KAMIS II – Associate 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 Associate person records is done from the associated customer's Person Admin/Associates and Affiliations page. For detailed instructions on using the Associate Search and Entry function, refer to Chapter 6 (Person Administration) of the KAMIS User Manual.

Note: Associates can still be created from the 'Create New Name Entry' button in Person Search Results, but once created, can only be accessed thereafter on the Person Admin/Associates and Affiliations page.

Search for an Associate

1. Use Person Search to find the Customer that the Associate should be associated with.
2. Open the Customer's Person Admin page (Update Person in Search Results.)
3. Click on the Associates and Affiliations tab.
4. If the Associate is already listed in the *Listing of Associates* table, use the 'KAMIS ID' link to view and/or edit the associate information.
5. If the Associate is not listed in the table, enter the associate name in the search fields and click on the 'Search' button.
6. The matching results will display in the *Associate Search Results* table. If there is no match, a 'no data found' message will display.

Add an Existing Associate to a Customer's Listing of Associates

1. From the *Associate Search Results* table, click on the 'Add' link of the person record to be associated with the Customer.
2. Enter the Roles information (all fields are required.)
3. Click on the 'Save Assoc Roles' button.
4. Update information as needed in the Person Information, Address Information List, and/or Address Information regions.

Note: Each region on the Associate Person Information page is saved separately using the appropriate Save button for that region.

Add a New Associate to a Customer's Listing of Associates

1. From the *Associate Search Results* table, click on the 'Create New Person as Associate' button.
2. Enter the associate person, roles, and address information.
   Address Note: The MMIS/KMAP Address is read only and will return an error if selected when saving a new address.
3. Click on the 'Save' button to save all regions.

Edit Associate Person Admin Information

1. From the *Listing of Associates* table, click on the 'KAMIS ID' link of the Associate whose person admin information you want to view and/or edit.
2. Make the desired changes to the Person Information Associate region.
3. Click on the 'Save Person Information' button to save the changes.

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Add New Address to Existing Associate

1. From the *Listing of Associates* table, click on the 'KAMIS ID' link of the Associate whose address information you want to add.
2. Enter the new address information in the 'Address Information Associate' region.
   NOTE: The MMIS/KMAP Address is read only and will return an error if selected when saving a new address.
3. Click on the 'Save Address' button to save the new address and update the Address Information List region.

Edit/Terminate an Associate Address

1. From the *Listing of Associates* table, click on the 'KAMIS ID' link of the Associate whose address information you want to edit or terminate.
2. Click on the 'View/Modify' link of the address to be edited or terminated.
3. Make the desired changes to the Address Information Associate region, or just enter a Termination Date if terminating the address.
4. Click on the 'Save Address' button to save the changes and update the Address Information List region.

Terminate an Associate (association status)

1. From the *Listing of Associates* table, click on the 'KAMIS ID link of the associate whose association you want to terminate. If terminating multiple associations for the same person, it does not matter which one you select.
2. Enter the termination date of the association to the customer.
3. Click on the 'Save Term Date' button.
4. If additional associate roles are to be terminated for this associate, click on the View/Term icon of the additional role(s) in the Person Associate Roles region table to access the role and terminate it.

NOTE: Terminating an associate's and customer's association does not affect any associations to any other customers.