Storyboard

Person Profile– Address

This storyboard demonstrates how to add a new address, change an address, and how to edit address details.

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Enter New Address

Use the following steps to add an address for a new person or an existing person who has no current address entry.

Step 1:   Add New Address

1. Navigate to **Person Home Page** of person for whom address will be added
2. Click **Person** link
3. Click **Address** tab
4. Click **Add Address**

The **Domestic Address Search** screen displays.

5. Enter **Address Search Criteria**
6. Click **Search**
    a. If address <u>is returned</u>
        i. Click **Select**
Note: Click **Persons Associated** to see other persons associated with address, if needed
    b. If address <u>is not returned</u>
        i. Click **Save New Address**

The **Domestic Address Details** screen displays.

7. Choose **Address Type** from dropdown
8. Enter **Effective Date**
9. Enter additional details in the following narrative fields, if needed (optional)
    a. Get Driving Directions
    b. Delivery Details
    c. Environmental Hazard Details
    d. Special Instructions
10. Click **Save**

Enter Change of Address

Use the following steps to enter a change of address for a person.

Step 1:   Navigate to Person Address Screen

1. Navigate to **Person Home Page** of person for whom address will be added/changed
2. Click **Person** link
3. Click **Address**

Step 2:   End Previous Address

End address of same type, if one exists, before proceeding to Step 3, Add New Address

1. Click **Select** next to address to be ended

The **Address Details** screen displays.

2. Enter **End Date**
3. Click **Save**

Step 3:   Add New Address

11. Click **Add Address**

The **Domestic Address Search** screen displays.

12. Enter **Address Search Criteria**
13. Click **Search**
    a. If address <u>is returned</u>
        i. Click **Select**
   Note: Click **Persons Associated** to see other persons associated with address, if needed
    b. If address <u>is not returned</u>
        i. Click **Save New Address**

The Address Details screen displays.

14. Choose **Address Type** from drop-down
15. Enter **Effective Date**
16. Enter additional details in the following narrative fields, if needed (optional)
    a. Get Driving Directions
    b. Delivery Details
    c. Environmental Hazard Details
    d. Special Instructions
17. Click **Save**

Note: If an error is received, go back to **Person Address** screen; if it lists an active address of the same type as the one being entered, end active address per instructions in step 2, then proceed to add new address. You may also click **View Address History** to determine the issue.

Edit Address Details

Use the following steps If an edit is needed to fix Address Type or date overlaps.

Step 1:   Edit Address Details

1. Navigate to **Person Home Page** of person for whom address will be edited
2. Click **Person** link
3. Click **Address**
4. Do one of the following:
   a. Click **Select** next to an active address to edit **OR**
   b. Click **View Address History** and select a previous address to edit

The Address Details screen displays.

5. Change any of the following:
   a. **Address Type**
   b. **Effective Date**
   c. **End Date**
   d. **Any of the optional narrative fields**
6. Click **Save**

Note: If an error is received, go back to **Person Address** screen; if it lists an active address of the same type as the one being edited, end the address per Step 2 in previous topic, then proceed to edit address.

You have completed this storyboard.