UAccess Student
Updating Biographic and Demographic Data
# Table of Contents

**Updating Biographic and Demographic Data** .......................................................... 1

**Introduction** .................................................................................................................. 1

- Agenda .......................................................................................................................... 1
- Objectives ....................................................................................................................... 1
- Reference Material and Resources .............................................................................. 1
- Logging In to UAccess Student ................................................................................... 3
- Updating Carry ID in User Defaults ............................................................................ 5

**Activity One: Updating Phone, Email, and Preferred Name** .................................... 7

- Updating or Adding a Phone Number ......................................................................... 7
- Updating or Adding an Email Address ........................................................................ 13
- Adding a Preferred Name ............................................................................................ 15

**Activity Two: Updating Ethnicity Information** .......................................................... 19

- Clearing Look Up Information ................................................................................... 19
- Entering Ethnicity Information ................................................................................... 21

**Activity Three: Updating Addresses** ....................................................................... 23

- Updating an Address .................................................................................................. 23
- Using Update/Display and Include History .................................................................. 31

**Activity Four: Updating Multiple Pieces of Information** ........................................ 37

- Overview of Add/Update a Person ............................................................................. 37
- Updating Marital Status .............................................................................................. 43
- Exercise: Updating Name and Address in Add/Update a Person .................................. 47

**Activity Five: Adding Emergency Contacts (Using Search/Match)** .......................... 49

- What to Do When You Can't Find a Person: Joys of Search/Match ............................... 49
- Choosing and Saving Search Parameters in Search/Match .......................................... 51
- Choosing and Saving Search Results in Search/Match .................................................. 57
- Viewing Results in Search/Match ................................................................................. 63
- Using Carry ID in Search/Match ............................................................................... 69
- Adding Emergency Contacts ...................................................................................... 71

**Review Exercise** ........................................................................................................ 77

**Appendix A: Address Type Definitions** ................................................................... 79

**Appendix B: SIS/Matrix to UAccess Student** ......................................................... 83

**Appendix C: Joining the Mosaic Community** ............................................................. 87

**Glossary** ....................................................................................................................... 89
Updating Biographic and Demographic Data

Introduction
This workshop is for users in academic departments and administrative offices who will be updating biographic and demographic data, such as addresses, names, phone numbers, and emergency contacts.

You will learn how to navigate the UAccess Student system in order to access and update personal information for people. You will also learn how to ensure that you are entering information in the correct record.

You will be introduced to key concepts in UAccess Student: Effective-Dated information, Update/Display view, and Include History view. In addition, you will learn how to conduct advanced searches using Search/Match to find records that cannot be located through the basic search function.

Agenda
• Introduction
• Activity One: Updating Phone, Email, and Preferred Name
• Activity Two: Updating Ethnicity Information
• Activity Three: Updating Addresses
• Activity Four: Updating Multiple Pieces of Information
• Activity Five: Adding Emergency Contacts (Using Search/Match)
• Mosaic Community Orientation
• Review Exercise

Objectives
• Navigate UAccess Student
• Use UAccess Student components to update preferred name, address, email, phone number, and other information for a person
• Use Effective Date fields to create future-dated changes to biographic information
• Use Include History to view historical information in addition to current information
• Use Search/Match to find hard-to-locate records

Reference Material and Resources
• 24/7 IT Support Center (http://247.arizona.edu/)
• UITS Workshop and Training Team (http://uits.arizona.edu/workshops)
• Mosaic Community (http://mosaic.community.arizona.edu/)
• Mosaic Listserv (http://mosaic.arizona.edu/mosaic_listserv)
## Logging In to UAccess Student

### Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The training version of the UAccess Portal may look slightly different than the screen you will use to access the real application and database.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Administrative Staff</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>You can type the desired information into the <strong>NetID</strong> field. Type &quot;train#&quot; or another valid value.</td>
</tr>
<tr>
<td>4.</td>
<td>You can type the desired information into the <strong>Password</strong>: field. Type &quot;Love2Learn!.&quot;</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>LOGIN</strong> button.</td>
</tr>
<tr>
<td>6.</td>
<td>The choices and options you have in your <strong>menu pagelet</strong> depend on the level of access you've been granted.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 7.   | Clicking the small arrow button to the left of a menu item expands the menu on the menu pagelet.  
Click the **Campus Community** button. |
| 8.   | Clicking the actual link will expand the **menu pagelet**, but will also bring up the **Main Menu**.  
Click the **Campus Community** link. |
| 9.   | **End of Procedure.** |
**Updating Carry ID in User Defaults**

**Procedure**

One of the first things you will want to do when you log in to the real UAccess Student for the first time is set your **User Defaults**.

In this lesson, you'll see how to set your defaults to make updating records easier.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>Set Up SACR</strong> link.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>User Defaults</strong> link.</td>
</tr>
<tr>
<td>12.</td>
<td>Note that there are lots of different defaults that you can set for yourself in <strong>User Defaults</strong>. We're going to focus on one.</td>
</tr>
<tr>
<td>13.</td>
<td>Click the <strong>User Defaults 4</strong> tab.</td>
</tr>
<tr>
<td>14.</td>
<td>Checking the <strong>Carry ID</strong> option will allow you to store a person's ID as you navigate through the system. It will keep you from having to look that person up every time you navigate to a new screen. Click the <strong>Carry ID</strong> option.</td>
</tr>
</tbody>
</table>
Step | Action
---|---
15. | Click the **Save** button.
16. | That's it for setting your **Carry ID** default. Feel free to play with **User Defaults** more in the real UAccess Student to see what else you like. **End of Procedure.**
Activity One: Updating Phone, Email, and Preferred Name

In this activity, you are working with a student who needs help updating their phone number, personal email address, and Preferred Name (nickname) in UAccess Student.

You'll have an opportunity to conduct a basic search for the student's record and perform some basic data entry.

You'll also get your first look at Effective Date, a key concept in UAccess Student.

For this activity, you will work with the student listed as Person One on the handout you received in the workshop.

Updating or Adding a Phone Number

Procedure

Students are able to update their own phone numbers in the Student Center component of UAccess Student, but you may find yourself updating a phone number for a student. Doing so is quite simple.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td>You will find the Phones component under Campus Community &gt; Personal Information &gt; Biographical &gt; Addresses/Phones. Click the Phones link.</td>
</tr>
<tr>
<td>18.</td>
<td>All components in UAccess Student include a Look Up screen where you will search for the person whose record you want to update. Ideally, you will be able to search for the person using ID (EmpID), Campus ID (NetID), or National ID (SSN). However, if you don't have any of that information, you can also search by name. You can type the desired information into the Last Name field. Type &quot;quigley&quot; or another valid value.</td>
</tr>
<tr>
<td>19.</td>
<td>Click the Search button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>20.</td>
<td>Note that you can sort the list of records using any of the underlined column headers. You can click once on the column header to sort ascending on that column. Clicking a second time will sort the data in ascending order on that column.</td>
</tr>
<tr>
<td>21.</td>
<td>The <strong>Search Results</strong> include some basic information that will help you ensure that you are choosing the right person's record. You can confirm first, last, and middle name. You can also check the person's <strong>Date of Birth</strong>, <strong>Campus ID</strong> (NetID), and <strong>National ID</strong> (SSN) to make sure you are entering the right record. It is <strong>critical</strong> that you confirm that you are entering the right record before you start making changes! Click <strong>Person One's</strong> link.</td>
</tr>
</tbody>
</table>

Quiquley, Bernard Edward
Step | Action
--- | ---
22. | Note that the person's name and ID show at the top of the screen.
    | Always check these to confirm that you are editing the right record!
23. | Phone numbers will automatically format for you. All you have to do is type in ten numbers.
    | In this case, you're going to change one of your person's phone numbers.
    | Choose a phone number to update.
    | You can type the desired information into the Phone Number field. Type "5208659432" or another valid value.
24. | Next, you're going to add a new phone number type for your person.
    | Click the Add button.
    | ![Add button](image)
25. | Click the Phone Type drop-down list.
    | ![Phone Type drop-down list](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>26.</td>
<td>Click the <strong>Campus</strong> list item.</td>
</tr>
<tr>
<td>27.</td>
<td>You can type the desired information into the <strong>Phone Number</strong> field. Type &quot;5256265462&quot; or another valid value.</td>
</tr>
<tr>
<td>28.</td>
<td><strong>Note</strong>: If you attempt to navigate away from the screen without saving first, UAccess Student will prompt you to save. Make sure that you read the prompt window carefully! Clicking <strong>OK</strong> will allow you to return and save. Clicking <strong>Cancel</strong> will discard your changes.</td>
</tr>
<tr>
<td>29.</td>
<td><strong>Note</strong>: One of the numbers must be checked as <strong>Preferred</strong> for the record to save. Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>30.</td>
<td>If you want to delete a row in UAccess Student, simply use the <strong>minus</strong> sign. Click the <strong>Delete</strong> button.</td>
</tr>
</tbody>
</table>
Step 31. In the confirmation window, click OK to confirm the deletion.

Click the OK button.
Step | Action
--- | ---
32. | Then, save the record. 
Click the **Save** button.

![Save button](image)

33. | **End of Procedure.**
# Updating or Adding an Email Address

**Procedure**

Editing email addresses is very similar to updating phone numbers.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | You'll find Electronic Addresses (email addresses) under **Campus Community > Personal Information > Biographical > Addresses/Phones.**  
   Click the **Electronic Addresses** link. |
<p>| 2.   | Check to make sure that you are viewing the right person's record. |
| 3.   | If your person already has a <strong>UA Official</strong> email address, you will need to click <strong>Add</strong> to add a row for a <strong>Personal</strong> email address. |
| 4.   | Click the <strong>Email Type</strong> drop-down list. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5.   | **Note:** **UA Official** email addresses will auto-populate when they are assigned to new students. You won't have to manually update them.  
Click the **Personal** list item. |
| 6.   | You can type the desired information into the **Email Address** field. Type "**bernie@yahoo.com**" or another valid value. |
| 7.   | One email address must be marked as preferred.  
*When UA Official email addresses load, they will automatically be marked as preferred. You should not change this setting.*  
Click the **Preferred** option. |
| 8.   | Click the **Save** button. |
| 9.   | That's it for adding an email address!  
**End of Procedure.** |
Adding a Preferred Name

Procedure

Students have the ability to include a Preferred Name (nickname or other non-legal name) in their record.

Students can update this information themselves through the Student Center. However, you may find yourself helping a student enter a Preferred Name.

Including students' Preferred Names in the system can be very useful when you are trying to look up a record. When a student tells you his name is Bobby Stevens and neglects to mention that his legal name is William Robert Stevens, you'll still be able to readily find him.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>You can find the <strong>Names</strong> component under <strong>Campus Community &gt; Personal Information &gt; Biographical</strong>. Click the <strong>Names</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Check to be sure that you are viewing the correct person's record.</td>
</tr>
<tr>
<td>3.</td>
<td>The <strong>Names</strong> component has more elements than the <strong>Phones</strong> and <strong>Electronic Addresses</strong> components. The key difference is that Names information has an <strong>Effective Date</strong>. That means that you can clearly see when a name was changed in UAccess Student by looking at the <strong>Effective Date</strong>. In other words, <strong>Names</strong> (and any other Effective-Dated information) includes a history.</td>
</tr>
</tbody>
</table>
4. You're going to add a Preferred Name, not update the Primary Name. But the shortcut to not have to retype the entire name is to click on the Primary link.

   Click the **Primary** link.

5. Clicking on the Primary link pulled the Primary Name information into the Add/change a name area.

   Your next step, of course, is to change the Type of Name to be accurate.

   Click the **Type of Name** drop-down list.

6. Click the **Preferred** list item.

7. Note that the Effective Date in the Add/change a name area defaults to today's date. That's exactly as you want it to be. When you save the information, it will take effect immediately.

   For most biographical information, the appropriate Effective Date is the date on which it was entered into UAccess Student (that is, today).
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>You can type the desired information into the <strong>First Name</strong> field. Type &quot;Bernie&quot; or another valid value.</td>
</tr>
<tr>
<td>9.</td>
<td>To enter the information into the record, you need to submit it. Click the <strong>Submit</strong> button.</td>
</tr>
<tr>
<td>10.</td>
<td>You can now see the new Preferred name with today's date in the <strong>Effective Date</strong> field. Note, however, that you have still not saved the change! You must actually click the <strong>Save</strong> button in order to do so. Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>

**UAccess STUDENT**

**Names**

<table>
<thead>
<tr>
<th>Personal Information</th>
<th>Name Type</th>
<th>Name</th>
<th>Effective Date</th>
<th>Status</th>
<th>Name History</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Bernard</td>
<td>Cuajey</td>
<td>11/21/2001</td>
<td>Active</td>
<td>name_history</td>
</tr>
</tbody>
</table>

**Effective Date**

- You have successfully added a preferred name to your person's record. And you've had your first taste of Effective Date. You'll see more of it throughout UAccess Student.

**End of Procedure.**
Activity Two: Updating Ethnicity Information

In this activity, you are working with a student who needs help correcting his or her ethnicity information in UAccess Student.

You'll have an opportunity to practice switching person records in search.

You'll also get a chance to work with some more complex data entry.

For this activity, you will work with the student listed as Person Two on the handout you received in the workshop.

Clearing Look Up Information

Procedure

When you navigate to a new component within UAccess Student, the system may remember whose record you were looking at most recently. So far, that's been pretty handy!

However, when you switch to updating a new person's information, you need to be very careful that you actually switch to viewing that new person's record.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Personal Attributes</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Ethnicity</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>The system may automatically bring up information for the last person you were looking at. But you actually want to update information for someone new.  &lt;br&gt;Click the <strong>Return to Search</strong> button.</td>
</tr>
</tbody>
</table>
4. If you see the ID of the record you were last working with in the ID field, the quickest way to get rid of it is to clear.

   Click the Clear button.

5. Now, you can search for the record you actually want to update.

   You can type the desired information into the Last Name field. Type "quigley" or another valid value.

6. Click the Search button.

7. Click the Person Two's link.

   Quigley, Qasim Muhammad

8. Once you enter the record, use the Name and ID at the top of the screen to ensure that you are looking at the right record.

   End of Procedure.
Entering Ethnicity Information

Procedure

Most Ethnicity information will come straight from the student's application. However, you may find yourself needing to review or even correct it.

You can find Ethnicity information under Campus Community > Personal Information > Biographical > Personal Attributes.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.</td>
<td>The Ethnicity component collects information for both federally mandated reporting categories and Native American tribes.</td>
</tr>
<tr>
<td>10.</td>
<td>If the person is Hispanic or Latino, the checkbox at the top must be checked. Click the Person is Hispanic or Latino option.</td>
</tr>
<tr>
<td>11.</td>
<td>If you check the box, you will also want to use the drop-down menu to identify the specific Ethnic Group. Click the If Yes, select Ethnic Group drop-down list.</td>
</tr>
<tr>
<td>12.</td>
<td>Whatever you choose in this drop-down menu will automatically populate the grid below. Click the Hispanic or Latino, Other list item.</td>
</tr>
<tr>
<td>13.</td>
<td>The information that you chose has automatically populated the Ethnicity grid. If you need to, you can change or add to the Ethnic Groups using standard UAccess Student navigation conventions.</td>
</tr>
</tbody>
</table>
| 14.  | If you are doing data entry in the Ethnicity fields, pay attention to the two tidbits below. 
1. Ethnicity information is usually only recorded for U.S. citizens; therefore, the Regulatory Region should always be USA. 
2. The UA is not using the Primary, IPEDS, or Percentage fields. Click the Save button. |
Training Guide

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>After you save, the system will show the date and time of your update. Note that Ethnicity information is not Effective-Dated.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
Activity Three: Updating Addresses

In this activity, you are working with a student who needs help updating their address, which will be changing on the first of the month.

You'll have an opportunity to switch person records in search.

You'll also get a more detailed look at Effective Date, including future-dating an entry. You'll also be introduced to Update/Display and Include History views, key tools in navigating information in UAccess Student.

For this activity, you will work with the student listed as Person One on the handout you received in the workshop.

Updating an Address

Procedure

You can find Addresses under Campus Community > Personal Information > Biographical > Addresses/Phones.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Addresses</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>You may need to clear out information that was carried over from the previous person's record that you were looking at. Do so if you need to. Click the <strong>Return to Search</strong> button.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Clear</strong> button.</td>
</tr>
<tr>
<td>4.</td>
<td>You can type the desired information into the Last Name field. Type &quot;quigley&quot; or another valid value.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>6.</td>
<td>Click Person One's link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>7.</td>
<td>Use the Name and ID at the top of the screen to confirm that you are looking at the correct record.</td>
</tr>
<tr>
<td>8.</td>
<td>Like <strong>Names</strong>, <strong>Addresses</strong> are Effective-Dated information. And the layout of the <strong>Addresses</strong> component is very similar to that of the <strong>Names</strong> component.</td>
</tr>
<tr>
<td>9.</td>
<td>Right now, you are viewing only the first two Address Types for your person. You can tell how many Address Types the person has by looking at the numbers in the upper right corner of the <strong>Current Addresses</strong> area (for example, &quot;1-2 of 3&quot;). You can see all of the Address Types on one screen by using the <strong>View All</strong> link. Click the <strong>View All</strong> link.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 10.  | Now that all of the addresses are on one screen, you can see not only what Address Types your person has, but also what those addresses are and when they took effect.  
**Note:** You can customize the data on this screen using the **Customize** link. Details on how to do so are covered in the **Customizing Column Display** online tutorial. |
| 11.  | Click on the link in front of the address you want to update in order to pull it into the **Add Address** area.  
In this case, you want to update the Permanent address.  
Click the **Permanent** link.  
Permanent |
| 12.  | Addresses are Effective-Dated information.  
The student knows that she will be moving to a new house on the first of the next month. She's planning ahead. So you need to future date the change you are about to make.  
When you future date information, it automatically goes into effect on the date that you choose.  
Click the **calendar** button. |
| 13.  | Click the button. |
| 14.  | Click the **1** link. |
15. Now, you're ready to make your changes to the address.

Click the Edit Address link.

[Edit Address]
### Step 16

Change the address to reflect the information that will be true on the first of next month.

You can type the desired information into the **Address 1** field. Type "1324 E Monkeyshine Ln" or another valid value.

### Step 17

You can type the desired information into the **Postal** field. Type "85714" or another valid value.

### Step 18

Click the **OK** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 19.  | You've made changes to the address, but now you need to tell the system which Address Types to apply that change to. See the **Appendices** for detailed definitions of Address Types.  

**Note:** There are some address types that very few people should change!  

- **Permanent**: Updatable by anyone with access.  
- **Mailing**: Updatable by anyone with access.  
- **Billing**: Updatable by anyone with access.  
- **UA Street Address**: Updatable by anyone with access.  
- **International - Home Country**: *Don't touch.* Student needs to talk to International Student Office.  
- **Diploma**: Updatable by anyone with access.  
- **Residence Hall**: *Don't touch.* Student needs to talk to Residence Life.  
- **ISIR**: *Don't touch.* Student needs to update with ISIR.  
- **Business**: Not used at UA.  
- **Other 2**: Not used at UA.  
- **Home**: *Don't touch.* Student needs to talk to Human Resources.  
- **Check**: Not used at UA. |
| 20.  | Note also that many records that were imported from SIS contain Permanent, Mailing, Billing, and Diploma addresses that are the same.  
In truth, a student only needs those additional Address Types if they are different from the Permanent address. |
| 21.  | In this case, the student's Permanent, Mailing, and Billing addresses are all the same. The student wants all correspondence sent to the same address.  
So, you are going to change the Permanent address and deactivate the Mailing and Billing addresses.  

**Note:** Updating the Permanent address without either deactivating or changing the Mailing and Billing addresses will cause the student's information to be sent to the wrong address! |
| 22.  | Note that **Address Types** that already exist in this record have a blue asterisk in front of them.  
Click the * **Permanent** option.  

   |  

| 23.  | Once you've chosen your Address Types, you're ready to Submit the changes.  
Click the **Submit** button.  

Submit |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.</td>
<td>You can tell that your changes successfully submitted by the green check marks next to the <strong>Address Types</strong>, but note that the <strong>Addresses</strong> and <strong>Effective Dates</strong> under Current Addresses haven't changed. The information under <strong>Current Addresses</strong> won't change until the date that you entered as the Effective Date of your change.</td>
</tr>
<tr>
<td>25.</td>
<td>In order to make additional address changes, you will need to clear out the <strong>Add Address</strong> area. Click the <strong>Reset</strong> button.</td>
</tr>
<tr>
<td>26.</td>
<td>Pull down the address you want to change. In this case, you are going to inactivate the Mailing and Billing address. Click the <strong>Mailing</strong> link.</td>
</tr>
<tr>
<td>27.</td>
<td>You want your change to be effective immediately, so you can leave the <strong>Effective Date</strong> at today's date. Click the <strong>Status</strong> drop-down list. <strong>Active</strong></td>
</tr>
</tbody>
</table>

![UAccess Student Interface](image.png)
## Step | Action
--- | ---
28. | Click the **Inactive** list item.
29. | Click the * Mailing option.
30. | Click the * Billing option.
31. | Click the Submit button.
32. | You’ve successfully deactivated the redundant addresses. Note that, because you used an Effective Date of today, your changes show immediately in the **Current Addresses** section.

### Address Change Form

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>33.</td>
<td>You’ve successfully submitted a future-dated address change and deactivated redundant addresses, but you haven’t yet saved the changes! In the next lesson, you’re going to look at some of the effects of future-dating an entry and explore data history. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
Using Update/Display and Include History

Procedure

In the previous lesson, you future-dated an address change.

In this lesson, you'll look at how that future-dated change shows in the Address History screen and how the view changes when you switch into Include History mode.

Step | Action
--- | ---
34. | In order to access the Address History, you'll need to click the Edit/View Address Detail link.

Click the Edit/View Address Detail link.
35. Because you future-dated your address change, you can see both the currently effective address and the future-dated address in this screen. Note that the future-dated address is editable. You can change any piece of its information, and you can delete the future dated information. (Clicking on the minus sign next to the row will delete it.) The currently effective address is not editable. Nor can you delete it. (The minus sign is visible, but UAccess Student will not allow you to go through with the delete.)

36. Changing the Effective Date to today's date will change how the data displays in addition to making the address change immediately effective.

Click the calendar button.

37. Click the Current Date link.

38. Click the OK button.
### Step 39.

Note that the **Address** and **Effective Date** in the **Current Addresses** section show your changes. Let's go back into **Address History** to see the results of changing the Effective Date to today.

Click the **Edit/View Address Detail** link.

---

### Step 40.

Now that the information is effective, you cannot edit or delete it. Because you have not yet saved the record, you can still see the previous address. And if you realize that you made a mistake when you changed the address, you can leave the record without saving in order to discard your erroneous changes.

Click the **Cancel** button.

---

### Step 41.

Click the scrollbar.

---

### Step 42.

Click the **Save** button.
Step | Action
--- | ---
43. | Let's see what has changed in the **Address History** now that you have saved the record. 

Click the **Edit/View Address Detail** link.

---

44. | You can only see the currently effective address. 

Click the **Cancel** button.
Step | Action
---|---
45. | Take a look at the bottom of the Addresses screen.

On the far right side, you’ll see two buttons: **Update/Display** and **Include History**.

**Update/Display** is currently grayed out, which indicates that it is the view mode you are currently using.

In Update/Display mode, you can view current and future-dated information, as you have seen.

Click the **Include History** button.

46. | Note that the **Include History** button is now grayed out, and the **Update/Display** button is bright, indicating that you are currently in Include History mode.

Click the **Edit/View Address Detail** link.
Step | Action
--- | ---
47. | Who knew there were three addresses?

In Include History mode, you can see future-dated, current, and all past information. You can only edit future-dated information.

Click the Cancel button.

48. | Most users have access to both Update/Display mode and Include History mode. Which one you use will depend on what kind of information you need to see.

In many cases, Update/Display (the default view) will suffice. If, however, someone has a question that can only be answered by seeing what the information used to be, you'll want to switch into Include History mode.

End of Procedure.
Activity Four: Updating Multiple Pieces of Information

In this activity, you are working with a student who needs help updating multiple pieces of information at once. Their marital status has changed, they want to change their Preferred Name, and their address will be changing on the first of the month.

You'll have another opportunity to practice switching people using search. You'll also be introduced to the all-in-one screen: Add/Update a Person.

You'll also have another opportunity to work with Effective Date and Update/Display and Include History views.

We'll work together to update the marital status, but you'll update the rest of the information on your own.

For this activity, you will work with the student listed as Person Two on the handout you received in the workshop.

Overview of Add/Update a Person

Procedure

Sometimes, you'll have multiple types of information to update or view at once, and Add/Update a Person is the tool that will let you do so.

In Add/Update a Person, you can see multiple pieces of information in one screen, and you can access some pieces of information, such as marital status, that aren't available anywhere else.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Access Add/Update a Person under Campus Community > Personal Information.  
      Click the Add/Update a Person link.  
      Add/Update a Person |
| 2.   | You are starting to work with a new person, so you will need to check to make sure you are viewing the right record and clear your search criteria as necessary.  
      Click the Return to Search button.  
      Return to Search |
3. **Step**  
   **Action**  
   Click the **Clear** button.

4. **Step**  
   **Action**  
   You can type the desired information into the **Last Name** field. Type "quigley" or another valid value.

5. **Step**  
   **Action**  
   Click the **Search** button.

6. **Step**  
   **Action**  
   Click **Person Two's** link.  
   Quigley, Madison Marie

7. **Step**  
   **Action**  
   Confirm that you are viewing the correct record.

---

8. **Step**  
   **Action**  
   Some pieces of information on the **Biographical Details** tab of **Add/Update a Person** are familiar. You've already seen (1) **Name**, (2) **Addresses**, (3) **Phones**, and (4) **Email Addresses** elsewhere.

   All of these functions work just like they did where you saw them before. You'll just need to click on the **Names** or **Addresses** link to access the familiar screens.
9. Some pieces of information are new here.

(1) **Date of Birth** and **Birth Information**, (2) **Campus ID** (NetID), (3) **Marital Status**, (4) **Gender**, (5) **National ID** (SSN), (6) **Visa/Permit Data**, and (7) **Citizenship** are all pieces of information that we have not seen elsewhere.

Some of this information (**Visa/Permit Data** and **Citizenship**) does have its own components. However, depending on your access levels, you may see it only here in **Add/Update a Person**.

10. **Campus ID** (NetID) will automatically populate when it is assigned.

**National ID** will rarely need to be altered from what the student entered into the application.

The next lesson will cover **Biographical History** in more detail.

You'll find information on **Entering Visa/Permit Data** and **Entering Citizenship Data** in the appropriate online tutorials.
### Step 11

You can view Addresses on the **Biographical Details** tab, but to edit them, you will need to be on the **Addresses** tab.

You can get there either by clicking directly on the **Addresses** tab or by clicking on the **Addresses** link in the **Addresses** section of this tab.

Click the **Addresses** tab.

### Step 12

The **Addresses** tab looks and functions exactly like the freestanding **Addresses** component that you used earlier.

### Step 13

Click the **Regional** tab.
14. The Regional tab includes familiar information (Ethnicity) and new information (Military Status).

   Ethnicity functions exactly as it does in the freestanding component where we saw it before.

15. Military Status is an Effective-Dated field. Mechanically, it functions just like Marital Status, which you will work with in the next lesson.

   By default the Military Status field will be initially populated with Veteran or Non-Veteran. The Registrar's Office will choose more specific terms as appropriate.

16. In the next lesson, you'll update the person's Marital Status, which is done on the Biographical Details tab.

   Click the Biographical Details tab.

17. End of Procedure.
# Updating Marital Status

## Procedure

In this scenario, a student has come to you for help updating his or her marital status. **Marital Status** is an Effective-Dated field; however, it works a little bit differently from what you've already seen in Names and Addresses.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The most crucial element of successfully updating the student's marital status is to remember that you do not want to overwrite the existing information. You want to add new information. To that end, your first step is to add a row of information. If you do not add a row, UAccess Student will not let you save the changes you have made! Click the <strong>Add</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 2.   | You are now looking at **1 of 2** records. You've added a row.  

Note that the **Effective Date** in this row is today's date. All of the other information carries over.  

**Note:** Military Status is an Effective-Dated field that works exactly the same way. |
| 3.   | One of the easiest ways to see what you are doing is to use the View All link to see all of the rows at once.  

Click the View All link. |
| 4.   | You can now see the information with the old Effective Date on the bottom and the new information with today's Effective Date on the top.  

The Marital Status Effective Date is the date that you entered the change. That is, today's date. So you don't need to make any changes to that field.  

Click the Marital Status drop-down list.  

**Unknown** |
| 5.   | Change the Marital Status to the appropriate value.  

Click the Civil Partnership list item. |
| 6.   | The As of field is the date that the marital status change was legally effective.  

Click the Calendar button. |
| 7.   | Click the Year drop-down list.  

**2001** |
| 8.   | Click the 2009 list item.  

**2009** |
| 9.   | Click the 20 link.  

**20** |
| 10.  | You've entered the update to the student's Marital Status. Now it's time to save.  

Click the scrollbar. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
12. | Note that after you save, only one record shows in the **Biographical History** section: the one you just entered. That's because you are looking at the record in **Update/Display** mode.

Click the **Include History** button.

13. | Now two records show. The first is the one you just entered. The second is the old information.

Click the **Next** button.

14. | There's the historical information.

15. | You've successfully updated Marital Status. The rest of the scenario you will complete on your own: updating the student's Name and Address information.

**End of Procedure.**
Exercise: Updating Name and Address in Add/Update a Person

A student has come to you for help updating his/her Marital Status, Preferred Name, and Address. The address change should take effect on the first of the next month.

You should already have completed the Martial Status change, and you should already be in the Add/Update a Person component of UAccess Student. Now, you will update the Preferred Name and the Address.

Updating a Name

1. Click the Names link on the Biographical Details tab to access the person's Name information.

2. Use the Primary link to access the name information.

3. Make changes to the person's name as you see fit. Make sure you are modifying a Preferred Name.

4. Click Submit.

5. Note the change to the person's Preferred name.

6. View the Name History to see the current (effective today) name and the any former names.

7. Click OK on the Name Type History screen and on the Names screen to return to Biographical Details.

8. Click Include History so that you can view all names this person has had.

9. Note that you are prompted to save. Click OK and then Save.

10. Switch to Include History view.

11. Navigate to Name Type History screen. How many Primary names has your person had in the system? _____ How many Preferred names? _____

12. Navigate back to the Biographical Details screen.

Updating an Address

1. Navigate to the Addresses screen within Add/Update a Person. (Note that there are two ways to get there.)

2. How many address types does your person have in the system? _____
3. Does your person have any Address Types that you should NOT change? What are they? _________________________________________________________

4. Pull the Permanent Address information down into the Add Address area.

5. Edit the address. (Make whatever changes you would like to.)

6. Return to the Addresses screen.

7. Change the Effective Date so that the address change will happen as of the first of the next month.

8. Choose the Address Type that you are updating.

9. Submit.

10. Deactivate any redundant addresses that you are allowed to update. (See the "Updating an Address" chapter if you need help.)

11. Switch between Update/Display view and Include History view to see how the Address History changes in the two views. Remember that you will be prompted to save.

How many Permanent Addresses does your person have in the system? ______
How many Mailing Addresses? ______
What was the Effective Date of the Permanent Address prior to the one you just added?
Activity Five: Adding Emergency Contacts (Using Search/Match)

In this activity, you need to look up a student's Emergency Contacts. You have a name for the student, but you can't find the student using basic search.

You'll have another opportunity to practice switching person records using search. You'll also be introduced to the high-powered version of searching for a person: Search/Match.

For this activity, use the **Preferred** name of the student listed as **Person One**. (You entered the Preferred name in Activity One.)

**What to Do When You Can't Find a Person: Joys of Search/Match**

**Procedure**

For this exercise, you are looking up a student by name. As it turns out, the name you've been given is actually the student's nickname. When you're looking for someone by nickname (Preferred Name) or an old name in a regular search, you won't be able to find them.

However, you can use **Search/Match** to find the person, even without having their current Primary Name or any specific ID information.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | First, let's navigate to Emergency Contacts, which can be found under Campus Community > Personal Information > Biographical.  
Click the Emergency Contacts link.  
[Emergency Contacts](#) |
| 2.   | You've been looking at someone else's record, so you may need to clear your search information to look up your new person.  
Click the Return to Search button.  
[Return to Search](#) |
| 3.   | Click the Clear button.  
[Clear](#) |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Enter the nickname (Preferred Name) that you gave your person in Activity One. You can type the desired information into the <strong>Last Name</strong> field. Type &quot;quigley&quot; or another valid value.</td>
</tr>
<tr>
<td>5.</td>
<td>You can type the desired information into the <strong>First Name</strong> field. Type &quot;angie&quot; or another valid value.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>7.</td>
<td>Lo and behold, you have no results. The regular search will not find someone by his or her Preferred Name or by a historical name. Even if you do have results, check closely to ensure that you are actually looking at the right person's record! Confirm date of birth, phone number, or whatever other information will allow you to verify that you are entering the right record.</td>
</tr>
<tr>
<td>8.</td>
<td><strong>Search/Match</strong> is a more robust search that will find people even with Preferred Names, old names, or other partial information. It's not necessary to use <strong>Search/Match</strong> all the time. But if you are adding a person or having trouble finding a person, it's essential. Click the <strong>Search/Match</strong> link.</td>
</tr>
<tr>
<td>9.</td>
<td>The next lesson will start walking you through how to conduct a basic Search/Match. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
Choosing and Saving Search Parameters in Search/Match

Procedure

The first step in **Search/Match** is to choose the type of search you want to run.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | There are three types of searches, but the majority of users will use the Person search.  
      | Click the **Search Type** drop-down list. |
| 2.   | Click the **Person** list item.  
      | ![Image](image1.png) |
| 3.   | Once you've chosen your Search Type, you need to choose your **Search Parameter**.  
      | The Search Parameter defines what terms you can use to search for the person (for example, First Name, Last Name, National ID, Email Address, etc.).  
      | Click the **Look Up** button. |
### Step 4

You will see multiple Search Parameters. Most users will use the same Search Parameters every time. In fact, you'll be able to save your preferences so that you don't have to choose them every time. But a quick overview of the options won't hurt!

**UA Admissions Manual** is the broadest pre-defined search. It is probably the easiest and fastest to use for most people's needs.

**UA Admissions Ad Hoc** is also a broad search, but it lets you choose your own search terms. You might use it if you can't find what you need using the UA Admissions Manual search.

**Financial Aid Search/Match** and **FA External Awards** are pre-defined searches used specifically by the Office of Student Financial Aid. If you need to use one of these searches, you will receive training specific to your department on how to do so.

**GC Ext Data Load Parameters** is used only by the Grad College for data loads. Most users won't need it.
### Step 5
Most users will use the **Admissions Manual Search** most of the time.

Click the **UA_AD_MANUAL** link.

### Step 6
Once you've entered the Search Parameter that you will typically use, you can save that search so that you don't have to look up the Parameter next time you visit **Search/Match**.

Click the **Save Search Criteria** link.

### Step 7
Name the search something that will be memorable for you.

You can type the desired information into the **Name of Search** field. Type "**General Search**" or another valid value.

### Step 8
Then, save your search.

Click the **Save** button.

### Step 9
Click the **Return to Advanced Search** link.
### Step 10

You will now see a **Use Saved Search** drop-down menu at the top of the screen.

Next time you visit **Search/Match**, you'll just choose your saved search and go!

**Note**: You can save multiple searches if you have a couple of searches that you frequently use. Just set up the search and click **Save Search Criteria** to save another search.

Click the **Search** button.

### Step 11

The Search Parameter that you entered defined which Search Fields show in the Search Criteria.

It also determined how the fields function. **National ID**, for instance, requires all digits of the SSN to function. **Last Name** and **First Name**, however, only require the first letters of the names.
12. There's one more step to configure your search. The next lesson will show you how to do it.

End of Procedure.
Choosing and Saving Search Results in Search/Match

Procedure

In the previous lesson, you saved Search Parameters to define your search criteria. In this lesson, you will save Search Results.

Search Results are predefined configurations that determine what columns of data your search will return (for example First Name, Last Name, Admission Term, Address, etc.).

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Let's just get straight to saving your settings so that you don't have to conduct the lookup again.</td>
</tr>
<tr>
<td></td>
<td>Click the User Default link. [User Default]</td>
</tr>
<tr>
<td>14.</td>
<td>Access the list of Search Result Codes.</td>
</tr>
<tr>
<td></td>
<td>Click the Look Up button. [Look Up]</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 15. | Most users will use the **Admissions Search Results** code.  
Click the **UA_AD_MAN_RESLT Admissions Search Results** link. |
| 16. | Click the **OK** button. |
| 17. | You've saved your default **Search Result Code**, so you'll never have to look them up again unless you want to.  
If you wanted to, you could simply click on the **Look Up** icon to switch your **Result Code**. |
| 18. | You've now saved your default **Search Results** and **Search Parameters**.  
The first time you log in to the real UAccess Student, you'll want to go through the steps to save these two items so that you're ready to roll with **Search/Match** when you need it. |

**End of Procedure.**
Using Selective Search in Search/Match

Procedure

Once you've configured your search (and it should only take that long the first time!), you're ready to start entering the person's information so that you can find them.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Enter whatever information you have about the person. In this case, we know the last name, which we can enter here.</td>
</tr>
</tbody>
</table>

**Note:** Search/Match only looks at the first 3 - 6 characters of names, depending on which Selective Search you use. Limiting the number of characters it looks at allows it to catch names that might have been misspelled.

You can type the desired information into the Last Name Search field. Type "quigley" or another valid value.
### Step 2
You have to exit the field for **Search/Match** to recognize the information you have entered.

You'll know that it has recognized the information when the screen flashes and (in the case of names) the letters convert to all caps.

Press `[Tab]`.  

### Step 3
Enter the Preferred Name (nickname) of the person whose information you edited in the first activity.

You can type the desired information into the **First Name Search** field. Type the person's preferred name.

Press `[Tab]`.  

### Step 4
Note that both first and last name now show as upper case.

Let's scroll down to see the **Selective Searches**.

Click the scrollbar.
### Step 6
**Search/Match** includes a variety of **Selective Searches** that use different pieces of information to search for the person.

Only searches that can be completed with the information you've provided are available. The rest of the **Selective Search** buttons are grayed out.

| Search Order | Description                  | Selective Search
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>SSN, Last Name, First Name</td>
<td>![Select](Selective Search)</td>
</tr>
<tr>
<td>20</td>
<td>Name, Email, DOB, Gender</td>
<td>![Select](Selective Search)</td>
</tr>
<tr>
<td>30</td>
<td>Name, Postal, DOB</td>
<td>![Select](Selective Search)</td>
</tr>
<tr>
<td>40</td>
<td>Last Name, First Name</td>
<td>![Select](Selective Search)</td>
</tr>
<tr>
<td>50</td>
<td>Last Name Only</td>
<td>![Select](Selective Search)</td>
</tr>
<tr>
<td>60</td>
<td>Email Address Only</td>
<td>![Select](Selective Search)</td>
</tr>
</tbody>
</table>

### Step 7
If you've entered as much information as you have, your odds of finding the person are much better.

You can use the **Selective Search** that best matches the information you have. Starting with one lower in the list will generally cast the widest net and give you best odds of finding the person.

**Note:** If you do not have enough information to complete any of the **Selective Searches**, you can use an **Ad Hoc** search to give yourself more options.

### Step 8
In this case, you're going to use the **Last Name, First Name (Search Order 40)** Selective Search.

Click the **Selective Search** button.
Step | Action
--- | ---
9. | The columns of information that you see in your **Search Results** were determined by the **Search Results Code** that you entered.

The next lesson will cover how to read your results.

---

Step | Action
--- | ---
10. | **End of Procedure.**
Viewing Results in Search/Match

Procedure

You will see different columns of information in your Search Results depending on which Search Results Code you chose on the previous screen.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>In this case, the first Results tab shows you basic information such as ID (EmplID), Name, Date of Birth, and Address.</td>
</tr>
<tr>
<td>2.</td>
<td>You may see multiple records with one ID (EmplID). If you look closely, you’ll see that those records have different Addresses and/or Names. <strong>Search/Match will return a row for every Effective-Dated piece of data in the person’s record that is included in the results.</strong> The ID (EmplID) is the key that allows you to determine that these are all, in fact, the same person record.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the Results2 tab.</td>
</tr>
</tbody>
</table>

![Image of UAccess Student interface showing Search Results](image-url)
4. The data on the **Results2** tab will, again, vary based on the **Search Results Code** you chose.

If you would like to shift data from one tab to another, review the **Customizing Column Display** online tutorial for details on how to do so.

5. Click the **Additional Information** tab.
6. Again, what shows on the Additional Information tab depends on your Search Results Code.

The University of Arizona is not currently using Person Organizational Summary and Relations With Institution, so you can ignore these links for now.

7. Click the Results tab.

8. Once you’ve identified a record that looks like it belongs to the person you’re looking for, you can use the Detail link to access Add/Update a Person for that record.

Doing so will allow you to fully confirm that it is the right record.

Click the Detail link.
### Step 9

Note that the **Add/Update a Person** screen opens in a new browser window or tab.

That means that you must have popups enabled in your browser for the **Detail** link to work.

### Step 10

You can click on the **Names** link to check **Name History** for your person and see what is going on.

Click the **Names** link.
Step 11. We can see that the person has a Primary and a Preferred Name. You may have the answer to your question just by seeing the Preferred Name.

If you don't have the answer yet, you can click on **Name History** to see whether the name you searched with is an old name for your person.

Click the **Name History** link.
### Step 12

Note that **Include History** is automatically enabled, so you are able to see all historical names for your person.

Click the **OK** button.

![Image of UAccess Student interface](image)

### Step 13

If what you needed to update or view was on the **Add/Update a Person** screen, you could update it here. However, Emergency Contact isn't.

You could use this window to navigate to Emergency Contact, but we're going to return to the **Search/Match** window for a moment.

Now that you've confirmed that this is the right person, navigate back to the **Search/Match** window.

Click the **Search/Match - Windows Internet Explorer** button.

![Image of Search/Match window](image)

### Step 14

You've found your person!

The next lesson will cover the easiest way to move through the person's record now that you've found them.

**End of Procedure.**
Using Carry ID in Search/Match

Procedure

Carry ID is a handy tool that will let you take the person's ID (EmplID) with you to the next component you want to look at, thereby simplifying your search.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Simply click on the **Carry ID** button to store the person's ID (EmplID).  
**Note:** The Search/Match Search Criteria screen has a Carry ID Reset button that will allow you to remove the stored ID if you need to.  
Click the **Carry ID** button. |
| 2.   | Now, navigate to Emergency Contacts, which can be found under Campus Community > Personal Information > Biographical.  
Click the **Biographical** link. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Emergency Contacts</strong> link. <a href="#">Emergency Contacts</a></td>
</tr>
<tr>
<td>4.</td>
<td>Note that the ID (EmplID) for your person has already populated the <strong>ID</strong> field. Click the <strong>Search</strong> button. <a href="#">Search</a></td>
</tr>
<tr>
<td>5.</td>
<td>Now, you're ready to update Emergency Contacts for your person.</td>
</tr>
<tr>
<td>6.</td>
<td><strong>End of Procedure</strong>.</td>
</tr>
</tbody>
</table>
Adding Emergency Contacts

Procedure

Students can update Emergency Contacts themselves using Student Center, but you may find yourself helping a student update their record, or you may need to look the information up.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The <strong>Contact Name</strong> field is free text. Just type in the contact's name. You can type the desired information into the <strong>Contact Name</strong> field. Type &quot;Susan Jones&quot; or another valid value.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Relationship</strong> drop-down list.</td>
</tr>
<tr>
<td>3.</td>
<td>Note that this list is shared with Financial Aid screens, so there may be terms on it that don't necessarily make sense for an emergency contact. Just choose the appropriate one that does. Click the <strong>Mother</strong> list item.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>4.</td>
<td>One contact (even if there is only one) must be marked as the <strong>Primary Contact</strong>. Click the <strong>Primary Contact</strong> option.</td>
</tr>
<tr>
<td>5.</td>
<td>If the contact shares an address with the student, you can pull that information over by checking the <strong>Same Address as Individual</strong> box. Click the <strong>Same Address as Individual</strong> option.</td>
</tr>
<tr>
<td>6.</td>
<td>Choose the address type that is shared. Click the <strong>Address Type</strong> drop-down list.</td>
</tr>
<tr>
<td>7.</td>
<td>Click the <strong>PERM</strong> list item.</td>
</tr>
<tr>
<td>8.</td>
<td>You can do the same with phone number. But if the phone number isn't shared, you can simply enter it at the bottom of the screen. Click the <strong>Same Phone as Individual</strong> option.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Phone Type</strong> drop-down list.</td>
</tr>
<tr>
<td>10.</td>
<td>Click the <strong>HOME</strong> list item.</td>
</tr>
</tbody>
</table>
Step 11. You can enter any other phone numbers on the Other Phones tab.

Click the Emergency Contact Other Phones tab.
### Step 12
Click the **Save** button.

### Step 13
If you need to add another contact, just click the **Add** button to add another row.
Click the **Add** button.

### Step 14
Note that you're now looking at 2 of 2 records.
Click the **Emergency Contact Information** tab.

### Step 15
From here, you're ready to add the information for the next contact.

### Step 16
If you want to delete a contact, simply click on minus sign.
Click the **Delete** button.

### Step 17
Click the **OK** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 18.  | You'll see that the 2 of 2 is still there, but it will vanish when you save.  
Click the **Save** button. |
| 19.  | You've successfully added an emergency contact.  
**End of Procedure.** |
Review Exercise
Review: Updating Biographic and Demographic Information

1. Look up the Address History for Zilpha Slartibartfast (NetID = ZILPHAP).
   a. What was the Mailing address on July 1, 2004?

   b. What is the Mailing address currently?

   c. What view did you use in order to see the historical information?

2. How do you make sure that you are looking at the right person's record? If you aren't, how do you switch people?

3. Which addresses should you NOT update in UAccess Student?

4. You see a mistake in historical information. How do you change it?

5. What should you do if you can't find a person using the information that they've given you? What function has the most robust search capabilities?
6. How do you know whether a particular piece of information maintains historical records?

7. What are the first things you should do when you log in to the real UAccess Student for the first time?

8. Once you’ve found your person in Search/Match, what is the easiest way to access their record in the component where you want to update information?

9. When you log in to the real UAccess Student, what should you do to make it easier to navigate to the functions that you use frequently?
# Appendix A: Address Type Definitions

<table>
<thead>
<tr>
<th>Address Type Code</th>
<th>Address Type Description</th>
<th>Use and Definition</th>
<th>Edit in UAccess Student?</th>
<th>Used By?</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERM</td>
<td>Permanent</td>
<td>A permanent address where the student can be reached during summers and if other addresses are absent or invalid. By default all Financial Aid correspondence during the summer and all diplomas are sent to this address if no alternate addresses are provided. Updateable in Student Center.</td>
<td>Yes</td>
<td>UAccess Student</td>
</tr>
<tr>
<td>MAIL</td>
<td>Mailing</td>
<td>General mail contact address. Also campus directory address. Used for Bursar's Office checks, including Financial Aid disbursements mailed during the academic year and Summer Session Financial Aid. Human Resources also uses it for employment checks and warrants. Updateable in Student Center.</td>
<td>Yes</td>
<td>UAccess Student &amp; UAccess Employee</td>
</tr>
<tr>
<td>BILL</td>
<td>Billing</td>
<td>Used by the Bursar's Office for bills when other addresses are not provided or are invalid. Updateable in Student Center.</td>
<td>Yes</td>
<td>UAccess Student</td>
</tr>
</tbody>
</table>
| **UA** | **UA Street Addr** | Used primarily for international students: physical street address while attending the UA. *Not a PO Box.* Used for International Student reporting for SEVIS and by the Registrar. 
Will initially be populated from the Permanent Address if the applicant is International. Updateable in Student Center. | Yes | UAccess Student |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INTL</strong></td>
<td><strong>Int'l - Home Contry</strong></td>
<td>Used for international students for their country of origin address; feeds to SEVIS system. International Student Office should update. Not updateable in Student Center.</td>
<td>No: SEVIS</td>
<td>UAccess Student</td>
</tr>
<tr>
<td><strong>DIPL</strong></td>
<td><strong>Diploma</strong></td>
<td>Address to send diploma to. Only used if this address is if different from the Mailing and/or Permanent address. Updateable in Student Center.</td>
<td>Yes</td>
<td>UAccess Student</td>
</tr>
<tr>
<td><strong>RES</strong></td>
<td><strong>Residence Life</strong></td>
<td>Residence Life address for students in dormitories. Used as the mailing address when it is available. Not updateable in Student Center.</td>
<td>No: Load from Residence Life</td>
<td>UAccess Student</td>
</tr>
<tr>
<td><strong>ISIR</strong></td>
<td><strong>ISIR</strong></td>
<td>Used for Financial Aid ISIR imports. Updated by batch load process. Students update these addresses through ISIR and they then are passed to us. Not updateable in Student Center.</td>
<td>No: Load from ISIR</td>
<td>UAccess Student</td>
</tr>
<tr>
<td>Code</td>
<td>Type</td>
<td>Note</td>
<td>UAccess Employee</td>
<td>UAccess Employee</td>
</tr>
<tr>
<td>-------</td>
<td>--------</td>
<td>------------------------------------------------</td>
<td>------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>BUSN</td>
<td>Business</td>
<td>Not used at the UA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>OTH2</td>
<td>Other 2</td>
<td>Not used at the UA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>HOME</td>
<td>Home</td>
<td>To be edited by Human Resources and employees only.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Used as primary residence address for most HR mailings.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Determines state and locality for income tax withholding and what benefits programs are available and paid for by UA plans at that location.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not updateable in Student Center.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHK</td>
<td>Check</td>
<td>Not used at the UA</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>
## Appendix B: SIS/Matrix to UAccess Student

<table>
<thead>
<tr>
<th>Matrix Screen</th>
<th>UAccess Function</th>
<th>UAccess Student Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>Search/Match: Advanced search capability</td>
<td>Campus Community&gt;Personal Information&gt;Search/Match</td>
</tr>
<tr>
<td>Matrix: Person Biographical Info</td>
<td>Maintaining Biographical/Demographic Data</td>
<td>Campus Community&gt;Personal Information&gt;Add/Update a Person</td>
</tr>
<tr>
<td>Matrix: Person Biographical Info &gt; Email; Addresses</td>
<td>Entering/Updating Names Information</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Names</td>
</tr>
<tr>
<td>Matrix: Person Biographical Info &gt; Email; Addresses</td>
<td>Entering/Updating Address Information</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Addresses/Phones&gt;Addresses</td>
</tr>
<tr>
<td>Matrix: Person Biographical Info &gt; Email; Addresses</td>
<td>Entering/Updating Electronic Addresses</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Electronic Addresses</td>
</tr>
<tr>
<td>Matrix: Person Biographical Info &gt; Email; Addresses</td>
<td>Entering/Updating Phone Information</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Phones</td>
</tr>
<tr>
<td>Matrix: Person Biographical Info</td>
<td>Enter/Update Ethnicity Information</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Personal Attributes&gt;Ethnicity</td>
</tr>
<tr>
<td>Matrix: Address Types were available for various relationships</td>
<td>Enter/Update Relationships</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Relationships</td>
</tr>
<tr>
<td>Matrix: Address Types were available for various relationships</td>
<td>Viewing a List of Relationships</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Person-to-Person Summary</td>
</tr>
<tr>
<td>Matrix: Person Biographical Info &gt; Emergency Contacts</td>
<td>Enter/Update Emergency Contacts</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Emergency Contacts</td>
</tr>
<tr>
<td>NA; Comments are parts of records</td>
<td>Add Comment</td>
<td>Campus Community&gt;Comments&gt;Comments Person&gt;Person Comment Entry</td>
</tr>
<tr>
<td>NA; Comments are parts of records</td>
<td>View Comments</td>
<td>Campus Community&gt;Comments&gt;Comments Person&gt;Person Comment Summary</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------</td>
<td>------------------------------------------------------------------</td>
</tr>
<tr>
<td>NA; Comments are parts of records</td>
<td>View Comment Detail</td>
<td>Campus Community&gt;Comments&gt;Comments Person&gt;Person Comment Detail</td>
</tr>
<tr>
<td>Matrix: Person &gt; International Info</td>
<td>Visa Permit Data</td>
<td>Campus Community&gt;Personal Information&gt;Biographical&gt;Citizenship&gt;Visa Permit Data</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu</td>
<td>Enter/Update Drivers License Data</td>
<td>Campus Community&gt;Personal Information&gt;Identification&gt;Driver's License Data</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Email; Letters</td>
<td>Assign Communication to Individual</td>
<td>Campus Community&gt;Communications&gt;Person Communications&gt;Communication Management</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Communications Summary</td>
<td>View Communication Summary</td>
<td>Campus Community&gt;Communications&gt;Person Communications&gt;Communication Summary</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Email; Letters</td>
<td>View Communication Detail</td>
<td>Campus Community&gt;Communications&gt;Person Communications&gt;Communication Detail</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Email; Letters</td>
<td>Using Letter Generation Process</td>
<td>Campus Community&gt;Communications&gt;Letter Generation</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Email; Letters</td>
<td>Using Communication Generation Process</td>
<td>Campus Community&gt;Communications&gt;Communication Generation</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Email; Letters</td>
<td>Viewing Communication Letter Data</td>
<td>Campus Community&gt;Communications&gt;Communication Letter Data</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Contacts; Requirements</td>
<td>Assign Checklist</td>
<td>Campus Community&gt;Checklists&gt;Person Checklists&gt;Checklist Management-Person</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Contacts; Requirements</td>
<td>View Checklist Summary</td>
<td>Campus Community&gt;Checklists&gt;Person Checklists&gt;Person Checklist Summary</td>
</tr>
<tr>
<td>Matrix: SAS Student Menu &gt; Contacts; Requirements</td>
<td>View Checklist Detail</td>
<td>Campus Community&gt;Checklists&gt;Person Checklists&gt;Person Checklist Detail</td>
</tr>
<tr>
<td>NA; flags added to screens, not a function</td>
<td>Enter Service Indicator Data</td>
<td>Campus Community&gt;Service Indicators&gt;Person&gt;Manage Service Indicators</td>
</tr>
<tr>
<td>NA; flags added to screens, not a function</td>
<td>View Service Indicator Information</td>
<td>Campus Community &gt; Service Indicators &gt; Person &gt; Manage Service Indicators</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-----------------------------------</td>
<td>---------------------------------------------------------------------</td>
</tr>
<tr>
<td>NA; flags added to screens, not a function</td>
<td>View Service Indicator Audits</td>
<td>Campus Community &gt; Service Indicators &gt; Person &gt; Audit Service Indicators</td>
</tr>
</tbody>
</table>
Appendix C: Joining the Mosaic Community

The Mosaic Community is an online networking resource available to everyone on campus who is affected by the Mosaic project.

If you have an official UA email address, you can join the Mosaic Community. Go to http://mosaic.community.arizona.edu and click the Sign Up link in the upper right corner of the screen. You'll see a brief membership application. Fill it out with your UA email address and a password. Once you're done, submit the form.

Once your membership is confirmed—usually within a few hours—you'll have access to valuable information about the software being implemented as part of the Mosaic Project.

Reading the FAQs within the Mosaic Community is a great way to learn how to use it. Here are a few of them to get you started.

**Where should I start?**
The Mosaic Community is arranged in groups, each of them focused on a different piece of software. So, the best place to begin is to find the group or groups that cover topics that you find most interesting. Join those groups and then start reviewing the information that's available within the group.

In each of the group areas, there are short videos showing you how to perform different tasks, discussion boards with questions from campus and answers from the experts, links to online tutorials, and information about upcoming workshops from the Workshops and Training Team.

**How do I join a group?**
When you click on the icon for the group you are interested in, you will be taken to that group's home page. If you are not yet a member, you will see a link in the upper right corner of the page that reads Join NAME OF GROUP. Click that link, and you're in!

**Which group should I join for which information?**
The groups are organized by application or by portion of an application. Join the group(s) that deal with an application that you use.

- **UAccess Analytics:** Join this group if you are interested in more information about using shared dashboards, the structure of reports on those dashboards, creating your own requests and dashboards, or the data structure.
Training Guide

- **UAccess Employee**: Join this group if you are interested in more information about Time and Labor, Manager Self Service, Employee Self Service, Position Cross-Reference, Payment Request, Labor Distribution Expense Transfer, or other functions related to Human Resources and Payroll.

- **UAccess Financials**: This group is not yet officially active. However, you are welcome to join if you are interested in information about accounting and purchasing functions.

- **UAccess Research**: This group is not yet officially active. However, you can go ahead and join it so that you will be notified once activity starts in the group. Join this group if you are interested in grant applications, Grants.gov, IRB functions, and all things sponsored projects.

- **Student: Academic Advising**: Join this group if you are interested in degree audits, advisor notes, and/or degree audit exceptions, and other academic advising tools.

- **Student: Course Scheduling and Catalog**: Join this group if you are interested in scheduling classes (the new greenbar process), updating and managing the Schedule of Classes, or updating the Course Catalog.

- **Student: Financial Aid**: Join this group if you view students’ financial aid information or post departmental awards to student accounts.

- **Student: Student Financials**: Join this group if you need to view student financial information. Student Financials, a.k.a. the Bursar’s Office, provides student account and billing information; receives payments for tuition, fees and miscellaneous campus charges; provides collection of delinquent accounts; delivers refunds and financial aid residuals after disbursement. We also provide banking and merchant services for campus departments.

- **Student: Student Records**: Join this group if you view or update student records or participate in enrollment.

- **Student: Transfer**: Join this group if you view, evaluate, or process transfer or test credit.

**How do I ask a question?**
The best way to ask a question and ensure that the right people see it and can answer it for you is to join the relevant group and post the question in that group’s Discussion Forum.

Once you’re on the group's page, simply scroll down to the bottom and click on View All, which will take you to the group's main discussion page. From there, you can search or browse the existing discussions, and you can add a discussion of your own.
Glossary

Add/Update a Person  Add/Update a Person allows you to access most biographic and demographic information about a person. You can use it to view and edit, among other things, names, addresses, phone numbers, email addresses, ethnicity, military history, and marital status.

Address History  The Address History allows you to view current, future, and previous addresses. You must be in Include History mode to view previous addresses.

Address Type  The Address Type indicates the specific purpose of a particular address.

The active Address Types you will see in UAccess Student are:

- **Permanent**: Updatable by anyone with access.
- **Mailing**: Updatable by anyone with access.
- **Billing**: Updatable by anyone with access.
- **UA Street Address**: Updatable by anyone with access.
- **International - Home Country**: *Don't touch.* Student must contact International Student Office. Students cannot update in UAccess Student.
- **Diploma**: Updatable by anyone with access.
- **Residence Hall**: *Don't touch.* Student needs to talk to Residence Life. Students cannot update in UAccess Student.
- **ISIR**: *Don't touch.* Student needs to update through ISIR. Students cannot update in UAccess Student.
- **Business**: Not used at UA.
- **Other 2**: Not used at UA.
- **Home**: *Don't touch.* Student needs to talk to Human Resources.
- **Check**: Not used at UA.

You can download a detailed description of specific address types or review it in the Appendices of the *Updating Biographic and Demographic Data Training Manual.*

Effective Date  Effective Date is a key concept in UAccess Student. You must pay attention to it in order to know that you are looking at currently accurate information.

The Effective Date for a piece of information in UAccess Student is the date on which that piece of information became (or will become) the currently accurate information.
You can use UAccess Student to review previous information (for example, someone's name before they changed it). You will use **Include History** to display this historical information.

In many cases, when you enter a date for **Effective-Dated** information, you will leave the date at the default: today's date, the date you are entering the information into the system. You can also use UAccess Student to review or enter future-dated information (for example, an address change that won't take effect until next month).

When you review a record—particularly if it includes future-dated information—you will need to pay close attention to the Effective Date to ensure that you are looking at the information you want.

**Include History**

The **Include History** view allows you to view current, future, and previous records for Effective-Dated information.

You can access **Include History** view by checking the Include History box on the search screen or by clicking the Include History button at the bottom of a component page.

**Preferred Name**

Students are able to enter a **Preferred Name** into UAccess Student. The **Preferred Name** can be a nickname, middle name used as a first name, stage name, or whatever the student prefers.

Recording **Preferred Names** will make finding students who go by an alternate name much easier. You will use Search/Match to do so.

**Primary Name**

The **Primary Name** is the student's legal name, the name associated with his or her Social Security Number.

**Search Parameters**

**Search Parameters** are the configuration of search terms that you choose when you begin using Search/Match. Your choice of **Search Parameters** defines what fields you can use to find your person.

Some **Search Parameters** are pre-configured for you, such as Admissions Manual Search. But when you can't find what you need using the Manual Search, you can conduct an Ad Hoc search, which will allow you to choose from many different fields as you try to find your person.
Most users will want to save their preferred **Search Parameters** the first time they log in to UAccess Student.

**Search Result Code**
The **Search Result Code** is the code in Search/Match that determines which columns of information you will see about the record(s) you are looking up.

**Search Results**
The **Search Result Code** is the code in Search/Match that determines which columns of information you will see about the record(s) you are looking up.

**Search/Match**
**Search/Match** is the heavy-duty search function that allows you conduct a more robust search than you can in the regular search. You can use **Search/Match** to find a person using Preferred names, historical information, email addresses, date of birth, and other information beyond what is available in regular search.

You should use **Search/Match** when you cannot find a person using the information you've been given and before you add a person to UAccess Student.

**SIS**
**SIS** is the **Student Information System**. That system is being replaced with **UAccess Student**.

**Update/Display**
The **Update/Display** view is the default view for Effective-Dated information. It allows you to view current and future information.

If you need to view historical information, you will need to switch to Include History mode.