SeniorSystems

Student/Parent Addresses
Release Bulletin
December 2008

In this release bulletin, the latest enhancements to the **Student/Parent Addresses** module are described.

NEW ADDRESS CHANGE TASKS AVAILABLE

As family situations grow more complex, managing parent records can become more complicated as well. Your **Senior System, Inc.** parent address record does much more than simply store the name and address of each parent.

These records implicitly establish custody, provide the ability to send bills and grades, link parent records to constituent records, and allow web access through one or more **My BackPack** web communities. To simplify the management of these records, this release introduces functionality to manage sensitive family status changes more easily.

In the **Address Maintenance** window, there is now a **Tasks** button ☑ Tasks available on the toolbar.

When you select ☑ Tasks, the **Address Change Tasks** menu (figure 1) appears with a list of available actions to manage addresses. Only the tasks that are applicable to the family you are working on appear in this menu.

Please note that some of these tasks are more likely to be utilized than others. For further clarification on when to use these tasks, please contact our Product Support group.
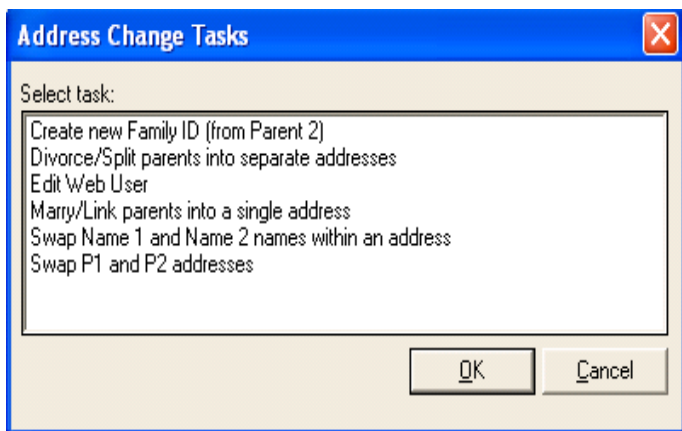
FIGURE 1. **Address Change Tasks**

Conditions for Displaying Each Task

The tasks that appear on this menu depend directly upon the type of data for each family. For example, the option to **Swap P1 and P2 addresses** will not appear if there is no P2 address present for the family you are working on. Conditions required for the presentation of each task are described here.

Create a New Family ID (from Parent 2)

The **Create Family ID (from Parent2)** task appears when there is at least one P2 address.

You can use this task to select which student(s) to move to a new/different Family ID along with the P2 address.

This task should rarely, if ever, be needed. In cases where the P2 record is not the custodial or biological parent for all children in the family, you may decide to create a separate Family ID for the P2 and his/her children.

Divorce/Split parents into separate addresses

The **Divorce/Split parents into separate addresses** task appears when there is at least one address with both a **Name1** and **Name2** listed.

You can use this task to select which person remains the custodial P1 address and which person becomes the non-custodial P2 address.

Edit the Web User

The **Edit Web User** task appears when there is at least one person in one of the addresses with a Web User Account.

A user must have access to the **Web User Maintenance** menu in the **System Administration** application to proceed with this task.

This task brings up the full **Web User Maintenance** window from **System Administration** that is used to remove an address from a **Web User Account**.

Marry or Link Parents into a Single Address

The **Marry/Link parents into a single address** task appears when there is at least one address with only a Name 1 defined and at least one address with only a Name 2 defined.

This task cannot be completed if the address is linked to one or more constituents in **Alumni/Development**. These constituents would need to be linked in the **Alumni/Development** application.

If the address is not linked to constituent records, you can use this task to select which addresses to merge/link and which of the two address records to keep.

Swap Name 1 and Name 2 within an Address

The **Swap Name1 and Name 2 names within an address** task appears when there is at least one address with both a **Name1** and **Name2** defined.

You can use this task to swap the **Name1** and **Email1** fields with the **Name2** and **Email2** fields.

Swapping Parent 1 and Parent 2 Addresses

The **Swap P1 and P2 addresses** task appears when there is at least one P1 and P2 address in a family. This task changes the P1 address to a P2 address, and the P2 address to a P1 address. The work addresses also change (P1FW to P2FW, etc.).

Since the following flags remain with the original address code: **Active**, **Application Active**, **Send Grades**, and **Bill Code**, it may be necessary to make modifications to these areas after the swap is completed. For example, if the P1 address was receiving the Original Bill then the new P1 address will receive the Original Bill.

Creating Separate Addresses for Divorced or Split Parents

In the following example, since the parents are divorcing, the father needs to be moved to a P2 address and the P1FW address needs to be changed to a P2FW address.

Each address also needs to be linked to the proper constituent record. Further, if these parents are Web Users, their current Web Account must remain intact.

If your school has the **Alumni/Development** application, there are two steps to divorcing parents and updating their addresses. You must first unlink the parents from each other in **Alumni/Development** before changing the addresses in **Student/Parent Addresses**. Continue to *Creating Separate Addresses for Divorced Parents (Constituents)* to perform this task.

If your school does not have the **Alumni/Development** application, then unlinking parents is not required. Go directly to *Creating Separate Addresses for Divorced Parents*.

Creating Separate Addresses for Divorced Parents (Constituents)

Follow these steps to unlink a constituent and create separate addresses for divorced parents:

1. Log into **Alumni Development**.
2. From the **Maintenance** menu, select **Link/Delete Constituents**.
3. When the **Constituent Link/Unlink** menu (figure 2) appears, use the search button next to I.D. to locate the constituents you want to unlink.
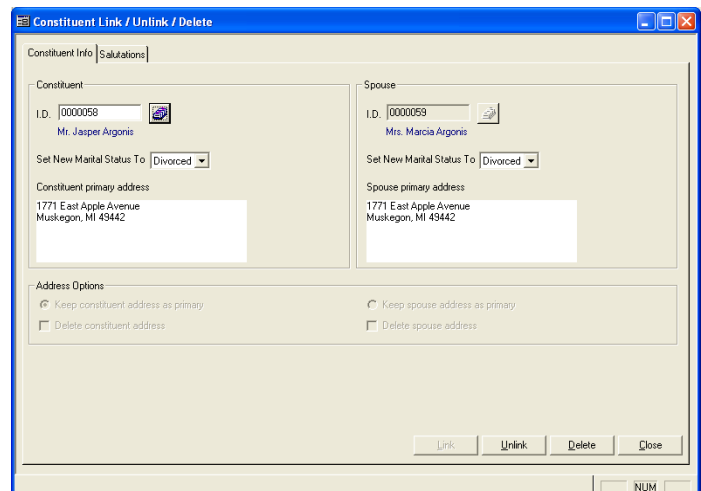

FIGURE 2. Constituent Link/Unlink

4. Click **Unlink**. The following message appears:

```
The constituents have been
successfully unlinked.
```

Note: This unlinking process has been enhanced to automatically create P2 addresses for the spouse. The primary constituent will retain the P1 addresses.

5. If the primary constituent will be retaining custody of the student, we are finished with the divorce process. In this example, the spouse (mother) was to retain custody, therefore we need to swap the P1 and P2 addresses.
6. Log into Student/Parent Addresses and select the family from the **Address Maintenance** menu (figure 3).
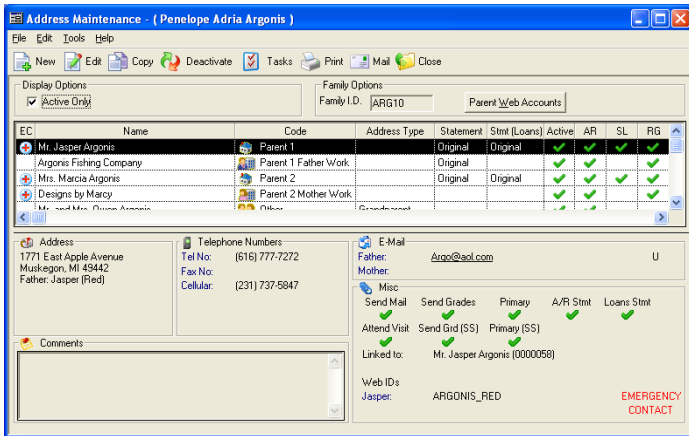
FIGURE 3. Address Maintenance

7. On the toolbar, click **Tasks**.

8. When the **Address Change Tasks** menu (figure 4) appears, select **Swap P1 and P2 addresses** and click **OK**.
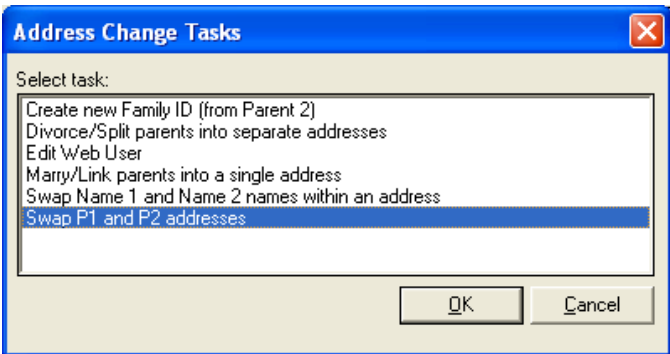

FIGURE 4. Address Change Tasks

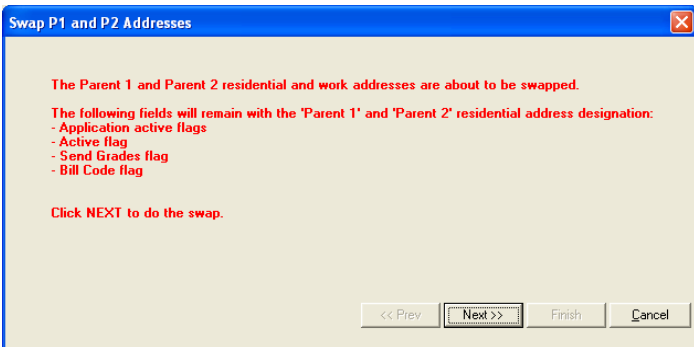9. When the **Swap P1 and P2 Addresses** message window (figure 5) appears, click **Next**.

FIGURE 5. Swap P1 and P2 Addresses

10. Click **Next**. The following message appears:

```
The Divorce/Split has completed.
Check the addresses to ensure that
```

11. Click **Finish**. You can then make any further adjustments needed to the address in the **Address Maintenance** menu (figure 6).
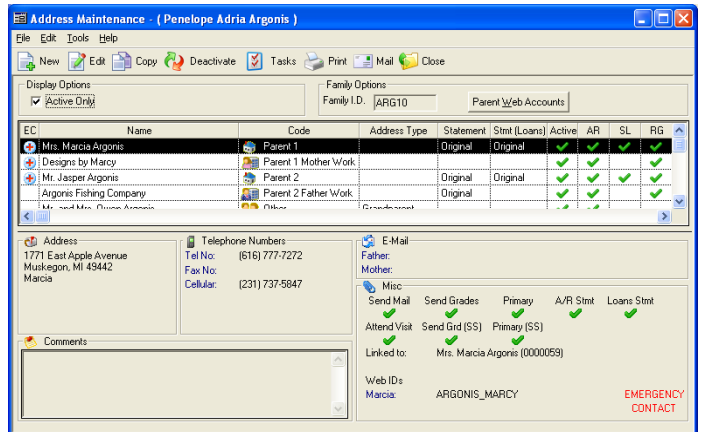

FIGURE 6. Address Maintenance

Creating Separate Addresses for Divorced Parents

This procedure is for schools **not running** the **Alumni/Development** application where a parent would first need to be unlinked from the constituent record.

If you have the **Alumni/Development** application, refer to Creating Separate Addresses for Divorced Parents (Constituents) on page 3.

Follow these steps to create separate addresses for divorced parents:

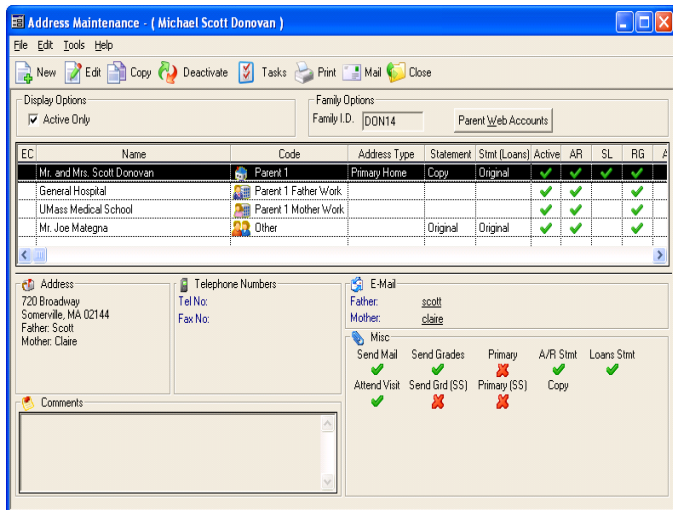1. Select a family from the **Address Maintenance** menu (figure 7).

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FIGURE 7. **Address Maintenance**

2. On the toolbar, click **Tasks**.

3. When the **Address Change Tasks** menu (figure 8) appears, select **Divorce/Split parents into separate addresses**, and click **OK**.
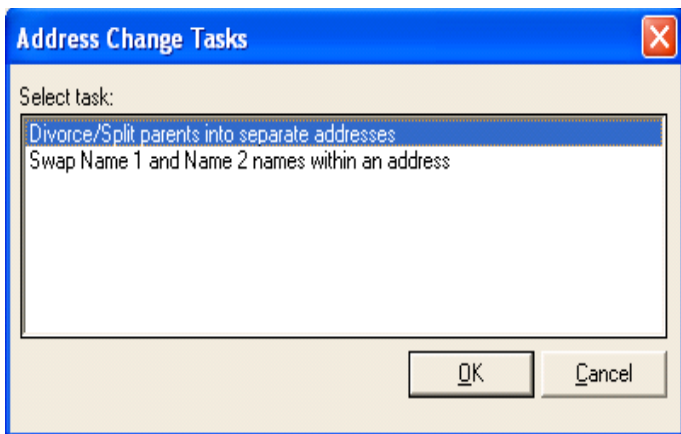

FIGURE 8. **Address Change Tasks**

4. When the **Divorce/Split Parents** menu (figure 9) appears, select the address, then click **Next**.
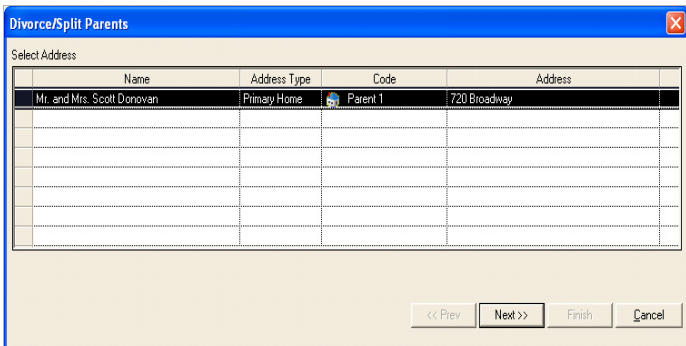

FIGURE 9. **Divorce/Split Parents**

5. When the **Divorce/Split Parents** menu (figure 10) appears, select which parent is to be the custodial parent, then click **Next**.
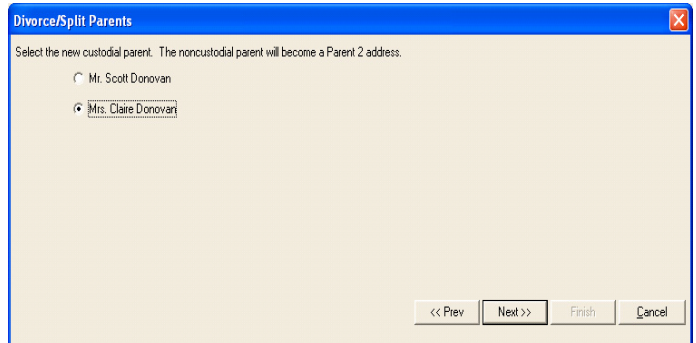

FIGURE 10. **Divorce/Split Parents**

The following message appears:

```
The individuals in the selected
address are about to be divorced/
split. Click Next to proceed.
```

6. Click **Next**. The following message appears:

```
The Divorce/Split has completed.
Check the addresses to ensure that
all of the information is correct.
Click Finish to close this window.
```

7. Click **Finish**. You can then make any further adjustments needed to the address in the **Address Maintenance** menu (figure 11).
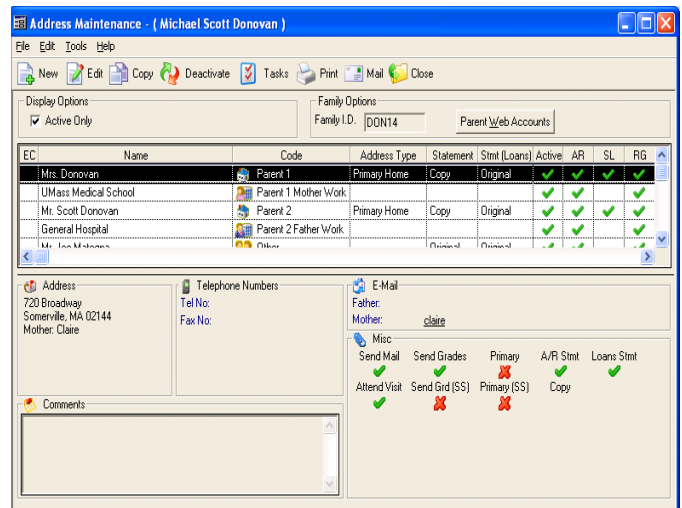

FIGURE 11. **Address Maintenance**

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GRADE TYPE FIELD ADDED TO FAMILY DIRECTORY

The student's **Grade Type** field has been added to the **Family Director**y mail merge.