

Households Tool Rights Overview

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The Households module contains related tools. Users may need access to several or all of these tools to perform their job duties.

▼ Households	- All	Read	Write	Add	Delete
Add Household	✓ All	Read	Write	✓ Add	✓ Delete
Census Wizard Add Address Add Household Add Person	All All All	✓ Read ✓ Read ✓ Read ✓ Read	✓ Write ✓ Write ✓ Write ✓ Write	Add Add Add Add	Delete Delete Delete Delete
Household Information	✓ All	Read	Write	✓ Add	✓ Delete
Household Addresses	✓ All	Read	✓ Write	✓ Add	✓ Delete
Household Fees	☐ All	Read	Write	Add	Delete
Household Food Service Deposit	☐ All	Read	Write	Add	Delete
Household Members	✓ All	Read	Write	Add	Delete
Household Payments	☐ All	Read	☐ Write	Add	Delete

Households Tool Descriptions

Follow the article links preceding each brief tool description to learn how to use each tool.

▶ Click here to expand...

Article Link	For users who need to:
Household Creation:	
Add Household	search for and work with existing households, or create new ones.
Census Wizard	assemble households using existing information (requires RW access to Add Household/Add Address/Add Person).
Related Tools for Household Components:	Three related tools necessary for maintenance of households are Household Information, Household Addresses and Household Members.
Household Information	see basic information such as household name, phone number and comments (users may need access to related tools Household Information, Household Addresses, and Household Members).



Article Link	For users who need to:
Household Addresses	see or manage address information associated with a selected household (users may need access to related tools Household Information, Household Addresses, and Household Members).
Household Members	see or manage membership of persons in a selected household (users may need access to related tools Household Information, Household Addresses, and Household Members).
Additional Tools:	
<u>Household Fees</u>	manage fee assignments, payments and adjustments for household members.
Household Food Service Deposit	manage food service deposits for household members.
Household Payments	disable a household member's ability to make online payments.

Households Tool Rights

Follow the links to the tool right article for more detailed information.

Tool Right Article Link	R	w	A	D
Add Household	Search for existing households in the Add Household Wizard.	Search for and create new households using the Add Household tool. Users also need RWA rights to Census > Households and Census > Households > Household Information	N/A Saving a new household brings the user to the Household Information tool.	N/A
<u>Census</u> <u>Wizard</u>	User can view information in the Census Wizard.	User can add information in the Census Wizard.	N/A	N/A



Tool Right Article Link	R	W	A	D
Add Person	Use can view person information in the Census Wizard.	User can add person information in the Census Wizard.	N/A	N/A
Add Address	User can view address information in the Census Wizard.	Use can add address information in the Census Wizard.	N/A	N/A
Add Household	User can view household information in the Census Wizard.	Use can add household information in the Census Wizard.	N/A	N/A
Household Information	User can view household information.	User can view, add and modify household information.	N/A	Users can delete household information
Household Addresses	User can view current and historical household address records.	User can modify existing household address details (start/end dates, mailing, etc.)	User can find and attach a new address to the household.	User can delete a household's association to an address. Does not delete Campus address record.
Household Fees	User can view household fees.	Users can view household fees.	Users can make new fee assignment, make payment, and make adjustments, and void fees.	N/A



Tool Right Article Link	R	w	A	D
Household Members	User can view household member information.	User can edit existing information on the household members tab.	User can find and add new household members.	User can delete household members. To preserve historical information, use Start/End dates instead of Delete.
Household Payments	User can disable online payment account for household members.	N/A	N/A	N/A

Additional Household Tool Rights

New Household Membership

To use the New Household Membership icon to add the person to a new household, the user must have:

- **RWAD** rights to Census > Household > Household Information
- **RWAD** rights to Census > Household > Members

Edit Field

If a user should have access to view/modify household and membership information through the edit fields, he/she must have:

- **RW** rights to Census > Households
- RW rights to Census > Household > Household Info
- RW rights to Census > Household > Members

Phone Field

To edit the phone field, the user must have:

- **RW** rights to Census > Households
- **RW** rights to Census > Households > Household Information

Address Field

To edit the address field, the user must have:



• RW rights to Census > Addresses > Address Information

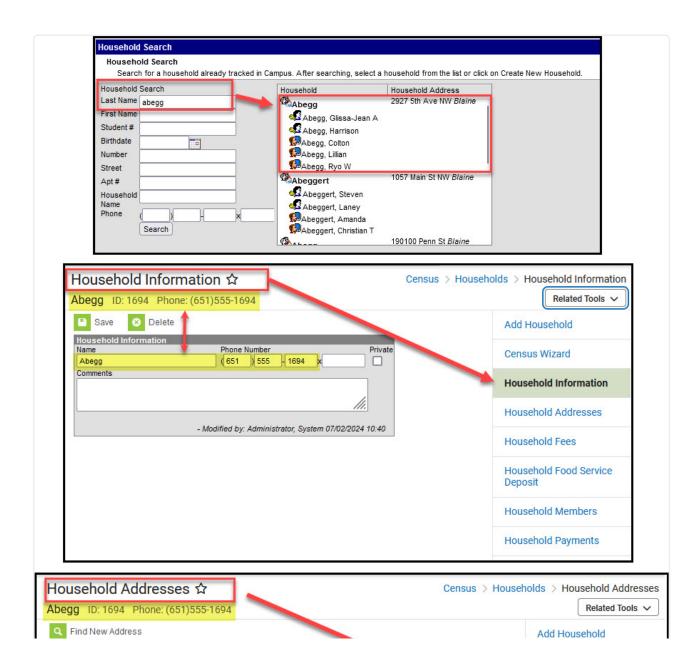
Related Tools

Users may require access to multiple related tools in order to perform their job functions.

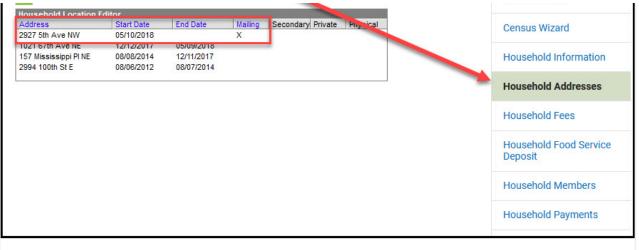
▶ Click here to expand...

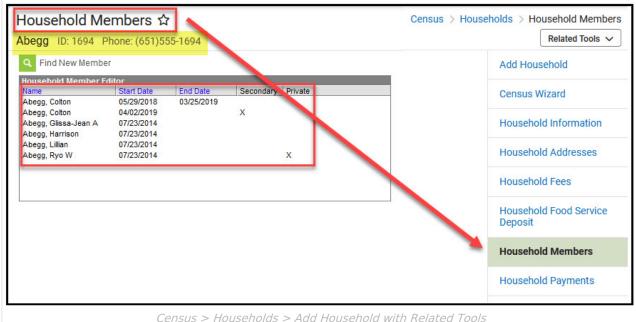
In the example below:

- 1. Add Household: Household Search displays households already tracked in Campus.
- 2. Selecting the household displays the **Household Information** tool.
- 3. Selecting **Household Addresses** from Related Tools displays address information for the household.
- 4. Selecting **Household Members** from Related Tools displays a list of household members.









Suggested User Groups

- Counselors
- Front Office
- <u>Principal</u>
- Registrars
- <u>Transportation</u>

See <u>User Groups and Suggested Roles</u> for more information.