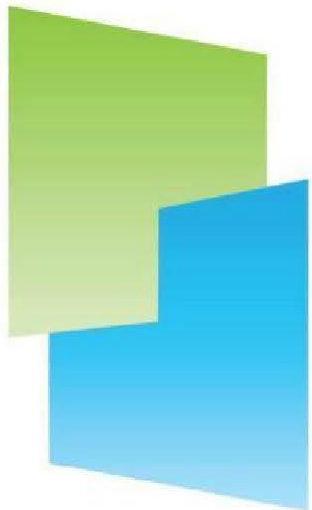




## Person Model

### *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:	<input type="text" value="000"/>
Contract Description:	<input type="text"/>
*Sub Agency:	<input type="text"/> <input type="button" value="Q"/>
*Period of Performance Start Date:	<input type="text"/> <input type="button" value="BT"/>
*Period of Performance End Date:	<input type="text"/> <input type="button" value="BT"/>
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 - 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: 08/15/2019
+ -

\*Display Name:
[Add Name](#)

**Biographic Information**

\*Date of Birth:

0 Years 0 Months

Date of Birth Re-enter

Birth Country:
USA

Birth State:

Birth Location:

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

\*Effective Date:
08/15/2019
+ -

\*Gender:
Unknown

**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				<a href="#">Add Address Detail</a>	+ -

**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

The screenshot shows a web interface for adding organizational relationships. At the top, there are three tabs: 'Biographical Details', 'Contact Details', and 'Organizational Relationships' (which is selected and highlighted with an orange border). Below the tabs, the text 'Person ID: NEW' is displayed. A dark blue header bar reads 'Choose Org Relationship to Add'. Below this, there is a checkbox labeled 'Person of Interest' which is checked and highlighted with an orange box. To its right is a dropdown menu with a blue header and a white body containing the following options: 'Affiliate', 'Contractor', 'Fellow', 'Intern', and 'Volunteer'. The dropdown menu is also highlighted with an orange border. To the right of the dropdown is a yellow button labeled 'Add the Relationship', also highlighted with an orange border. Below the dropdown and button are several action buttons: 'Save', 'Notify', 'Previous to', '+ Add', 'Update/Display', 'Include History', and 'Correct History'. 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 - 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

Personalize Find First 1 of 1 Last

Work Address Info

Display Include History Correct History

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.