

Quick Reference: Approve My BackPack Profile Changes

When parents or constituents submit changes to their profile information via My BackPack, those changes must be approved by a staff member before any record(s) are updated in the system. For parents who are ALSO constituents, the changes will often require separate approvals in BOTH the Alumni/Development application AND the appropriate Student/Parent application (Student/Parent Address, Registrar, Admissions, Accounts Receivable or Summer School), depending on which type(s) of information have changed (see table below for reference). Note that in some cases, the change can be approved in EITHER place (first approval updates all records); in other cases, the change must be approved separately in BOTH places.

Type of Information Changed in My BackPack	Requires Student/Parent approval	Requires Alumni/ Development approval
Title, Name (First, Middle, Last), Maiden Name, Suffix, Nickname and Relations	1	1
Notes	1	✓
Date of Birth, Gender, and Home page		1
Residential Address changes *	1	√
New Work address (adding an entirely new work address)	1	1
Work address changes *	1	√
Other Address (Z on the student record) *	1	√
Other Contact	1	
Education		√

Required Approvals for Parent and Constituent Profile Changes in My BackPack

* The red asterisks indicate that the change only needs to be approved in one place; either a Student/Parent approval or Alumni/Development approval will accept the change.



To approve a change in a Student/Parent application:

1. Open the Student/Parent Address application or other appropriate application (Registrar, Accounts Receivable or Summer School).

2. Click the My BackPack icon and select **Approve Profile Changes**.

aintenance Reports Mailings My	BackPack Help			
ddresses Companies S/P Mailing	Family Mailing Di	irectories	ackPack Sho	w Dashboard
Approve Profile Changes				
Sort Options Sort By Name S	iort Order 💿 A	scending (Descending]
Approve Profile Changes Sort Options Sort By Name	ort Order () A	scending () Descending Date Changed	Change
Approve Profile Changes Sort Options Sort By Name Name Mr and Mrs. Mike D. Parkswell	Family 1.D.	scending (Date Submitted 11-08-2012	Descending Date Changed 11-08-2012	Change Biographical, Changed Address
Approve Profile Changes Sort Options Sort By Name Name Mr and Mrs. Mike D. Parkswell Mrs. Hattie Smith	Family I.D. 0006049 ALEX01	scending (Date Submitted 11-08-2012 11-08-2012	Descending Date Changed 11-08-2012 11-08-2012	Change Biographical, Changed Address Biographical, New Address

Alternatively, you can click the **Addresses** button and search for an address that has been changed.

Maintenanc	e Reports				
Addresses	Companies	🙀 S/P Mailing	궁 Family Mailing	Oirectories	My BackPack Show Dashboard

When you click the address that has been changed, you'll see the **Family Profile Changed** screen. Click the **Go to Approve Profile Changes** button.

Search By Enter Student I.D.	Open						Additional Crite Show students	ria in group: Student	. •
Eilter Results	Last Name 💌	Begins With	Ľ.	•	PARKSWELL				
Show Addresses	Parent 1 🔹		Refr	esh List					
	Student Name		ID	Grade	Gender	B/D	Family ID	Address Code	Parer
Mark Parksw	ell		EDSDF	1	м	D	0006049	Parent 1	Mr Mike Parks
Family	Profile Changed			-	8				1
The F from N poster	amily you are trying to e My BackPack. These ch d before you can edit thi	dit has mad anges neec s Family inf	e changes I to be revie ormation.	to their (ewed an	profile d				



Note: If a user in Alumni/Development is approving changes at the same time, you will receive a message in the changes column stating that the item is locked by another user. Once the user has finished accepting or rejecting their changes in Alumni/Development, this item will be unlocked.

Changes	
Address	
Biographical	
Address	
** Locked by another user ***	

3. Either method will bring you to the **Profile Approval** screen. Click **Accept** to accept profile changes.

Home Addresses				
E-Change - Middle Name - Sulfix - Middle Name - Sulfix	Parent 1: Mr and Mrs. Mike D. Parkswell changed from 'Dan' to 'Daniel' changed from ', Esq.' to ', D.M.D.' added 'R.' added ', D.M.D.'	<u>Review</u>	Accept	<u>Reject</u>

4. The changes to review appear in blue. Additional changes can be made to the profile information at this point. Click **OK** to accept these changes.

Father / N	ame 1	Mother /	Name 2	
Title	Mi	Title	Mrs. 👻	
First	Mike	First	Misha	
Middle	Daniel	Middle	R.	
Last	Parkswell	Last	Parkswell	
Suffix	, D.M.D. 👻	Suffix	, D.M.D. 👻	
Preferred	Mikey	Preferred	Misha	
Relation	Father 👻	Relation	Mother -	
SSN	000-00-0000	SSN	000-00-0001	
Web I.D.	PARKS			
Full Name				
Mr and M	frs. Mike D. Parkswell		-	Custody





To approve a change in the Alumni/Development application:

- 1. Open the Alumni/Development application.
- 2. Click the My BackPack icon and select Approve Profile Changes.

intenance View Giving Reports N	Aailings Exports My D	uchPuck His	ap		
stituents Gift Posting Export	Global My BackPac	k Show Das	shboard Notification	Template Mar	nager
	Appro	ove Profile Ch	anges		
	Class	Notes Global Notes List	Delete	I .	
Approve Profile Changes Soft Options Cont Dec. Soft	Order @ Association	@ b		_	
Approve Profile Changes Sort Options Sort By Name Name Name	Order Ascending Primary Constituency	C Desc	ending Date Submitted	Date Changed	Chang
Approve Profile Changes Sort Options Sort By Name Name Name Name	Order Ascending Primary Constituency Alumni	© Desc I.D. 46586	Date Submitted	Date Changed 11-01-2012	Change Address
Approve Profile Changes Sort Options Sort By Name Name Name Mike Kumar Mr and Mrs. Mike D. Parkswell, D.M.D.	Order	© Desc 1.D. 46586 46598	Date Submitted 11-01-2012 11-08-2012	Date Changed 11-01-2012 11-08-2012	Chang Address Biographical, Address
Approve Profile Changes Sort Dptions Sort By Name Name Mike Kumar Mike Kumar Mir and Mrs. Mike D. Parkswell, D.M.D. Mr. and Mrs. Jason Smith	Order	© Desc 1.D. 46586 46598 39859	Date Submitted 11-01-2012 11-08-2012 11-08-2012	Date Changed 11-01-2012 11-08-2012 11-08-2012	Chang Address Biographical, Address Address
Approve Profile Changes Sott Options Sott By Name Sott Name Mike Kumar Mr and Mrs. Nike D. Parkswell, D.M.D. Mr. and Mrs. Richard A. Warden '81	Order Ascending Primary Constituency Alumni Current Parent Alumni Parent	© Desc 1.D. 46586 46598 39859 05520	Date Submitted 11-01-2012 11-08-2012 11-08-2012 01-24-2011	Date Changed 11-01-2012 11-08-2012 11-08-2012 06-01-2011	Chang Address Biographical, Address Address Address

Alternatively, you can click the **Constituents** button and search for an address that has been changed.

Maintenance	View Giving	Reports	Mailings	Exports My BackPack Help
89				_ 🐔 _ 🗔 😪 👘
Constituents	Gift Posting	Export	Global	My BackPack Show Dashboard Notifications Template Manager

When you locate the Constituent click **Go to Approve Profile Changes**.

Search By Enter <u>I</u> .D.		Open					Additional Lost / Dec	Criteria All	•	
Select Query	(All) Change Rur	ntime Parameters] [Gi	t Opti	ons		• ٩	Display Go To Tab	All	•	
Eilter Results	Sort Key	▼ Begins	With	F	Refresh L	PARKS ist	🗖 Display	Inactive Cons	tituents	
	N	ame	٠	I.D.	Type	Primary Cons	Class Year	Lost / Dec	1	Add
Mark Park	swell '23			46597	Ρ	Alumni	2023		791 Ocean Blvd	
Mr Mike P	arkswell			46598	Ρ	Alumni			791 Ocean Blvd	
Mrs. Mike	Parkswell			46599	S	Alumni			791 Ocean Blvd	
-		Constituent Profile	Chan	ged			23	7		
		The Constituent ; profile from My B and posted befor Go to Approv	e you e you	ire trying 'ack. Ti u can ed ile Chang	g to edi hese ch fit this (jes	t has made change anges need to be Constituent informal View Constituent	s to his/her eviewed ion. Cancel			





Note: If a user in the Student/Parent Address application is approving changes at the same time, you will receive a message in the changes column stating that the item is locked by another user. Once the user has finished accepting or rejecting their changes in Alumni/Development, this item will be unlocked.

Changes	
Address	
Biographical	
Address	
** Locked by another user ***	

3. Click **Review**, **Accept** or **Reject** on specific Profile changes, or click **Accept All**, or **Reject All** to accept or reject all changes at once.

Mr Mike D. Parkswell,	Esq.			
Biographical			Accept All	Reject All
- Middle Name	changed from 'Dan' to 'Daniel'	<u>Review</u>	Accept	Reject
^I Suffix	changed from ', Esq.' to ', D.M.D.'	Review	Accept	Reject
Mrs. Mike D. Parkswel	1			
Biographical			Accept All	Reject All
- Middle Name	added 'R.'	Review	Accept	Reject
L. Suffix	added ', D.M.D.'	Beview	Accept	Reject





4. The changes appear highlighted in blue. Make any further profile changes that are necessary on this screen. Click **OK** to save changes. The Parent or Constituent can now view the saved changes on My BackPack.

Prospe	ects Giv. Summar e Salutations	y Giv. Addres	Detail s	Track	Attributes	vents Re	Media elation Activity	Custom) (ation)	Comments Solicitor	Web ID Mailing:
Constitu	uent					Spouse					
.D.	46598	Assign				I.D.	46599	Assign			
Title	Mr 👻					Title	Mrs. 👻				
First	rst Mike		Pref.	Mikey		First	Misha	Pre		ef. Misha	
liddle	Daniel				Middle R. Last Parkswell						
.ast	Parkswell		Suffix , D.M.D -					Suffix D.M.D			
Maiden			Gender	м -	1	Maiden			Gende	r F 👻	1
	Constituencu	Pri	From	To			Constituencu	Pri	From	To	
Alu	umni		TION		Add	A	umni		11011	10	Add
Class Yr	Admiss Yr	Yr Lei	it	Grad	• • 1	Class Yi	r Admiss Yr	Yr Lef	t	Grad	↓ ^ 1
Giving L	.evel			SI	udent	Giving L	Level			St	tudent