Registrar 2 (M)

Infinite Campus University

Intended Audience: Staff that currently manage Census data for students, new families, emergency contact and Staff. Staff should have attended Registrar 1 prior to this training session.

Description: The Registrar 2 course focuses on editing Census information, making changes to household units, editing demographic, address and household information. It is required to attend session 1 prior to taking session 2.

Time: 4 hours

Review Searching Census Information (15 minutes)	Review navigation, search procedures and help options

New Student Registration (and Household) Process Review (30 minutes)	Review the new student registration and dropping process
	 • Adding people
	 • Adding enrollment, if applicable
	 • Adding district employment and assignment, if applicable
	 • Add address
	 • Household assembly using the Census Wizard to
	    • Link the people to the household
	    • Link the address to the household
	    • Add appropriate relationships and flags

Editing Census Data (60 minutes)	Learn how to edit and change Census data, including • Identity changes • Changing personal contact information • Address changes for families • Separating/splitting households
Scenarios work time (120 minutes)	Hands-on time to make changes to sample households
Review (15 minutes)	• Q & A with the trainer • Complete the training survey

Scenario 1: New Students in a Split Family

2 students have moved into your district from Saint Paul, MN. Add two students and create new enrollments.

Add 2 adults (Mom & Dad) to your database.

Mom moved her children as the result of an in-process divorce; she and her children are living with friends in your district. Use the Census Wizard to create a new three person household (Mom and the two children).

Attach the household to an existing address with a family living there.

Create non-household relationships between the children and the father (he still has Portal rights, but not mailing).

Scenario 1B: Address Change

The household created in Scenario 1 has moved to a new address in your district (they've gotten an apartment). Create a new address for the household, attach the three person household to the new address and end date their attachment with the other address.

Scenario 1C: Identity Changes

The divorce has been finalized, and the Mom has also had her last name (and that of her kids) changed to her maiden name, which happens to be the same as your last name. Change the students' and mother's identity to reflect the legal name change.

Scenario 1D: Student Moving Out

The father has moved to your district, and the oldest child has decided to live with the father part-time.

- Create a new household for the father with an address .
- Add the oldest child as a secondary member of his father's household.

Scenario 2A: New Blended Family

Add two new students and two adults with different last names using Census>Add Person. Create a new household for the family using the Census Wizard.

Scenario 2B: Divorce/Household Separation

Using the household created in Scenario 2A:

- Split the household into two households following a divorce (Mom keeps the family's current address).

- The father's household is the primary household for the younger student.

- The mother's household is the primary household for the older student.

- Both students live part-time (secondary) in the other parent's household.

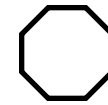- Both guardians need mailing and Portal access for both students.

CENSUS MAINTENANCE

OVERVIEW
This lesson will introduce the process of changing data in the Census module. Changes to an individual's data such as their legal name and contact information will be completed in Census > People, while changes in household membership and addresses will be done from the household level.

Changing a Person's Identity
Scenario: A student comes to the office with a legal name change, or a teacher has gotten married and has changed her name.

1. Search for the person—Search (All People).
2. Select the person from the search results.
3. Select Identities tab.
4. Click New.
5. Enter the person's new Name and/or other information.
6. Select the Effective Date for when the identity change happens.
7. Click Save.
8. Verify that the new identity is marked in the list as the current identity.
9. Select the person's old name in the search results.
10. Verify the new name appears above the Census tabs.

This lesson will demonstrate the process of making changes to households and relationships. Keep in mind that every situation and family is unique and may not exactly fit the models shown in this lesson.

Figure 1. In this example, "Dylan Abegg" has had a legal name change to "Boy Genius." By changing the identity, Boy Genius' old name (Dylan Abegg) is preserved.

Changing Preferences for a Messenger Contact

Scenario: A parent calls in and wishes to change where attendance messages are sent.

1. Search for the person—Search (All People).
2. Select the person from the search results.
3. On the Demographics tab, scroll down to personal contact information.
4. Check the checkbox that matches the type of message and where it should be routed.
5. Click Save when finished.

Changing Contact Info for a Person

Scenario: a parent calls in with a new cell phone or work phone number for themselves.

1. Search for the person—Search (All People).
2. Select the person from the search results.
3. On the Demographics tab, scroll down to personal contact information.
4. Enter the new cell phone or work phone number.
5. Click Save when finished.

Changing a Household Address
Scenario: A household has moved to a new address.

1. Search for the household by entering the name of one of the members of the household—Search (Household).
2. Select the household from the search results.

3. Select the Addresses tab.
4. Click Find New Address.
5. Search for the new address.
6. If the address does not exist in Campus, click New Address. Otherwise, select the address by clicking it and jump to step 10.

7. Enter in the information for the new address.
8. Click Save.

9. Enter a Start Date for the new address (when did the household start living at that location).
10. Check Mailing if this is where their mail should be sent to.
11. Click Save.

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Changing household membership for students

Scenario: A student has moved out of one household and has moved into another existing household, as in the case of a child being placed into a group home or foster care. **If the situation involves a divorce or the student becoming emancipated, see the section on splitting a household into two new households.**

1. Search for the student—Search (All People).
2. Select the student from the search results.
3. Select the Households tab.
4. On the existing household, click Edit.
5. Enter an End Date (when did that student move out).
6. Click Save. A pop-up window will appear asking about the student's existing household relationships.
7. Select the appropriate option for modifying the existing household relationships.
   - **Keep the relationships** will keep the student's relationships as is.
   - **End the relationships by adding an end date** will allow the user to enter an End Date that will be applied to all existing household relationships the student has. There will be a historical record of the relationships maintained on the student's Relationships tab.
   - **Delete the relationships** will delete all existing household relationships the student has. There will be no historical record of the relationships.
8. Click New Household Membership.
9. Search for the household the student is moving into.
10. Select the household in the results list.
11. Enter a Start Date.
12. Click Save.

Once the student has been moved out of their household, the relationships they have may also need to be edited.

To edit relationships:
1. Select the student's Relationships tab.
2. Edit the check boxes (Guardian, Portal, Messenger) to reflect the changed parental rights.
3. Click Save when finished.

Splitting a Household into Two New Households
Scenario: One parent has moved out of the household, as in the case of a divorce or separation.

Moving the Parent Out of the Household
1. Search for the household that needs to be split by entering the name of one of the members of the household—Search (Household).
2. Select the household from the search results.
3. Select the Members tab.
4. Select the family member who is moving out.
5. Enter an End Date.
6. Click Save.

If the parent will still be receiving mail at a new address OR if a student will be living with them, proceed with the steps to create a new household. If the parent will NOT be receiving mail, you may skip to the section on maintaining or changing relationships.

Creating a New Household
1. In the Index select Add Household from the Census module.
2. Create a new household for the parent who moved out.
3. Click Save.
4. Select the Addresses tab.
5. Search for the address for the new household.
6. Attach address to the household, check Mailing as needed.
7. Select the Members tab for the household.
8. Click Find New Member.
9. Search for the parent to add them to their household.
10. Repeat steps 8 and 9 for students IF the student will be living with the separated parent.
11. Select the household in the results list.
12. Enter a Start Date (when the student moved in).
13. Click Save.

Maintaining or Changing Relationships
1. Search for the student—Search (All People).
2. Select the student from the search results.
3. Select the Relationships tab.
4. Edit the check boxes (Guardian, Portal, Messenger) to reflect the changed parental rights.
5. Click Save when finished.