Person Model
Sponsor and Data Entry Training

LincPass

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USDA United States Department of Agriculture

V 1.3

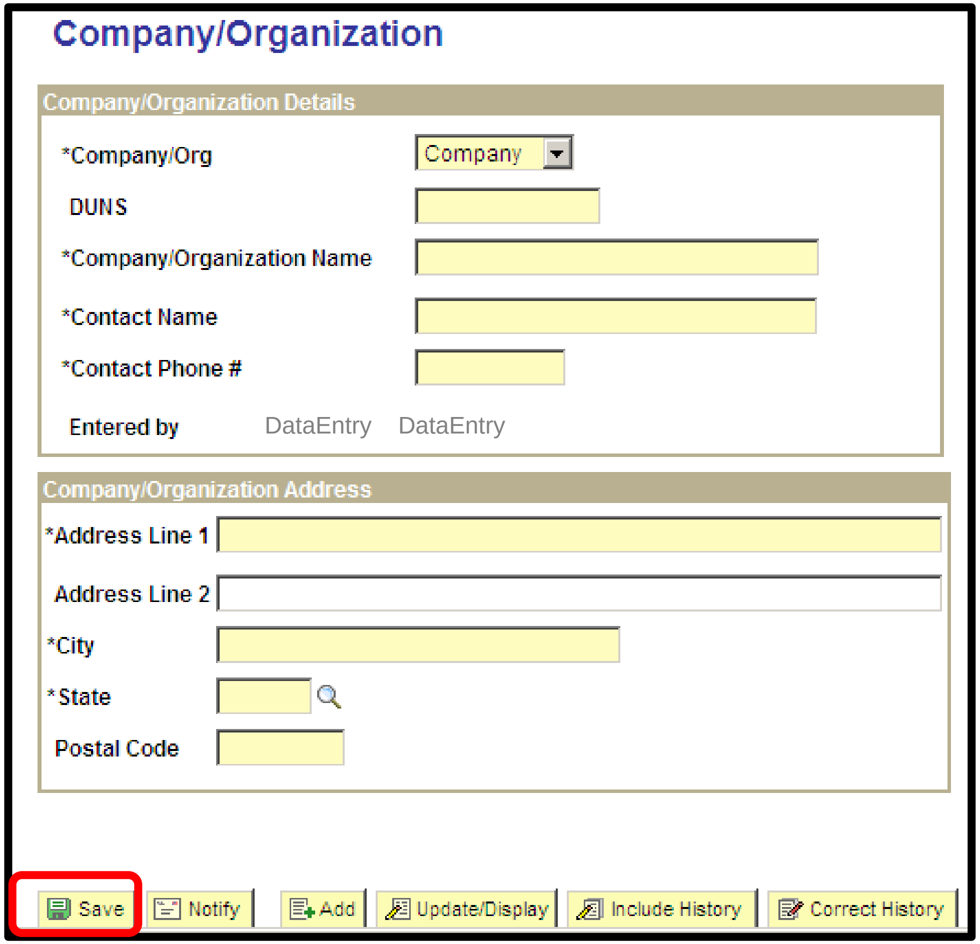
Module D: Company/Organization (Optional)

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 Company

DUNS

*Company/Organization Name

*Contact Name

*Contact Phone #

Entered by DataEntry DataEntry

Company/Organization Address

*Address Line 1

Address Line 2

*City

*State

Postal Code

Save | Notify | Add | Update/Display | Include History | Correct History

Module E: Contract, Grant or Agreement Record

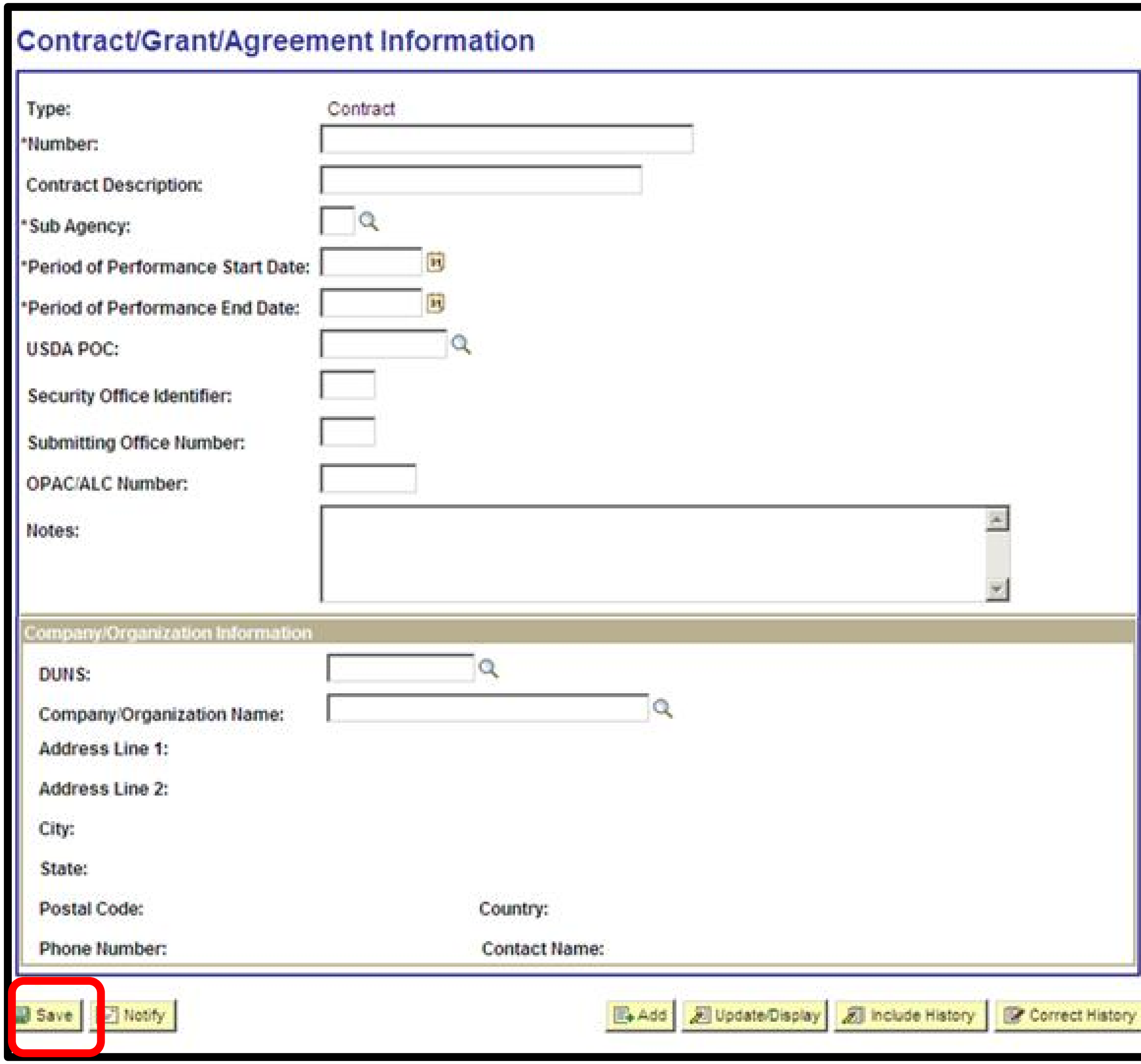
The screenshot to the right shows a blank Contract/Grant/Agreement record.

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.



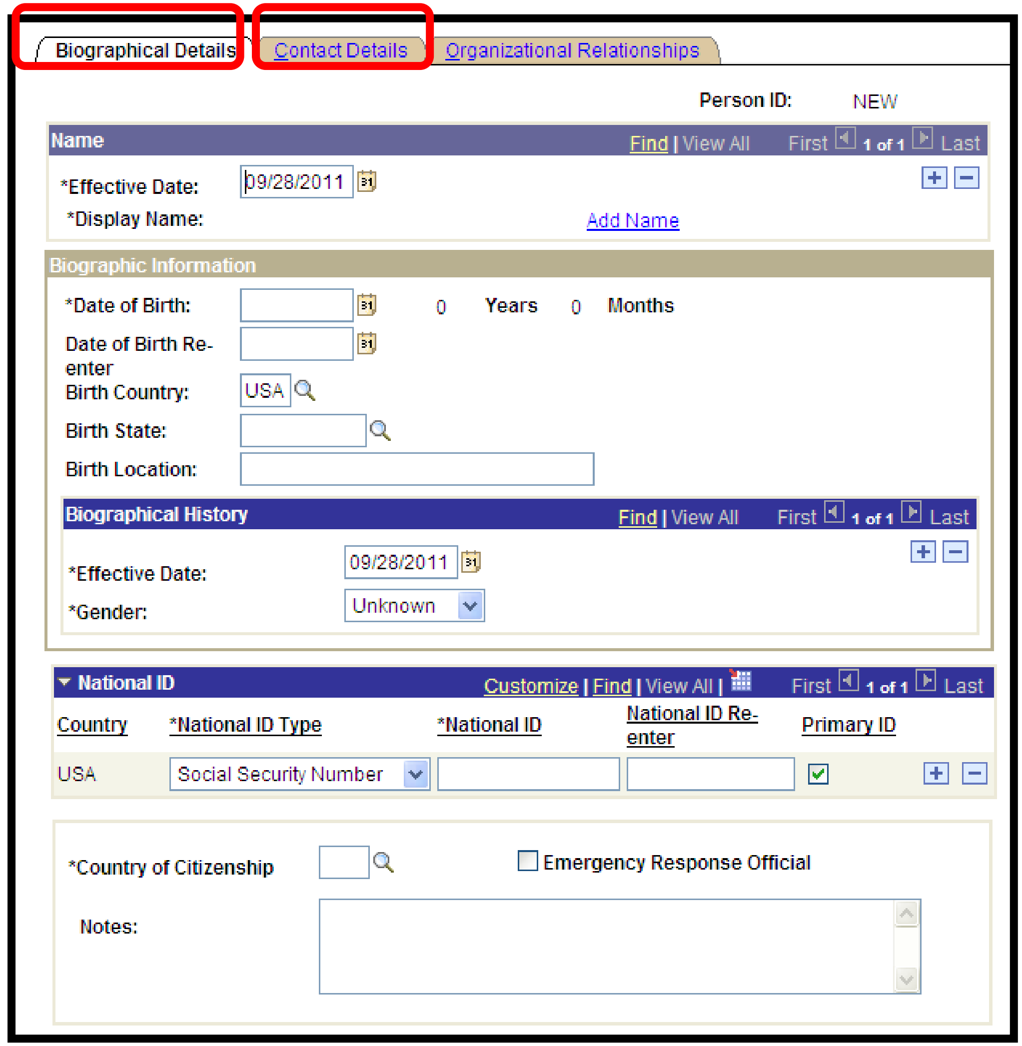
Module F: Person Information

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.

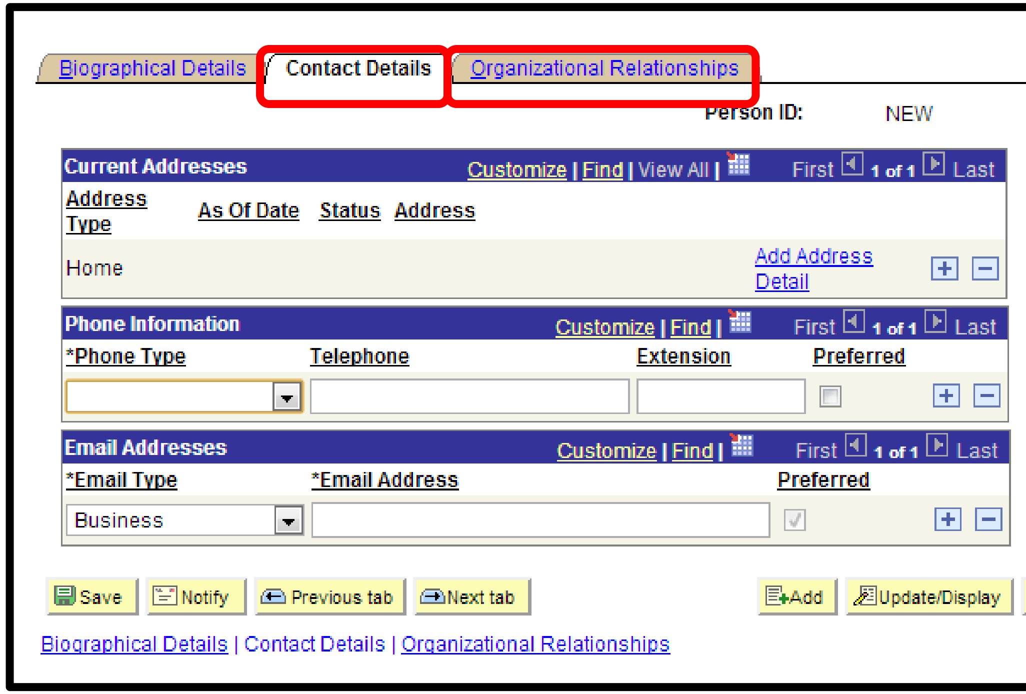


Module F: Person Information

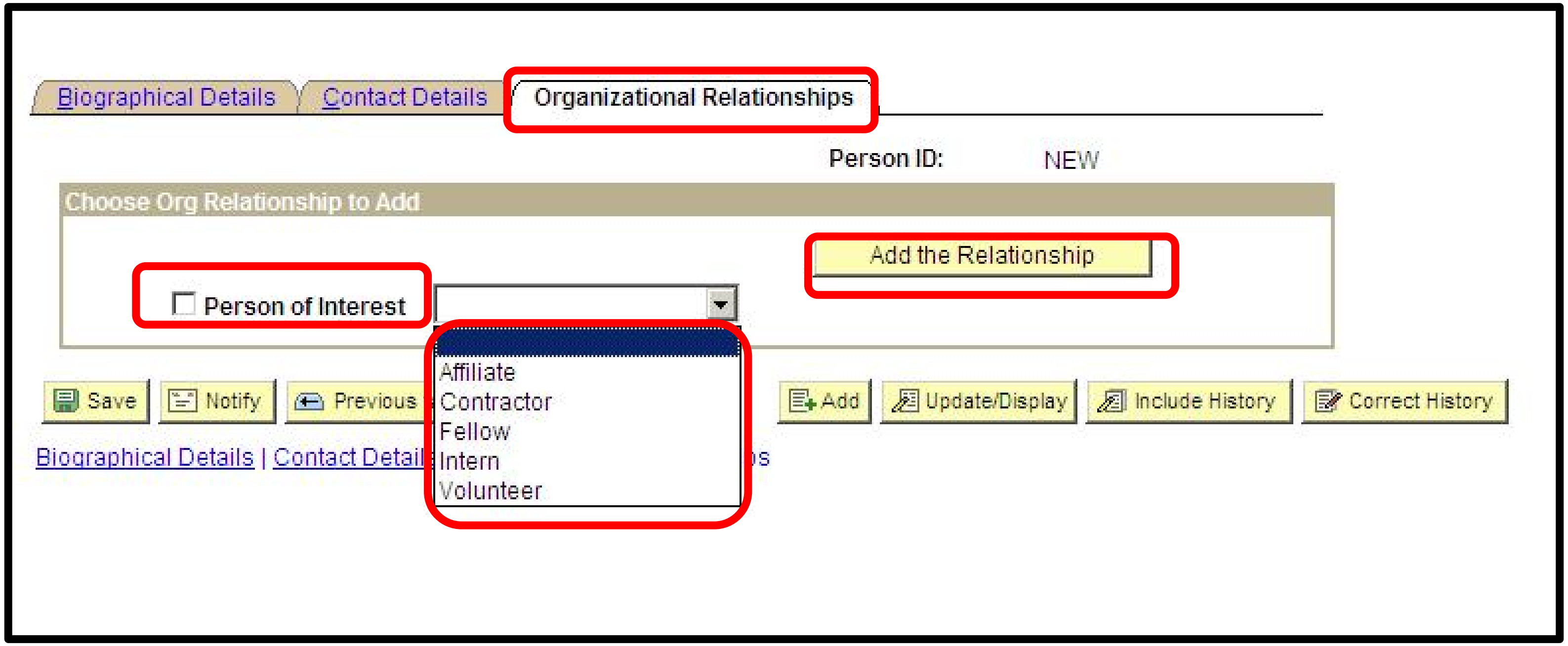
The screenshot to the right shows the **Contact Details** tab on a blank Person Information record.

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.



Module F: Person Information



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.**

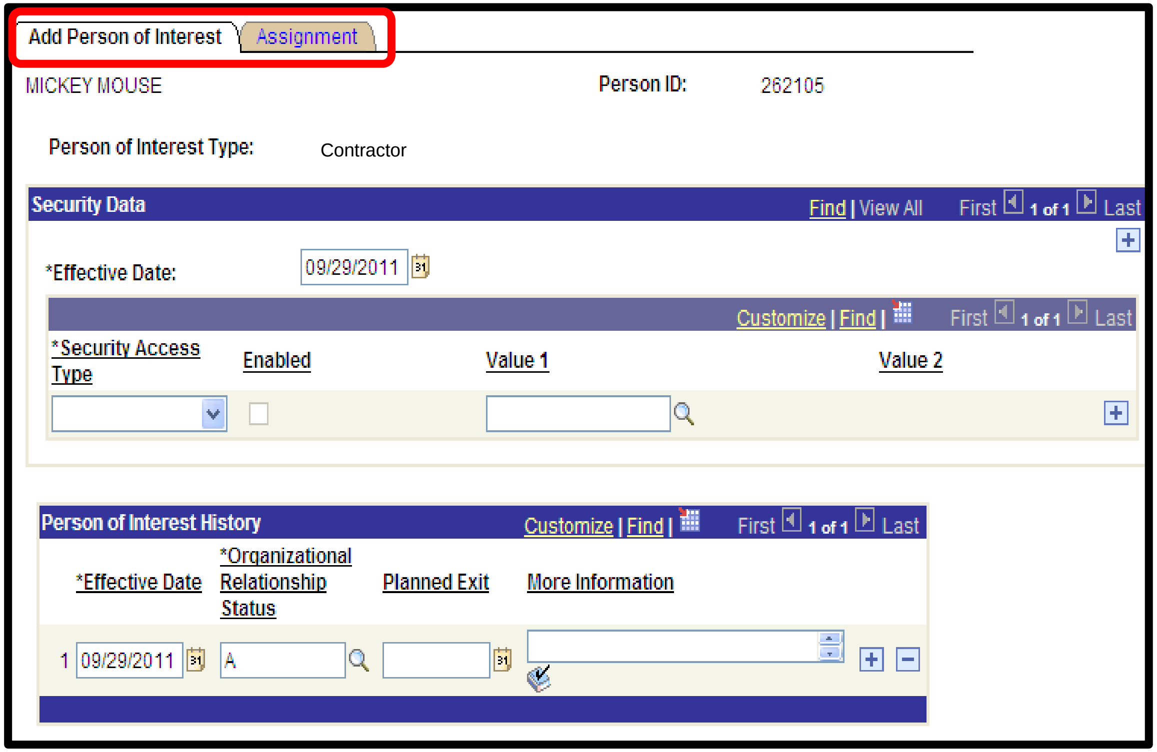
Module G: Assignment and Sponsorship

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

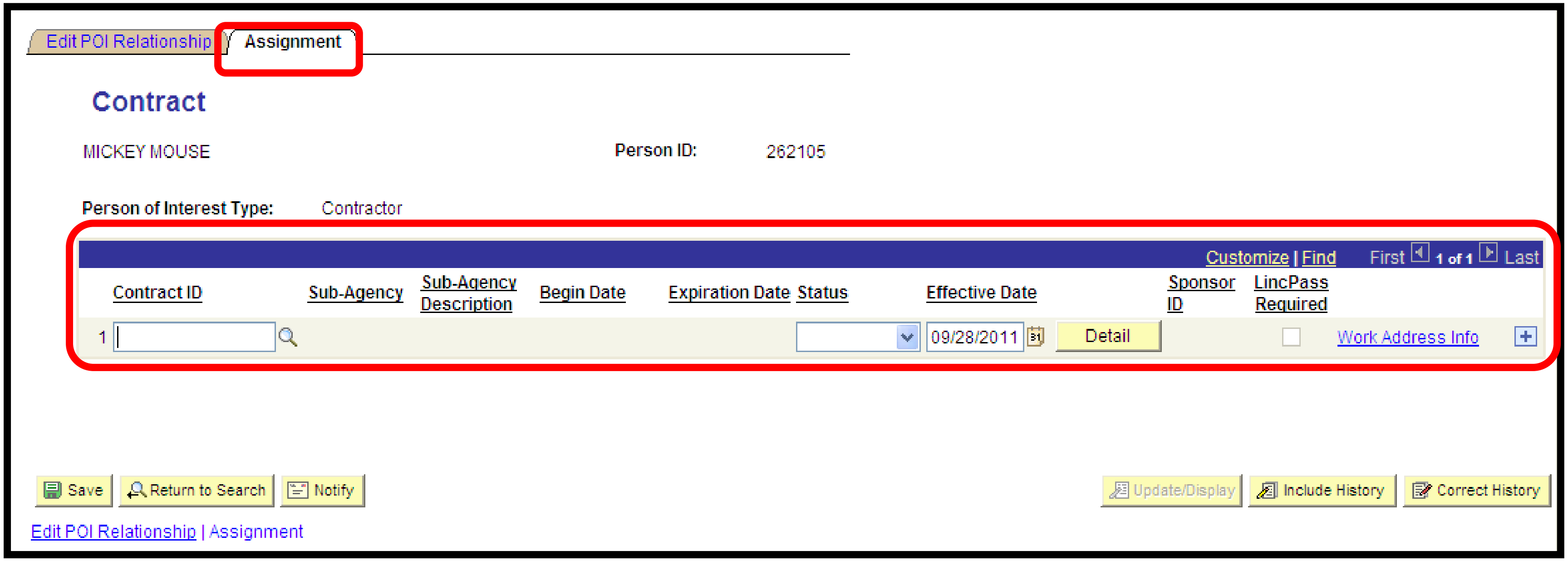
The screenshot to the right shows a blank Organizational Relationship. Note the two tabs at the top of the record. You will enter information on both of these tabs.

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)



Module G: Assignment and Sponsorship



Edit POI Relationship | Assignment

Contract

MICKEY MOUSE

Person ID: 262105

Person of Interest Type: Contractor

Customize | Find First 1 of 1 Last

	Contract ID	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date		Sponsor ID	LincPass Required		
1							09/28/2011	Detail			Work Address Info	+

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.