

StudentContactPersonal - OK

July
2025

StudentContactPersonal - OK

Summary

OK - SIF Unity **StudentContactPersonal** requirements

Batch Condition

1. Existing SIF_Condition elements to support:
 - a. @RefId
 - b. Name/LastName
 - c. Name/MiddleName
 - d. Name/FirstName

Object Triggering Logic

| Action | Business Rules |
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| Add | <p>When a Relationship is created for the student</p> <ul style="list-style-type: none">• When the relationship previously did not overlap today's date, and it is changed so that it overlaps today's date.• When a student was previously Excluded and when it's changed to Not Excluded• When two people have relationship and one of them get enrolled |
| Change | <p>When Contact's address is changed</p> <p>When Contact's information in demographics is changed</p> <p>When the household, household location &/or household membership are changed</p> <p>When the identity is changed</p> |

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| Delete | <p>When the contact is deleted</p> <p>When a relationship is ended before today's date, the record will be deleted for that year</p> <ul style="list-style-type: none"> • When all of the students non Enrollments are deleted • When the Student is changed to Excluded • When the relationship previously overlapped today's date, and it is changed so that it does not overlap today's date |
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Object Population and Business Rules

| # | Requirements |
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| R1 | <p>The Student must have a StudentPersonal Record</p> <p>StudentContact exists when a relationship is created</p> <ul style="list-style-type: none"> • The relationship must overlap today's date • The contact person must not have an enrollment in the zone year • Do Not Report when the Calendar > 'Exclude from SIF Exchange' is selected |
| R2 | <p>Follow SIF Zone Options Rules for Zones:</p> <p>Exclude:</p> <div> <input type="checkbox"/> No Show Enrollments <input type="checkbox"/> Secondary Enrollments <input type="checkbox"/> State Exclude Enrollments <input type="checkbox"/> State Exclude District Assignments </div> <p>Publish:</p> <div> <input type="checkbox"/> Social Security Numbers in StaffPersonal <input type="checkbox"/> Social Security Numbers in StudentPersonal </div> <p>Demographics:</p> <div> <input type="checkbox"/> Use Legal Gender <input type="checkbox"/> Use Legal Name </div> |

Object Data Elements Logic

The Mandatory (M)/ Conditional (C)/ Optional (O) column indicates what the state requires for each data element.

| # | Data Element Label (format) | Business Rules | M /C /O | Data Source GUI Path | Database Field |
|---|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|----------------------|-----------------|
| 1 | @RefId | <i>The Id (GUID) that uniquely identifies the instance of the object.</i> CATs | M | | |
| 2 | PersonInfo (List) | <i>Common element containing person demographic information.</i> | M | Census> Identity | |
| 3 | PersonInfo/LocalId | <i>The locally-assigned identifier for this person. Note: LocalId may be used as a unique person identifier rather than a unique contact identifier. In this case there may be more than one object instance with the same LocalId.</i> Reports the Person Id | O | | Person.personID |
| 4 | PersonInfo/ OtherIdList | <i>Optional. Do Not Report.</i> | O | | |
| 5 | PersonInfo/ Name (List) | <i>The name of the person. Note: Type attribute value of 04 must be used here.</i> | M | | |
| 6 | PersonInfo/ Name/ @Type | <i>Code that specifies what type of name this is.</i> Reports "FullName" | M | | |

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| 7 | PersonInfo/ Name/ LastName | <i>The Last name</i> _____ Reports the Last Name | M | | identity.lastName |
| 8 | PersonInfo/ Name/ FirstName | <i>The First name</i> _____ Reports the First Name | M | | identity.firstName |
| 9 | PersonInfo/ Name/ MiddleName | <i>The Middle Name</i> _____ Reports the Middle Name | O | | identity. middleName |
| 10 | PersonInfo/ Name/ Suffix | <i>Generation of suffix like II, Jr., etc.</i> _____ Reports the Suffix | O | | identity.suffix |
| 11 | PersonInfo/ Name/ PreferredName | <i>This is a name that the person prefers to be called by</i> _____ Reports the Alias | O | | identity.alias |
| 12 | PersonInfo/ Name/ SortName | <i>This is the name to be used for sorting purposes</i> _____ Last Name, First Name (space) Middle Initial | O | | identity.lastName, identity.firstName, identity. middleName |
| 13 | PersonInfo/ Name/ FullName | <i>A free text field for the complete name</i> _____ First Name + Middle Name + Last Name | O | | identity.firstName, identity. middleName, aidentity.lastName |
| 14 | PersonInfo/ OtherNames (List) | <i>Previous, alternate or other names or aliases associated with the Person.</i> _____ _____ | O | | |

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| 15 | PersonInfo/ OtherNames/ Name | <i>Name of the person. Note: Type value of 04 may not occur here.</i> _____ | MR | | |
| 16 | PersonInfo/ OtherNames/ Name/ @Type | <i>Code that specifies what type of name this is, excluding "name of record."</i> _____ Reports "OtherName" for the earliest prior identity name record (previous 01) Reports "PreviousLegalName" for the second most recent identity name record, only if there are 3 or more identity records | M | | |
| 17 | PersonInfo/ OtherNames/ Name/ LastName | <i>The last name</i> _____ Reports the contact's Last Name | M | | identity.lastName |
| 18 | PersonInfo/ OtherNames/ Name/ FirstName | <i>The first name</i> _____ Reports the contact's First Name | M | | identity.firstName |
| 19 | PersonInfo/ Demographics | <i>Optional. Does Not Report</i> | O | | |
| 20 | PersonInfo/ AddressList (List) | <i>The person's address(es).</i> _____ | O | Census > Households > Addresses | |
| 21 | PersonInfo/ AddressList/ Address | <i>A collection of the addresses that exist for the student.</i> _____ Order address by: 1. Non-secondary 2. Most recent Start Date. | MR | | |

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| 22 | PersonInfo/ AddressList/ Address/ @Type | <p><i>Code that defines the location of the address. Note: A subset of specific valid values for each instance in a data object may be listed in that object.</i></p> <hr/> <ol style="list-style-type: none"> 1. Report Addresses in the following hierarchy <ol style="list-style-type: none"> a. Report Primary Household before Secondary Household <ol style="list-style-type: none"> i. If more than 1 Primary Households address then report in order of start date b. If above is tied, then report in order of MemberID <ol style="list-style-type: none"> i. When a student does not have a HouseholdMembership that overlaps today's date, then report the address for the student's HouseholdMembership with latest end date before today's date. ii. If the student has no past HouseholdMemberships, report blank. iii. Do not report addresses where Private is checked c. The AddressType should be unique for a student d. Do not report more than 5 addresses for a student e. For each reported address: <ol style="list-style-type: none"> i. Reports "Mailing" when address.postOfficeBox = checked on the student's household. ii. Reports "Physical" for the first non-secondary address. iii. Reports "OffCampus" for the first secondary address. iv. Subsequent addresses report "Billing", then "Shipping", then "PermanentStudent", and then "PermanentAdmission" for the remaining addresses f. Do not report more than one P.O.Box. <ol style="list-style-type: none"> i. In multiple Primary Household scenarios <ol style="list-style-type: none"> 1. Report in order of Household start date 2. If above is tied, then report in order of MemberID | M | | <p>householdlocation. private</p> <p>householdmember. private</p> |
| 23 | PersonInfo/ AddressList/ Address/ Street (List) | <p><i>The street element is a complex element and breaks the street down into several parts.</i></p> <hr/> | M | | |

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| 24 | PersonInfo/ AddressList/ Address/ Street/ Line1 | <p><i>Address line 1.</i></p> <hr/> <p>When address.postOfficeBox = checked, reports "P.O. Box " followed by address.number (e.g. "P.O. Box 1234")</p> <p>When address.postOfficeBox = not checked, reports address.number, prefix, street, tag, and dir separated by spaces</p> | M | | Address.number, . prefix, .street, . tag, .dir |
| 25 | PersonInfo/ AddressList/ Address/ Street/ Line2 | <p><i>Address line 2.</i></p> <hr/> | O | | Address.apt |
| 26 | PersonInfo/ AddressList/ Address/ Street/ Line3 | <p><i>Address line 3.</i></p> <hr/> <p>Reports in format: City, ST ZIP</p> | O | | Address.city, . state, .zip |
| 27 | PersonInfo/ AddressList/ Address/ Street/ StreetNumber | <p><i>The address number assigned to the building.</i></p> <hr/> <p>Reports the Street Number</p> | O | | Address.number |
| 28 | PersonInfo/ AddressList/ Address/ Street/ StreetPrefix | <p><i>Street prefix like NE</i></p> <hr/> <p>Reports the Prefix</p> | O | | Address.prefix |
| 29 | PersonInfo/ AddressList/ Address/ Street/ StreetName | <p><i>The name of the street.</i></p> <hr/> <p>Reports the Street Name</p> | O | | Address.street |
| 30 | PersonInfo/ AddressList/ Address/ Street/ StreetType | <p><i>The type of street. For example, Lane, Blvd., Ave., etc.</i></p> <hr/> <p>Reports the Street Type</p> | O | | Address.tag |

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| 31 | PersonInfo/ AddressList/ Address/ Street/StreetSuffix | <i>Street suffix like SW.</i> _____ Reports the Street Suffix | O | | Address.dir |
| 32 | PersonInfo/ AddressList/ Address/ Street /ApartmentNumber | <i>The number of the apartment.</i> _____ Reports the Apartment | O | | Address.apt |
| 33 | PersonInfo/ AddressList/ Address/ City | <i>The city part of the address.</i> _____ Reports the City | M | | Address.city |
| 34 | PersonInfo/ AddressList/ Address/ County | <i>The county part of the address.</i> _____ Reports the County | O | | Address.county |
| 35 | PersonInfo/ AddressList/ Address/ StateProvince | <i>The state or province code.</i> _____ Reports the State | M | | Address.state |
| 36 | PersonInfo/ AddressList/ Address/ Country | <i>The country code.</i> _____ default | M | | |
| 37 | PersonInfo/ AddressList/ Address/ PostalCode | <i>The ZIP/postal code.</i> _____ Reports the Zip | M | | Address.zip |
| 38 | PersonInfo/ PhoneNumberList (List) | <i>The contact's phone number(s).</i> _____ Reports twice: one for household phone and one for contact phone | O | Census > People > Demographics > | |

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| 39 | PersonInfo/ PhoneNumberList/ PhoneNumber (<i>List</i>) | <hr/> <p>Reports twice: one for household phone and one for contact phone</p> | MR | | |
| 40 | PersonInfo/ PhoneNumberList/ PhoneNumber/ @Type | <p><i>Code that specifies what type of phone number this is. Note: A subset of valid values may be specified in data objects.</i></p> <hr/> <p>Report Home for household</p> <p>Report Other for contact</p> <p>Report Work for work Phone</p> <p>Report Mobile for cellPhone</p> | M | | |
| 41 | PersonInfo/ PhoneNumberList/ PhoneNumber/ Number | <p><i>Phone number. Free-form, but typical U.S. formats include: (###) ###-#### or ###-####</i></p> <hr/> <p>When reporting for household, report the household phone number for the household that the student is a member of today.</p> <p>When reporting for contact, if the student's Cell Phone is provided, report Cell Phone; otherwise report Work Phone.</p> | M | Census > People > Demographics > Personal Contact Information | Household.phone Contact.cellPhone Contact. workPhone |
| 42 | PersonInfo/ EmailList (<i>List</i>) | <p><i>The contact's e-mail address(es).</i></p> <hr/> | O | | |
| 43 | PersonInfo/ EmailList/ Email | <p><i>The staff member's e-mail address(es).</i></p> <hr/> <p>Reports the email address</p> | MR | Census > People > Demographics > Personal Contact Information | Contact.email |

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|----|----------------------------------------|------------------------------------------|---|--|--|
| 44 | PersonInfo/ EmailList/ Email/ @Type | Type of e-mail _____ Report "Home" | M | | |
| 45 | EmployerType | Optional. Does Not Report. | O | | |
| 46 | EducationalLevel | Optional. Does Not Report. | O | | |
| 47 | OptOutEmail | Optional. Does Not Report. | O | | |
| 48 | SIF_Metadata | _____ | O | | |
| 49 | SIF_ExtendedElements | | O | | |

Considerations/Assumptions

Testing

Preconditions/Setup

| Requirement | Description | Testing Steps | Expected outcome | Testing Complete | Notes | Tester |
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| | | | | <input type="checkbox"/> Issue <input type="checkbox"/> Integration | | |
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QA Testing

SPA Links

[Attribute Updates](#)

[Activate Existing Tab](#)

[New Tab Creation](#)