



Person Model

Sponsor and Data Entry Training



LincPass
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Module D: Company/Organization (Optional)

The screenshot to the right shows a blank Company/Organization record. The minimum required fields to save a Company/Organization record are:

- Company/Org
- DUNS (if company selected)
- Company/Organization Name
- Contact Name
- Contact Phone #
- Address Line 1
- City
- State

Enter as much data as you have for the Company/Organization, then click Save.

For step-by-step instructions, please refer to the Person Model Sponsor Data Entry Guide.

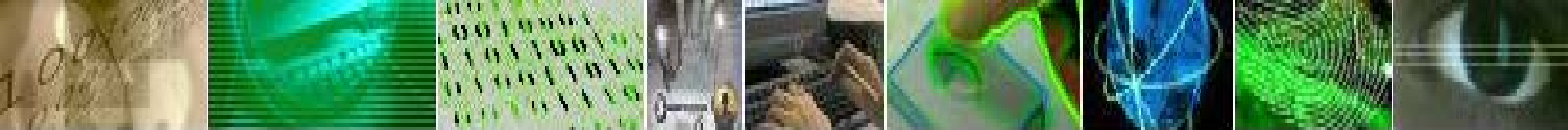
Company/Organization

Company/Organization Details

*Company/Org	<input type="text" value="Company"/>
DUNS	<input type="text"/>
*Company/Organization Name	<input type="text"/>
*Contact Name	<input type="text"/>
*Contact Phone #	<input type="text"/>
Entered by	DataEntry DataEntry

Company/Organization Address

*Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
*City	<input type="text"/>
*State	<input type="text"/> <input type="button" value="🔍"/>
Postal Code	<input type="text"/>



Module E: Contract, Grant or Agreement Record

The screenshot to the right shows a blank Contract/Grant/Agreement record.

The minimum required fields to save a Contract/Grant/Agreement record are:

- Type
- Number
- Sub-Agency
- Period of Performance Start Date
- Period of Performance End Date

Enter as much data as you have for the Company/Organization, then click Save.

For step-by-step instructions, please refer to the Person Model Sponsor Data Entry Guide.

Contract/Grant/Agreement Information

Type:	Contract
*Number:	<input type="text"/>
Contract Description:	<input type="text"/>
*Sub Agency:	<input type="checkbox"/> <input type="text"/>
*Period of Performance Start Date:	<input type="text"/> <input type="button" value="H"/>
*Period of Performance End Date:	<input type="text"/> <input type="button" value="H"/>
USDA POC:	<input type="text"/> <input type="button" value="Q"/>
Security Office Identifier:	<input type="text"/>
Submitting Office Number:	<input type="text"/>
OPAC/ALC Number:	<input type="text"/>
Notes:	<input type="text"/>

Company/Organization Information

DUNS:	<input type="text"/> <input type="button" value="Q"/>
Company/Organization Name:	<input type="text"/> <input type="button" value="Q"/>
Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Postal Code:	<input type="text"/>
Country:	<input type="text"/>
Phone Number:	<input type="text"/>
Contact Name:	<input type="text"/>



Module F: Person Information

The minimum required fields to save a Person Information record are:

- Effective Date (pre-populated)
- First and Last Name
- DOB (enter twice)
- Effective Date and Gender (pre-populated)
- SSN (enter twice)
- Country of Citizenship
- Home Address 1, City, State, Country
- Business Email
- Organizational Relationship/Type and Assignment

Enter as much data as you have for the **Biographical Details** tab, then click on the **Contact Details** tab.

For step-by-step instructions, please refer to the Person Model Sponsor Data Entry Guide.

Person ID: NEW

Biographical Details | **Contact Details** | Organizational Relationships

Name: Find | View All | First 1 of 1 | Last

*Effective Date: 09/28/2011 [B] + -

*Display Name: Add Name

Biographic Information

*Date of Birth: [] [B] 0 Years 0 Months

Date of Birth Re-enter: [] [B]

Birth Country: USA [M]

Birth State: [] [M]

Birth Location: []

Biographical History Find | View All | First 1 of 1 | Last

*Effective Date: 09/28/2011 [B] + -

*Gender: Unknown [V]

National ID Customize | Find | View All | [] First 1 of 1 | Last

Country	*National ID Type	*National ID	National ID Re-enter	Primary ID
USA	Social Security Number [V]	[]	[]	[X] + -

*Country of Citizenship: [] [M] Emergency Response Official

Notes: []



Module F: Person Information

The screenshot to the right shows the **Contact Details** tab on a blank Person Information record.

Enter as much data as you have for the **Contact Details** tab, then click on the **Organizational Relationships** tab.

For step-by-step instructions, please refer to the Person Model Sponsor Data Entry Guide.

Biographical Details | **Contact Details** | Organizational Relationships

Person ID: NEW

Current Addresses			
Address Type	As Of Date	Status	Address
Home			

Phone Information			
*Phone Type	Telephone	Extension	Preferred

Email Addresses		
*Email Type	*Email Address	Preferred
Business		

Save | Notify | Previous tab | Next tab | Add | Update/Display

Biographical Details | Contact Details | Organizational Relationships

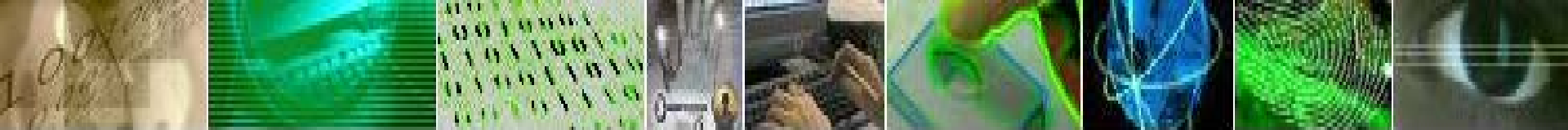
Module F: Person Information

The screenshot shows a web interface for managing person information. At the top, there are three tabs: 'Biographical Details', 'Contact Details', and 'Organizational Relationships'. The 'Organizational Relationships' tab is active and highlighted with a red box. Below the tabs, the text 'Person ID: NEW' is visible. A section titled 'Choose Org Relationship to Add' contains a checkbox labeled 'Person of Interest' (checked) and a dropdown menu. The dropdown menu is open, showing a list of relationship types: 'Affiliate', 'Contractor', 'Fellow', 'Intern', and 'Volunteer'. A yellow button labeled 'Add the Relationship' is located to the right of the dropdown. Below the dropdown, there are several action buttons: 'Save', 'Notify', 'Previous', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The 'Add' button is highlighted with a red box. At the bottom left, there are links for 'Biographical Details' and 'Contact Details'.

On the **Organizational Relationships** tab, check the **Person of Interest** box, then Select the **Person of Interest** type. Click **Add the Relationship**.

You will now be directed to the **Add a Person of Interest** screen.

Note: You must follow the steps covered on the next few slides to properly save the Person Information record. **If you do not complete the following steps, the record you entered will not be visible in the system.**



Module G: Assignment and Sponsorship

You will now learn how to complete the Assignment and how to perform Sponsorship.

The screenshot to the right shows a blank Organizational Relationship. Note the two tabs at the top of the record. You will enter information on both of these tabs.

The minimum required fields to complete the Organizational Relationship are:

- Effective Date (pre-populated)
- Security Access Type
- Value 1
- Value 2
- Effective Date (pre-populated)
- Organizational Relationship Status (pre-populated)
- Contract/Grant/Agreement Number
- Status
- Effective Date (pre-populated)

Add Person of Interest **Assignment**

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

Security Data Find | View All First 1 of 1 Last

*Effective Date: 09/29/2011

***Security Access** Enabled Value 1 Value 2

Type

Person of Interest History Customize | Find | First 1 of 1 Last

	*Effective Date	*Organizational Relationship Status	Planned Exit	More Information
1	09/29/2011	A		

Module G: Assignment and Sponsorship

[Edit POI Relationship](#) **Assignment**

Contract

MICKEY MOUSE Person ID: 262105

Person of Interest Type: Contractor

Contract ID	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	Sponsor ID	LincPass Required
1						09/28/2011		<input type="checkbox"/>

[Save](#) [Return to Search](#) [Notify](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Edit POI Relationship](#) | [Assignment](#)

Click on the **Assignment** tab. The screenshot above shows a blank **Assignment** screen. The minimum required fields to complete on this page are:

- Contract/Grant/Agreement Number
- Status
- Effective Date (pre-populated)

The remaining fields will be populated based on the contract, grant or agreement you select, or will be system-generated. For step-by-step instructions, please refer to the Person Model Sponsor Data Entry Guide.