Person Model
Sponsor and Data Entry Training

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USDA United States Department of Agriculture

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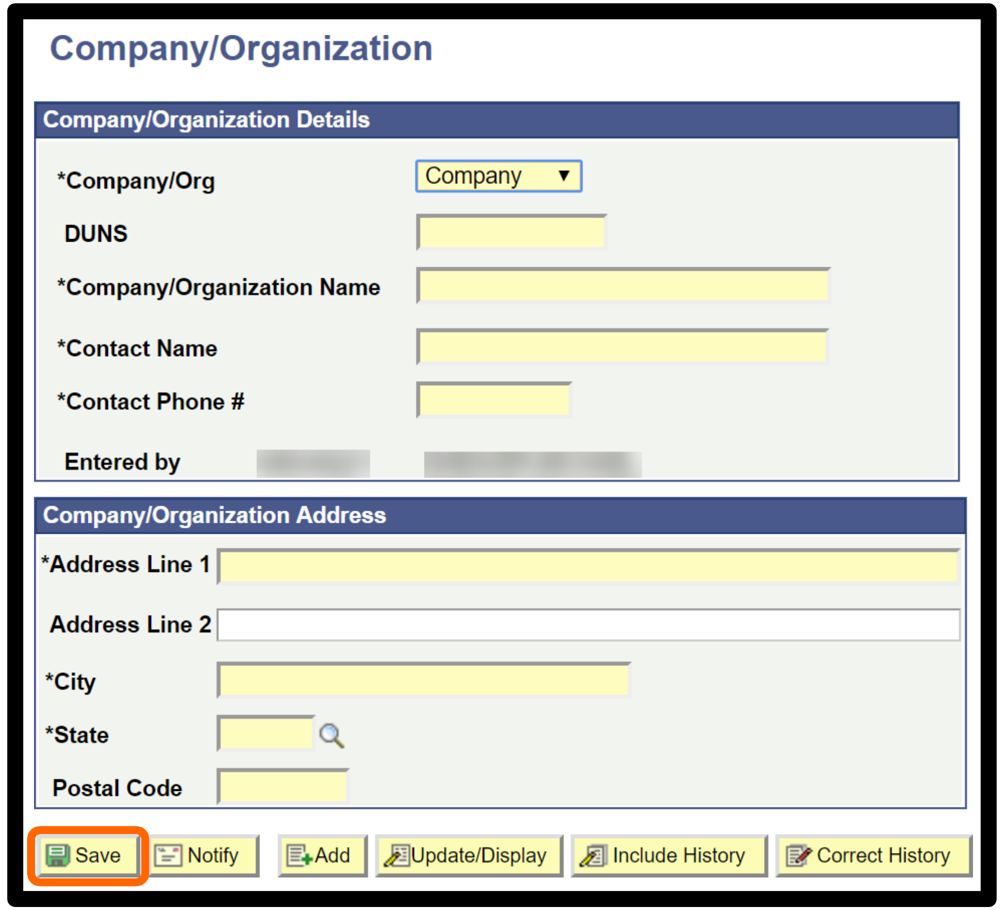
Module D: Company/Organization (Optional) - Four

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.



Module E: Contract, Grant or Agreement Record - Four

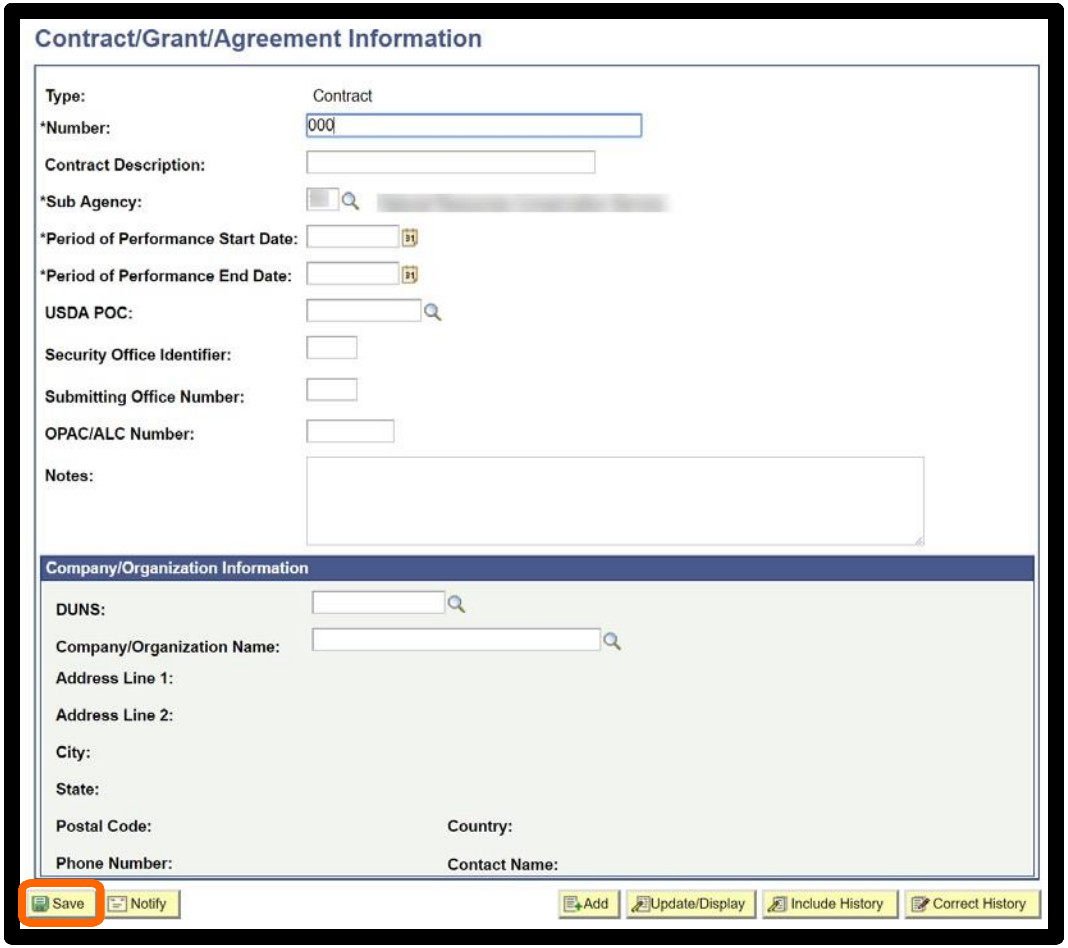
The screenshot to the right shows a blank Contract/ Grant/ Agreement record.

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.



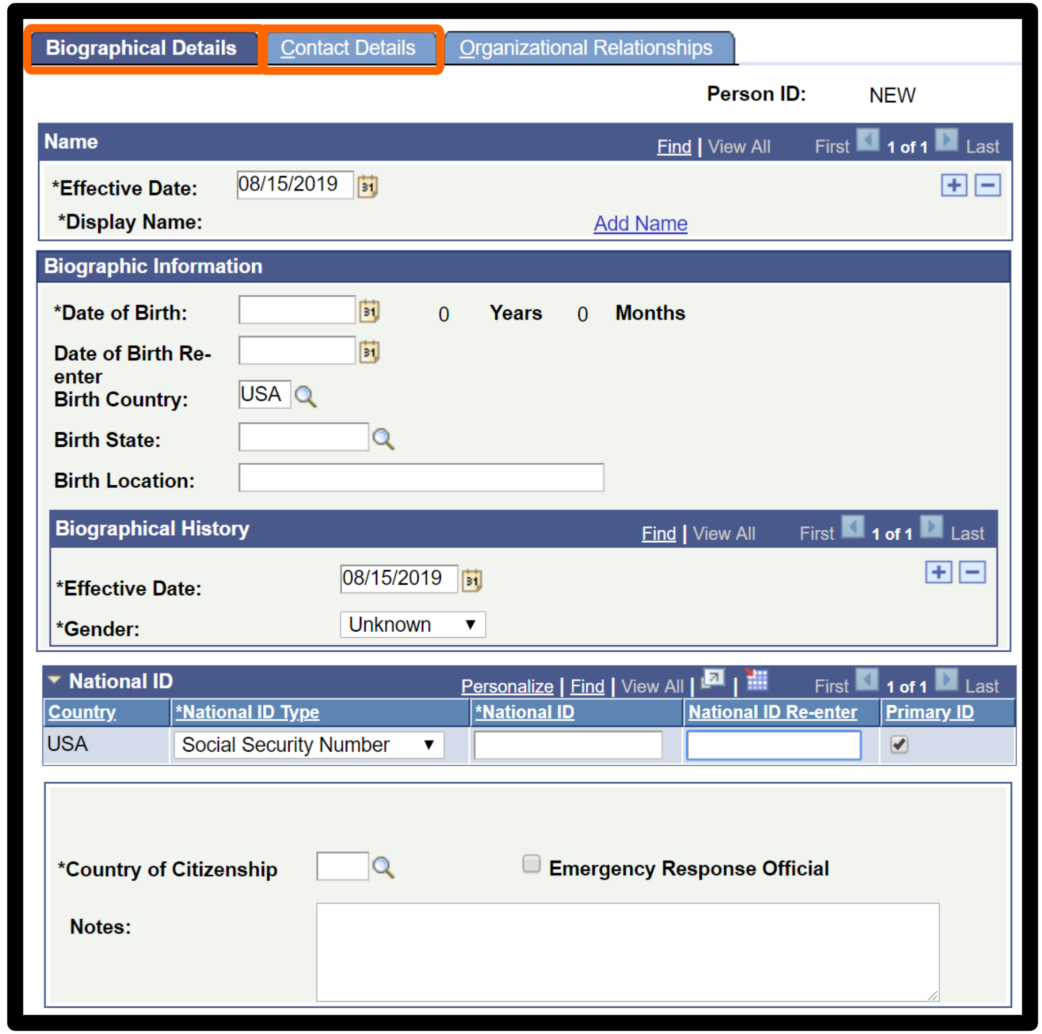
Module F: Person Information - Seven

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.

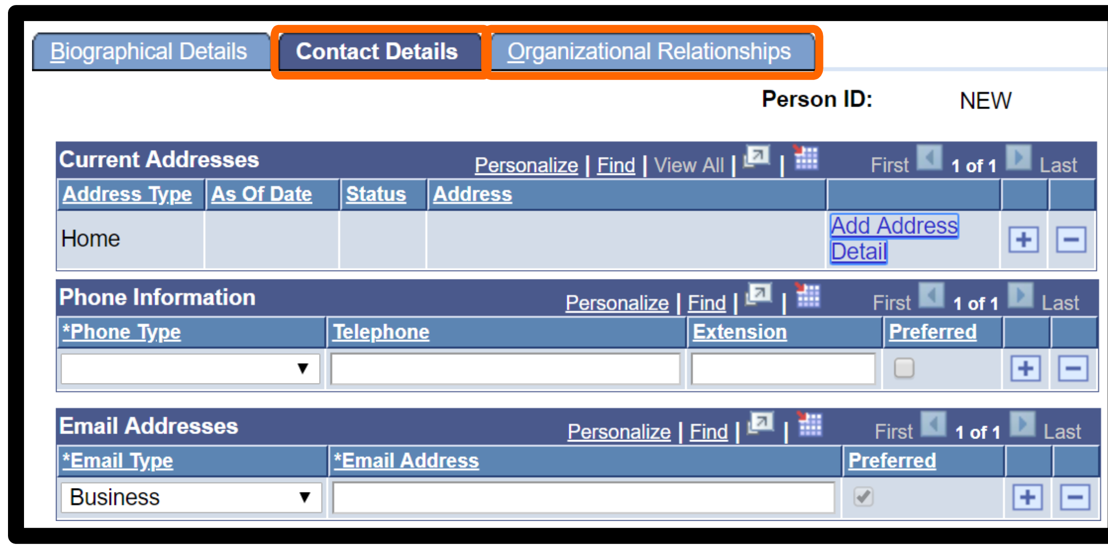


Module F: Person Information - Eight

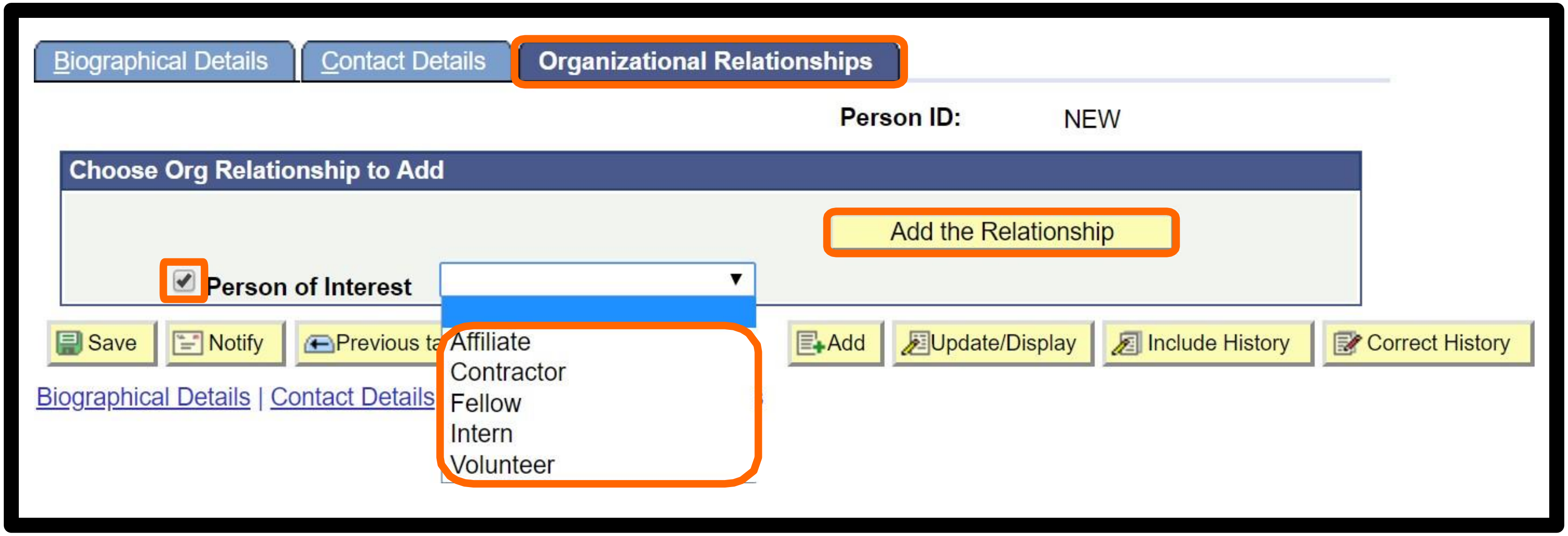
The screenshot to the right shows the **Contact Details** tab on a blank Person Information record.

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.



Module F: Person Information - Nine



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

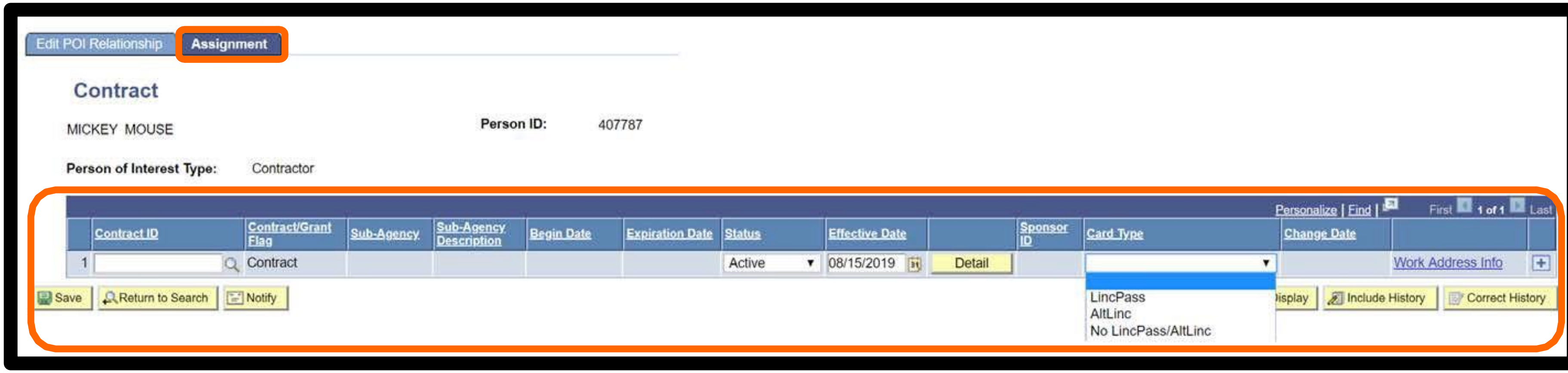
You will now learn how to complete the Assignment and how to perform Sponsorship.

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)

Module G: Assignment and Sponsorship - Three



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.