

**Intended Audience:** Staff that currently manage Census data for students, new families, emergency contacts, 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 (45 minutes)	Review the new student registration and dropping process. <ul style="list-style-type: none"> <li>• Adding people.</li> <li>• Adding enrollment, if applicable.</li> <li>• Adding district employment and assignment, if applicable</li> <li>• Add address</li> <li>• Household assembly using the Census Wizard to: <ol style="list-style-type: none"> <li>1. Link the people to the household</li> <li>2. Link the address to the household</li> <li>3. Add appropriate relationships and flags</li> </ol> </li> </ul>
Editing Census Data (60 minutes)	Learn how to edit and change Census data, including: <ul style="list-style-type: none"> <li>• Identity changes</li> <li>• Changing personal contact information</li> <li>• Address changes for families</li> <li>• Separating/splitting households</li> </ul>
Scenarios work time (90 minutes)	Hands-on time to make changes to sample households.
Review (30 minutes)	<ul style="list-style-type: none"> <li>• Q&amp;A with the trainer</li> <li>• Complete the training survey.</li> </ul>

### 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 in your local district.

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)

### **Scenario 2: Address Change**

The household created in Scenario 1 has moved to a new address in your district. Create a new address for the household and attach the three person household to the new address and end date their attachment with the other address.

### **Scenario 3: Identity Changes**

The divorce of the family in Scenario 1 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 4: 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 and add the oldest child as a secondary member of his father's household.

### **Scenario 5: 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 6: Divorce/Household Separation**

Using the household created in Scenario 5:

- 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.

## Overview

This lesson will introduce you to the process of changing data in the Census module. Changes to 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.

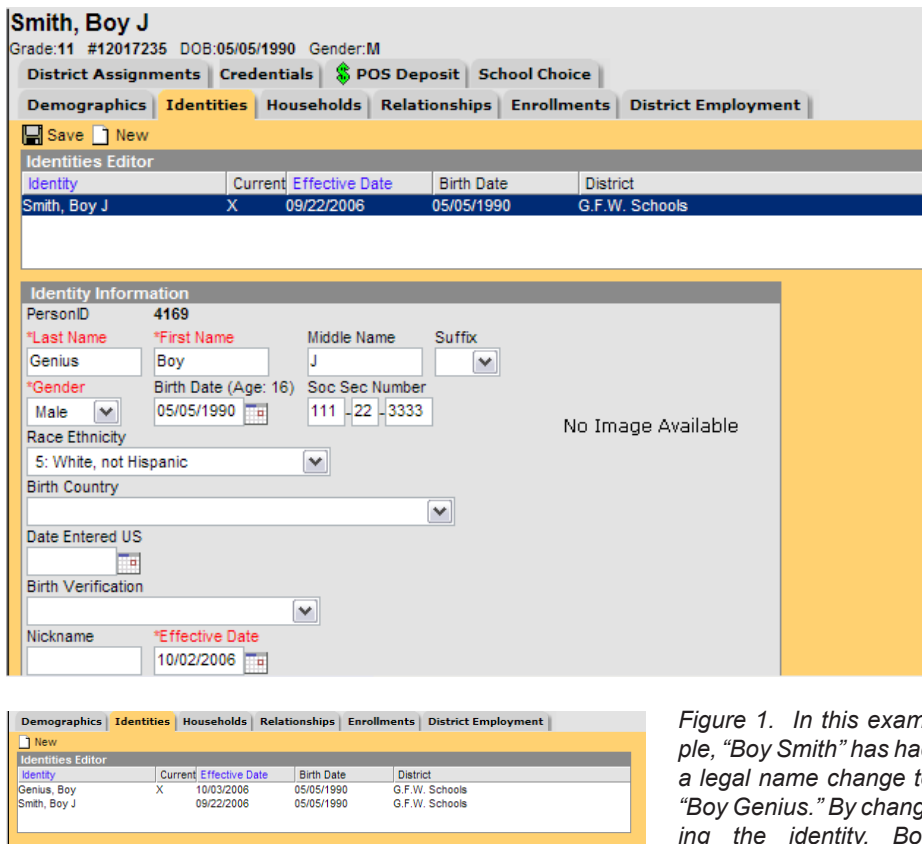
## Changing a Person's Identity

Scenario: A student comes to you 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.
3. Click identities tab.
4. Click New identity.
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. Click on 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.*



Identity	Current	Effective Date	Birth Date	District
Smith, Boy J	X	09/22/2006	05/05/1990	G.F.W. Schools

Identity	Current	Effective Date	Birth Date	District
Genius, Boy	X	10/03/2006	05/05/1990	G.F.W. Schools
Smith, Boy J		09/22/2006	05/05/1990	G.F.W. Schools

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

## Maintaining & Changing Census Data

### 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.
2. Select the person.
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.

**Personal Contact Information**

Other Phone    x   Private      Work Phone (218) 777 -6543 x   Private

Cell Phone (218) 666 -4321 x        Pager ( )  -  x

Email

Preferred Language

Comments

**Messenger Preferences**

Contact Reason	High Priority	Attendance	Behavior	General	Teacher
* Smiths Household: (218)888-7689	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Phone:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Phone:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cell Phone:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

\* Household phone preferences apply to all active members of this household.

### Changing preferences for a Messenger contact

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

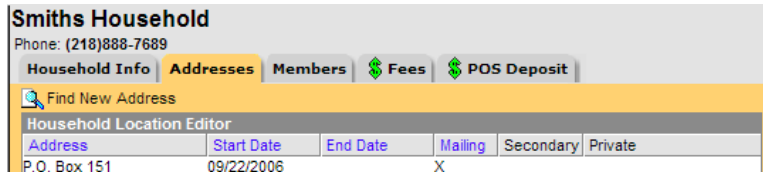
1. Search for the person—Search (all People).
2. Select the person.
3. On the demographics tab, scroll down to personal contact information.
4. Check the checkbox that matches the type of message and where it should be routed.
5. Click save when finished.

# Maintaining & Changing Census Data

## Changing a household address

Scenario: a household moves to a new address

1. Search tab. Switch to search for household.
2. Enter the name of one of the members of the household.
3. Select the household.
4. Click the Addresses tab.
5. Click "Find New Address".



**Smiths Household**  
Phone: (218)888-7689

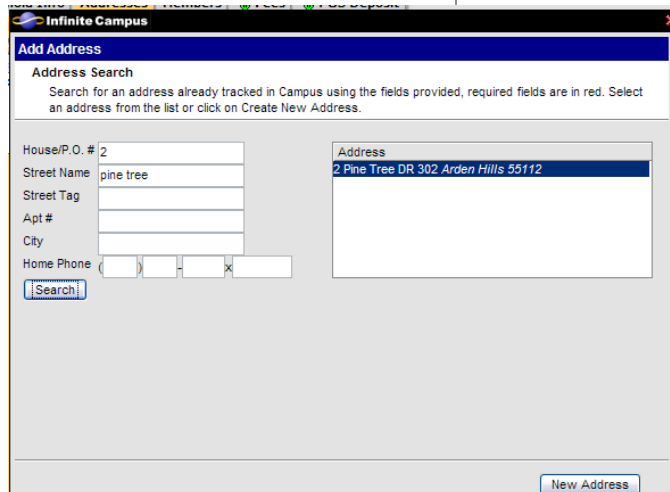
Household Info | **Addresses** | Members | Fees | POS Deposit

Find New Address

Household Location Editor

Address	Start Date	End Date	Mailing	Secondary	Private
P.O. Box 151	09/22/2006		X		

6. Search for the new address.
7. If the address does not exist in Campus, click New Address. Otherwise, select the address by clicking it and jump to step 10.
8. Enter in the information for the new address.
9. Click save.
10. Enter a start date for the new address (when did the household start living at that location).
11. Check mailing if this is where their mail should be sent to.
12. Click Save.



**Infinite Campus**

**Add Address**

Address Search

Search for an address already tracked in Campus using the fields provided, required fields are in red. Select an address from the list or click on Create New Address.

House/P.O. # 2

Street Name pine tree

Street Tag

Apt #

City

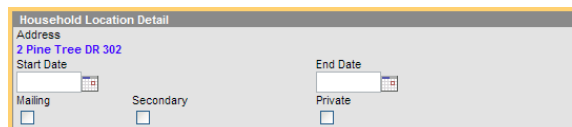
Home Phone ( ) - - x

Address

2 Pine Tree DR 302 Arden Hills 55112

Search

New Address



Household Location Detail

Address

2 Pine Tree DR 302

Start Date

End Date

Mailing

Secondary

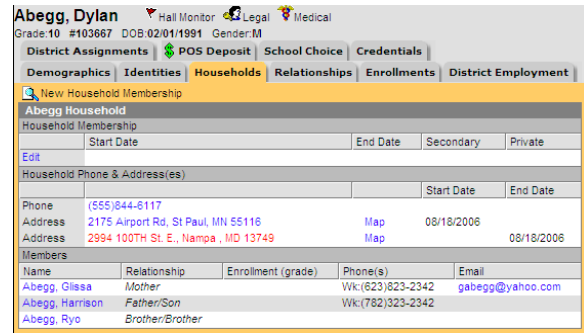
Private

## Maintaining & Changing Census Data

### Changing household membership for students

Scenario: A student has moved out of one family 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.**

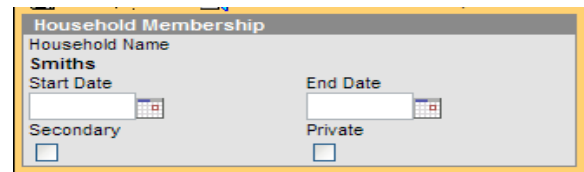
1. Census>People.
2. Click the search tab.
3. Search mode: all people.
4. Search for the student.
5. Select the student.
6. Households tab.
7. On the existing household, click edit.
8. Enter an end date (when did that student move out).
9. Click save.
10. Click new household membership.
11. Search for the household the student is moving into.
12. Select the household in the results list.
13. Enter a start date.
14. Click save.



Abegg, Dylan  
Grade: 10 #103667 DOB: 02/01/1991 Gender: M  
District Assignments | POS Deposit | School Choice | Credentials |  
Demographics | Identities | **Households** | Relationships | Enrollments | District Employment

**New Household Membership**

Abegg Household				
Household Membership				
Start Date	End Date			
Household Phone & Address(es)				
Phone	(555)844-6117			
Address	2175 Airport Rd, St Paul, MN 55116			
Address	2994 100TH St. E., Nampa, MD 13749			
Members				
Name	Relationship	Enrollment (grade)	Phone(s)	Email
Abegg, Glissa	Mother		Wk: (623)823-2342	gabegg@yahoo.com
Abegg, Harrison	Father/Son		Wk: (782)323-2342	
Abegg, Ryo	Brother/Brother			

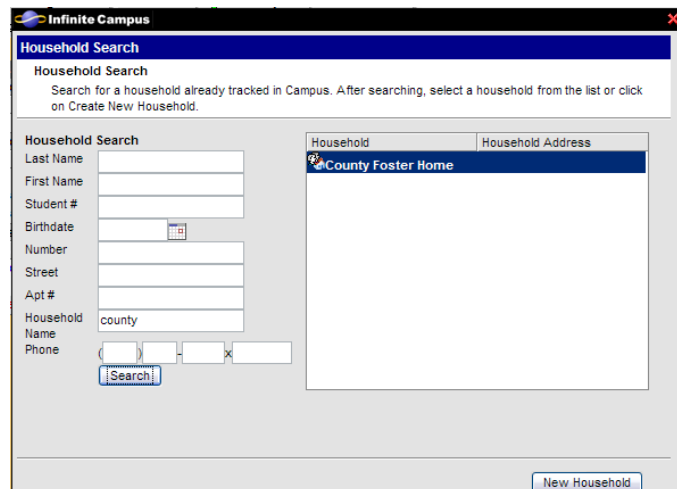


**Household Membership**

Household Name  
**Smiths**

Start Date  End Date

Secondary  Private



**Infinite Campus**

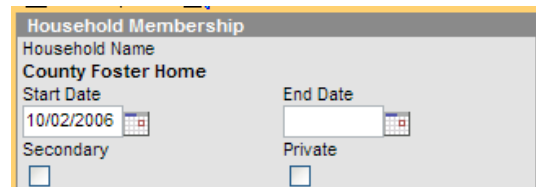
**Household Search**

Search for a household already tracked in Campus. After searching, select a household from the list or click on Create New Household.

Household Search	Household	Household Address
Last Name		
First Name		
Student #		
Birthdate		
Number		
Street		
Apt #		
Household Name	county	
Phone		
<input type="button" value="Search"/>		
<input type="button" value="New Household"/>		

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

1. Relationships tab.
2. Edit the check boxes to reflect the changed parental rights.
3. Click save when finished.



**Household Membership**

Household Name  
**County Foster Home**

Start Date  End Date

Secondary  Private

## Maintaining & Changing Census Data

### **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. Census>Households
2. Click the search tab.
3. Search mode: households.
4. Search for the household that needs to be split.
5. Members tab.
6. Select the family member who is moving out.
7. Enter an end date.
8. 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. Index>Census>Add Household.
2. Create a new household for the parent who moved out..
3. Click save.
4. Addresses tab.
5. Search for the address for the new household.
6. Attach address to the household, check mailing as needed.
7. Members tab.
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 did the student move in?)
13. Click save.

#### MAINTAINING OR CHANGING RELATIONSHIPS

1. Census>People
2. Search for the student.
3. Relationships tab.
4. Edit the check boxes to reflect the changed parental rights.
5. Click save when finished.

