Biographical Data Maintenance

Relationships

Description

This script will describe how to enter relationships data, and describes how to:

- Relate one individual to another.
- Identify an individual's legacy relationship to institution.
- Enter relationship detail data.
- Enter relationship addresses.

Process Steps

You can access the Relationships page through multiple navigation paths. NOTE: Depending on the path, there may be some additional search criteria. To ADD a new relationship, begin at Step 1. To MODIFY an existing relationship, skip to Step 3.

Student Recruiting > Maintain Prospects > Relationships > Relationships
Student Admissions > Application Entry > Relationships > Relationships
Campus Community > Personal Information (Student) > Biographical (Student) > Relationships > Relationships

Step 1: The Relationships Search Page

1.1.1 **ID:** If you know the student's EMPLID, enter it here. This is the most efficient way to search for a student.

1.1.2 **National ID:** If you know the student's National ID number (Social Security Number for USA, Social Insurance Number for Canada), enter it here.

1.1.3 **Last Name:** You can enter a portion of the last name as search criteria.

1.1.4 **First Name:** You can enter a portion of the first name as search criteria.

1.1.5 Click **Search** to continue or **Clear** to have the system clear all of the text boxes so you can start again.
1.2 If only one relationship exists for this person, you will be immediately directed to the Relationships page. If more than one relationship exists, you will see those relationships in the Search Results. If the relationship you wish to add does not exist, you must Add a New Value.

**Step 2: Adding a New Relationship**

2.1) To add a new relationship, click on Add a New Value.

2.2) Re-enter the person’s ID and click Add.

2.3 Relationships Page

2.3.1) If the related person is in the database, enter the related person’s ID, relationship, status and effective date. You may use the Lookup feature to find the ID of the related individual. See DIAGRAM #4

If the related person is not in the database, the name and biographical data fields are available.
so that you can enter the related person’s name and bio/demo data without an ID. Name should be entered as Lastname, Firstname Middle. See DIAGRAM #5.

2.3.2) The Guardian field is used to indicate the status (Guardian, N/A, Other, Parent) of the related person to the primary individual.

Amy Picard is in the database – her data is visible in Jean-Luc Picard’s record here.
2.3.3) Click on the **Legacy** button to access the Legacy Information page, where you can identify the related person’s legacy relation with your institution, if applicable (alumni/a, donor, trustee).

Click **OK** when finished to return to the Relationships page. See **DIAGRAM #6**

**DIAGRAM #6**

2.4) **Communications Recipients and Joint Communication Management**

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

On the **Joint Communication Management** page, you can create or dissolve joint communications for these two individuals.

**NOTE! We did NOT implement these two features during set-up.**
2.5) **Relationship Address Panel**

2.5.1) Select the related individual’s **Address Type** to associate with this relationship. If the related person does not have an ID, the address fields become available to manually enter the related person’s address data. When the individual has an ID, the system automatically displays the address data for the address type you select. Only those address types that contain data are available.

If the related person has an ID, you may click this link to edit or update the related person’s address data.

2.5.2) You may also choose to associate a certain address for the Primary ID in this relationship. If so, choose the Address Type you wish to associate with the relationship.
2.5.3) Click the Primary ID’s Addresses link if you wish to edit or update the primary person’s address data.

2.6) Relationship Detail Panel

The Relationship Detail panel allows you to track demographic information on the related person. We do not intend to collect income, occupation information or employer ID. However, you may enter the related person’s occupation in free-form, and their highest level of education.

2.6.1) When finished with all three panels, click on to save the new relationship.
Step 3: Modifying an Existing Relationship

3.1) Enter the ID of the person for whom you wish to modify a relationship on the **Relationships search page**, pictured below, and click **Search**.

3.2) Click on the Relationship that you wish to modify for this person.

We wish to make the relationship with his daughter inactive.

3.3) Click on the **+** button in the **Relationship** section to insert a new effective-dated row for this relationship. Make the changes to the relationship as needed, including the effective date, and other criteria as necessary. You may also make a **Comment** on the field if desired. In the **Comment** field add your initials, your career code and the date since these comments are not career-specific.
3.4) When finished with all changes, click **Save** to save the modified relationship.

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**Source Documents**

Admissions Application, Financial Aid, Contributor Relations, HR, Employee Tuition Waiver form

**Security (functional) Roles**

Maintained by:
- S_RA_SUPERUSER
- S_RA_RECRUITER
- S_RA_DATA_ENTRY
- S_RA_LEADER
- S_RA_APPLICATION_REVIEWER
- S_RA_QUICK_ADMIT

Registrars, registrar staff, registration staff.
Financial Aid Staff
Contributor Relations

Viewable by everyone

APPROVED and TESTED by Admissions and Campus Community Team on January 10, 2006