

InformationNOW – Census

Overview

This document covers the options available under the *Census* menu in *InformationNOW*.

People Module

The *People* module stores all persons in the database, including students, staff, parents, contacts, etc. In the *People* module, users with the appropriate access privileges may perform various tasks.

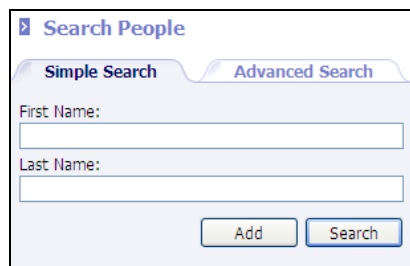
Search for People

Searches are not case-sensitive, therefore users may enter a name (or several letters of a last name) in upper or lower case or any combination thereof, and the system will return any records matching the criteria, regardless of the case of the actual data.

- To search for people, click the **Census | People** menu item.
- There are two ways to search for people: the *Simple* search and the *Advanced* search.

Simple Search for People

This is a *Name*-only search. Enter all or part of a last name and the system will return a list of all people with that last name.



The screenshot shows a web interface titled "Search People". It features two tabs: "Simple Search" (which is active) and "Advanced Search". Below the tabs are two input fields: "First Name:" and "Last Name:". At the bottom of the form are two buttons: "Add" and "Search".

Advanced Search for People

Click the *Advanced Search* tab and the screen shown below will appear.

Search People

Simple Search **Advanced Search**

Personal Criteria

First Name: Last Name:

Date of Birth: Gender:

Social Security Number: Phone:

File No.:

Address Criteria

Address Line 1:

Address Line 2:

City: State: Zip Code:

The following are the search criteria:

- **First Name**: This is the first name of the person.
- **Last Name**: This is the last name of the person.
- **Date of Birth**: This is the date of birth of the person.
- **Gender**: This is the gender of the person.
- **Social Security Number**: This is the Social Security Number of the person.
- **Phone**: This is the phone number of the person. Enter an area code or three-digit phone prefix to view all people within a certain area.
- **File No.**: This is a unique number which is auto-generated by the program and is used to identify person records.
- **Address Line 1**: This is the *Address Line 1* of the address associated with the person. This may be used to search for a person whose address is known.
- **Address Line 2**: This is the *Address Line 2* (where applicable) of the address associated with the person.
- **City**: This is the city in which the person resides.
- **State**: This is the state in which the person resides.
- **Zip Code**: This is the ZIP Code in which the person resides. The 5-number format (xxxxx) or the 9-number format (xxxx-xxxx) may be entered.









Once the desired search criteria have been entered, click **Search**. The search operation will execute and return the results of the search in a grid.

Search People - People Result List



People

Search Criteria: [All](#)

[Add](#) [View](#) [Delete](#)

<input type="checkbox"/>	File No.	Name	G	Birthdate
<input type="checkbox"/>	S1001	 Adams, Amy	F	09/04/1992
<input type="checkbox"/>	P1026	Adams, Beth	F	08/21/1967
<input type="checkbox"/>	P1027	Adams, Michael	M	09/16/1964
<input type="checkbox"/>	S1002	 Affleck, Ben	M	08/26/1991
<input type="checkbox"/>	S1003	 Agassi, Andre	M	08/10/1991
<input type="checkbox"/>	S1004	 Aikman, Troy	M	11/12/1992
<input type="checkbox"/>	S1005	 Anderson, Amanda	F	01/01/1992
<input type="checkbox"/>	S1006	 Anderson, Hank	M	01/01/1992
<input type="checkbox"/>	ST1002	 Anderson, Pamela Dean	F	08/01/1980
<input type="checkbox"/>	ST1003	 Andretti, Mario	M	01/20/1976

The following data relating to people will be displayed:

- **File No.:** This is a system-assigned number for a person. No two persons will have the same file number. The file number begins with a letter indicating the type of record.
 - *S* indicates the person is a student .
 - *ST* indicates the person is a staff member .
 - *P* is used to designate a person in the database who is neither a student nor a staff member. These records may include student contacts such as guardians, doctors or emergency contacts.
- **Name:** This is the name of the person in *<Last Name>, <First Name>* format.
- **Gender:** This is the gender of the person.
- **Date of Birth:** This is the date of birth of the person.

As with other search screens, the following points should be noted:

- If the search results are unsatisfactory, click on the **Search Criteria** link at the top of the screen to go back to the *Search* screen and reenter the search criteria.
- Click the **Add** button to add a new person. See “Add a Person Record” on page 4 for more details.
- Select one or more persons (by checking the box to the left of the person’s name in the grid) and click the **View** button to view/edit information of one or more persons. See “View/Edit a Person Record” on page 6 for more details.
- Click on a file number, which is a link under the *File No.* column, to view/edit the person information of a person.
- Select one or more people (by checking the box in the grid) and click the **Delete** button to delete one or more people. A warning message will display to confirm deletion of selected person(s). Click **Yes** to proceed.

Add a Person Record

To add a new person record, either:

- Click the **Add** button in the *Search for People* screen; or,
- Click the **Add** button in the *Search Results* screen.

The screenshot shows the 'Add Person' form with the following fields and options:

- Personal Section:**
 - Title: [Dropdown]
 - First Name: [Text]
 - Middle Name: [Text]
 - *Last Name: [Text]
 - Generation: [Dropdown]
 - Preferred Name: [Text]
 - Date Of Birth: [Text (MM/dd/yyyy)]
 - Age: [Text]
 - Phone: [Text]
 - Social Security No.: [Text]
 - *Gender: [Dropdown]
 - Race: [Dropdown]
 - Hispanic:
 - Photograph: [Image Placeholder]
- Mailing Address Section:**
 - Address Line 1: [Text]
 - Address Line 2: [Text]
 - City: [Text]
 - State/Province: [Dropdown]
 - Zip Code: [Text]
 - Country: [Dropdown (United States Of America)]
- Physical Address Section:**
 - Address Line 1: [Text]
 - Address Line 2: [Text]
 - City: [Text]
 - State/Province: [Dropdown]
 - Zip Code: [Text]
 - Country: [Dropdown]

Buttons: [Change](#), [Remove](#), [Create](#), [Cancel](#)

Required fields are indicated with an asterisk (*).

- **Title:** The title of the person (examples: *Mr, Ms*, etc.) may be any of the values specified in the *Title* lookup.
- **First Name:** The first name of the person.
- **Middle Name:** The middle name of the person.
- ***Last Name:** This is the last name of the person.
- **Generation:** The generation of the person (example: *Jr, III*, etc.) may be any of the values specified in the *Generation* lookup.
- **Preferred Name:** The first name of the person is the default value. The user may change this if desired.
- **Date of Birth:** The birthday for the person.
- **Age:** This is a read-only field. The age is automatically calculated based on the date of birth and current system date.

- **Phone:** This is the phone number associated with the person. A person may have any number of phone numbers, with one of them serving as the *primary* phone number. To add more than one phone number, click the **More** button located at the top right corner of the *Phone* field, as shown below:

A screenshot of a form field for a phone number. The label 'Phone:' is at the top left. To its right is a purple 'More' link. Below the label is a text input box containing the number '(734) 111-4579'.

- Use the **Add/View/Delete** buttons to add, view, edit or delete phone numbers.
- **Social Security Number:** The Social Security Number of the person.
- ***Gender:** The gender of the person.
- **Race:** A person may be associated with one or more ethnicities. Use the **More** link to associate a person with more than one ethnicity. When adding or editing an ethnicity, an ethnicity percentage may be entered as shown below.

A screenshot of a dialog box titled 'Add Ethnicity'. It contains a dropdown menu for 'Ethnicity' with 'American Indian' selected. Below it is a text input box for 'Percentage' containing the value '80'. At the bottom right are two buttons: 'Create' and 'Cancel'.

- **Hispanic:** Check if this person is considered Hispanic, based on federal guidelines.
- **Mailing Address:** This is the mailing address of the person.
- **Physical Address:** This is the physical address of the person.
- **Same as Mailing:** Check this box if the mailing and physical addresses are the same.

Once the appropriate information is entered, click the **Create** button to add the person or click **Cancel** to cancel the process.

Clicking the **Create** button adds the person to the system (if there are no validation errors). Once the person has been successfully added, the *Miscellaneous* tab and *Address* tab are enabled.

View/Edit a Person Record

People Record: Summary Tab

The *Summary* tab displays basic demographic information. Access to the summary tab may be managed through Security options.

The screenshot shows the 'Summary' tab of a person record. The interface has a top navigation bar with tabs: Summary, Main, Miscellaneous, Addresses, and Access. The 'Personal' section contains the following information: File No.: P1026, Name: Adams, Elizabeth Anne, Gender: Female, Date Of Birth: 08/21/1994, Social Security Number: 123-45-6789, Education Level: Assoc. Degree, Ethnicity: Hispanic, and Primary Phone Number: (800) 844-0884. There is a placeholder box for a photograph. Below this are two sections: 'Mailing Address' (PO Box 14352, Hometown Illinois 61601 Hometown County United States of America) and 'Physical Address' (234 Madison Way, Hometown Illinois 61601 Hometown County United States of America). At the bottom right are 'OK' and 'Close' buttons.

People Record: Main Tab

The *Main* tab is similar to the *Add* screen.

Records may be modified by users with the appropriate privileges. To do this, change data elements as needed and then click **OK**.

The screenshot shows the 'Main' tab of a person record. The interface has a top navigation bar with tabs: Summary, Main, Miscellaneous, Addresses, and Access. The 'Personal' section contains the following information: Title: Ms., First Name: Elizabeth, Middle Name: Anne, *Last Name: Adams, Generation: (dropdown), Photograph: (placeholder with 'Change Remove' link), Preferred Name: Beth, Date Of Birth: 08/21/1974, Age: 35, Phone: (800) 844-0884, Social Security No.: 123-45-6789, *Gender: Female, Race: Hispanic, and a checkbox for 'Hispanic'. Below this are two sections: 'Mailing Address' and 'Physical Address', each with a 'More' link. The 'Mailing Address' section has fields for Address Line 1 (PO Box 14352), Address Line 2, City (Hometown), State/Province (Illinois), Zip Code (61601), and Country (United States Of America). The 'Physical Address' section has fields for Address Line 1 (234 Madison Way), Address Line 2, City (Hometown), State/Province (Illinois), Zip Code (61601), County (Hometown County), and Country (United States Of America). A checkbox 'Same as Mailing' is present. At the bottom right are 'OK' and 'Close' buttons.

People Record: Miscellaneous Tab

The *Miscellaneous* tab appears as follows:

The following fields are available:

- **Marital Status**: Select any value specified in the *Marital Status* lookup.
- **Religious Affiliation**: Select any value specified in the *Religious Affiliation* lookup.
- **Go Green**: Check to indicate that this person has requested to *Go Green*. When certain reports such as transcripts or report cards are generated, users may select a *Go Green* box indicating that a paper copy of the report should not be generated for people who have selected *Go Green* on the *Miscellaneous* tab. Once a report is generated, users may go to **Mgmt Console | Alerts** to send an e-mail to the person to let them know an electronic version of the report is available online via the *InformationNOW* Home Portal.
- **Citizenship/Nationality**: This may be any value specified in the *Country* lookup. Use the **More** link to associate the person with more than one citizenship/ nationality code.
- **Country of Residency**: This may be any value specified in the *Country* lookup.
- **Residency Status**: This may be any value specified in the *Residency Status* lookup.
- **Language**: This may be any value specified in the *Language* lookup. Use the **More** link to associate the person with more than one language.
- **Homeless**: Check this check box if the person is homeless.
- **Person Number**: Displays the system-assigned unique identifier for this person record.
- **Alternate Person Number**: An alternate person number may be assigned to this person record. This number is at the district's discretion.
- **E-mail**: Click the **More** link to associate the person with more than one e-mail address.
- **Messenger Provider and Internet Messenger**: For *Messenger Provider*, select any value specified in the *Internet Messenger Type* lookup. To associate a person with multiple instant messenger contacts, click the **More** link.
- **Employer Name**: Enter the person's employer, if applicable.

- **Education Level:** This may be any value specified in the *Education Level* lookup.

People Record: Addresses Tab

The *Addresses* tab appears as follows:

<input type="checkbox"/>	File No.	Address Type	Address Line 1	Address Line 2	City	State	Zip Code
<input type="checkbox"/>	A1001	Mailing	PO Box 14352		Hometown	IL	61601
<input type="checkbox"/>	A1038	Physical	234 Madison Way		Hometown	IL	61601
<input type="checkbox"/>	A1027	Other	405 Forrest Drive		Miami	FL	90808

From the *Addresses* tab, a person may be associated with one or more address.

Click **Add**. Enter the address information or click **Search** to select an existing address from the database for this person.

- **Unlisted:** Checking this box will ensure that this address will not be printed on various reports.
- **Head of Household:** Check this box if the person is the head of the household.
- **Address Type:** This is a required field. Select *Mailing*, *Other* and *Physical*.
- **Description:** Enter a description of the address.

People Record: Access Tab

The *Access* tab appears as follows:

User Account

Account Disabled User must change password at next login Password never expires

User Name:

Reset Password

Password: Retype Password:

Home Access Available for the Following Students

Student	Name	G	Birthdate
S1001	Adams, Amy Louise	F	09/04/1992
S1002	Affleck, Brent	M	08/26/1991

From the *Access* tab, users may set up User Account and Password criteria as well as view the students they may access via the home portal.

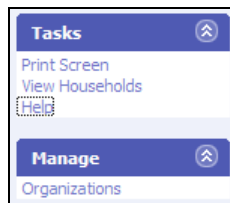
- **Account Disabled:** Check this box to prohibit the person from accessing *InformationNOW*.
- **User Must Change Password At Next Login:** If this option is selected, the next time the person logs in to *InformationNOW*, he or she will be required to change the password.
- **Password Never Expires:** Check this box if the user will never be required to change his or her password.

- **User Name:** Enter a unique user name the person will use to access the program. Click **Generate** to have the program generate a user name.
- **Password/Retype Password:** Enter the password the user will enter to access the program. Reenter the password in the field provided.

Note: Users may have *InformationNOW* automatically generate passwords using the option under **System Preferences | Accounts**.

- **Home Access Available For the Following Students:** View the list of students to which this person is marked as *Student Is Visible in Home Access* on the student’s *Contacts* tab. Click the student number that appears as a blue link to access the student’s demographic information.

Tasks/Manage Menu



- **Print Screen:** Select to send a copy of the current screen to the printer.
- **View Households:** Click to view the households to which this person has been assigned.
- **Help:** Click to access online help.
- **Organizations:** Organizations such as PTA Member, Volunteer, or Board Member may be created under **System Preferences | Setup | Organizations**. Once organizations have been created, click the Organization link to assign them to the contact. Organizations may be assigned to students, contacts, staff or people in the census.

Addresses Module

Addresses are entered for schools, students, staff members, contacts, and district locations. The *Addresses* module serves as a bank of address records. An address record may be shared by multiple persons, minimizing duplicate data entry.

Note: The ability to enter addresses for staff, census and student records may be disabled for users. To disable the ability for users to enter addresses and force the users to select the address from the existing address database, go to **School/District | Setup**. Click the *Settings* tab. Check the *Lock Address Fields* box. If selected, users will not be able to manually enter an address for a staff, census or student record and will be forced to select the address from the existing list of addresses found in the address module.

For example: If a student record is created, the address entered for that student will automatically be stored as an address record in the *Addresses* module. Subsequently, when a new record is created for any person who shares the same address, the user may search the *Addresses* module and select the appropriate existing address record for that person.

Note: If an address is entered as (for example) *123 South Main* and again as *123 S Main*, two unique address records will be created. To minimize duplication, it is recommended that users develop standardized address entry guidelines for the district.

In the *Addresses* module, which is accessed by clicking on **Census**, a user with appropriate access privileges may perform the following actions:

- Search for Addresses (see “Search for Addresses” below).
- View address search results for addresses that match search criteria (see “Addresses Search Results” on page 11).
- Add new addresses to the system (see “Adding Addresses” on page 12).
- View/edit address information elements associated with an address (see “View/Edit Address Records” on page 14).
- Delete an address.

View all Addresses

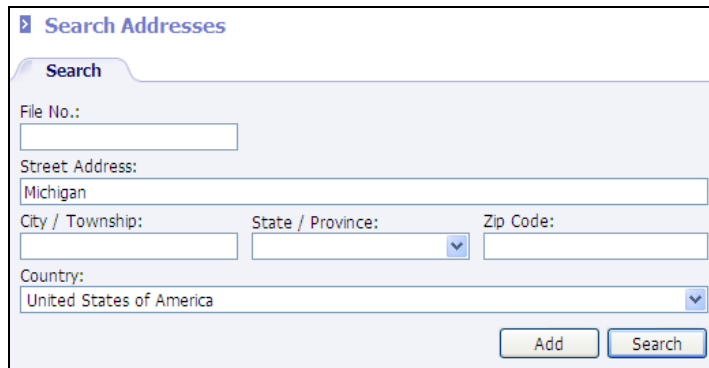
See the section “Associated People” on page 15 for additional information about this feature.

Search for Addresses

Searches are not case-sensitive, therefore users may enter criteria in upper or lower case or any combination thereof, and the system will return any records matching the criteria, regardless of the case of the actual data.

Each criterion entered will be combined with any other criteria to get the search results. Additionally, all searches are *starts with...* searches. For example, if a ZIP Code of 36608 and city of *Hometown* are entered on the search screen all addresses in *Hometown* with a ZIP Code of 36608 will be returned in the search results.

- To search for addresses, go to **Census | Addresses**. This opens the following screen:



Addresses Search Criteria

Note: It is not necessary to enter search criteria. To pull up all addresses in the system, simply click **Search** with no search parameters entered.

Search criteria are as follows:

- **File No.:** This is a unique auto-generated number which is assigned to each address record.
- **Street Address:** This will search only the 1st address line field. Addresses with matching criteria in only the 2nd address line will not be included in the search results.
- **City/Township:** The city associated with the address.
- **State/Province:** The state associated with the address. If the address is in the USA, the standard two-letter abbreviation may be used (for example, *AL* for Alabama) in this field.

- **Zip Code:** The ZIP Code associated with the address. The 5-number format (xxxxx) or the 9-number format (xxxxx-xxxx) may be entered.
- **Country:** The country associated with the address.

After entering the search criteria, click the **Search** button. A search will be performed and the results will be returned. See “Addresses Search Results” below for more details.

Addresses Search Results

Once search criteria are entered and a search is performed, the results will display.

<input type="checkbox"/>	File No.	Address Line 1	Address Line 2	City	State	Zip Code
<input type="checkbox"/>	A1015	809 Michigan Ave		Hometown	IL	61611
<input type="checkbox"/>	A1026	818 Michigan Ave		Hometown	IL	61060
<input type="checkbox"/>	A1008	884 Michigan Ave		Hometown	IL	60101
<input type="checkbox"/>	A1016	997 Michigan Ave		Hometown	IL	61611

If no search criteria were chosen, all addresses will be displayed.

The grid displays the following data in columnar form relating to addresses:

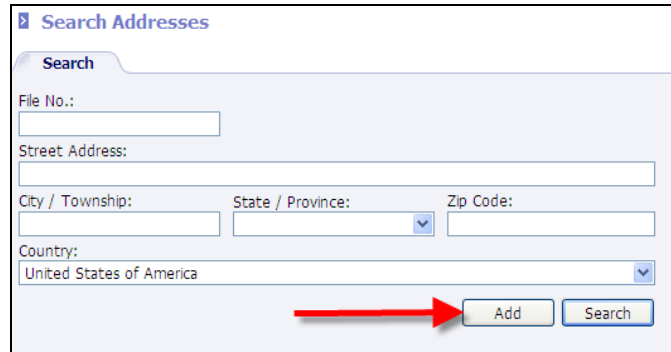
- **File No.:** This is a system-assigned number for an address. No two addresses have the same file number.
- **Address Line 1:** This is the information from line 1 of the address, usually the street address or a post office box.
- **Address Line 2:** This is the information from line 2 of the address (if applicable). Ex. apartment number.
- **City:** The city associated with the address.
- **State:** The state associated with the address.
- **Zip Code:** The ZIP Code associated with the address. (5-digit or 9-digit)

Perform any of the following actions:

- If the search results are unsatisfactory, click the **Search Criteria** link at the top of the screen to go back to the *Search* screen and re-enter search criteria.
- Click the **Add** button to add a new address. See “Adding Addresses” on page 12 below for more details.
- Select one or more addresses (by checking the boxes to the left of the *File No.* column in the grid) and click the **View** button to view/edit address information for one or more addresses. See “View/Edit Address Records” on page 14 for more details.
- Click on a file number under the *File No.* column which is a link that may be used to view/edit information associated with an address.
- Select one or more addresses (by checking the boxes to the left of the *File No.* column in the grid) and click the **Delete** button to delete the address(es). A warning message will display asking to confirm deletion.

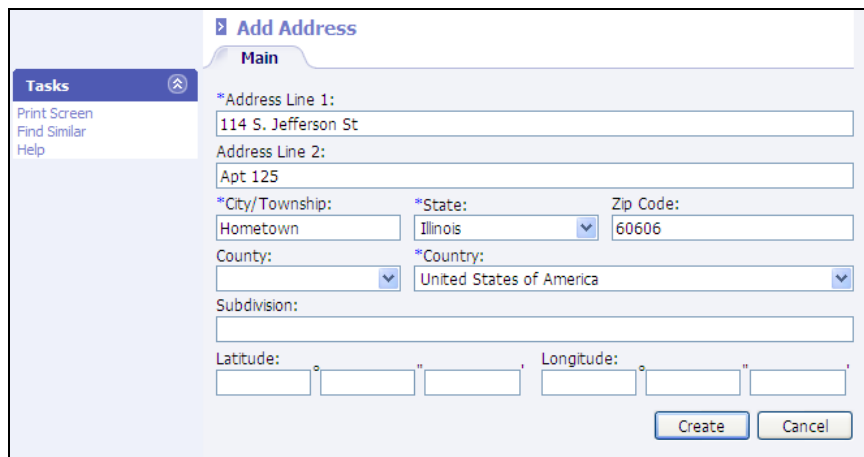
Adding Addresses

To add an address, click the **Add** button in the Search Addresses screen. Addresses may also be added on the school, student, contacts or staff screens. It is not necessary to enter addresses from the **Census | Addresses** menu.



The screenshot shows the 'Search Addresses' interface. It features a 'Search' tab and several input fields: 'File No.', 'Street Address', 'City / Township', 'State / Province' (a dropdown menu), 'Zip Code', and 'Country' (a dropdown menu set to 'United States of America'). At the bottom right, there are two buttons: 'Add' and 'Search'. A red arrow points directly to the 'Add' button.

Note: It is recommended to search for an address to see if it already exists in the database before adding. When searching, click **Associated People** to view the person(s) already associated with this address.



The screenshot shows the 'Add Address' interface. It features a 'Main' tab and several input fields: '*Address Line 1' (containing '114 S. Jefferson St'), 'Address Line 2' (containing 'Apt 125'), '*City / Township' (containing 'Hometown'), '*State' (a dropdown menu set to 'Illinois'), 'Zip Code' (containing '60606'), 'Country' (a dropdown menu set to 'United States of America'), and 'Subdivision'. At the bottom right, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is highlighted with a blue border.

The following fields are required as indicated onscreen with an asterisk (*).

- **Address Line 1**: This is the primary address information.
- **City / Township**: The city associated with the address.
- **State**: The state associated with the address. If the address is within the USA, select the state from the drop-down list.
- **Country**: The country associated with the address.

The following fields are not required, but may be important components of the address:

- **Address Line 2**: This would consist of any additional address information that doesn't fit into the *Address Line 1* field. Ex.: An apartment number.
- **Zip Code**: The ZIP Code associated with the address. Use the 5-number format (xxxxx) or the 9-number format (xxxx-xxxx).
- **Subdivision**: The name of the subdivision associated with the address. Alternately, a demographic direction or area may be entered here, such as *north*, *south*, *east* or *west*.

- **Latitude:** The latitude of the address. Latitude may be expressed in the format <degrees><minutes><seconds>. *Degrees* support numbers between 90 and -90. *Minutes* range from 0 to 59, while *Seconds* may range from 0.00 to 59.99. The only required field for latitude is <degrees>.
- **Longitude:** The longitude of the address. Longitude may be expressed in the format <degrees><minutes><seconds>. *Degrees* support numbers between 180 and -180. *Minutes* range from 0 to 59, while *Seconds* may range from 0.00 to 59.99. The only required field for longitude is <degrees>.

Click the **OK** button to add the address to the database. If there are errors displayed in red, these data elements must be corrected before the record may be saved. Click **Cancel** to stop the adding process.

Printing Address Records

To print an open address record, click on **Print Screen** in the *Tasks* area of the record.

Find Similar Addresses

This option is useful when adding addresses; for example, multiple apartment numbers in an apartment complex would have the same street addresses.

- To locate similar addresses, enter the basic street address information and click **Find Similar**.

File No.	Address Line 1	Address Line 2	City	State	Zip Code
A1031	114 S. Jefferson St	Apt 125	Hometown	IL	60606

- Existing similar addresses will be displayed. Bullet the similar address to be used and click **Create**.

- A new address record will be created based on the selected address. In the example shown above, the user could change the apartment number in *Address Line 2* and then click **Create** to save the new address record. To close the *Add Address* screen without creating a new record, simply click **Cancel**.

View/Edit Address Records

To view or edit an existing address record, go to **Census | Addresses**.

Enter the criteria and click **Search**. Once the list displays, either:

- Click the file number under the *File No.* column; or,
- Check one or more rows and click the **View** button.

The *Summary* tab displays a read-only quick view of the important information elements related to the address.

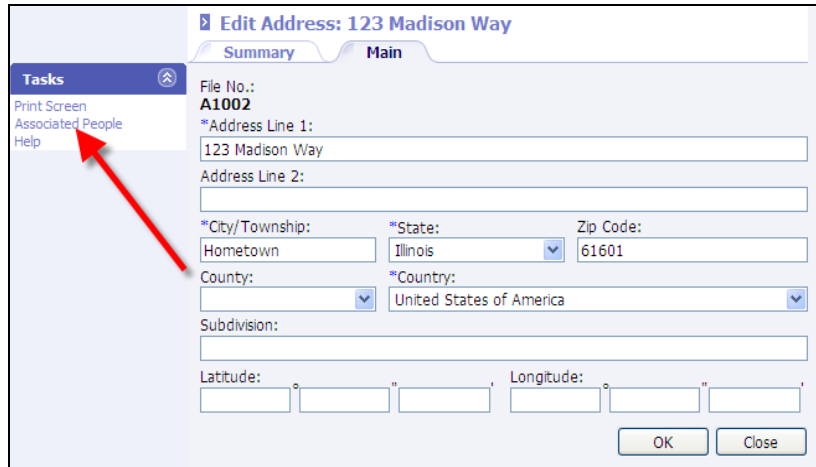
To edit the address information, click the *Main* tab. For a detailed description of the use of the *Main* tab, refer to “Adding Addresses” on page 12.

Note: When editing an existing address, click **OK** after changes have been made. A screen will display showing the other people who are associated with the address. Place a check next to the people who are to be changed to the new address and click **OK**.

Associated People

Once an address record is created, the person(s) associated with this address may be viewed.

- From **Census | Addresses**, search for and select the address. Click the **Associated People** link.

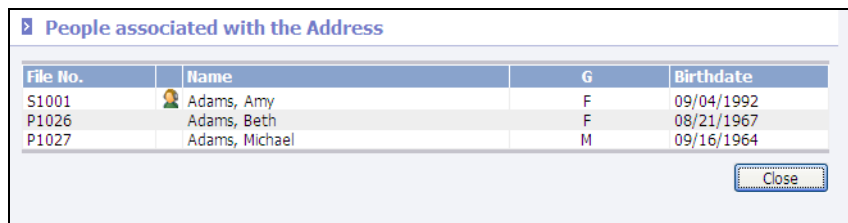


The screenshot shows a web application window titled "Edit Address: 123 Madison Way". On the left, there is a "Tasks" menu with options: "Print Screen", "Associated People" (highlighted with a red arrow), and "Help". The main area contains a form with the following fields:

- File No.: A1002
- *Address Line 1: 123 Madison Way
- Address Line 2: (empty)
- *City/Township: Hometown
- *State: Illinois
- Zip Code: 61601
- County: (empty)
- *Country: United States of America
- Subdivision: (empty)
- Latitude: (empty)
- Longitude: (empty)

Buttons for "OK" and "Close" are at the bottom right.

- All persons (students, contacts, staff) associated with this address will display.



The screenshot shows a table titled "People associated with the Address". The table has four columns: "File No.", "Name", "G", and "Birthdate".

File No.	Name	G	Birthdate
S1001	Adams, Amy	F	09/04/1992
P1026	Adams, Beth	F	08/21/1967
P1027	Adams, Michael	M	09/16/1964

A "Close" button is located at the bottom right of the table.

- Click **Close** to exit the screen.

Household

A *Household* may be established to tie students and person records together. Households are beneficial for billing purposes and for generating reports by household. This option is available under **Census | Household**. This feature allows users to group people together for the purpose of family tracking and will be used in conjunction with the Tuition Billing module for *InformationNOW*.

From the **Census | Household** screen, users may insert a new household record by clicking **Add** or search for an existing household by entering specific criteria and clicking **Search**.

Add Household

When the user selects to **Add** a new household, the following screen will display. Required fields are indicated with an asterisk (*).

File No.	Name	Adult / Child	Role	HOH	Res. for Bill	Allow Charges	Allow Late Fee	Bill Copy
<input type="checkbox"/>								

- ***Name:** The unique name of the household by which the household will be referred. Limit 100 characters.
- **Addressee:** The name that should display on reports or letters when sent to households (ex. *The Smith Family*). Limit 150 characters.
- **Formal Salutation:** What should display when the user selects the option to address a report or letter using the Formal Salutation. Limit 150 characters.
- **Informal Salutation:** What should display when the user selects the option to address a report or letter using the Informal Salutation. Limit 150 characters.
- **Status:** Select if this is an Active or Inactive household.

To save the household record, click **Create**.

Add Members to Household

Once a household is created, members may be added.

- Go to **Census | Household**.
- Search for and select to **View** the household.
- Under the *Household Members* section, click to **Add** a new member.
- The *Search People* screen will display. Enter search criteria on the *Simple* or *Advanced Search* tab and click **Search**.

- The *Search People* result screen will display. Bullet the person to be added to the household and click **OK** or click the **File No** of the person that appears as a blue link.

File No.	Name	G	Birthdate
S1005	Anderson, Amanda	F	01/01/1992
S1090	Anderson, Brent	M	12/01/1992
S1006	Anderson, Hank	M	01/01/1992
ST1002	Anderson, Pamela Dean	F	08/01/1980
<input checked="" type="radio"/> P1118	Anderson, Richard Dean	M	
ST1003	Andretti, Mario	M	01/20/1976

- Enter the criteria for this household member.

- **Role:** Select the Role the person plays within the household.
- **Head of Household:** Check if this person is considered the head of the household. Only one household member may be set as Head of Household.
- **Member Type:** Select if this person is a child or an adult within the household.
- **Student Billing Attributes:** Only available if using STI Billing.
 - **Allow Charges:** Select if this person is allowed charges on the household account.
 - **Responsible For Bill:** Indicates that the household is responsible for the selected member's bills. This member will be included on invoices sent to the household. Only one household member can be marked as *Responsible For Bill* per student member.
 - **Allow Late Fees:** Indicates that late fees charges may be assessed to the selected household for the selected child member.
 - **Receives Bill Copies:** Indicates the household should receive billing invoices associated with tuition billing for student members for whom it is not responsible for bill or have charges assessed. For example, Grandmother is not responsible for a student's bill but indirectly provides the funds that pay the tuition and bills and wants to receive a copy of the student's bills. This member will be included on special statement copies which only contain transactions for the indicated student.

Notes

- When the user adds a member to a household, the system will automatically create a Student Contact record for each student child and adult pair.
- When the user deletes a member from a household, the system will prompt the user to determine whether to delete the student contact records associated with that household.
- Once a member is added, an option is available to **Add Members at Same Address** under the *Manage* menu on the left. If selected, a screen will display listing the other people who share the same physical address. Users may select the people and click **OK** to add the selected people to this household.

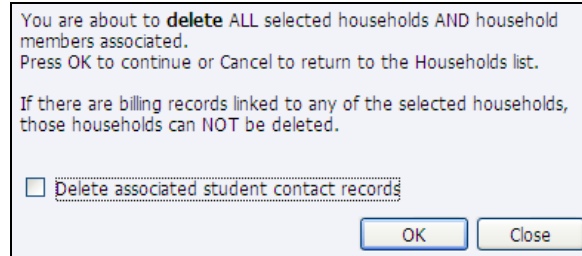
View a Household

To view a household, go to **Census | Households**. Enter search criteria and click **Search**. Households are listed alphabetically in ascending order by household name. Click the household number (ex. *H1001*) that appears as a blue link or place a check next to the household number and click **View**.

Delete a Household

To delete a household, go to **Census | Households**. Enter search criteria and click **Search**. Place a check next to the household number and click **Delete**.

Note: This option is only available if the user has permission to *Maintain Households*.



You are about to **delete** ALL selected households AND household members associated.
Press OK to continue or Cancel to return to the Households list.

If there are billing records linked to any of the selected households, those households can NOT be deleted.

Delete associated student contact records

OK Close

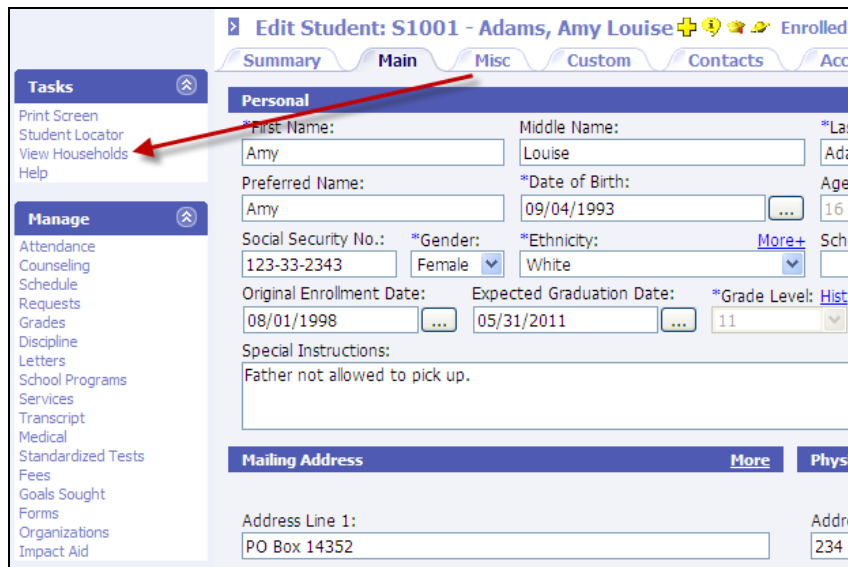
Note: If the district has STI Billing enabled AND there are records associated with the household, it cannot be deleted.

A message will display. Users may also select to delete associated student contact records. Click **OK** to delete the household along with all established household relationships or **Close** to exit the screen without deleting the household.

Warning! If **OK** is selected, the program will delete contact records for each for each member in the household for each student in the household. Contacts who are not members of the household (i.e. doctors and other contacts not related to the household) will not be deleted.

Viewing Households from Student Screen

A new task option is added to Student, Staff and person to allow the user to view household members.



Edit Student: S1001 - Adams, Amy Louise + Enrolled

Summary Main Misc Custom Contacts Acc

Tasks

- Print Screen
- Student Locator
- View Households
- Help

Manage

- Attendance
- Counseling
- Schedule
- Requests
- Grades
- Discipline
- Letters
- School Programs
- Services
- Transcript
- Medical
- Standardized Tests
- Fees
- Goals Sought
- Forms
- Organizations
- Impact Aid

Personal

First Name: Amy Middle Name: Louise *Last: Ada

Preferred Name: Amy *Date of Birth: 09/04/1993 Age: 16

Social Security No.: 123-33-2343 *Gender: Female *Ethnicity: White More+ Scho

Original Enrollment Date: 08/01/1998 Expected Graduation Date: 05/31/2011 *Grade Level: Hist

Special Instructions: Father not allowed to pick up.

Mailing Address More Physic

Address Line 1: PO Box 14352 Address: 234 M

If selected, the following screen will display.

File No.	Name	Adult / Child	Role	HOH	Res. for Bill	Allow Charges	Allow Late Fee	Bill Copy
S1005	Adams, Amy Marie	C	Daughter					
P1186	Adams, Thomas William	A		Y				
S1114	Applegate, Tyler Michael	C	Stepson					

Reports

Family Directory

A **Family Directory** report is available. This report will provide a list of Heads of Household/Guardians and students that are marked as family and Family and share the same physical address.

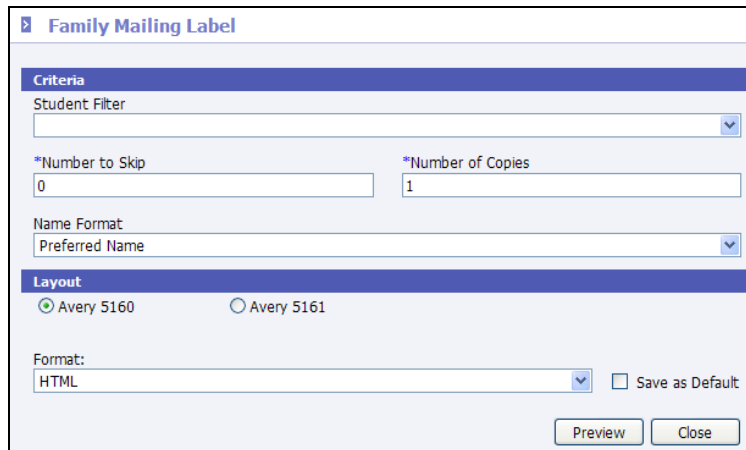
- **Alphabetic Range:** Enter the alphabetic range of the last name of the person. For example, to print only a family directory for those with a last name that begins with *A, B, C, D* or *E*, enter an *A* to *E* in the range.
- **Show Unlisted Information:** Check to include unlisted addresses and phone numbers on the report.
- **Format:** Select the format to print (Acrobat *.PDF* file, *.CSV*, Excel *.XLS*, *HTML*, *.TIFF* file or *.XML*).
- **Save As Default:** Check to save the format selected for future printing of this report.

Head of Household Directory		
A		
Beth Adams 234 Madison Way Hometown, IL 61601 Home Phone: (800) 844-0884	Children Amy Adams	Grade 10

Family Mailing Label

A Family Mailing Label is available to print a label for each family unit. The report may be accessed from either:

- **Reports | All Reports**
- **Census | Reports**



The screenshot shows a configuration window titled "Family Mailing Label". It is divided into two main sections: "Criteria" and "Layout".

Criteria Section:

- Student Filter:** A dropdown menu.
- *Number to Skip:** A text input field containing the number "0".
- *Number of Copies:** A text input field containing the number "1".
- Name Format:** A dropdown menu with "Preferred Name" selected.

Layout Section:

- Avery 5160:** A radio button that is selected.
- Avery 5161:** An unselected radio button.
- Format:** A dropdown menu with "HTML" selected.
- Save as Default:** An unchecked checkbox.

At the bottom right of the window are two buttons: "Preview" and "Close".

- **Student Filter:** Select the filter of students for which to print family mailing labels. If no filter is selected, a label for each family will print.
- **Number to Skip:** If printing to a partially used sheet of labels, enter the number of the label at which to start printing. For example, if user is printing on a page of labels and the top three labels have already been used, enter a 4 to indicate that printing should begin on the fourth label.
- **Number of Copies:** Enter the number of labels to print for each student (maximum 99).
- **Name Format:** Select the option to print for the head of household – *Preferred Name*, *First Last* or *Title First Last*.
- **Layout:** Select whether to print for labels that are compatible with Avery 5160 or Avery 5161 labels.
- **Format:** Select the format of Acrobat (*PDF*) file, *CSV*, *Excel*, *HTML*, *TIFF* or *XML*.
- Click **Preview**.
 - If no filter is selected, the report will print the label for head of household of the students enrolled or registered in the current academic session.
 - If a student has multiple heads of household, the report will print the labels for each separately.
 - When printing the labels for multiple students, the labels will order by head of household's last name, first name and middle name. The order will apply across the page - left to right.
 - The label will address one person/head of household only once or as defined by the *Number of Copies* parameter. For example, if a same person is marked head of household for more than one student, the report will only print the label once for that person.