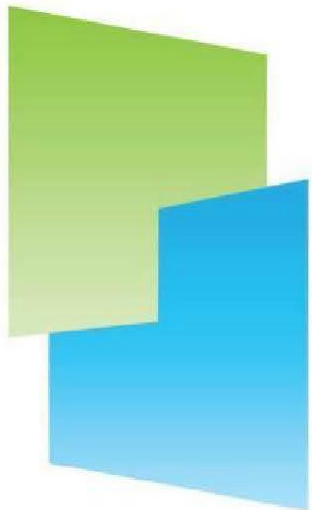




Person Model

Sponsor and Data Entry Training



LincPass
simple. smart. secure.



Module D: Company/Organization (Optional) - Four

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

DUNS

*Company/Organization Name

*Contact Name

*Contact Phone #

Entered by

Company/Organization Address

*Address Line 1

Address Line 2

*City

*State

Postal Code



Module E: Contract, Grant or Agreement Record - Four

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:

Contract Description:

*Sub Agency:

*Period of Performance Start Date:

*Period of Performance End Date:

USDA POC:

Security Office Identifier:

Submitting Office Number:

OPAC/ALC Number:

Notes:

Company/Organization Information

DUNS:

Company/Organization Name:

Address Line 1:

Address Line 2:

City:

State:

Postal Code: Country:

Phone Number: Contact Name:



Module F: Person Information - Seven

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.

Biographical Details
Contact Details
Organizational Relationships

Person ID: NEW

Name
Find | View All
First 1 of 1 Last

*Effective Date:

31
+ -

*Display Name:

Biographic Information

*Date of Birth:

0
Years

0
Months

Date of Birth Re-enter

31

Birth Country:

🔍

Birth State:

🔍

Birth Location:

Biographical History
Find | View All
First 1 of 1 Last

*Effective Date:

31
+ -

*Gender:

▼ National ID
Personalize | Find | View All
First 1 of 1 Last

Country	*National ID Type	*National ID	National ID Re-enter	Primary ID
USA	Social Security Number ▼	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

*Country of Citizenship

🔍
 Emergency Response Official

Notes:



Module F: Person Information - Eight

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 Personalize | Find | View All | First 1 of 1 Last

Address Type	As Of Date	Status	Address		
Home				Add Address Detail	+ -

Phone Information Personalize | Find | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred		
			<input type="checkbox"/>	+ -	

Email Addresses Personalize | Find | First 1 of 1 Last

*Email Type	*Email Address	Preferred		
Business		<input checked="" type="checkbox"/>	+ -	

Module F: Person Information - Nine

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

Person ID: NEW

Choose Org Relationship to Add

Person of Interest

Add the Relationship

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

Biographical Details | Contact Details | **Affiliate**
Contractor
Fellow
Intern
Volunteer

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 - One

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
- Value1
- Value2
- 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: 407786

Person of Interest Type: Affiliate

Security Data Find | View All | First 1 of 1 Last

Effective Date: 08/15/2019 +

*Security Access Type	Enabled	Value 1	Value 2
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

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

	*Effective Date	*Organizational Relationship Status	Planned Exit	More Information
1	08/15/2019	A		

OK Cancel Apply

Module G: Assignment and Sponsorship - Three

Edit POI Relationship **Assignment**

Contract

MICKEY MOUSE Person ID: 407787

Person of Interest Type: Contractor

Contract ID	Contract/Grant Flag	Sub-Agency	Sub-Agency Description	Begin Date	Expiration Date	Status	Effective Date	Sponsor ID	Card Type	Change Date
1	Contract					Active	08/15/2019			

Save Return to Search Notify

Card Type dropdown: LincPass, AltLinc, No LincPass/AltLinc

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)
- Card Type (required when status = Active; all other statuses do not require this field)

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.