ACHIEVEMENT IN MONTANA

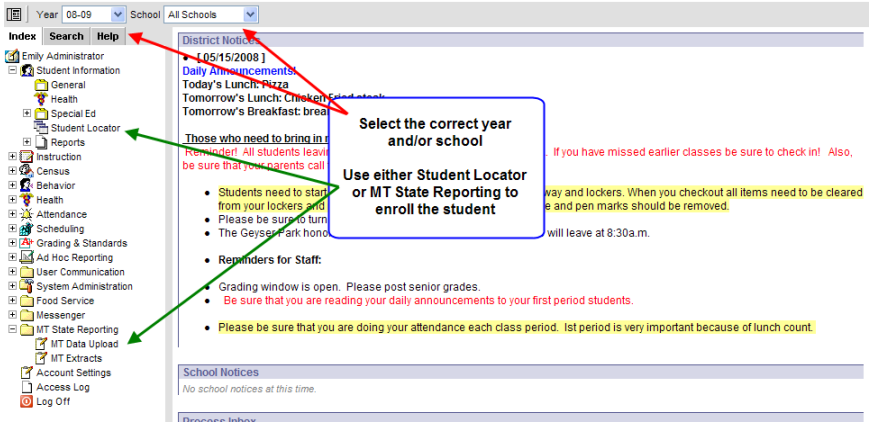
Quick Reference Guide

HOUSEHOLD ASSEMBLY

STEP 1: Enroll the Student

Use the **Student Locator** or the **File Upload** method to enroll the student into the correct grade and calendar.

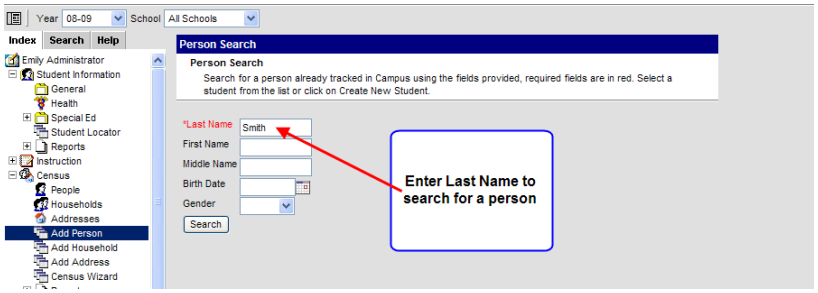
Path: *Student Information/General/Student Locator or MT State Reporting/MT Data Upload*



STEP 2: Add other People who live in the Student's Household

Use the **Add Person** tool in the **Census** module to add people that live in the student's household. If the person already exits in your database do not create a new person.

Path: *Census/Add Person*



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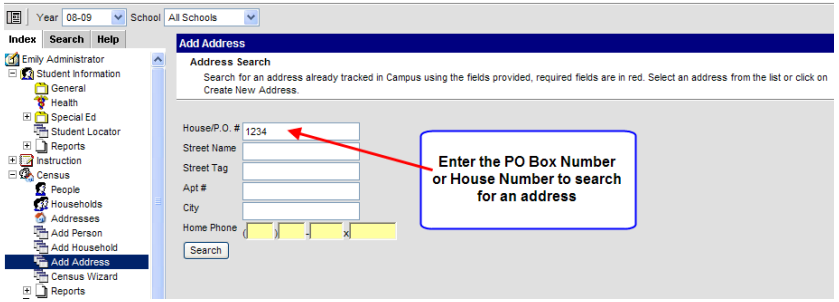
STEP 3: Add the Student's Address

Use the **Add Address** tool in the **Census** module to add an address for the student's household. If the address already exits, check to see if the address is already associated with another household. If the address is connected to another household you will need to end the other household's association with that address before assembling the household.

Path: *Census/Add Address*



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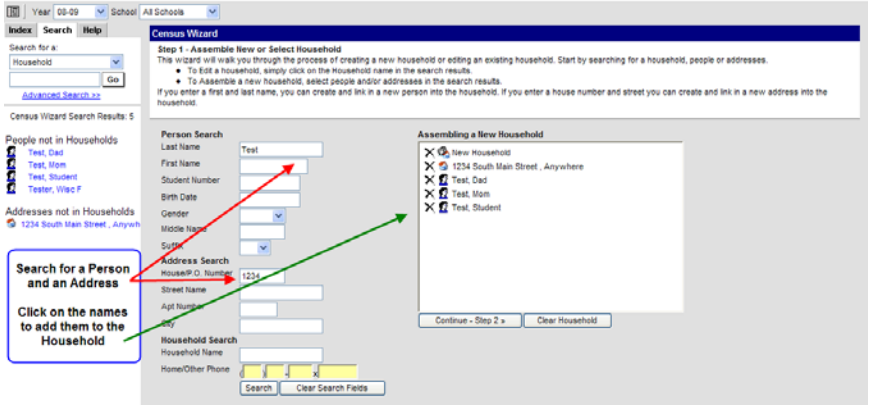
STEP 4: Assemble the Household

a. Use the **Census Wizard** Tool in the **Census** module to assemble the household.
b. Under **Person Search** enter the last name of the student. Click ***Search***. The student's name will appear on the left. Click the student's name to add them to the **Household**. If the last name of the parents (or other household members) matches the student, click the other name to add them to the household. If the last name of the parents (or other household members) does not match the last name of the student, enter the last name of other household members and add them to the household.
c. Under **Address Search**, enter the number of the house or PO Box. Click ***Search***. A list of potential matches will appear on the left. Click on the address to be associated with this household.
d. Check the **Household** box to make sure that all household members and their address(es) are included. Click ***Continue – Step 2***.



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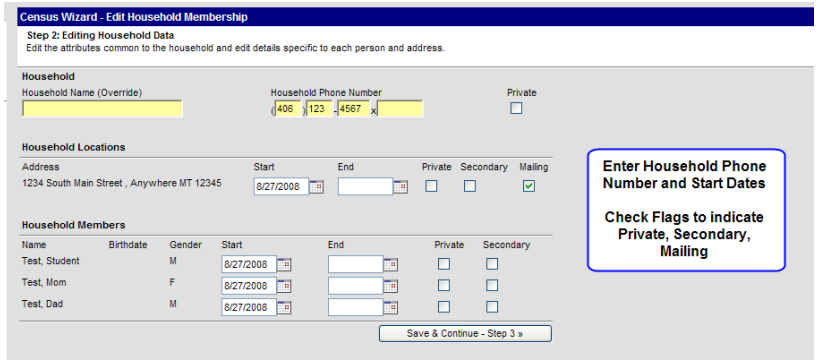
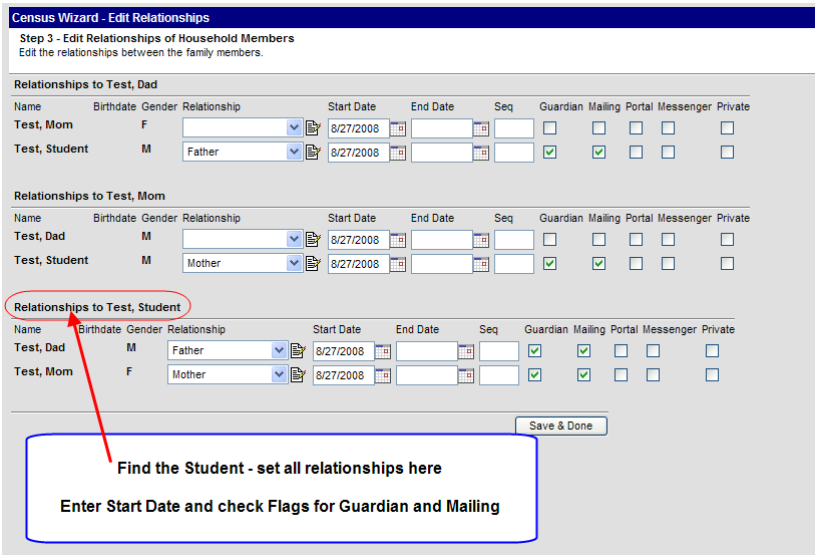
STEP 4: Assemble the Household (con't)

e. Enter the *Household Phone Number* and *Start Dates* for all **Household Locations** and **Household Members** (the *Start Date* can be either the effective date or the first day of school). Mark the appropriate flags for **Household Locations** and **Household Members**. Click ***Save & Continue – Step 3***.

f. Find the student in the list of names. Set the all relationships in the student's record first. If there is more than one student in the household, set all student relationships first. Set all other relationships between household members. Mark the appropriate flags for all household members. Click ***Save and Done***.

Path: *Census/Census Wizard*





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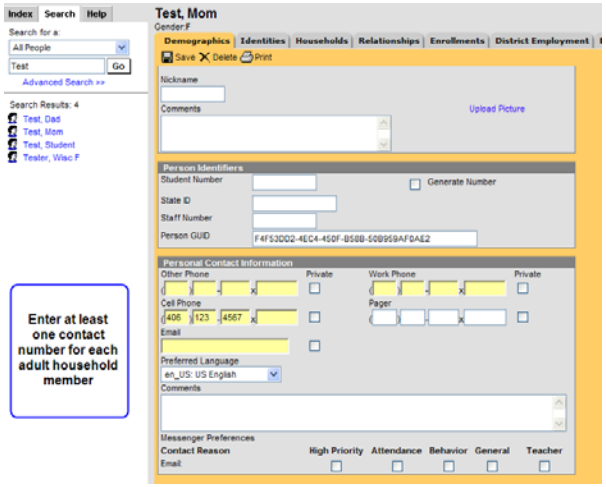
STEP 5: Enter Household Member Contact Information

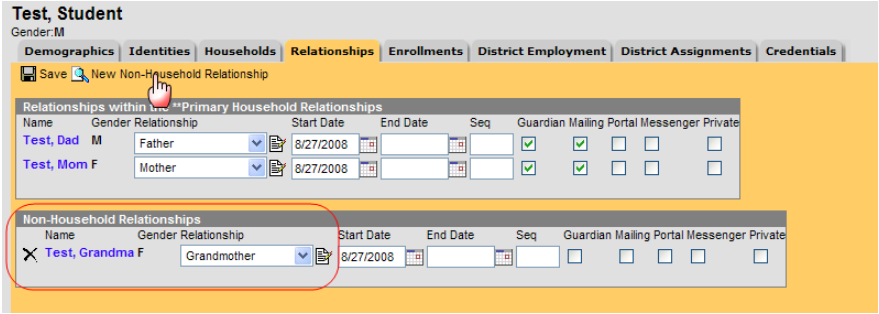
Use **Census** to search for household members. Click on the **Search** tab. Choose *All People* from the search list and type the last name of a household member. Click ***Go***. Choose a matching name and click on it.

Find **Personal Contact Information** on the **Demographics** tab and enter at least one contact number (other information, including other numbers and email, may be entered).

Path: *Census/People/Demographics*



STEP 6: Add Non-Household Relationships

a. Use the **Add Person** tool in the **Census** module to add all people associated with the student's household (e.g., emergency contacts, grandparents, day care providers, etc.). If the person already exits, do not create a new person.
b. Locate the student's **Census** record (*Census/People*). Click on the **Relationships** tab. Click ***New Non-Household Relationship***. Enter the last name of the person to be added and click ***Search***. A list of matches will appear on the right. Click the name of the person to be added. Exit **Person Search**. Choose a *Relationship*, enter the *Start Date* and mark all appropriate Flags.

Path: *Census/People/Relationships*