



*Washoe County
School District*

Infinite Campus Census Modification



CENSUS MODIFICATION

OVERVIEW

This documentation will introduce the process of changing data in the Census module. Changes to a person's data such as their legal name and contact information will be completed in **Census > People**. Changes in household membership and addresses are changed at the household level.

Upon completion of this training, users will be able to:

Change a person's Identity.

Change a person's contact information.

Change Preferences for Messenger Contact.

Change a household address and phone number.

Change household membership.

Change a household name.

Split a household.

Maintain or Change relationships.

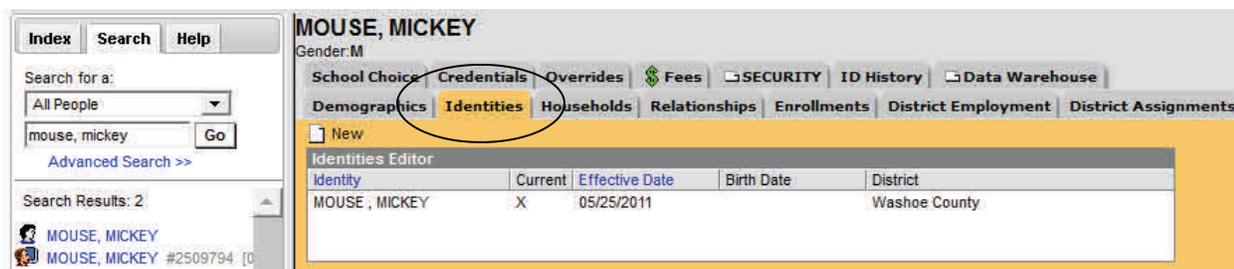
CHANGING A PERSON'S IDENTITY

Always change a person's Identity from the **Identities** tab. This will maintain the name history and when someone searches for the old name, the results will include the new name.

Scenario: A teacher has gotten married and is changing her name or a student has a legal name change.

Note: Student names changes must be accompanied by a new birth certificate or legal papers showing name change.

1. Search for the person—**Search > All People**.
2. Select the person from the search results. Review the Demographics and make sure this is the correct person record.
3. Click **Identities**. You will see the current name in the **Identities Editor** field.



The screenshot displays the 'MOUSE, MICKEY' profile page. The 'Identities' tab is selected and circled in red. Below the tabs, the 'Identities Editor' table shows the following data:

Identity	Current	Effective Date	Birth Date	District
MOUSE, MICKEY	X	05/25/2011		Washoe County

4. Click **New**.



5. Enter the new information in the Identity Information window by typing in the new data in the appropriate field.

The screenshot shows the 'Identity Information' form with the following fields: PersonID (287395), *Last Name (MOUSE), *First Name (MICKEY), Middle Name (M), Suffix (dropdown), *Gender (Male), Birth Date (calendar icon), Soc Sec Number (three boxes), Race/Ethnicity (Edit), and No Image Available.

6. Click **Save**. You will now see an additional name in the list. The current name will have an **X** in the Current column.

7. Select the person's old name in the search results.

8. Verify the new name appears above the Census tabs.

CHANGING CONTACT INFO FOR A PERSON

Scenario: parent calls into the school with a new cell phone number and a new work number. She would also like to add her email address.

1. Search for the person—**Search > All People**.
2. Select the person from the **Search Results** list.
3. From the **Demographics** tab, scroll down to the **Personal Contact Information**.
4. Enter the new cell phone number, work phone number or email address.
5. Click **Save**.

The screenshot shows the 'Personal Contact Information' form with the following fields: Contact Information (Email, Secondary Email, Cell Phone, Other Phone, Work Phone, Pager), Private (checkbox), Messenger Preferences (Emergency, Attendance, Behavior), Contact Reasons (General, Priority, Teacher), Preferred Language (en_US: US English), and Comments. The form is modified by Unknown.

CHANGING PREFERENCES FOR A MESSENGER CONTACT

Messenger allows schools and teachers to send messages to the parents. Many teachers have started using the Messenger module in Teacher Tools so the Teacher box must be marked for parent's to receive the messages.

Attendance messages are not sent through Infinite Campus.

1. Search for the person—**Search > All People**
2. Select the person from the **Search Results** list.
3. On the **Demographics** tab, scroll down to **Personal Contact Information**.
4. Check the appropriate check boxes that match the type of communication the user wishes to receive.
5. Click **Save**.

Messenger Preferences Contact Reasons					
Emergency	Attendance	Behavior	General	Priority	Teacher
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CHANGING A HOUSEHOLD ADDRESS

Scenario: a household moves to a new address.

1. Search for the household by entering the name of a member of the household—**Search > Household**.
2. Select the household from the **Search Results** list.
3. Click on the **Addresses** tab.
4. Click **Find New Address**.

Addresses

5. Search for the new address. **Enter the address number only** and review the list of matching results. *If the address is not in the search results, log a call with the IT help desk 789-3456 and the Infinite Campus support team will add the address and contact you when it has been entered.*

Find New Address

6. Click on the matching address.

Infinite Campus

Add Address

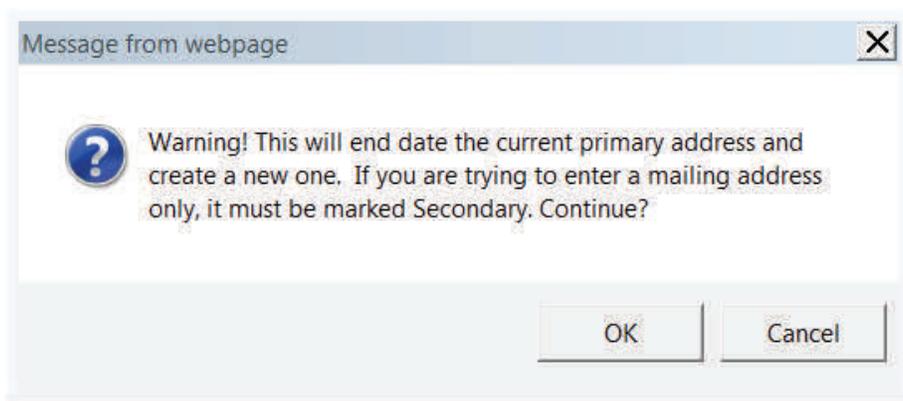
Address Search

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. #	12345	Address	
Street Name		12345 CAMEL ROCK DR RENO 89506	
Street Tag		12345 HIGH VISTA DR RENO 89511	
Apt #		12345 OCEAN VIEW DR SPARKS 89441	
City		12345 PRETEND ST RENO 89501	←
Home Phone	() - - x	12345 PRETEND ST SPARKS 89431	
		12345 NE ROOSEVELT WAY #201 SEATTLE 98125	

Search

7. Enter the **Start Date**.
8. Check the **Mailing** check box if this is the Primary address (there is no P. O. Box).
9. Click **Save**. You will see a message indicating that the old address will be end dated.



Remember that in Washoe County School District, the mailing address is the Primary address.

CHANGING HOUSEHOLD MEMBERSHIP

Scenario: A person has moved out of one household and has moved into another existing household. This could be a student or a person moving from one household to another. If the situation involves a divorce or a student becoming emancipated, see the section on splitting a household into two new households.

There are two different ways to end date a person from a household and add them to a different household.

Process 1:

1. Search for the person—**Search-All People**.
2. Select the person from the search results on the left side of the window.

3. Click on the **Edit** link.

BROOKS, LOUISA M Nickname:
DOB: 09/07/2005 Gender: F

District Employment | District Assignments | School Choice | Credentials | Overrides | Fees | SECURITY | ID History | Data Warehouse | Demographics | Identities | **Households** | Relationships | Enrollments

New Household Membership

BROOKS Household **Primary

	Start Date	End Date	Secondary	Private
Edit				

Household Phone & Address(es)

	Start Date	End Date
Phone	(775)000-0000	
Address	12345 PRETEND ST , RENO, NV 89501	Map

Members

Name	Relationship	Enrollment (grade)	Phone(s)	Email
BROOKS , AMANDA M	Mother		Wk: (775)789-3214x C: (775)123-4567	ABROOKS@EMAIL.COM

4. Enter the **End Date**, the date the person left the household.

5. Click **Save**.

Demographics | **Identities** | **Households** | Relationship

Save | Delete | New Household Membership

Household Membership

Household Name
BROOKS

Start Date End Date

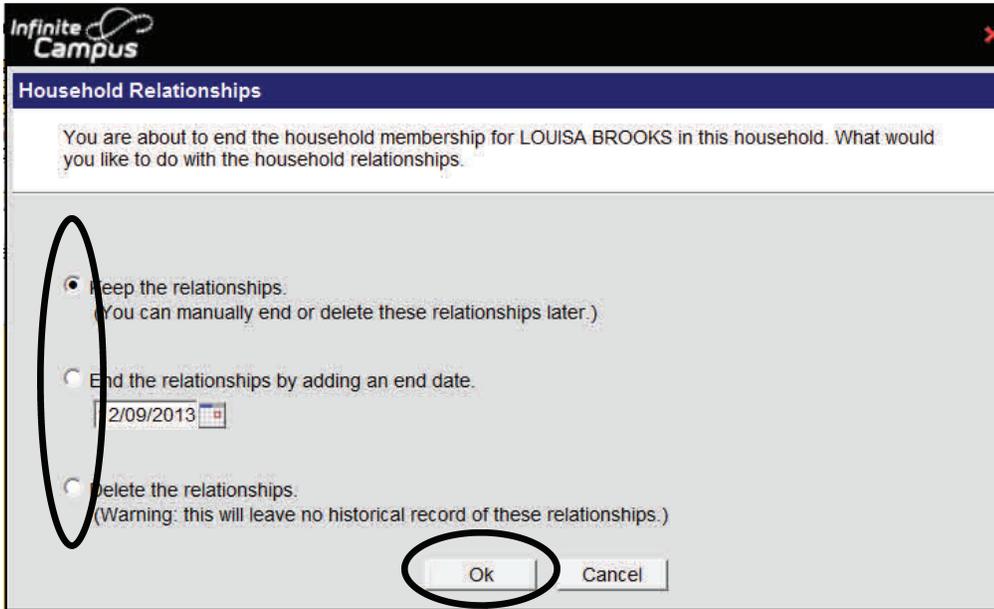
Secondary Private

- Modified by: SNELL, DEANNA 11/05/2013 09:34

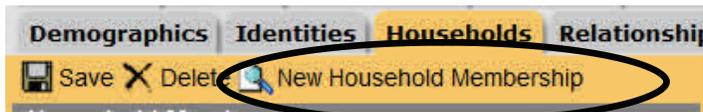
A dialogue box will appear asking if you want to keep the relationships. This will depend on what kind of relationships the person has to the remaining people in the household.

- Parents would keep the relationship unless they have lost custodial rights.
- Non-Household relationships such as Emergency Contact may end or the relationship may be deleted.

6. Select the appropriate button then click **OK**.

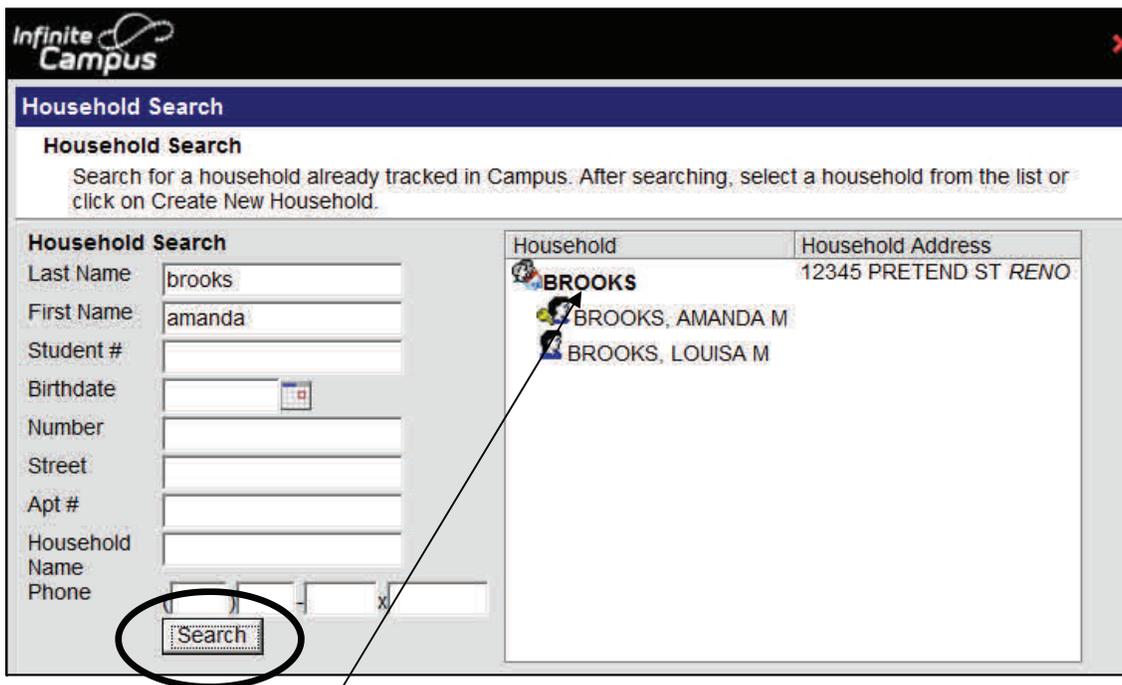


7. Click **New Household Membership**.



8. Enter the search data for the new household. You can use the Household name, address or the name of a person that resides in the household.

9. Click **Search**.



10. Click on the household name of the matching household.

11. Enter the date the person became a member of the household.

The screenshot shows a software interface with tabs for Demographics, Identities, Households, and Relationship. Below the tabs is a yellow bar with buttons for Save, Delete, and New Household Membership. The 'Save' button is circled in black. Below this is a 'Household Membership' form. The 'Household Name' is 'BROOKS'. There are fields for 'Start Date' and 'End Date', both with calendar icons. The 'End Date' field is circled in black. Below these are checkboxes for 'Secondary' and 'Private'.

12. Click Save.

Remember, you can mark a student as Secondary using this tool. A student can only have one Primary address. If a student resides in two households, he must be marked as Secondary in one. Mark the student as Secondary, not the Address.

Process 2:

Index>Search>Household

1. Enter the search criteria for the person or the address of the household.

The screenshot shows a search interface with tabs for Index, Search, and Help. Below the tabs is a search form with a dropdown menu set to 'Household' (circled in black), a text input field containing 'brooks, amanda', and a 'Go' button. Below the search bar is a link for 'Advanced Search >>'. The search results section shows 'Search Results: 1' and a list of results: 'BROOKS (2 members)', '12345 PRETEND ST , RENO', 'BROOKS, AMANDA M [01/29/1983]', and 'BROOKS, LOUISA M [09/07/2005]'. An arrow points from the 'BROOKS (2 members)' result to the 'Members' tab in the next screenshot.

2. Click on the name of the Household.

3. Click on the **Members** tab.

The screenshot shows the 'BROOKS Household' page. At the top is the phone number '(775)000-0000'. Below are tabs for Household Info, Addresses, Members (circled in black), and Fees. Below the tabs is a 'Find New Member' button. Below that is a 'Household Member Editor' table with columns for Name, Start Date, End Date, Secondary, and Private. The table contains two rows: 'BROOKS, AMANDA M' and 'BROOKS, LOUISA M'.

Name	Start Date	End Date	Secondary	Private
BROOKS, AMANDA M				
BROOKS, LOUISA M				

- Click on the name of the person leaving the household.

BROOKS Household
Phone: (775)000-0000

Household Info | Addresses | **Members** | Fees

Find New Member

Household Member Editor

Name	Start Date	End Date	Secondary	Private
BROOKS, AMANDA M				
BROOKS, LOUISA M				

- Type in the **End Date** or click on the calendar icon and choose the appropriate date.

Household Member Detail

Name
BROOKS, LOUISA M

Start Date

End Date

Secondary

Private

- Click **Save**.
- Go to **Index>Search>Household**.
- Enter the search criteria for the name of person or address of household.

Index | **Search** | Help

Search for a:
Household

brookS, BRYAN

[Advanced Search >>](#)

Search Results: 1

- BROOKS** (1 members)
- 123 ANYWHERE ST , RENO
- BROOKS, BRYAN A

- Click on the **Household** name.
- Click on the **Members** tab.

BROOKS Household
Phone: (775)000-0111

Household Info | Addresses | **Members** | Fees

Save Delete

Household Information

Name	Phone Number
BROOKS	(775)000 -0111 x

11. Click on **Find New Member**.



12. Enter the name of the person you are adding to the household, then click **Search**.

A screenshot of a "Person Search" form. The form has a title bar "Person Search" and a subtitle "Person Search". Below the subtitle is a instruction: "Search for a person already tracked in Campus using the fields provided, required fields are in red. Select a student from the list or click on Create New Person." The form contains several input fields: "*Last Name" (BROOKS), "First Name" (LOUISA), "Middle Name" (empty), "Birth Date" (empty), and "Gender" (empty). A "Search" button is at the bottom left. On the right side, there is a "Details" link and a search result for "BROOKS, LOUISA M" with a female icon, birth date "09/07/2005", and "PersonID: 415342".

13. Find the correct person in the results list and click on their name.

14. Enter the **Start Date**. (If this person is a student living in this household as a **Secondary** household, click the **Secondary** checkbox before you save.)

A screenshot of a "Household Member Detail" form. The form has a title bar "Household Member Detail". The "Name" field is "BROOKS, LOUISA M". The "Start Date" field is "12/10/2013". The "End Date" field is empty. The "Secondary" checkbox is unchecked. The "Private" checkbox is unchecked.

13. Click **Save**.

14. Search for the person name in a household search and you will see that they are now a member of the new household.

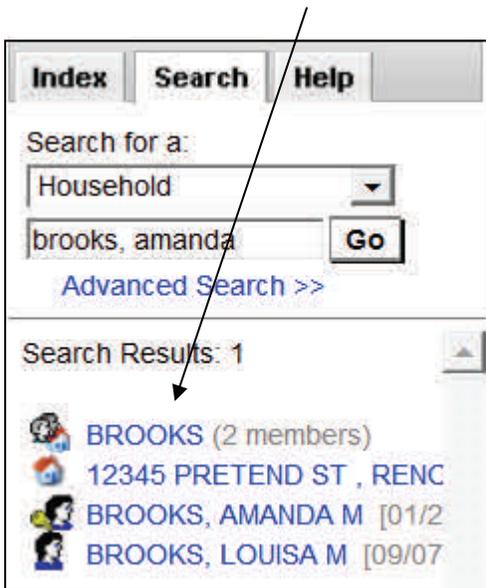
A screenshot of a household search results page. The search criteria are "Household" and "brooks, bryan". The search results show "Search Results: 1" and a list of household members: "BROOKS (2 members)", "123 ANYWHERE ST , RENO", "BROOKS, LOUISA M [09/07/2005]", and "BROOKS, BRYAN A".

CHANGING A HOUSEHOLD NAME

Scenario: Parents are splitting or divorcing and will reside in two different households. Mother is changing her name back to her maiden name and wants the name of the household to reflect the change.

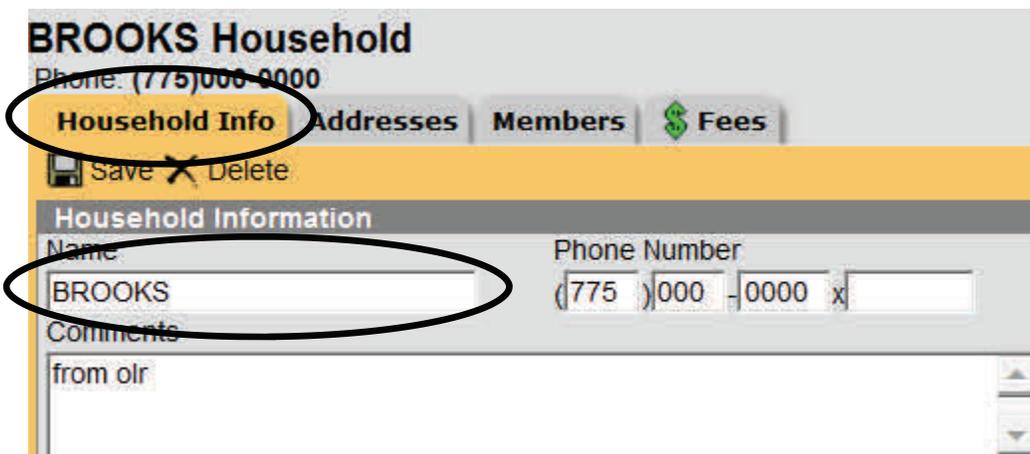
Index>Search>Household

1. Enter the search criteria for the household. You can enter a name of a person in the household or the address connected to the household.
2. Select the name of the household from the results list.



The screenshot shows a search interface with three tabs: 'Index', 'Search', and 'Help'. The 'Search' tab is active. Below the tabs, there is a 'Search for a:' label, a dropdown menu set to 'Household', a text input field containing 'brooks, amanda', and a 'Go' button. Below the search bar is a link for 'Advanced Search >>'. The search results section shows 'Search Results: 1' and a list of results. An arrow points from the search criteria to the first result, 'BROOKS (2 members)'. The results list includes: 'BROOKS (2 members)', '12345 PRETEND ST , RENC', 'BROOKS, AMANDA M [01/2]', and 'BROOKS, LOUISA M [09/07]'.

3. Click on the **Household Info** tab.



The screenshot shows the 'BROOKS Household' form. The 'Household Info' tab is selected and circled. Below the tabs are 'Save' and 'Delete' buttons. The 'Household Information' section has a 'Name' field containing 'BROOKS' and a 'Phone Number' field containing '(775) 000 - 0000'. The 'Name' field is circled. Below the 'Name' field is a 'Comments' field containing 'from olr'.

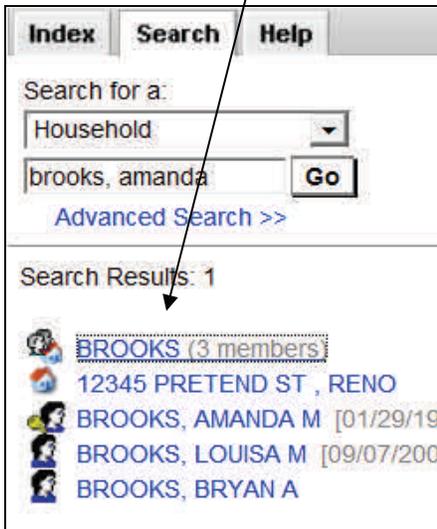
4. Enter the new name of the household in the **Name** field.
5. Click **Save**.

SPLITTING A HOUSEHOLD

Scenario: A parent is leaving the household such as in the case of divorce or separation. Student will be living part time with both parents.

Index>Search>Household

1. Enter the search criteria such as the name of a person in the household or the address.
2. Click on the **Household** name from the results list.



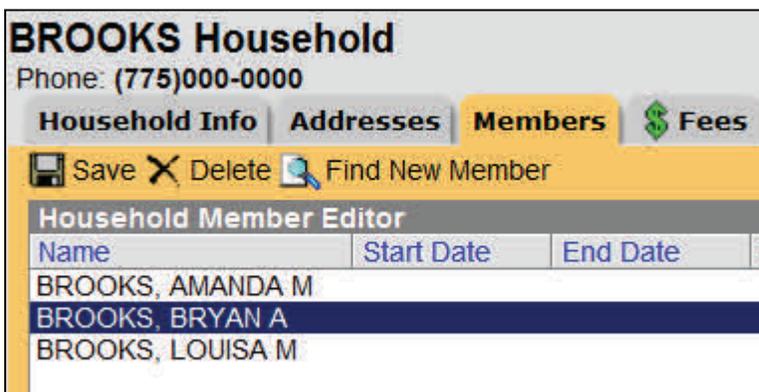
The screenshot shows a web interface with tabs for 'Index', 'Search', and 'Help'. Under 'Search', there is a dropdown menu set to 'Household', a text input field containing 'brooks, amanda', and a 'Go' button. Below the search bar is a link for 'Advanced Search >>'. The search results section shows 'Search Results: 1' and a list of household members: 'BROOKS (3 members)', '12345 PRETEND ST , RENO', 'BROOKS, AMANDA M [01/29/19]', 'BROOKS, LOUISA M [09/07/200]', and 'BROOKS, BRYAN A'. An arrow points from the 'Household' name in the instructions to the 'BROOKS (3 members)' result.

3. Click on the **Members** tab.



The screenshot shows the 'BROOKS Household' page. It includes the phone number '(775)000-0000' and a navigation bar with tabs for 'Household Info', 'Addresses', 'Members', and 'Fees'. The 'Members' tab is highlighted. Below the navigation bar is a yellow bar with a magnifying glass icon and the text 'Find New Member'.

4. Click on the name of the person leaving the household.



The screenshot shows the 'BROOKS Household' page with the 'Members' tab selected. Below the navigation bar, there are icons for 'Save', 'Delete', and 'Find New Member'. A table titled 'Household Member Editor' is visible, with columns for 'Name', 'Start Date', and 'End Date'. The table contains three rows: 'BROOKS, AMANDA M', 'BROOKS, BRYAN A', and 'BROOKS, LOUISA M'. The row for 'BROOKS, BRYAN A' is highlighted in blue.

5. Enter the **End Date** by typing in the date or clicking on the calendar icon and selecting date.

6. Click **Save**. The person has now been removed from the household and is no longer a member of any household.
7. Keep or change the **Relationships**. Keep the **Relationships** if the parent is leaving the household and they maintain guardianship rights to the children.
8. End the relationships if they are a current **Emergency contact** and will no longer maintain that relationship.
9. Click **OK**. The person name will now have an **End Date** in the **Member** list.

Household Relationships

You are about to end the household membership for BRYAN BROOKS in this household. What would you like to do with the household relationships.

Keep the relationships.
(You can manually end or delete these relationships later.)

End the relationships by adding an end date.

Delete the relationships.
(Warning: this will leave no historical record of these relationships.)

The person has now been removed from the household. If this is a parent and the children will be living part time in their household, please follow the steps below to create a new household and add the appropriate persons.

Index<Census<Census Wizard

1. Enter the name of the person that will be in the new Household. The name will appear in the results list under **People not in Households**. You can check the person information by clicking on **Details**.

Index
Search
Help

Search for a:

Household

[Advanced Search >>](#)

Census Wizard Search Results: 1

People not in Households

[Details](#) BROOKS, BRYAN A

Create a new Person

brooks, bryan

Census Wizard

Step 1 - Assemble New or Select Household

This wizard will walk you through the process of creating a new household, people or addresses.

- To Edit a household, simply click on the Household name
- To Assemble a new household, select people and/or add

If you enter a first and last name, you can create and link in a new address into the household.

Person Search

Last Name

First Name

Student Number

Birth Date

- Click on the name in the list and it will populate the **Household** field. Use these steps to add all persons who will be part of this household. When searching for person records for children that will live part time in the new household, they will appear in the results window as a member of the other parent's household. Click on their name to add them to the new household.

Person Search
 Last Name: brooks
 First Name: bryan
 Student Number:
 Birth Date:
 Gender:
 Middle Name:
 Suffix:
Address Search
 House/P.O. Number:
 Street Name:
 Apt Number:
 City:
Household Search
 Household Name:
 Home/Other Phone: () - x

Assembling a New Household

- New Household
- BROOKS, BRYAN ANDREW

Search for a:
 Household
 brooks, amanda
[Advanced Search >>](#)

Census Wizard Search Results: 1

- BROOKS (2 members)
- 12345 PRETEND ST, RENO
- BROOKS, AMANDA M [01/29/1983]
- BROOKS, LOUISA M [09/07/2005]

Person Search
 Last Name: brooks
 First Name: ioulsa

- Clear the name information and enter the address information in the **Address Search** fields, then click **Search**.

Census Wizard Search Results: 1

Addresses not in Households

- 123 ANYWHERE ST, RENO
- Create a new Address
- 123 anywhere

Person Search
 Last Name:
 First Name:
 Student Number:
 Birth Date:
 Gender:
 Middle Name:
 Suffix:
Address Search
 House/P.O. Number: 123
 Street Name: anywhere
 Apt Number:
 City:
Household Search
 Household Name:
 Home/Other Phone: () - x

- Click on the correct address in the results list. *It may appear under **Addresses not in Households** but may also be attached to another household. Clicking on the address will not remove it from another household, it will just add it to the one you are creating.*

- When all persons belong to the new household and address appear in the **Assembling a New Household** field, click **Continue—Step 2**.

Assembling a New Household

- X New Household
- X 123 ANYWHERE ST , RENO
- X BROOKS, BRYAN ANDREW
- X BROOKS, AMANDA MARIE [01/29/1983]

Continue - Step 2 » Clear Household

- Enter the **Household Name** and **Household Phone Number**.
- Enter the **Start Date** and mark the **Mailing** check box for the address.
- Enter the **Start Date** for the **Household Members**.
- Mark **Secondary** for any children that will be living part time in this household but are currently in a **Primary** household.

Census Wizard - Edit Household Membership

Step 2: Editing Household Data
Edit the attributes common to the household and edit details specific to each person and address.

Household

Household Name (Override) Household Phone Number Private

BROOKS (775) 000-0112 x

Household Locations

Address	Start	End	Private	Secondary	Mailing
123 ANYWHERE ST , RENO	12/10/2013		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Household Members

Name	Birthdate	Gender	Start	End	Private	Secondary
BROOKS, AMANDA MARIE	01/29/1983	F	12/10/2013		<input type="checkbox"/>	<input checked="" type="checkbox"/>
BROOKS, BRYAN ANDREW		M	12/10/2013		<input type="checkbox"/>	<input type="checkbox"/>

Save & Continue - Step 3 »

- Click **Save & Continue—Step 3**.

11. Review **Relationships**, add data if needed.
12. Review and add or remove **Guardian, Mailing, Portal and Messenger** permissions as needed.
13. Click **Save & Done**. After the **Save**, the screen does not change.
14. Search for the household and review the data to make sure it is correct.

MAINTAINING OR CHANGING RELATIONSHIPS

Index>Search>All People

1. Search for the student
2. Select the student from the search results.
3. Click the **Relationships** tab.

Screenshot of the Relationships tab in a software application. The interface shows two tables of relationships for the BROOKS household. The top table is for "Primary Household Relationships" and the bottom table is for "Secondary Household Relationships". The "Secondary Household Relationships" table has two rows: one for "BROOKS, AMANDA M F" and one for "BROOKS, BRYAN A M". The "BROOKS, BRYAN A M" row has a dropdown menu for "Gender Relationship" and four checkboxes for "Guardian", "Mailing", "Portal", and "Messenger" permissions. The "Guardian", "Mailing", and "Portal" checkboxes are checked, while the "Messenger" checkbox is unchecked. The "Emergency Priority" field is set to 1. The "Start Date" is 10/15/2013.

4. Enter the **Relationship** from the drop down list.
5. Edit the check boxes (**Guardian, Portal, Mailing and Messenger**) to reflect the changed parental rights. *Parents will not be able to see their children on the Parent Portal unless they have Guardian and Portal check boxes checked.*
6. Click **Save**.

MAINTAIN FOR CHANGE RELATIONSHIPS

Scenario 1: Parents have moved to a new address and no longer want the old neighbor to be an emergency contact.

Index>Search>All People

1. Enter the name of the student in the search field, click **Go**.
2. Select the matching name from the search results list.

2. Select the **Relationships** tab.

BROOKS, LOUISA M Nickname:
DOB: 09/07/2005 Gender: F

School Choice | Credentials | Overrides | Fees | SECURITY | ID History | Data Warehouse
Demographics | Identities | Households | **Relationships** | Enrollments | District Employment | District Assignments

Save | New Non-Household Relationship

Relationships within the BROOKS **Primary Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian	Mailing Portal
BROOKS, AMANDA M	F	Mother	10/15/2013		1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Relationships within the BROOKS **Secondary Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian	Mailing Portal
BROOKS, BRYAN A	M		10/15/2013		2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

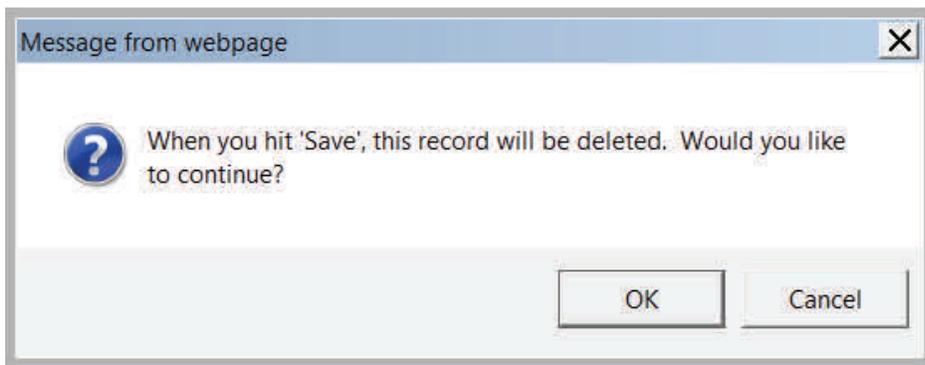
Non-Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian	Mailing Portal
SMITH, JOHN		Emergency Contact	10/15/2013		3	<input type="checkbox"/>	<input type="checkbox"/>

3. Find the appropriate relationships which needs to be changed. In this case the **Non-Household** relationships is the **Emergency Contact**.

To delete the Non-Household relationship

A. Click on the **X** next to the name. You will receive the following message.



B. Click **OK**.

A. Click **Save**.

To End Date the relationship

A. Find the correct person in the **Relationships** list

B. Enter the **End Date** .

Non-Household Relationships

Name	Gender	Relationship	Start Date	End Date	Emergency Priority	Guardian	Mailing Portal
SMITH, JOHN		Emergency Contact	10/15/2013			<input type="checkbox"/>	<input type="checkbox"/>

C. Click **Save**.