



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

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#### **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**.

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#### **Navigation**

**Student Recruiting > Maintain Prospects > Relationships > Relationships**

or

**Student Admissions > Application Entry > Relationships > Relationships**

or

**Campus Community > Personal Information (Student) > Biographical (Student) > Relationships > Relationships**



## ▶ Relationships

*QG / Quick Guide*

### 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](#)

### F Y I

**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.

#### Relationships

Enter any information you have and click Search. Leave fields blank for a list

[Find an Existing Value](#)

[Add a New Value](#)

ID:

Relationship Nbr:

National ID:

Last Name:

First Name:

Relationship:

Include History  Correct History  Case Sensitive

[Search](#)

[Clear](#)

[Basic Search](#)

[Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

#### Relationships

[Find an Existing Value](#)

[Add a New Value](#)

ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)



## ▶ Adding a New Relationship

*QG / Quick Guide*

### 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 emplid 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).

The screenshot shows the 'Relationships' page for a student named Charlotte Czerny (ID: 0539777). The page has three tabs: 'Relationships', 'Relationship Address', and 'Relationship Detail'. The 'Relationships' tab is active. The form contains the following fields:

- Effective Date:** 07/21/2006
- Status:** Active
- Related ID:** (empty)
- Relationship:** None Indi (highlighted in the dropdown menu)
- Name:** (empty)
- Prefix:** (empty)
- Suffix:** (empty)
- Sex:** (empty)
- Marital Status:** (empty)
- Guardian:** N/A
- NID Country:** (empty)
- NID Type:** (empty)
- National ID:** (empty)
- Comment:** (empty)

The dropdown menu for 'Relationship' is open, showing the following options:

- Active
- Oth Relat
- Brother
- Daughter
- Employee
- Employer
- Ex-Spouse
- Father
- Friend
- Granddaugh
- Grandfather
- Grandmother
- Grandson
- Communication
- Ln Co-Makr
- Ln Co-Sign
- Ln Refernc
- Mother
- Neighbor
- None Indi
- Oth Relat
- Other
- Partner

Buttons at the bottom include 'Save', 'Notify', 'Add', and 'Cancel'. Navigation links at the bottom are 'Relationships | Relationship Address | Relationship Detail'.



## ▶ Adding a New Relationship

*QG / Quick Guide*

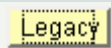
### Step 3: More Data Fields

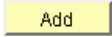
The [Biographical Details](#) link is **only** used when the related person is in Campus Community.

**Do not use Biographical Details for an external person!**

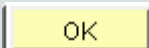
The **Communication Recipients** and **Joint Communication Management** buttons are not used.

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



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  button.

To return to the **Relationships** page, click



Relationships | Relationship Address | Relationship Detail

Charlotte Czerny 0539777

Relationship Find | View All First 1 of 1 Last

\*Effective Date: 07/21/2006 \*Status: Active

Related ID: \*Relationship: Mother

\*Name: Czerny,Caroline

Prefix: Ms Suffix:

Sex: Female Marital Status: Widowed \*Guardian: N/A

NID Country: USA NID Type: PR National ID:

Comment: Does not wish to receive phone calls

Biographical Details **Legacy** Communication Recipients Joint Communication Management

Save Notify Add Update/Display Include History

Relationships | Relationship Address | Relationship Detail

Relationship

Legacy Information

Legacy Relation to Institution Customize | Find First 1 of 1 Last

Legacy Number	*Affiliation	From Date	To Date	Institution	Academic Program
1	Donor			University of Maine	

Alum Law School  
Alumni  
Board Of Visitors  
Board of Visitors Law School  
Donor  
Donor Law School  
Donor UM System  
Trustee UM System

OK Add



## ▶ Adding a New Relationship

*QG / Quick Guide*

### 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

Relationships | **Relationship Address** | Relationship Detail

Charlotte Czerny 0539777

**Relationship Address Details** Find | View All First 1 of 1 Last

**Effective Date:** 07/21/2006 **Status:** Active

**Relationship:** Mother Czerny, Caroline

**Related ID (or Name) Address**

Address Type:   Joint Address

Country: USA

Address: [Edit Address](#)

**Primary ID Address**

Address Type: HOME  Joint Address

Country: United States

Address: 1111 First St  
Danforth, ME 04424  
Washington



## ▶ Adding a New Relationship

*QG / Quick Guide*

### Step 5: Relationship Detail tab

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

### Step 6: Save

Click 

Relationships | Relationship Address | **Relationship Detail**

Charlotte Czerny 0539777

**Relationship** Find | View All First 1 of 1 Last

**Effective Date:** 07/21/2006 **Status:** Active

**Relationship:** Mother Czerny, Caroline

**Daytime Telephone**

Day:  Eve:  Fax:

**Email ID**

Email ID:

URL Address:

**Relation Demographics**

Income:  USD Occupation:

External Org ID:  Employer:

Highest Education Level:

**Relation Residency**




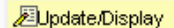
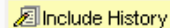
Country: USA United States State:  Date:

**Country of Citizenship**

Citizen Country: USA United States Citizenship Status:

Birth Country: USA United States

[Phones](#) [Email Address](#) [Biographical Details](#) [Citizenship and Passport Data](#)



## Updating Relationships

*QG / Quick Guide*

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**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

ID:

Relationship Nbr:

National ID:

Last Name:

First Name:

Relationship:

Include History  Correct History  Case Sensitive

[Basic Search](#)

**Search Results**

View All First

ID	Name	National ID	NID Short Description	Related People ID	Relationship	Name	Cr
<a href="#">0539777</a>	<a href="#">Czerny,Charlotte Anna</a>	<a href="#">999999999</a>	<a href="#">SSN</a>	(blank)	Mother	<a href="#">Czerny,Caroline N</a>	
<a href="#">0539777</a>	<a href="#">Czerny,Charlotte Anna</a>	<a href="#">999999999</a>	<a href="#">SSN</a>	(blank)	Brother	<a href="#">Czerny,Joseph N</a>	

**Relationships** | Relationship Address | Relationship Detail

Charlotte Czerny 0539777

**Relationship** Find | View All | First 1 of 1 | Last

'Effective Date:   'Status:

Related ID:   'Relationship:

'Name:



## ▶ Updating Relationships

*QG / Quick Guide*

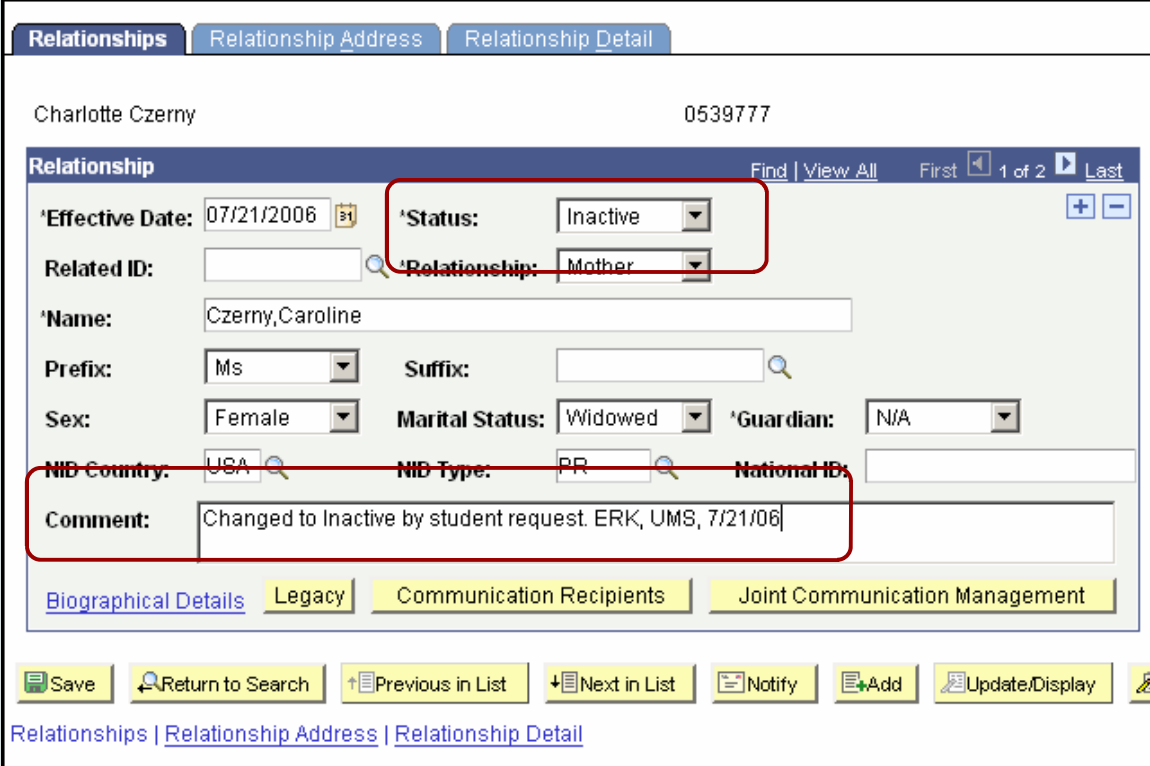
Relationships are not controlled by Institutional security. All Institutions share this data.

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



The screenshot displays a web interface for managing relationships. At the top, there are tabs for "Relationships", "Relationship Address", and "Relationship Detail". The main content area shows a form for a relationship with the following fields:

- Effective Date:** 07/21/2006
- Status:** Inactive (highlighted with a red box)
- Related ID:** (empty)
- Relationship:** Mother (highlighted with a red box)
- Name:** Czerny, Caroline
- Prefix:** Ms
- Suffix:** (empty)
- Sex:** Female
- Marital Status:** Widowed
- \*Guardian:** N/A
- NID Country:** USA
- NID Type:** PR
- National ID:** (empty)
- Comment:** Changed to Inactive by student request. ERK, UMS, 7/21/06 (highlighted with a red box)

Below the form are several tabs: "Biographical Details", "Legacy", "Communication Recipients", and "Joint Communication Management". At the bottom, there is a navigation bar with buttons for "Save", "Return to Search", "Previous in List", "Next in List", "Notify", "Add", and "Update/Display".