



Governors

Adding Person Details

Adding Person Details

This reference guide explains how to add a person and their address details to the list of available governors.

1. Select **Governors** from the primary navigation panel to display the **Person Search** page.
2. Enter search criteria and click the **Search** button to display the **List of People** matching the criteria.
If the required person is not listed, click the **Add Person** button to display the **Add Person Details** page.

3. On the **Person Details** panel:
 - a. Enter name information. **Legal Surname** is mandatory.
 - b. Enter **NI Number**, if required.
 - c. Select a **Title**.
 - d. Select **Gender**, if required.
 - e. Select a **Date of Birth**, if required.

4. On the **Contact Details** panel enter phone numbers, **Fax** and **Email**, as required.

Correspondence Address is automatically completed.

If the person is a Local Authority employee, the **Employee** check box is automatically selected and the **Base Address** displayed.

5. On the **Person Profile** panel:
 - a. If required, de-select the **Active** flag and select an **Inactive Reason** and **Inactive Date**.

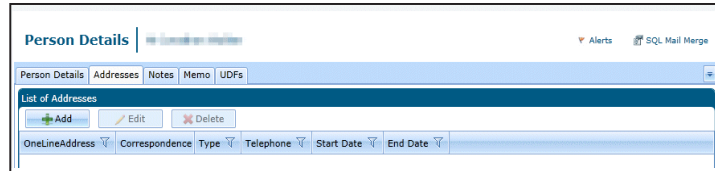
6. Record **Impairment Details**, if required:
 - a. If the person is on the Disability Register, select the relevant check box.
 - b. Enter **Disability Number**.
 - c. Select from drop-down to indicate the effect of the disability.

7. Select **Ethnicity**, if required.
8. Select **Home Language**, if required.
9. Select the **Asylum Seeker** check box, if required.
10. Click the **Save** button.

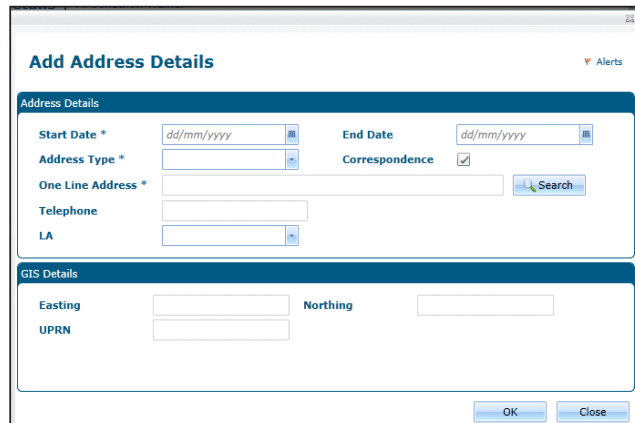


Adding Address Details

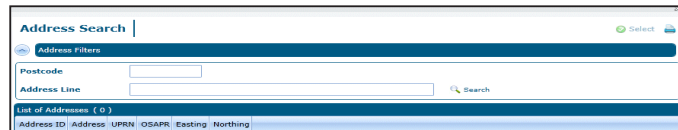
1. On the **Addresses** tab, click the **Add** button to display the **Add Address Details** dialog.



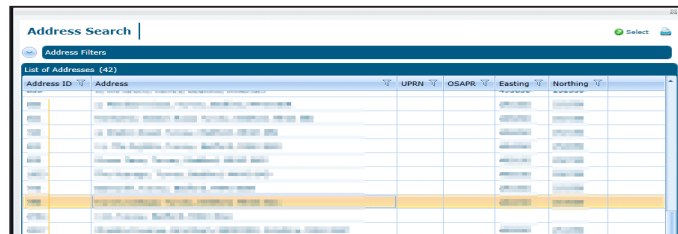
2. On the **Address Details** panel, select a **Start Date** and **Address Type**.
3. If this is not the correspondence address, de-select the **Correspondence** check box.
4. Select an **LA**, if required.
5. Click the **Search** button to display the **Address Search** dialog.



6. On the **Address Search** dialog, enter at least two characters of the **Postcode** or three characters of the **Address Line** and click the **Search** button to display matching addresses in the **List of Addresses**.



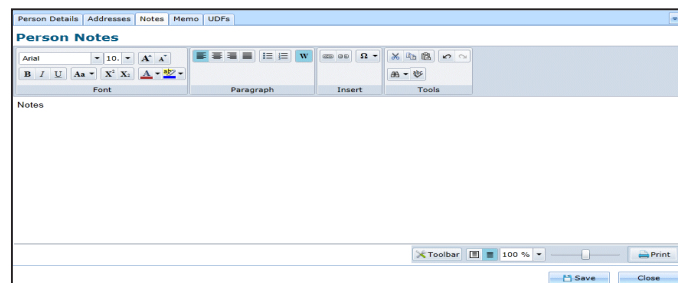
7. Double-click an address in the list to select it and display it on the **Add Address Details** dialog.



8. Click the **Save** button.

Adding Notes and Memo

1. Click the **Notes** tab to display the **Person Notes** dialog and add notes for the person, if required.
2. Click the **Memo** tab to display the **Person Memo** dialog and add a memo, if required.
3. Click the **UDFs** tab to display UDFs that have been defined.



Related Reference Guides:

- **Governors Primary Navigation**
- **Governors Person Search**