record, click the [Add a New Value](#) link. The following page, now with the person’s EMPLID, will appear.

Click the Add  button and the existing Bio/Demo Data and Address pages will be displayed and become available for modification. The Prospect Career Data and Prospect Program Data pages will empty and will need to be completed before you can save the component.

- 5.3 **Biographical Details Page** – Notice that the Biographical History section is effective dated. You must insert a new row if you wish to change data in this section by clicking on the  sign. In the example below, we inserted a row to add a prefix and suffix to the person’s name, change their military status, and change their ethnic group.

- 5.3.1 **National ID – CAUTION!** Although there is an “Add” button to add a National ID, this is only used when a person has a *different* country ID. It cannot be used to add a second National ID for the USA (i.e., SSN). To change a SSN, simply type over the National ID field – it is one of those rare exceptions where you can do this in a field that has a plus or minus button connected to it.

5.4 Biographical Details

There is quite a bit of information in this section when you consider the pages behind the hyperlinks. Each of the hyperlinked pages has its own process document:

Names	CC 002	follow the Names link on the top right of the page
Visa/Permit Data	CC 035	follow the link on the bottom right of the page
Citizenship	CC 019	follow the link on the bottom right of the page
Phone	CC 011	you can edit, add or delete phones on this page
Email Address	CC 010	you can edit, add or delete Email addresses on this page

Important Procedural Note: Primary name, displayed throughout the PeopleSoft system and maintained here, is shared with the HR pages and a few parts of the Finance database. When a student office changes primary name, that office must determine if the student is an employee, and if so, a copy of the new Social Security card (the only acceptable proof) must be sent to the campus HR/Payroll office.

William Riker 0138386 [Names](#)

Person Information

Date of Birth: 08/19/1985 [Birth Information](#) Campus ID:

Biographical History Find | View All First 1 of 1 Last

*Effective Date: 12/28/2005 [+](#) [-](#)

*Marital Status: Single As of: 12/28/2005

*Gender: Male

National ID Customize | Find First 1 of 1 Last

*Country	*National ID Type	National ID	Primary
USA	Social Security Number	999-99-9999	<input checked="" type="checkbox"/>

[Add](#)

Contact Information Find | View All First 1 of 2 Last

Addresses

Address Type: Home [Addresses](#)

Effective Date: 12/29/2005

Status: Active

Country: USA

Address: 350 Narrow Passage Rd
Valdez, AK 90950

Phone

*Type	Phone	Ext	Country	Preferred
Cellular	987/517-1234			<input type="checkbox"/>
Home	231/547-2335			<input checked="" type="checkbox"/>

[Add](#)


Email

*Type	*Email Address	Preferred
Home	deanashubby@myspace.com	<input type="checkbox"/>
Business	willriker@starfleet.gov	<input checked="" type="checkbox"/>

[Add](#)

[Visa/Permit Data](#) [Citizenship](#)

5.5 **Addresses Page** – refer to process document CC 0009.

5.6 Click  **Save** when you have finished making changes to this page. (Save is for modifications only.)

Prospect Career Data

Description

Multiple prospect records can be created for a prospect by adding another prospect record for each academic institution or career. The first two pages in the Prospect Data component, the Prospect Biographical Details and Regional pages, are the same for each academic institution because the data on those pages is shared. The data on the remaining three pages in the Prospect Data component is unique to each academic institution or career. Prospects must be tracked at the academic institution and career level, but may also be tracked at the program and plan level.

Process Steps

















Navigation: Student Recruiting > Maintain Prospects > Create/Update Prospects

Prospect Career Data page

Step 6: Prospect Career Data


After finding the prospect record, select the Prospect Career Data page:


6.1 Prospect Career Data

Biographical Details	Addresses	Regional	Prospect Career Data	Prospect Program Data	Prosp
William Riker		0138386			
Academic Career: Undergraduate		Institution: UMS05		  	
Admit Term:	0710 	2006 Fall	<input type="checkbox"/> Applied		
Admit Type:	FYR 	First-Year Student			
Campus:	UM 	University of Maine			
Academic Load:	Full-Time 				
Academic Level:	First Year 				
Housing:	On Campus 				
<input checked="" type="checkbox"/> Financial Aid Interest					
Recruiting Information					
*Recruiting Status:	Inquiry 	Referral Source:	NEUS 	NE-USM	
Status Date:	12/28/2005 	Source Date:	09/22/2005 		
Created On:	12/28/2005 	*Recruiting Center:	UGRD 	UMUgradRC	
Transfer To:	Education 	Go			

- 6.1.1 **Admit Term** is the academic term in which the prospect has expressed an interest, or is assumed to be interested. Select a valid term from the drop-down list or enter the code. The first two digits represent the academic year (05 = 09/2004-8/2005); the last two digits represent the term/semester (10 = Fall, 20 = Spring, 30 = Summer).
- 6.1.2 The **Applied** check box is automatically updated when an application is recorded for the prospect.
- 6.1.3 Select **Admit Type, Campus, Acad Load, and Acad Level** from the lookup and drop-down lists.
- 6.1.4 Select a **Housing** preference and check the **Financial Aid Interest** checkbox to inform Housing and Financial Aid staff.
- 6.1.5 Choose the appropriate **Recruiting Status** from the drop-down list and **Referral Source** from the lookup list. Recruiting Status values:

Search	The Recruiting Center has initiated contact; no response yet from student.
Inquiry	Individual has contacted the Recruiting Center, either in response to a communication, or self-initiated
Applicant	Application received, automatically updated
FastTrack	Currently just for UMA, for walk-ins
Inactive	No longer an interested prospect or applicant

- 6.1.6 The **Status Dt, Source Dt** and **Created On** will default to today's date, but may be modified.
- 6.1.7 The **Recruiting Center** is required. The Recruiting Center is keyed to the institution and career, and only those for which you have security access will displayed if you lookup, , a recruiting center:

- 6.1.8 If modifying an existing prospect record click  now. Otherwise, if creating a prospect record, continue until all prospect information is entered (to avoid triggering a 3C event with incomplete information).
- 6.1.9 The **Transfer To** box allows you to navigate quickly to another page, but most likely you want to just tab to the next page here, to [Prospect Program Data](#)...

Prospect Program Data

Description

While you are required to enter prospect career data, you are not required to enter prospect program data because you might not have that information at this stage. Tracking prospects by programs under a career, by academic plans under programs, and by sub-plans under academic plans are possible on this page.

Process Steps

Navigation:

Student Recruiting > Maintain Prospects > Create/Update Prospects

Prospect Program Data page

Step 7: Prospect Program Data

After finding the prospect record, select the **Prospect Program Data** page.

7.1 Prospect Program Data

Biographical Details | Addresses | Regional | Prospect Career Data | **Prospect Program Data** | Prospect Scho

William Riker 0138386
Academic Career: Undergraduate **Institution:** UMS05

Program Data Find | View All First 1 of 1 Last

***Academic Program:** EGR College of Engineering
Campus: UM University of Maine

Program Recruiting Information

***Recruiting Status:** Inquiry **Application Number:**
Status Date: 12/29/2005 ***Recruiting Center:** UGRD UMUgradRC

Plan Data Find | View All First 1 of 1 Last

***Academic Plan:** CEN-BS Computer Engineering Major BS

Sub-Plan Data Find | View All First 1 of 1 Last



***Sub-Plan:**

Transfer To: Education Go

- 7.1.1 Select the **Academic Program** in which the prospect has expressed an interest. Add additional rows if there is more than one interest.

- 7.1.2 **Campus** and **Program Recruiting Information** will fill in from the **Prospect Career Data** page, but may be edited if different. If the student is interested in multiple programs, the **Recruiting Status** for each program could very well be different from each other and from the career. **Recruiting Status** values are:

Search	The Recruiting Center has initiated contact; no response yet from student.
Inquiry	Individual has contacted the Recruiting Center, either in response to a communication, or self-initiated
Applicant	Application received, automatically updated
FastTrack	Currently just for UMA, for walk-ins
Inactive	No longer an interested prospect or applicant

- 7.1.3 When the prospect applies to this academic program, the system automatically updates the **Application Nbr.** Do not enter anything here.
- 7.1.4 If the prospect has indicated an interest that can be matched with what is traditionally recognized as a major or minor, select the appropriate plan from the look up list by **Acad Plan**. The last group of letters in the code indicates the type of plan--either a degree type or MIN for "minor." This information will appear next to the **Acad Plan** code after you have selected one. If the prospect is interested in more than one plan within the same program (multiple majors, or a major and a minor, for example), add additional rows in the **Plan Data** section by clicking on the . When searching for plans, click the "Academic Plan Type" column heading to sort the list of plans by type.
- 7.1.5 Many Academic Plans have Sub-plans associated with them. These are what we have formerly considered concentrations or specializations, and can only be associated with a specific plan. Use the look up list by **Sub-Plan** to select an area of specialization in which the prospect is interested.
- 7.1.6 If modifying an existing prospect record click  now. Otherwise, **if creating a prospect record, continue until all prospect information is entered (to avoid triggering a 3C event with incomplete information).**

School and Recruiting Data

Description

This script will describe how to enter school and recruitment data pertaining to a prospect. This panel contains the most recent school attended, recruiting region, recruiting categories, and the recruiter assigned to the prospect. Additional external education information is tracked on the Education pages.


Process Steps

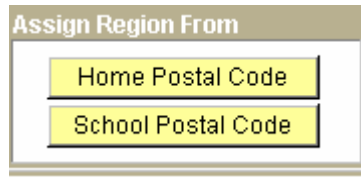
Navigation:


Develop Enrollment > Recruit Prospective Students > Use > Prospect Data >

Prospect School/Recruiting

Step 8: Entering School and Recruiting Data

- 8.1 **School Information** – Enter the Last School Attended and Graduation Date, if known. The school's organization ID can be found by using the Lookup, , function. If the school is not located using the Lookup, it must be added to the Organization file. Contact your university PeopleSoft project coordinator to add this school to the database.
- 8.2 **Recruiting Information** – You can assign a recruiting region based on the home address postal code or the school address postal code. Click on the appropriate button based on your university's procedures. The recruiting region will be auto-filled based on your selection. (not working!)



- 8.3 **Recruiting Categories** – You can enter multiple recruiting categories and prospect supporting information for each career. These values were set up during implementation. The values available can be found by using the Lookup, , function in the **Category** field.




Note: If you plan to assign a regional recruiter to this prospect, you **must** enter a category of *REGN* (region).


Sub-Category - Select a recruiting subcategory, if known. Subcategories can indicate the priority of this recruiting category. The delivered values are (*none*), *High*, *Low*, and *Medium*.

Group - The system automatically populates this field from the Recruiting Category Table page after you enter a recruiting category in the Category field.

Move to Application – this checkbox will default to being checked. This was set up during implementation.

- 8.4 **Recruiters** - Recruiter assignment is tied to recruiting categories. If you entered a recruiting category, the Recruiters group box becomes available. Use this section to assign one or more recruiters pertinent to this category for the prospect. You can add multiple recruiters under all categories entered.

Biographical Details		Addresses		Regional		Prospect Career Data		Prospect Program Data		Prospect School/Recruiting	
William Riker						0138386					
Academic Career: Undergraduate						Institution: UMS05					
Events   											
School Information											
Last School Attended:		0101892		Valdez High School							
Graduation Date:											
School Type:		Secondary		Proprietorship: Unknown							
City:		Valdez		State: AK		Country: USA					
Recruiting Information											
Region:		AK		Alaska		Assign Region From					
From:		Region Tree				Home Postal Code					
Primary Recruiter ID:						School Postal Code					
Recruiting Categories Find View All First 1 of 1 Last											
Category:		HON		Honors		Group: Academic					
Sub-Category:		High				<input checked="" type="checkbox"/> Move to Application					
Description:		NHS in high school									
Recruiters Find View All First 1 of 1 Last											
Recruiters Prompt		Recruiter ID		Recruiter Type		Primary					
<input checked="" type="checkbox"/> Recruiters						<input type="checkbox"/>					

8.5 Click  once you have finished entering your data.

Source Documents

Inquiry Cards, emails, phone calls, or everything listed under referral sources.

Security Roles

Maintained by:
 S_RA_SUPERUSER
 S_RA_LEADERS_RA_RECRUITER
 S_RA_APPLICATION_REVIEWER
 S_RA_DATA_ENTRY
 S_RA_STUDENT_STAFF

Viewable by: All admissions staff including tele-counselors. Athletics, Colleges/Academic departments. There is variation by campuses.

APPROVED by Admissions and Campus Community Team on January, 30 2006

Appendix A

