

Creating a new person record

In order to reduce the creation of duplicate records within the system you must first search for existing records.

- *Enter as much of the name as possible within the text boxes. Middle name is not normally required.*
- *Click Search*

The search displays any records found within the system which are similar to the search criteria entered. If the results include the record you wish to create, you should either Transfer the record, or apply for a Clearance. If the record is not found, click the link to create the new record.

Transferring a record

Transferring a record simply means adding it to your organization. For example, it is possible to add a player to a club who currently plays for another club.

Transferring means that duplicate IDs are not created.

Applying for a Clearance

Your parent organization may require clearances for certain participants before they can join another organization. For example, some associations require players to obtain a clearance before they can play at a new club.

Creating a new record

When creating a new record a Role must be assigned, with one or more Sub-Roles. Depending on how the page was accessed*, the Role may not be able to be changed.

▢ [More information about Roles](#)

People within your organization can be assigned one or more roles and sub roles

in order to designate the record as a certain type. A person record may have any number of roles assigned. For example, a person can be assigned a PLAYER role, and within that role, on or more Sub-roles such as SENIOR, JUNIOR etc. The Roles and Sub-roles available depend on your organization type.

When the role is no longer relevant (for example, if a player leaves a club), the role can be removed. The underlying person record can still be accessed by the organization, and if necessary, roles added back in at a later date.

Roles can be added and removed from a person record from the *Roles* tab of the Person edit screen. This screen also lists the history for certain roles (ie when they were added, removed) for that person record.

Roles can also be added and removed in bulk (i.e. for several person records at once) via the *Person Roles Bulk Change* screen.

*If accessed via *Add new Person*, the role can be selected, if accessed via *Add new Player* or *Add new umpire* then the role is fixed.

Mandatory fields and other validation

- First and last names are mandatory, and cannot contain numbers
- Other fields may be mandatory in certain cases, depending on rules set by controlling organizations. In these cases it will be indicated by an asterisk next to the field.
- All phone numbers, mobile numbers and fax numbers, if entered, must contain 10 digits, including area code where applicable. Certain characters such as ()- and spaces are also allowed.
- Postcode, if entered, must contain 4 digits only.

Click the *Add* button to create the record. The system will validate the new record according to the rules set by the controlling organization regarding creation of duplicate records. If a duplicate is found you will not be able to create the record, and you must go through the transfer/clearance process listed above.

Editing an existing record

This is similar to adding a new record above, except that Roles are added and removed on the *Roles* tab rather than directly on the main Person Edit screen. Also, in some circumstances, participants can prevent their record from being viewed or edited by certain organizations. In this case a message will display. *If any records have recently been transferred to your organization, you will not be able to view or edit the record for a period of 5 days after the transfer.* Click the *Update* button to update the record. The system will validate the new record according to the rules set by the controlling organization regarding creation of duplicate records. If a duplicate is found you will not be able to create the record, and you must go through the transfer/clearance process listed above.