

# Contact Information (Personnel Master)

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Tool Search: Contact Information

The Contact Information editor allows you to manage personal, work, and emergency contact information.

The screenshot shows the 'Personnel Master' interface with a 'Save' button at the top. The left sidebar contains navigation options: '+ HR General Information', 'Contact Information', 'Qualifications', '+ Work Assignments', 'Leave Entry', and 'Evaluations'. The main content area is titled 'Contact Information' and includes a 'Households & Addresses' section with an 'Add Household' button. Below this, it displays information for 'SMITH (01/01/2006 - )' with a 'Show Details' link. The 'Work Information' section contains fields for 'Work Phone Number' (with a dropdown for area code '555' and a field for number '555-5555') and 'Work Email' (with the value 'smith@work.email.com'). The 'Personal Information' section includes a red warning: '\*At least one phone number is required when no Household Home Phone is populated.' It has fields for 'Other Phone Number' (555-1111) with a 'Private' checkbox checked, 'Cell Phone Number' (555-2222) with a 'Private' checkbox unchecked, 'Personal Email' (smith@personal.email.com) with a 'Private' checkbox checked, and a 'Pager' field with a 'Private' checkbox unchecked. The 'Emergency Contacts' section has an 'Add Emergency Contact' button and a note 'Maximum of 4 allowed.' Below this, it shows a list of contacts with one entry: 'David Smith -- Phone: (555)555-5555' and a 'Show Details' link.

## Add Households and Addresses

- You can save current and future addresses.
- Addresses are removed from the system once the end date has been reached. However, if the household includes members that are not saved in the Human Resources application, students for example, Campus will continue to display old addresses in the Campus [Households](#) tool and the address will be accessible when searching for addresses in Campus.
- You may or may not be able to save multiple Primary addresses. This feature is controlled by the [System Preference](#) called **Allow Multiple Primary Addresses**.
- At least one active household and one phone number is required before you can save any information on the Contact Information screen.
- The **Payroll Residence** checkbox only displays if the [Campus Payroll](#) module is enabled.

Contact Information

Households & Addresses

SMITH (01/01/2006 - )  
[Hide Details](#)

**\*Household Name** SMITH **\*Membership Start Date** 01/01/2006 **Membership End Date**

Home Phone (555) 555 - 1234 x Private Secondary

Household Members: Derrick Smith, Carla Smith, Bob Smith, Andrew Smith

Primary Address  Secondary Address

1650 69th Ave Ne  
 Metro City MN 55129

HR Mailing  SIS Mailing

Start 10/15/2011 End

1. Click the **Add Household** button.

**Result**

The **Add Household** wizard displays.

Add Household

**Household Search**

**Household Search**  
 Search for a household already tracked in Campus. After searching, select a household from the list or click on Create New Household.

**Household Search**

Last Name

First Name

Student #

Birthdate

Number

Street

Apt #

Household Name

Phone ( ) - x

2. Use the information in the following table to enter search criteria.

Field	Description
<b>Last Name</b>	Last name of the individual that is being searched.
<b>First Name</b>	First name of the individual that is being searched.
<b>Student Number</b>	Local identification number assigned to a student.
<b>Birth Date</b>	Birth date of the person being searched, in <i>mmdyy</i> format.
<b>Number</b>	Street number of the household address.

Field	Description
<b>Street</b>	Street name of the household address.
<b>Apartment Number</b>	Apartment number assigned to the household address.
<b>Household Name</b>	Name of the household being searched.
<b>Phone</b>	Household phone number being searched.

- Click the **Search** button.

**Result**

The wizard is designed with built-in checks to eliminate the creation of multiple households with identical members and contact information. If the search criteria are entered with the same information as an existing household, the existing household(s) appear to the right of the search fields.

- Complete one of the following options.

To...	Then...
add personnel to an existing household	select the household from the search results. Campus adds the person to the household and creates a new entry on the Contact Information editor.
create a new household	click the <b>New Household</b> button. Campus displays a new entry on the Contact Information editor. Enter a <b>Household Name</b> .

- Enter a **Membership Start Date**.
- Enter a **Home Phone** number. (optional)

The **Private** checkbox serves as a visual reminder that the numbers are unpublished and should remain confidential. The checkbox can be used as a filter in Ad hoc to remove people who do not want to be listed.

- Select the **Secondary** checkbox if the household is not the person's primary household. (optional)
- Click the **Add Address** button.

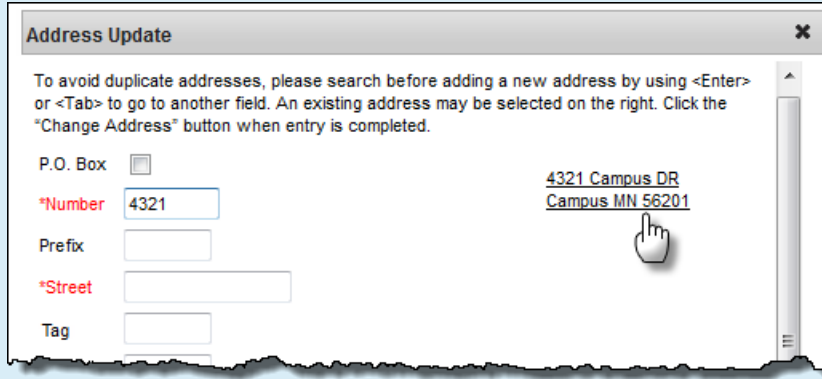
**Result**

The Address Update window displays.

- Enter the address number in the **Number** field and press **Enter**.

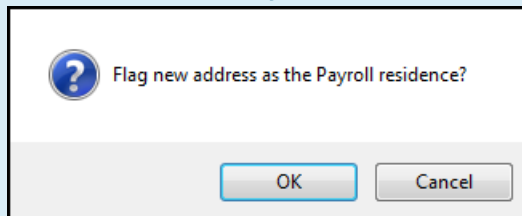
Existing addresses that match your entry display on the right-hand side. If the address you need displays, click the existing address to quickly enter the remaining address fields

on this window and go to step 10.



- Fill in the remaining address fields and click the **Update Address** button.

If the Campus Payroll module is enabled, a confirmation message displays asking whether this should be the Payroll residence.



- Select the **HR Mailing** checkbox to indicate that Human Resource mailings and employee-related mailings should be sent to this address.
- Select the **SIS Mailing** checkbox to indicate that mail from the student information system should be sent to this address.

This feature is useful for specifying a different mailing address for student information.

- Select the **HR Private** checkbox (Secondary Address only) to indicate that this address is only available to Campus Human Resource users and not the student information system.

To avoid duplicate entries of addresses, the address is updated in Campus; however, the person's name on the address or household is marked "Private."  
You cannot select this checkbox if the **SIS Mailing** checkbox on this address is also marked.

14. Select the **Payroll Residence** checkbox to indicate this address should be used for Payroll taxation and reporting purposes. Only one Payroll residence is allowed.
15. Enter a Start date in the **Start** field.
16. Repeat steps 8-14 to enter additional addresses.

At least one active primary address must exist on a person's record at all times. You may or may not be able to save multiple Primary addresses. This feature is controlled by the [System Preference](#) called **Allow Multiple Primary Addresses**.

17. Click the **Save** button.

## Update a Work Phone Number or Email

1. Select **Contact Information** from the left-hand navigation.

### Result

The Contact Information editor displays.

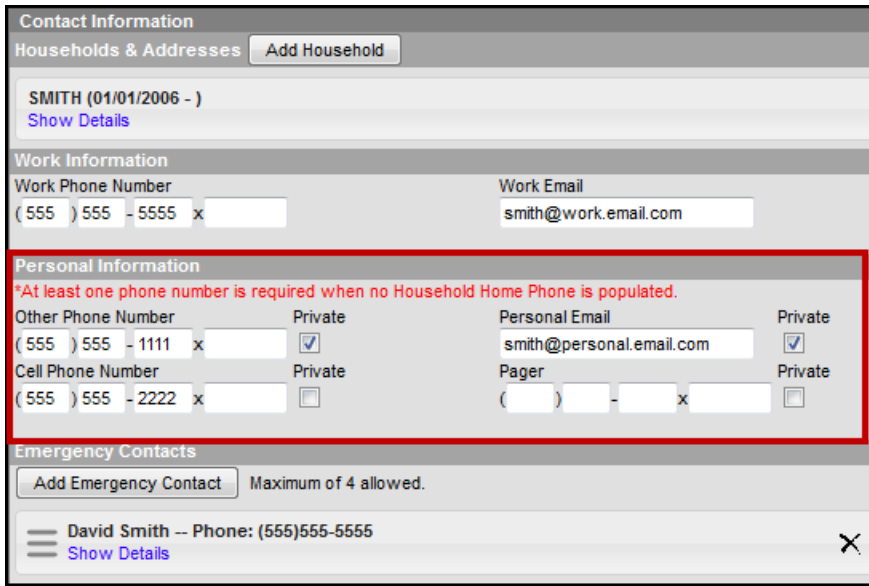
2. Enter or change the **Work Phone Number** and/or **Work Email**.
3. Click the **Save** button.

Updates to the Work Phone Number and Work Email are reflected in the student information system. The Work Email address updates the Email Messenger preferences.

## Add Personal Information

At least one active household and one phone number is required before you can save any information on the Contact Information screen.

The **Private** checkbox serves as a visual reminder that the numbers are unpublished and should remain confidential. The checkbox can be used as a filter in Ad hoc to remove people who do not want to be listed.



1. Select **Contact Information** from the left-hand navigation.

**Result**

The Contact Information editor displays.

2. Enter or change the **Other Phone Number** or **Cell Phone Number**. At least one number is required.
3. Enter or change the **Personal Email** address. (optional)
4. Enter or change the **Pager** number. (optional)
5. Click the **Save** button.

## Change Address Information

You can save current and future addresses. Addresses are removed from the system once the end date has been reached. However, if the household includes members that are not saved in the Human Resources application, students for example, Campus will continue to display old addresses in the Campus [Households](#) tool and the address will be accessible when searching for addresses in Campus.

You must always have at least one active address marked as HR Mailing. If you are removing an address that starts in the future, click the black "X" next to the address.

If the Campus Payroll module is enabled, one address must always be marked as the **Payroll Residence**.

1. Select **Contact Information** from the left-hand navigation.

**Result**

The Contact Information editor displays.

Contact Information  
Households & Addresses Add Household

— Smith Household (11/07/2011 - )

\*Household Name: Smith Household      \*Membership Start Date: 11/07/2011      Membership End Date: [ ]

Home Phone: (555) 426 - 7130 x [ ]      Private: [ ]      Secondary: [ ]

Household Members: Benjamin Smith, Kathryn Smith, Jessica Smith

**Primary Address** Change Address      **Secondary Address** Change Address

4321 109th Ave NE, Blaine MN 55442      1234 Hazard Way, Blaine MN 55449

HR Mailing: [checked]      SIS Mailing: [checked]      HR Mailing: [ ]      SIS Mailing: [ ]      HR Private: [checked]

Payroll Residence: [checked]      Payroll Residence: [ ]

Start: 01/01/2011      End: [ ]      Start: 06/01/2011      End: [ ]

- Expand the household for which you want to change an address.
- Click the **Change Address** button.

**Result**

The **Address Update** window displays.

Address Update ✕

**Move**

New Address including new start date.

**Address Correction**

4321 109th Ave NE      Start Date: 01/01/2011  
Blaine MN 55442

Overwrite the existing address with changes. Previous address will no longer be available in Campus.

Change the address to a new address. Previous address will still be available in Campus.

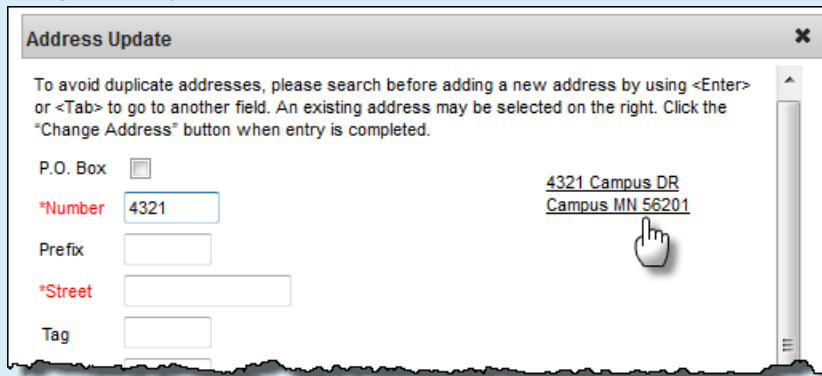
- Select one of the following options.

Option	Description
<b>New Address including start date.</b>	<p>Select this option if you want to enter a new address and a new start date.</p> <p><b>Result</b> The Update Address window displays.</p> <p>When the Address Update wizard closes and the Household editor displays, you must enter an end date on the original address. When the end date is reached, Campus will remove the original address from Human Resources for this person.</p>

Option	Description
<p><b>Overwrite the existing address with changes. Previous address will no longer be available in Campus.</b></p>	<p>Select this option if you need to make corrections to the original address.</p> <div style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p>Selecting this option updates the address for <b>ALL</b> households currently using this address.</p> </div> <p><b>Result</b> The Update Address window displays.</p>
<p><b>Change the address to a new address. Previous address will still be available in Campus.</b></p>	<p>Select this option if you want to change the address but keep the original start date and previously selected mailing options.</p> <p><b>Result</b> The Update Address window displays.</p>

- Enter the address number in the **Number** field and press **Enter**.

Existing addresses that match your entry display on the right-hand side. If the address you need displays, click the existing address to quickly enter the remaining address fields on this window and go to step 7.



- Fill in the remaining address fields and click the **Update Address** button.

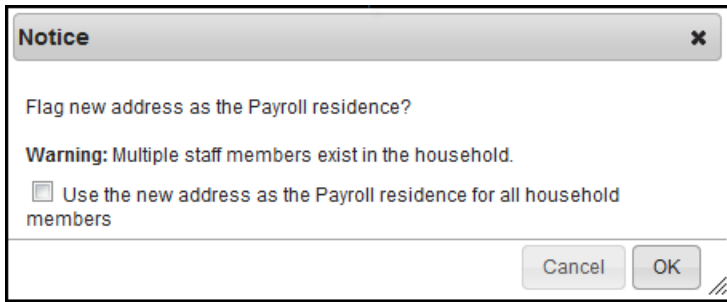
**Result**

If you choose to enter a new address including a start date and Campus Payroll is enabled, the following notice displays: "Flag new address as the Payroll residence?" Click **OK** to use the address as the Payroll residence or **Cancel** if you do not want to use the address as the Payroll residence.

If there are other employees in the same household, an additional option appears on the Notice: "Use the new address as the Payroll residence for all household members." When the



checkbox is marked, Campus updates the Payroll residence for all members in the household regardless of whether their existing Payroll residence is tied to an address in a different household, or if their Payroll residence was tied to a secondary address in the same household.



7. Complete the following options if you are entering a new address or overwriting the existing address.
  - Select the **HR Mailing** checkbox to indicate that Human Resource mailings and employee-related mailings should be sent to this address.
  - Select the **SIS Mailing** checkbox to indicate that mail from the student information system should be sent to this address.

This feature is useful for specifying a different mailing address for student information.

- Select the **HR Private** checkbox (Secondary Address only) to indicate that this address is only available to Campus Human Resource users and not the student information system.

To avoid duplicate entries of addresses, the address is updated in Campus; however, the person's name on the address or household is marked "Private." You cannot select this checkbox if the **SIS Mailing** checkbox on this address is also marked.

- Enter a Start date in the **Start** field.
- Enter an end date on the original address if you added a new address. When the end date is reached, Campus will remove the original address from Human Resources for this person.

8. Click the **Save** button.

## Remove Address Information

You must always have at least one active address marked as HR Mailing. If you are removing an address that starts in the future, click the black "X" next to the address. The following procedure is for removing addresses with a Start date in the past.

If the Campus Payroll module is enabled, one address must always be marked as the **Payroll Residence**.

1. Select **Contact Information** from the left-hand navigation.

**Result**

The Contact Information editor displays.

2. Enter an end date in the **End** date field.

The screenshot shows the Contact Information editor with two address entries. The Primary Address section contains the address 4321 92nd Cir NE, Blaine MN 55014. It has checkboxes for HR Mailing (checked), SIS Mailing (checked), and Payroll Residence (unchecked). The Start date is 07/01/1997 and the End date is 03/15/2012. The Secondary Address section contains the address 1234 Maine Street NE, Blaine MN 55434. It has checkboxes for HR Mailing (checked), SIS Mailing (checked), HR Private (unchecked), and Payroll Residence (checked). The Start date is 03/16/2012 and the End date is empty. A black 'X' icon is visible next to the Secondary Address header.

3. Click the **Save** button.

## Add Emergency Contacts

You may enter up to 4 Emergency Contacts. New contacts are added to the bottom of the list. You may need to scroll down to see the new emergency contact information. You can prioritize contacts by dragging the contacts into the order in which the people should be contacted.

1. Select **Contact Information** from the left-hand navigation.

**Result**

The Contact Information editor displays.

2. Click the **Add Emergency Contact** button.

**Result**

The New contact fields display.

3. Enter the contact's **First Name** and **Last Name**.
4. Select one of the following **Relationship Types**:
  - Child
  - Extended Family
  - Friend
  - Parent
  - Sibling
  - Significant Other
  - Spouse
  - Unknown
5. Enter a **Phone Number**.
6. Enter information in any of the following optional fields:
  - **Alternate Phone Number**
  - **Emergency Contact Address** (The Add Address button displays a window where you can enter the address.)
  - **Comments/Contact Instructions**.
7. Click the **Save** button.

## Remove Emergency Contacts

1. Select **Contact Information** from the left-hand navigation.

### Result

The Contact Information editor displays.

2. Click the yellow **X** on the contact you want to remove.

### Result

A confirmation window displays.

3. Click the **OK** button.
4. Click the **Save** button.