9.2 Using Add/Update a Person

Purpose: Use this document to add new individuals to the system in ctcLink.

Audience: Student Services Staff.

⚠ You must have at least one of these local college managed security roles:

To view data:

- ZD CC Personal Information
- ZD CC SOGI
- ZD CC Super user

  To view, add, and update data:

- ZZ CC Pers Info NID Update
- ZZ CC Personal Information
- ZZ CC SOGI

  To view, add, and update data and use Correct History:

- ZC CC Personal Information
- ZC CC SOGI

  You must also set these SACR Security permissions:

- CS 9.2 SACR Security: Basic Requirements for Staff

  If you need assistance with the above security roles or SACR settings, please contact your local college supervisor or IT Admin to request role access

⚠ College staff should first use **Search/Match** to determine if the Person/Record already exists in the system before proceeding with this process. See QRG: **9.2 Search for Records (Using Search/Match)**.

Add an Individual to the System

Navigation: Menu > Campus Community > Personal Information > Add/Update a Person

1. The **Add/Update a Person** search page displays.
2. Select the **Add a New Value** tab.
   - **ID** field defaults to **NEW** when the **Add a New Value** tab is selected. The system will generate an ID once the information has been entered and save.
   - To update existing information, enter the person's ID, National ID, Last Name, or First Name. Select **Include History** check box and press **Search**.
3. Select the **Add** button.

> ℹ️ Use the **Biographical Details** page to enter an individual's **First Name, Last Name, Date of Birth, Sex, etc.**
>
> - **The Legal Definition of Sex:**
>   - Please enter the legal sex as denoted on this person's birth certificate or driver's license per **WAC 246-490-075** or **WAC 308-104-0150.**
>
> The **Effective Date** field in the **Person Information** section defines the date at which the information is valid. The field defaults to the current system date, but can be modified if needed.

4. The **Biographical Details** tab displays.
5. Select **Prefix**, if disclosed by student. Choose the desired item from the drop-down menu--it is not a required field.
6. Enter the person's information:
   - **First Name**
   - **Last Name**
   - **Date of Birth**
7. Select the **Birth Information** link to access the **Birth Information Detail** page.

> ℹ️ • **What is in a (Primary) Name?** An EMPLID must have an active Primary name. When an individual does not have an active Primary name, weird things happen. Real life examples include student names not displaying correctly on their official transcript, student names being replaced by a "Send Email" hyperlink on the grade roster, instructor and Responsible ID names not displaying correctly in Self-Service, and student names not being available for queries used to assign student ID cards or generate student emails. Do not inactivate Primary names. If an individual's Primary name changes, add a new effective-dated row to document the change. The QCS_CC_INACTIVE_NAMES query is useful for identifying inactive names.
> - **While we're talking about Name Types,** queries that include "name" in the results depend on a record having a Preferred name and, in the absence of a Preferred name,

a Primary name. You are welcome to make use of other available types (e.g. Former, Legal); however, your student must have at least a Primary name. To prevent unwanted impacts on reporting and financial aid, primary names should be the student's legal name. Keep in mind that person records are global.

8. The **Birth Information Detail** pagelet displays.
9. Enter the individual's birth location, country, and state (*Optional*).
10. Select the **OK** button to return.
11. Use the **Effective Date** field in the **Biographical History** section to enter the date from which the marital status and gender is valid in your system.
12. **Marital Status--**
    - This field is identified with an asterisk, but it is not required in order to save.

13. Select the **Sex** drop-down list and choose the desired item from the drop down menu--**Female, Male, Not Exclusively Male or Female, Unknown** as been disclosed by the student.
14. **The Legal Definition of Sex**: Please enter the legal sex as denoted on this person's birth certificate or driver's license per **WAC 246-490-075** or **WAC 308-104-0150.**

In the **National ID** section, enter or confirm the country of the individual's national ID. If the individual has more than one National ID, you can add them here. In the **National ID Type** field, the system displays the value that you establish or the specified country on the **National ID Type Table** page. You can override this default value if needed.

15. Enter the desired information into the **National ID Type** field.
16. Select the **Add** button.

In the **Contact Information** section, enter the address information:

- Address Type such as Home, Business, or Mailing. The system displays **Home** as the default address type.

The default for the **Effective Date** field is the current system date. The effective date is the date when the address for the address type you selected is effective. This date is also the date when the status that you select is valid.

The **Status** field is set to either **Active** or **Inactive**.

> When you specify the country for the address, the system displays the address entry in the format required for that country.

17. Select the **Edit Address** link.
    - If you are entering a foreign address for a student, you must select the foreign country first using the lookup tool and then click **Edit Address** to enter the address fields next.

> ℹ️ PeopleSoft delivers foreign address formats to conform to the customary address format of the specified country. Below is a helpful crosswalk for staff to use when determining where to enter values in PeopleSoft foreign address fields.
>
> - **PeopleSoft Foreign Address Field Label Crosswalk**

> ℹ️ Select the **Edit Address** link to edit an individual's address data.
>
> The system validates the address by comparing it to the county, state, and city defined on the **Valid Address** page. You will receive an error if your address does not contain a valid county, state, and city for the selected country.

18. Enter the desired information into the following:
    - **Address 1** field
    - **Address 2** field (if applicable)
    - **City** field
    - **State** field
    - **Postal** field
    - **County** field

19. Select the **OK** button.
    - If you are unable to save your address, confirm your address by **checking the accuracy of your address**. If you cannot save the address due to an error, select the **Change Country** link and choose your country. This will allow you to bypass the error before choosing **OK**.
        - Click **here** for instructions on bypassing an address.
    - **Note**: When searching for England, select GBR (United Kingdom) to open the address fields.

> ℹ️ Unlike "Home" or "Business" email addresses, students are not able to see, set or modify their own "Other" email addresses. If the student has an "Other" email address on file and that email address has been set as their Preferred email address, the student will not be able to designate another email address as their Preferred email address without the direct assistance of a staff member. We recommend not using the "Other" email address type if possible and not setting the student's "Other" email address as their Preferred email address.
>
> A new query, **QCS_CC_OTHR_EMAIL_PREF,** in Production can be used to identify students who have their "Other" email address set as their Preferred email address

20. You will next enter phone and email information for this individual.
21. In the **Phone** section, select the **Type** list and choose the desired item from the drop down menu.
22. Enter the desired information into the **Phone** field.
23. In the **Email** section, select the **Type** list and choose the desired item from the drop down menu.
24. Enter the desired information into the **Email Address** field.

> ℹ️ Use the **Visa/Permit Data** link to enter the visa/permit data that has been disclosed by the individual.
>
> Use the **Citizenship** link to enter the citizenship and/or passport data that has been disclosed by the individual.

22. Select the **Regional** tab.
23. Enter the **Ethnicity** information that has been disclosed by the individual.
    a. Additional entries can be added by selecting the [+] plus icon.

24. The **History** section allows you to enter Military Status information. This section is not required and should only be entered if it has been disclosed by the individual.
25. Select the **Personal** tab.
26. Select the **Gender Identity** drop-down list to select the appropriate option if the information has been disclosed by the individual.
27. Select the **Sexual Orientation** drop-down list to select the appropriate option of the information has been disclosed by the individual.

Why are we collecting this information?

28. **Sexual Orientation & Gender Identity**
    a. The primary purpose for collecting sexual orientation and gender identity information is to ensure inclusivity and success for all students in our system. It is imperative, and a

system goal, to provide safe places for all students to be affirmed in their identity and learn in an environment free from harassment and discrimination. In addition, this data will assist local colleges in providing services and creating programs and curriculum designed to support student success within the LGBTQIA+ community.

29. Verify that all information has been entered on each tab. Once the information has been verified, select Save. When **Save** is selected, the system will generate an **ID** number.
30. Process complete.

Bypass an Address

> ℹ Sometimes, a student will provide a valid address that isn't recognized by Clean Address. This often happens when an apartment or home is under new construction. In cases where you've verified that a student's address is accurate and the address isn't recognized by Clean Address, **bypass Clean Address by following the steps listed below.**
>
> The Clean Address database is updated every few months (with data from USPS), so colleges do not need to report addresses that are not recognized by Clean Address.
>
> To view a table of invalid address error descriptions, visit the QRG 9.2 Update Address Information.

1. Enter the desired information into the following:
   - **Address 1** field
   - **Address 2** field (if applicable)
   - **City** field
   - **State** field
   - **Postal** field
   - **County** field

2. Select the **OK** button in the lower-left corner.
3. If the address is not verified as deliverable, a message box will appear at the top of the screen.
4. In the message box, select **OK**.
5. Above the Address field, select the **Change Country** link.
6. Select **USA** by scrolling or searching.
7. Select **OK** in the bottom-left corner.
8. The Address History page displays. Verify the address in the **Address History** panel.
9. Select **OK**.
10. The Addresses tab displays. Select **Save** in the lower-left corner.

Process complete.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

⚠️ **VIDEO COMING SOON!**

Video Tutorial via Panopto

View the link to **Using Add/Update a Person**. This link will open in a new tab/window.