

KAMIS II – Organization Member Search and Entry

Quick Reference Guide

The Person Search function in KAMIS (KAMIS Home Page or Person Search on the navigation menu bar) only searches for and displays persons with a Customer role. Searching for, creating, and updating Organization Members (Assessors, Case Managers, and Options Counselors) is done from the Organization Member Search page, accessible via the *Org. Members* button on the navigation menu bar. For detailed instructions on using the Organization Member Search and Entry function, refer to Chapter 23 (Org Member) of the KAMIS User Manual.

Adding an Organization Member to an Organization, and adding Organization Member Roles, is what populates Assessor, Case Manager, and Options Counselor drop-down lists in various KAMIS forms.

Note: Case Managers, Assessors, and Options Counselors can still be created from the 'Create New Name Entry' button in Person Search Results, but once created, can only be accessed thereafter from the Organization Member Search page.

Find All Existing Members of an Organization

1. Access the Organization Member Search page.
2. Type the organization name (full or partial) in the Organization Search field, press Enter, and then select the organization name from the drop-down list.
3. Leave the First Name, Middle Name, and Last Name fields blank.
4. Click on the SEARCH button.
5. An Organization Members table displays, containing all active members of the organization. (If the organization has no active members, a 'no data found' message displays in place of the table.)

Find a Specific Member of an Organization

1. Access the Organization Member Search page.
2. Type the organization name (full or partial) in the Organization Search field, press Enter, and then select the organization name from the drop-down list.
3. Enter the name of the person. First Name and Middle Name are optional. Last Name (at least two characters must be entered) is required for a specific member search.
4. Click on the SEARCH button.
5. If the person is not in the list of members in the Organization Member table, or a 'no data found' message displays, the person is not an active member of the organization.

Add Organization Member (Person Does Not Exist in KAMIS)

1. Access the Organization Member Search page.
2. Type the organization name (full or partial) in the Organization Search field, press Enter, and then select the organization name from the drop-down list to which the member is to be added.
3. You must first search for an organization member before you can create the new person record. Enter the new organization member's First Name and Last Name. Entering a Middle Name/initial is optional.
4. Click on the 'SEARCH' button. A 'no data found' message displays in the *Organization Members* region.
5. The name just searched for auto-populates the Name search fields in the *Organization Members* region. Click on the 'Search' button to perform a global search for the person record.
6. The *Search Results* region displays with a 'no data found message' and an 'Add Member' button.
7. Click on the 'Add Member' button.
8. The ORGANIZATION MEMBER ADMINISTRATION – ADDING NEW MEMBER page displays. Complete each region, entering all required fields, and any optional fields as desired.

9. Click on the 'Save' button at the top of the page to save all the regions.
10. If more than one org member role needs to be added, use the Additional Organization Member Roles region to add the roles after the initial Save.
11. Click on the Return button to return to the main Organization Member page.

Add Organization Member (Person Exists in KAMIS)

1. Complete the Search for a specific organization member.
2. When the *Organization Members* region displays with the 'no data found' message, complete the 'Search for existing people to add as new organization members.'
3. In the Search Results table, click on the 'Add' link of the person to be added as an organization member.
4. On the *ORGANIZATION MEMBER ADMINISTRATION* page, in the *Organization Member* region, enter the Member Effective Date and any other information as desired. Click on the 'Save Org Member' button.
5. Add the appropriate org member roles using the *Organization Member Roles* and *Additional Organization Member Roles* regions.
6. Update and Save any other regions as needed.
7. Click on the Return button to view the new organization member in the *Organization Members* table.

Edit Organization Member Information

1. Complete the Search for the specific organization member.
2. From the *Organization Members* table, click on the 'KAMIS ID' link of the Org Member.
3. Update the Region information as needed:
 - a. Person Information Organization Member – update Name or Gender
 - b. Organization Member Roles – terminate an org member role
 - c. Additional Organization Member Roles – access additional roles to terminate
 - d. Organization Member – Enter additional information or edit existing information
 - e. Address Information List – Edit/terminate an address
 - f. Address Information Organization Member – add a new address
(The DCF Address is read only and will return an error if selected when saving a new address.)

Note: Use a region's individual Save button to save each region's changes.

Terminate an Organization Member

Please note that it is no longer necessary to terminate Active Roles of an Organization Membership prior to terminating the actual membership. When the Organization Membership is terminated, any Organization Member Roles are automatically terminated.

1. Complete the Search for the specific organization member.
2. From the *Organization Members* table, click on the KAMIS ID link of the org member.
3. In the *Organization Member* region, enter the Member Termination Date.
4. Click on the 'Save Org Member' button.
5. The following actions occur:
 - a. A message appears above the *Person Information Organization Member* region, stating 'This Organization Member Record has been terminated as of 'mm/dd/yyyy.'
 - b. All Organization Member Roles are terminated and no longer appear in the Organization Member Roles and Additional Organization Member Roles regions.
 - c. The *Organization Member* region is read only. The 'Add Organization Member' button displays so the member can be added back to the organization at some point.