Recording Data about Relatives, Spouses, etc. of a Student or Applicant

Description
This Guide demonstrates how to record and update information about a student’s (or applicant’s) relationships with other people. These other people could be in the Campus Community, or be external to the System. Adding a relationship does not automatically enter the person into Campus Community; it simply permits a record of contact information and the type of relationship with the student.

For more detailed coverage of this subject, see the Business Process: CC005 Relationships.

Navigation
Student Recruiting > Maintain Prospects > Relationships > Relationships
or
Student Admissions > Application Entry > Relationships > Relationships
or
Campus Community > Personal Information (Student) > Biographical (Student) > Relationships > Relationships
Step 1: Search for the student/applicant

The search criteria will vary somewhat depending on which navigation you used.

If you want to view or update an existing relationship, use the tab:

Find an Existing Value

To add a new relationship, click the second tab:

Add a New Value

Enter the student’s ID and click

Add

FYI

Tip: To perform a search when using the Add a New Value tab, put a ? in the ID field and click the look up button.

This will bring up a search page where you can search on name to get the student’s emplid.
Step 2: Enter Relationship Data

The Relationships page has 3 tabs. Fill in as much data as you have on each tab.

On the Relationships tab, if the related person is in the Campus Community database, enter his/her empID in the Related ID field. This will automatically fill in address, phone, etc. information on the other two tabs.

If the related person is NOT in Campus Community, leave the Related ID field blank.

Use the pull-down Relationship menu to select the relation this person has with the student.

Enter the related person’s name in format: lastname,firstname (note: no blank after the comma).
Step 3: More Data Fields

The Biographical Details link is only used when the related person is in Campus Community.

Do not use Biographical Details for an external person!

The Communication Recipients and Joint Communication Management buttons are not used.

To record any association that the related person may have with the University System (that is, legacy data) click the Legacy button.

On the Legacy Information page, select the Affiliation type from the pull-down menu, date information if you have it, which Institution, etc. Add more rows if needed using the Add button.

To return to the Relationships page, click the OK button.
Step 4: Relationship Address tab.

If the related person has an ID in Campus Community, the address information will be copied from that person’s Biographical data.

If the person is external (as in our example), you will need to enter an address.

Fill in the Country field first.

Second, click Edit Address.

This will bring up the usual address entry form. Fill it in and click OK.
### Adding a New Relationship

**Step 5: Relationship Detail tab**

Enter whatever data you have in this tab. None of this data is required.

**Step 6: Save**

Click **Save**
Updating Relationships

To update a relationship:

Step 1: Search
If you want to view or update an existing relationship, use the tab:

Find an Existing Value

In the example on the right, the person has two relationships recorded. Select the one you want to update.

The relationship is effective dated, so to update it (for example to change the Status to inactive), you must add a new effective dated row.

Use the + button to add a new row and make the required changes.
Relationships are not controlled by Institutional security. All Institutions share this data.

Therefore, if you make a change to a relationship—for example, make it inactive—you should enter a comment that identifies you and your Institution, as well as why the change was made.

See the example on the right.

**Step 2: Save your changes.**

Click ![Save](Save_icon)