

Welcome! We will begin shortly.

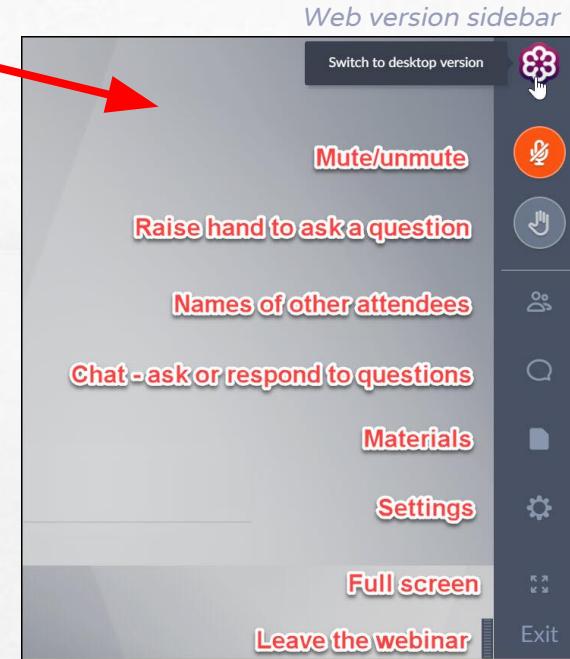
Explore the webinar tools on the right side of your screen.

Test your speakers. Go to the Settings icon  on the sidebar. Click the “test your sound” link.

Slides and handouts are under the Materials icon  Download them now or get them later from the SiD Help Center.

We will mute all users to minimize background noise. We will unmute for questions, etc.

Problems? Type your concerns under the Chat icon. 



SiD

Person Search & Person Add

Jan 22, 2019

I am speaking now.

If you cannot hear me,
type a message in the chat area.



Jenny
Schlugebier



Mary
Zimmerli



NOW RECORDING



Topics*

* An Admin level SiD
login is needed for Person Search and Person Add

■ Person Search

■ Person Add

■ One person, multiple person types



Person Search



Person Search

- Find people using search criteria
- Decode search results
- Confirm student identity



Search results can go many directions



- No potential matches
- One potential match - in site or not in site
- Multiple potential matches - can be a mix of some, all, or none in site



One Potential Match

Already a student in your site

Search String

✖

search

Search on dar aanen complete.

Match List

| Badge ID | Person Name | Birth Date | Relationship | Search Category |
|----------|-------------------|------------|--------------|-----------------|
| 134813 | Aanenson, Darlene | 7/25/1982 | Student | Name/Birthdate |

A student in an ABE site
somewhere in MN (or may be
shared by a couple programs)

Search String

✖

search

Search on kacou complete.

Match List

| Badge ID | Person Name | Birth Date | Relationship | Search Category |
|----------|---------------|------------|--------------|-----------------|
| | Kacou, Noneli | 10/10/2006 | Not in site | Name/Birthdate |



Check info to confirm this is your student

| Kacou, Noneli | | |
|--|---|--------------|
| 123 Main St. Apt 2D, Maple Grove, MN 55111 | | |
| (651) 123-5678 | | |
| nonie@gmail.com | | |
| Add as Student to Site | Add as Volunteer to Site | |
| Add as Staff to Site | | |
| This Person Search summary screen helps you decide if a record already exists in the statewide database. | | |
| Site Name | Relationship | Last Contact |
| Ronald M Hubbs Center | Student | 1/16/2017 |
| Social Security | Mouse Over | |
| Birth Date | 10/10/2006 | |
| Gender | Female | |
| Is Hispanic | No | |
| Ethnicity | Black or African American | |
| Education | Non-US Education Some Postsecondary education (no degree) | |
| Language | French | |
| Country of Origin | Cote d'Ivoire | |



Multiple potential matches for "John Smith"

| | | | | |
|----------------------------|------------|-------------|----------------|------------------------------------|
| Smith, John B | 9/3/1991 | Student | Name/Birthdate | John B Smith 09031991 |
| Smith, John B | 5/27/1989 | Not in site | Name/Birthdate | John B Smith 05271989 |
| Smith, John F | 5/16/1985 | Student | Name/Birthdate | John F Smith 05161985 |
| Smith, John Henderson | 1/12/1974 | Not in site | Name/Birthdate | John Henderson Smith 01121974 |
| SMITH, JOHN L | 8/19/1972 | Student | Name/Birthdate | JOHN L SMITH 08191972 |
| Smith, John P | 12/1/1974 | Not in site | Name/Birthdate | John P Smith 12011974 |
| Smith, John S | 10/5/1987 | Student | Name/Birthdate | John S Smith 10051987 |
| Smith, John S. | 10/5/1987 | Not in site | Name/Birthdate | John S. Smith 10051987 |
| Smith, Johnathan | 4/7/1983 | Not in site | Name/Birthdate | Johnathan Smith 04071983 |
| Smith, Johnathan C | 4/7/1983 | Not in site | Name/Birthdate | Johnathan C Smith 04071983 |
| Smith, Johnathan Cornelius | 12/20/1976 | Not in site | Name/Birthdate | Johnathan Cornelius Smith 12201976 |
| Smith, Johnathan J | 6/26/1978 | Student | Name/Birthdate | Johnathan J Smith 06261978 |
| Smith, Johnathan J | 6/26/1978 | Not in site | Name/Birthdate | Johnathan J Smith 06261978 |
| Smith, Johnathon A | 8/8/1986 | Student | Name/Birthdate | Johnathon A Smith 08081986 |
| Smith, Johnathon C | 4/7/1983 | Student | Name/Birthdate | Johnathon C Smith 04071983 |



Narrowed down with birthday in search

Search String

Enter up to three strings.

search

Search on john smith
10051987 complete.

New Student

New Staff

New Volunteer

Match List

| Badge ID | Person Name | Birth Date | Relationship | Search Category | Match String |
|----------|----------------|------------|--------------|-----------------|------------------------|
| | Smith, John S | 10/5/1987 | Not in site | Name/Birthdate | John S Smith 10051987 |
| | Smith, John S. | 10/5/1987 | Not in site | Name/Birthdate | John S. Smith 10051987 |



Multiple Results

2 different records
from different sites.

Likely the same person.

Search String

Enter up to three strings. 

New Student

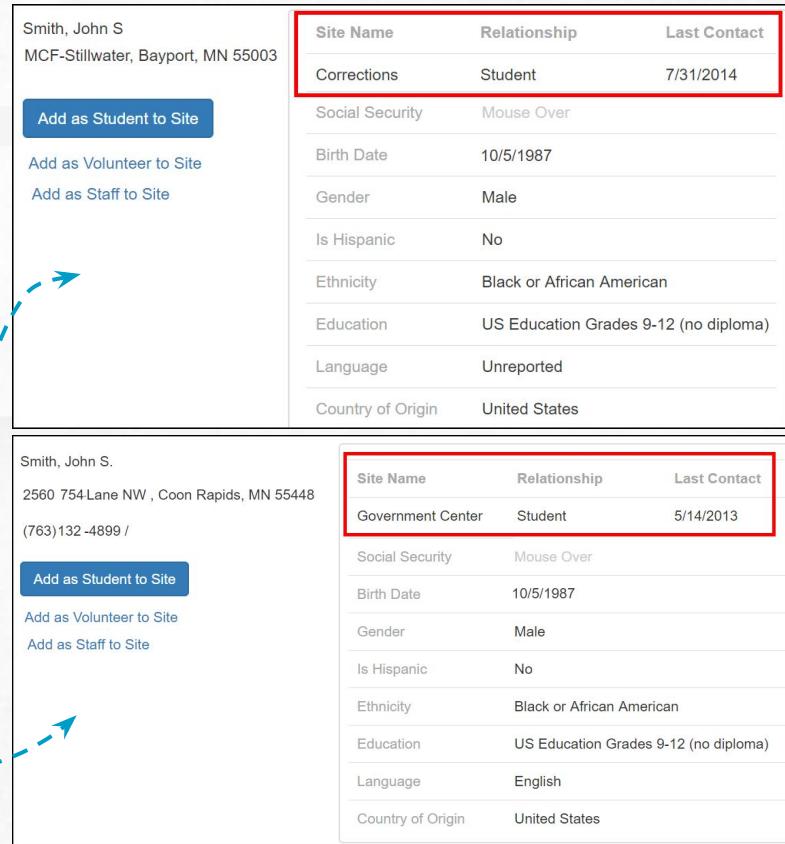
search

Search on john smith

10051987 complete.

Match List

| Badge ID | Person Name | Birth Date | Relationship | S |
|----------|----------------|------------|--------------|---|
| | Smith, John S | 10/5/1987 | Not in site | |
| | Smith, John S. | 10/5/1987 | Not in site | |



| | | | |
|-----------------------------------|-------------------|---------------------------------------|--------------|
| Smith, John S | Site Name | Relationship | Last Contact |
| MCF-Stillwater, Bayport, MN 55003 | Corrections | Student | 7/31/2014 |
| | Social Security | Mouse Over | |
| | Birth Date | 10/5/1987 | |
| | Gender | Male | |
| | Is Hispanic | No | |
| | Ethnicity | Black or African American | |
| | Education | US Education Grades 9-12 (no diploma) | |
| | Language | Unreported | |
| | Country of Origin | United States | |

| | | | |
|---|-------------------|---------------------------------------|--------------|
| Smith, John S. | Site Name | Relationship | Last Contact |
| 2560 754Lane NW , Coon Rapids, MN 55448 | Government Center | Student | 5/14/2013 |
| (763)132-4899 / | Social Security | Mouse Over | |
| | Birth Date | 10/5/1987 | |
| | Gender | Male | |
| | Is Hispanic | No | |
| | Ethnicity | Black or African American | |
| | Education | US Education Grades 9-12 (no diploma) | |
| | Language | English | |
| | Country of Origin | United States | |



Multiple Results

1 person, shared by 3 programs.

Both results point to the same person's single, shared record.

The 2 results appear because this person has a two spelling variations of the same name.

Search String

New Student
New Staff
New Volunteer

Search on 01011980 Farah Abdinasir complete.

Match List

| Badge ID | Person Name | Birth Date | Relationship |
|----------|-----------------------|------------|--------------|
| | Farah, Abdinasir A | 1/1/1980 | Not in site |
| | Farah, Abdinasir Abdi | 1/1/1980 | Not in site |

| Site Name | Relationship | Last Contact |
|---|---|--------------|
| MLC Main Site | Student | 8/3/2017 |
| Ronald M Hubbs Center | Student | 12/21/2016 |
| Volunteers of America - VOA Adult High School | Student | 3/24/2009 |
| Social Security | Mouse Over | |
| Birth Date | 1/1/1980 | |
| Gender | Male | |
| Is Hispanic | No | |
| Ethnicity | Black or African American | |
| Education | Non-US Education Grades 9-12 (no diploma) | |
| Language | Somali | |
| Country of Origin | Somalia | |

| Site Name | Relationship | Last Contact |
|---|---|--------------|
| MLC Main Site | Student | 8/3/2017 |
| Ronald M Hubbs Center | Student | 12/21/2016 |
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| Education | Non-US Education Grades 9-12 (no diploma) | |
| Language | Somali | |
| Country of Origin | Somalia | |

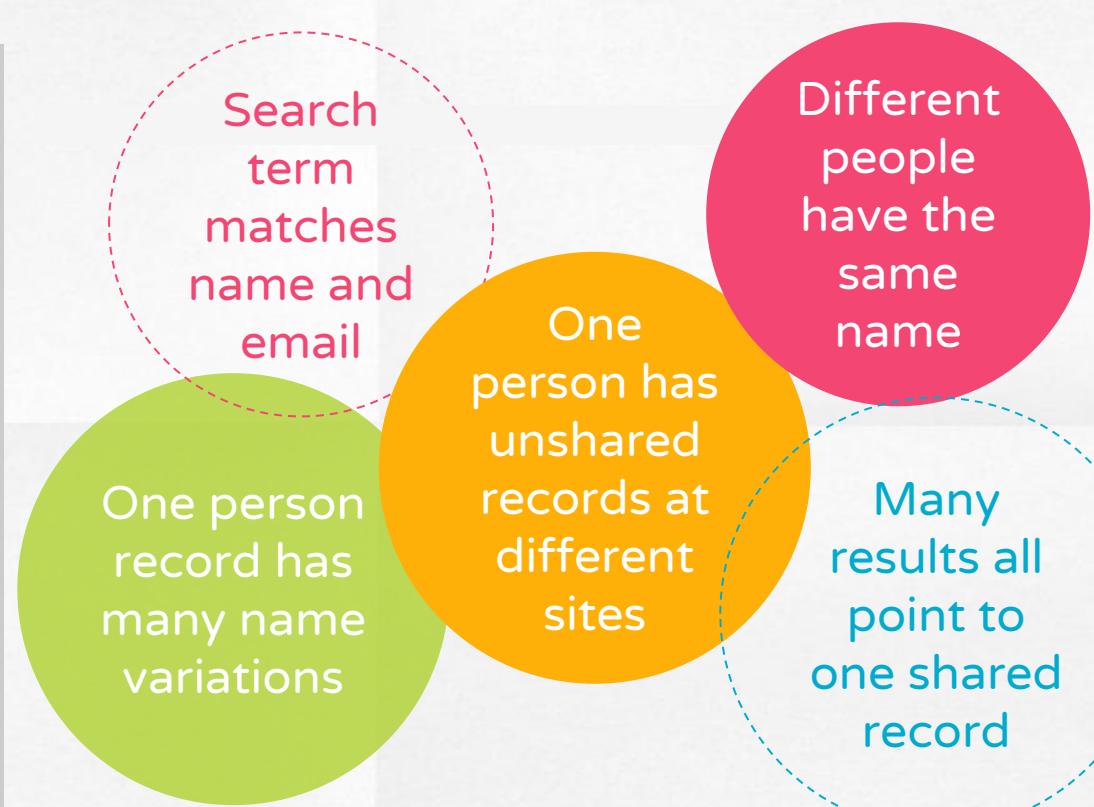


Check info to confirm this is your student

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|--|---|--------------|
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| Birth Date | 10/10/2006 | |
| Gender | Female | |
| Is Hispanic | No | |
| Ethnicity | Black or African American | |
| Education | Non-US Education Some Postsecondary education (no degree) | |
| Language | French | |
| Country of Origin | Cote d'Ivoire | |



Once you really make sense of the results, you will know how to deal with them.



Person Merge

- Run the Duplicate Report on the Reports tab to find multiple records in your site for the same person.
- Use Person Merge to combine duplicates into a single record.

Merge Person Two into Person One [?](#)

| | |
|---|--|
| Badge ID One (keep this record) | Badge ID Two |
| <input type="text" value="1943"/> 1 Zimmerli, Mary | <input type="text" value="7458"/> 2 Zimmerli, Mary |
| Click the checkbox. Then type what is displayed in the text box. | |
| Merge <input checked="" type="checkbox"/> Zimmerli, Mary <input type="text" value="Mary"/>  into <input checked="" type="checkbox"/> Zimmerli, Mary <input type="text" value="Mary"/>  | |
| 3 4 <input type="button" value="merge"/> Cancel | |



Person Add



Person Add

- Person Search buttons
- Add new vs edit personal data
- How student re-entry fits in
- Oops! Remove a person added by mistake



Person Search buttons

New Student

button on the Person Search results screen

Creates a new student record.

Use when there are no matches in the statewide database.

...
The button goes to this screen.

Search String
Enter up to three strings.

Search on john smith complete.

Use these buttons to create a brand new record from scratch (no matches in statewide database)

Create a Student

Tennessee Completed

| | | | |
|--|---|--|-----------------------------------|
| Intake Date <input type="text" value="1/14/2019"/> | Social Security Number <input type="text"/> | | |
| Last Name <input type="text"/> | First Name <input type="text"/> | Middle Name <input type="text"/> | Nick Name <input type="text"/> |
| Street Address <input type="text"/> | City <input type="text"/> | State <input type="button" value="MN"/> | Zip Code <input type="text"/> |
| County of Residence <input type="button" value="Unreported"/> | School District of Residence <input type="button" value="Unreported"/> | | |
| Primary Phone <input type="text"/> | Secondary Phone <input type="text"/> | Email <input type="text"/> | |



**Add as
Student to Site**
button on the
Person Search
summary screen

Adds a
shared student
record to your site.

Use when there
are matches in the
statewide database.

...

The button goes to
this screen.

Smith, John

Use these buttons to add a person to your site that already exists in the statewide database

Add as Student to Site Add as Volunteer to Site Add as Staff to Site

Add this student to your site
Use this form to add new or update existing info.

Tennessee Completed [?](#)

Intake Date
1/14/2019

Social Security (replace 0 with # digits to overwrite 47x-xx-xx81) 0

For a NEW name, address, phone, or email: check the 'New?' box, then type desired info.
Type/re-type ALL parts that will make up a new name or address.

New Name?

| | | | |
|--------------------|--------------------|-----------------|---------------|
| Last Name Smith | First Name John | Middle Name | Nick Name |
|--------------------|--------------------|-----------------|---------------|

New Address?

| | | | |
|--------------------------------------|---------------------|-------------|-------------------|
| Street Address 234 Lincoln St. NE | City Minneapolis | State MN | Zip Code 55418 |
|--------------------------------------|---------------------|-------------|-------------------|

Primary Phone
New Phone? (612) 123-4567

| Site Name | Relationship |
|-----------------|--------------|
| SouthWest Metro | Student |
| Social Security | Mouse Over |



Add new vs. edit personal data

As you are adding someone to your site from Person Search, you can

accept existing name and contact info

OR

update existing info by adding new name and contact info.



You can also add new or edit info after adding the person to your site.



To accept the
existing personal data,
skip over all items in
the blue outlined box.



For a NEW name, address, phone, or email: check the 'New?' box, then type desired info.
Type/re-type ALL parts that will make up a new name or address.

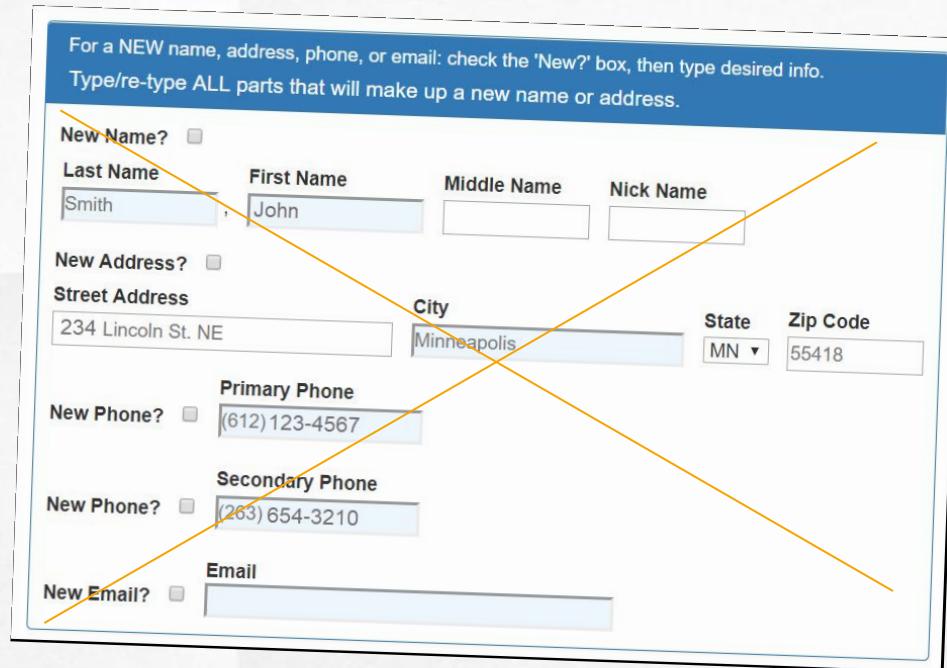
New Name? Last Name First Name Middle Name Nick Name

New Address? Street Address City State Zip Code

New Phone? Primary Phone

New Phone? Secondary Phone

New Email? Email



To update existing personal data with NEW information:

1. Check the “New?” box in the desired section.
2. Record new legal name, address, phone, or email.
This will create a new row for name, address, etc., on the student record.
3. NOTE: retype all blue shaded boxes in each section you update.

For a NEW name, address, phone, or email: check the 'New?' box, then type desired info. Type/re-type ALL parts that will make up a new name or address.

New Name? Type or re-type ALL new name parts in blue shaded boxes, even if they are the same.

| | | | |
|-----------------------|-----------------------|-------------|-----------|
| Last Name Kangaroo | First Name Captain | Middle Name | Nick Name |
|-----------------------|-----------------------|-------------|-----------|

New Address? Type or re-type ALL new address parts in blue shaded boxes, even if they are the same.

| | | | |
|---------------------------------------|------------------------|-------------|-------------------|
| Street Address 142 Dancing Bear St | City Lake Woebegone | State MN | Zip Code 55544 |
|---------------------------------------|------------------------|-------------|-------------------|

Primary Phone
New Phone? (912) 674-3728

Secondary Phone
New Phone? (912) 555-2873

Email
New Email? thecaptain@tds.net

- Use this part of the form to add NEW info to a student record.
- Correct typos in an existing name, address, phone or email by editing on the Students>Info screen.
- Existing addresses, phones, and emails cannot be removed using this form. Instead, deactivate them on the Students>Info screen.



New Name example



Since she last enrolled, Jane Blue changed her legal name to Jane Denise "Dennie" White.

1. Check the “New Name?” box.
2. Overtype Last and First Names.
3. Type new Middle and Nick Names.

For a NEW name, address, phone, or email: check the 'New?' box, then type desired info.
Type/re-type ALL parts that will make up a new name or address.

| | | | | |
|------------------------------------|-----------|------------|-------------|-----------|
| New Name? <input type="checkbox"/> | Last Name | First Name | Middle Name | Nick Name |
| | Blue | Jane | | |

For a NEW name, address, phone, or email: check the 'New?' box, then type desired info.
Type/re-type ALL parts that will make up a new name or address.

| | | | | |
|---|-----------|------------|-------------|-----------|
| New Name? <input checked="" type="checkbox"/> | Last Name | First Name | Middle Name | Nick Name |
| | White | Jane | Denise | Dennie |





New Address example

Jane moved to a
new address in the
same town.

1. Check the “New Address?” box.
2. Type new street address.
3. Overtype City, State, and Zip.

| | | | | |
|--|---|------------------------|----------------------|--------------------------|
| New Address? <input type="checkbox"/> | Street Address 1110 George St | City Slayton | State MN ▾ | Zip Code 53153 |
|--|---|------------------------|----------------------|--------------------------|

| | | | | |
|---|---|------------------------|----------------------|--------------------------|
| For a NEW name, address, phone, or email: check the 'New?' box, then type desired info. Type/re-type ALL parts that will make up a new name or address. | | | | |
| New Address? <input checked="" type="checkbox"/> | Street Address 123 Main St, Apt 12B | City Slayton | State MN ▾ | Zip Code 53153 |



Another option
after adding the
person to your site:

Update personal data on
the Students>Info screen.

- Edit typos
- Edit to add middle or nicknames to an existing name
- Add new name, address, phone, email rows

Students>Info screen

Personal Data History

| Name | ABE Site | Date | New Name | | |
|-------------------------------|--------------|------------------------|----------------------|-----------|----------------------|
| Smith Jonh | Sandbox | 1/15/2019 | edit | | |
| Street | City | State | Postal | Date | New Address |
| 4201 Millersville Rd | Apple Valley | MN | 55124 | 1/15/2019 | edit |
| Phone | Primary | click to add new phone | | | New Phone |
| (612) 987-1234 | Yes | 1/15/2019 | | | edit |
| Email | Date | New Email | | | |
| warningwillrobinson@gmail.com | 1/15/2019 | | | | edit |





Caution!

Don't replace old, valid names, addresses, etc.,
by editing or overwriting!

We need to preserve history for better Person Search results.

Having a complete history is more important than
having fewer rows in the Personal Data section.



How Student Re-entry fits in



When a former student at YOUR site comes back,
do a Person Search first.

You find a potential match:

- Confirm the student's identity.
- Add matching records to your site. Use the Add form to update/add the latest student info.
- Person Merge to combine the (same) students into a single record.

There are no matches:

- On the Students>Summary screen, click the Student Re-Entry button.
- Update/add the latest student info.

In the end, you should have
one record
for the student in your site.



Oops! I accidentally added the wrong person!

1.
Person Search
results screen

Search String
Enter up to three strings.
Search on john smith complete.

Use these buttons to create a brand new record from scratch (no matches in statewide database)

New Student
New Staff
New Volunteer

A **New Student** record created from scratch
cannot be undone or deleted.

This person will stay in your site.



Oops! I accidentally added the wrong person!

2.
Person Search
info screen

| Site Name | Relationship |
|-----------------|--------------|
| SouthWest Metro | Student |
| Social Security | Mouse Over |

Smith, John

Use these buttons to add a person to your site that already exists in the statewide database

Add as Student to Site Add as Volunteer to Site Add as Staff to Site



Someone you **Add as Student to Site** CAN be removed from your site - if you have not added classes or hours.

1. Email support@mnabe.org. We will give you a removal code.
2. Enter the code on the Students>Summary edit screen.



one person,
multiple
person types

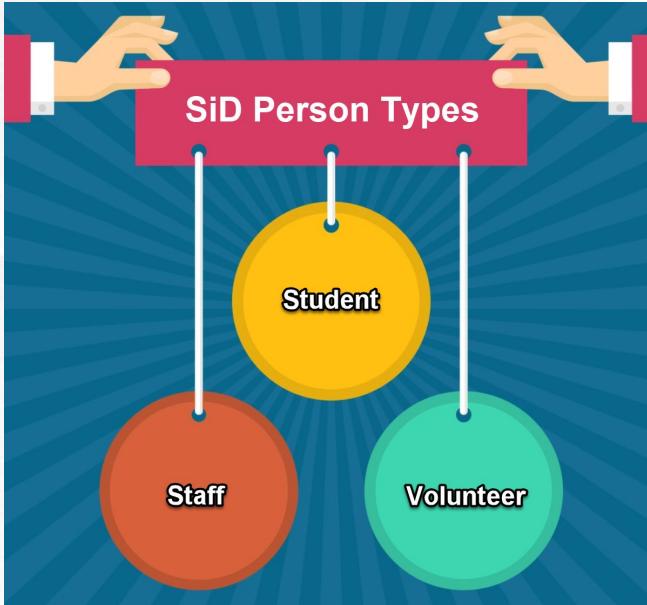


One Person,
multiple
person types

- SiD Person Types
- Add other person types to a record



SiD Person Types



A person can have more than one **type** of record, but should have only **ONE** person record.
in SiD.



A few possible combinations

Student
becomes a
volunteer

Staff
person
becomes a
volunteer

Former
student
becomes a
volunteer,
then a staff
person

In all cases, the person has only one SiD record.



1 person, 3 types of records example

The screenshot shows a software interface with a navigation bar at the top. The 'Volunteers' button is highlighted with a red box. Below the navigation bar, the title '[11] Admin, Agnes' is displayed. A red box highlights the 'Info' tab in a sub-menu. The main content area is divided into three sections: 'Contact List', 'ABE Site History', and 'Personal Data History'. The 'Contact List' section shows a table with columns 'Type', 'Name', and 'Agency'. A red box highlights the 'Name' column for the entry 'MFIP'. The 'ABE Site History' section shows a table with columns 'Site Name', 'Relationship', and 'Last Contact'. A red box highlights the 'Relationship' column for the entry 'Sandbox'. The 'Personal Data History' section shows a table with columns 'Name', 'Street', 'City', 'State', and 'Postal'. A red box highlights the 'Name' column for the entry 'Admin, Agnes'. Red annotations are present: 'This person has 3 types of records' points to the 'Name' column in the 'ABE Site History' table; 'Links to other types of records for this person' points to the 'Go to Student Record' and 'Go to Staff Record' buttons at the bottom of the 'ABE Site History' table.

This person has
3 types of records

Links to other types of
records for this person

| Type | Name | Agency |
|------|------|--------|
| MFIP | | |

| Site Name | Relationship | Last Contact |
|-----------|-------------------------|--------------|
| Sandbox | Student Volunteer Staff | |

| Name | Street | City | State | Postal |
|--------------------------|--------|------|-------|--------|
| ABE Site Admin, Agnes | | | | MN |

[Go to Student Record](#) [Go to Staff Record](#)



How to: Student becomes a Volunteer

1. Select the student from the Student List.
2. Go to the Students>Info screen.
3. Click the Add as **Volunteer to Site** button, which goes to **this** screen.
4. Complete the form.

Use these buttons to add another Person Type to a SiD record

| Site Name | Relationship | Last Contact |
|-----------|--------------|--------------|
| Sandbox | Student | 1/4/2019 |

Add as Volunteer to Site **Add as Staff to Site**

Add This Volunteer to Your Site.
If You Select a Change Info Box, The Required Fields in that Area are Blue.
Muted Field Placeholders will not be Submitted as Part of New Data.

Entry Date

New Name?

| | | | |
|---|--|--|-----------------------------------|
| Last Name <input type="text" value="Kennedy"/> | First Name <input type="text" value="Sarah"/> | Middle Name <input type="text" value="Jo"/> | Nick Name <input type="text"/> |
|---|--|--|-----------------------------------|

New Address?

| | | | |
|---|---|--|--|
| Street Address <input type="text" value="127 Spring Lake Rd"/> | City <input type="text" value="Keewatin"/> | State <input type="text" value="MN"/> | Zip Code <input type="text" value="55124"/> |
|---|---|--|--|

Primary Phone
New Phone? (218) 245-8954



After a student becomes a student/volunteer

The student will now have
both Student and Volunteer records.

Students tab

Students

| Badge ID | Last | ▲ | First | ▲ | Middle | NickName | Birth Date | Gender | Phone | First Entry | Last Hours | Scheduled |
|----------|---------|---|-------|---|--------|----------|------------|--------|----------------|-------------|------------|-------------------------------------|
| 4 | Kennedy | | Sarah | | Jo | | 2/27/1990 | Female | (218) 245-8954 | 10/15/2018 | 1/4/2019 | <input checked="" type="checkbox"/> |

Volunteers tab

Volunteers

| Badge ID | Last | ▲ | First | ▲ | Middle | NickName | Birth Date | State Staff Type | Program | Active |
|----------|---------|---|-------|---|--------|----------|------------|------------------|---------|-------------------------------------|
| 4 | Kennedy | | Sarah | | Jo | | 2/27/1990 | Paraprofessional | ABE | <input checked="" type="checkbox"/> |



Thanks!

Any questions?

- Raise your hand in the sidebar
- Type a question in the chat box
- Hang around after the session ends
- Email us at support@mnabe.org

