

Create or Edit a Person

1. A person is created and information about them is edited in the primary organization to which they belong or are associated with. For a Secular Franciscan or a person who is associated with a Fraternity they will be created and updated through that organization. Even if they are the national minister, the basic information about them is maintained through their home Fraternity. Unlike the old system, a person was last associated with a fraternity is no longer active, they still can be searched for and, if the user has the proper permission, their record can be viewed or edited.
2. The form which details information about a person has many fields, but only those that are relevant are exposed. On the form is a field called Religious Order. If the person is *associated* with the seculars even if they are not processed (e.g., a visitor, an affiliate, an aspirant/observer)) select **OFS**. Additionally, some fields will be required depending on their status (basically the date when they obtained that status). If the date is unknown enter January 1, 1900 (1/1/1900).
3. Most of these instructions assume the person being entered is associated with the Seculars. The current status of a person is also dependent on the order with which they are associated. For example, a professed Secular can be Lapsed or Dismissed but a Visitor or Affiliate can be Asked to Leave.
4. To create a new person: select the organization with which they will be associated. And go to the Fraternity Summary Page and select the **Create New Member** link. This will open the Create New Member form.
 - a. At the top is a link to **Person Search**, click on it. **Do not skip this step**. This will open the global person search form. It can also be located clicking on the **Global Search** link under General Functions on any Organization Summary page. There are instructions at the top of the form that is opened. Use '%' whenever you have incomplete information For example, if the persons 1st name is Bill or William, try entering '%ill%'. In general, it is best to leave the search as open as possible: i.e., "All" Name Suffixes, Active Flag of "Any", Profession Status of "All" and no address information. However, you can be more specific if you are sure of the details. Note: OFS in the Name Suffix does refer to formal members of the order. The goal is to see if they are already in the system. If you get multiple hits this is not an issue. Try their email address if it's available. Again use the '%' wildcard if there is any question.

Create New Member

[BACK TO FRATERNITY SUMMARY](#)

Check to see if person already exists

General Information

Last Name

First Name

Name Suffix

Active Flag Yes No Any

Profession Status

Email Address

Phone Number

City

State/Province

[SEARCH](#)

Person ID	Prefix	First Name	Middle Name	Last Name	Suffix	Display Name	Last/First/Middle	Primary Membership Org Unit
3577		Judith	Bernice	Mussatto	OFS	Judith Mussatto	Mussatto, Judith Bernice	Holy Spirit-Claremont-CA
81101		Katharine	Barbara	Mussatto	OFS	Katharine Barbara Mussatto	Mussatto, Katharine Barbara	Holy Spirit-Claremont-CA
45390		William	Roland	Mussatto	OFS	Bill Mussatto	Mussatto, William Roland	Holy Spirit-Claremont-CA

Because this search is available to any user the information is general, and does not give contact information. If you have a possible match, contact the Fraternity for any missing details. This is particularly important for people who come to you who may have already started formation or have visited a Fraternity in the past. There may be a reason that you need to know about as to why they are not with that Fraternity. If the search comes up blank proceed to create a new person. If not, research to determine if there is truly a duplicate, and begin the transfer process, even if they are only listed as a Visitor. If you need to create a new person follow the steps outlined below.

- b. The Primary Membership Org Unit Id, **Primary Membership** and **Org Unit Name** field are prefilled.
- c. Unless you know they are going into a subsidiary group leave the **Secondary Membership Org Unit ID** field blank.
- d. Any field with an '*' must be filled in. Note the birth year is required by our Order, but the month and day are optional. If you have the complete birthday, you can enter it in the **Birth Date** field. However, you will also need to enter the year in the Birth Year field. For any records that had a birthdate in the current system, the **Year, Month** and **Day** will be populated in the data transfer.
- e. The *legal* First and Last names are required, and by default make up the Display Name, but you can change it after you enter the names. For example my legal name is William Roland Mussatto, but my display name is with Bill Mussatto.
- f. Select Religious Order (it will default to OFS). If you select another order some fields will vanish (we don't record when a friar took his final vows).

The screenshot shows a form for creating a person record. The fields and their values are as follows:

- Primary Membership Org Unit Id:** 10149
- Primary Membership Org Unit Name:** Holy Spirit-Claremont-CA
- Secondary Membership Org Unit ID:** Select if Applicable
- Name Prefix:** (empty)
- First Name * ?**: (empty)
- Middle Name ?**: (empty)
- Last Name * ?**: (empty)
- Religious Order *:** OFS - Secular Franciscan Order
- Profession Status *:** Select Profession Status (dropdown)
- Name Suffix:** (empty)
- Membership Status *:** Please Select Membership Status (dropdown)
- Display Name Edit ?**: (empty)
- Birth Year * ?**: Select Year (dropdown)
- Birth Month:** Select Month (dropdown)
- Birth Day:** Select Day (dropdown)
- Birth Date ?**: (empty) with a calendar icon
- Clergy:** Select if Applicable (dropdown)
- Ethnicity:** Select Ethnicity (optional) (dropdown)

g. **Membership Status**

depends on the Profession status. Here are the options for a Candidate. When you select Profession Status, the [Path to Profession Information](#) dates will appear. You *must* put in the date associated with the current status (e.g., if the status is

Candidate, then the Date of Admission must be entered). If you do not know the dates and fraternities for earlier stages, you can leave them blank.

h. If they are coming in from overseas, use the **Notes** section for details. The system only knows about US fraternities.

This screenshot shows a form with the following fields and options:

- Religious Order ***: OFS - Secular Franciscan Order
- Profession Status ***: Candidate
- Name Suffix**: OFS
- Membership Status ***: Please Select Membership Status (dropdown menu open showing options: 01-Active, 02-Lapsed, 03-Deceased, 04-Active-Excused, 06-Temporary Withdrawal, 07-Definitive Withdrawal, 08-Suspended, 09-Dismissed)
- Display Name Edit** (?)
- Birth Year *** (?)
- Birth Month**
- Birth Day**
- Birth Date** (?)
- Clergy**
- Ethnicity**
- Select if Applicable** (dropdown menu)
- Select Ethnicity (optional)**

This screenshot shows the **Path to Profession Information** section of a form with the following fields:

- Date of Welcoming Ceremony into Inquiry**: [Date picker]
- Fraternity where Inquirer Welcomed**: [Text input: Begin typing fraternity name for]
- Welcomed into Fraternity ID** (?)
- Admission Date ***: [Date picker]
- Fraternity Where Candidate Admitted**: [Text input: Begin typing fraternity name for]
- Admitted in Fraternity ID** (?)
- Profession Date**: [Date picker]
- Fraternity Where Member Permanently Professed**: [Text input: Begin typing fraternity name for]
- Professed in Fraternity ID** (?)
- Temporary Professed Date**: [Date picker]
- Fraternity Where Member Temporarily Professed**: [Text input: Begin typing fraternity name for]

- i. The bottom section has the dates associated with status changes. Fill these in as needed. The **Active flag** is automatically set based on the membership status. You can enter any notes which you believe are important. Click on **SUBMIT** to save the person you just created. Click on **Edit with no change** to abandon the creation.

Warning: After you create a person whose preferred language is *not* English, you need to update them to specify their preferred language. See Edit section below.

- 5. To Edit a person’s record on the Fraternity Summary Page, scroll down to **Member Search/Edit**, find the person in the list and click on the **Details** link. *Remember*, the **Subsidiary Group Summary’s Member Search/Edit** page has the same link. All member data is maintained at the fraternity level.

Note: The **Details** link in the **Org Unit Positions** section edits information about the position, *not* the person occupying the position.

- a. The form that is displayed is identical to the Create Person form except it says Person Edit and contains the existing information about the person.
- b. At the bottom is a link to **Edit/Add Language Proficiency** which will open the Edit Language Proficiency Form. At the right are links to Delete a proficiency or to Edit it. If you click on Edit you can change the language and select Fluency from speak, read, write, comprehend and/or interpret/translate. You can select more than one by holding down the CTRL button while clicking on your choices. When done click on **UPDATE** to record the change. The green button next to it can be used to abandon the change (it shows “Cancel” when you move your cursor over it). To add an additional language click on **Add Language Proficiency** link at the bottom of the page and the *Add Language Proficiency* form will open. On both of these forms you can select the language as the Preferred language.

Display Name	Language	Fluency	Preferred Language
Maria Esther Martinez	Spanish		<input type="checkbox"/>
Maria Esther Martinez	English		<input checked="" type="checkbox"/>

To add an additional language click on **Add Language Proficiency** link at the bottom of the page and the Add Language Proficiency form will open. On both of these form you can select the language as the Preferred language.

- c. Click on the **Edit/Add Interest Area** link to indicate the special interest area of the person.

To the right are Edit and Delete links. Clicking on Edit will open a box where you can change the Interest Details. To the left are the Update and Cancel buttons. Below is the **Add Interest Area** link which will open the Add Interest Form. Select the interest area from the dropdown menu and Add Interest Details if needed then click **SUBMIT**. An acknowledgement screen will appear.

Note: Use the **Contact Us** link if you have to remove a person record. This should only be done if you entered a duplicate, or created a person by mistake. All other records are maintained, and marked inactive by changing their membership status.