

## Creating New Affiliations Training Video Transcript

In this instructional video, you will learn how to create a new affiliation.

Begin by searching for the facility utilizing the wild card (the percent sign) with the numerical portion of the physical address, as well as the number for the county.

This way the alphabetical portion of the physical address is misspelled or utilizes an incorrect direction, for instance, FIESTA will still be able to locate the existing record.

Press F12 to begin the query.

Once a list of facilities matching your criteria appears, locate and double-click on the appropriate facility.

Click on the affiliations tab to see what affiliations are currently in the database.

If the facility contact is no longer the person listed, click the green plus sign to open a new record.

The affiliation type for the facility contact is FCCT. If you are unsure of the abbreviations for the affiliation you wish to use, you can get a list of affiliations by placing the cursor in the space after affiliation type and clicking the black down arrow.

From here you may select the facility contact by either double-clicking on it or clicking on it once to highlight it and then clicking OK.

Press tab.

You will be prompted to verify that you wish to create a new facility contact for this ME.

Click yes.

The primary association will always either be O for organization or I for individual.

Since the facility contact will always be an individual, enter I and press tab.

The date will automatically generate today's date. Change it to the date of inspection, if necessary.

Before creating a new individual, always perform a search to see if that individual already exists in the database.

Since we share a database with other programs, the individual may already exist.

To search, place the cursor in the block beside the individual name and press Ctrl + L.

Place the cursor in the space beside individual last name and enter the individual's last name.

Press tab.

Then enter the individual's first initial and the wildcard. That way, if you have an individual whose name is James, for example, you will be able view results for James and Jim to determine which may be the correct one.

Highlight the correct individual name, make sure that Return this Individual is checked, as well as Return this Mailing Address (as long as the mailing address is the same that you wish to use).

Click Return to Data Entry.

Notice that the individual's name, address and phone number have been automatically generated.

Add the individual's email address, if known.

Double-check that the telephone number has not changed.

Click save.

You will see a message stating that the previous facility contact that was in the affiliations tab has been inactivated.

Click OK.

Validate the address by clicking Validate Address.

Accept the address by clicking Accept Address.

Click Return.

If there is a suite, building or room number, you will need to re-add it and then click save.

Now click back to go back to the affiliations tab and notice that the contact you just created is at the top and the one that just ended is at the bottom.

Follow these same instructions to create other affiliations, such as the operator for the facility and the land owner, as necessary.

In this example, we have been notified that the operator for this facility has changed, therefore we need to create a new operator affiliation.