Create a New NVTI Student Contact Record

Purpose:	Search for and, if needed, complete a new Student Contact record.
Assumptions:	You have a complete, approved NVTI application open and CRM open.

Step-by-Step:

1. On the CRM top bar, click .

Result: A search box opens.

2. In the search box, enter the student name in the NVTI application, using the **firstname*lastname** format.

3. Under the **General** column, click the **Contacts** button.

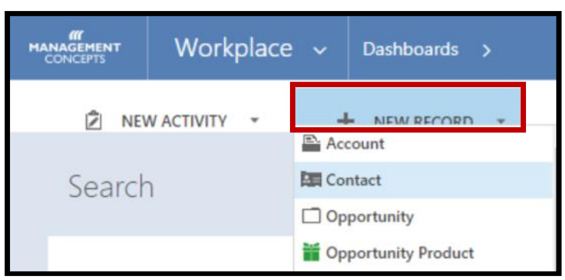
*Result: The **Active Contacts: Modified within last 12 months** window opens.*

If an existing student record is returned: *Continue to Enroll a Student in a Course.*

***If no results were found**: Continue with the process steps below.*

4. Click the **+ New Record**.

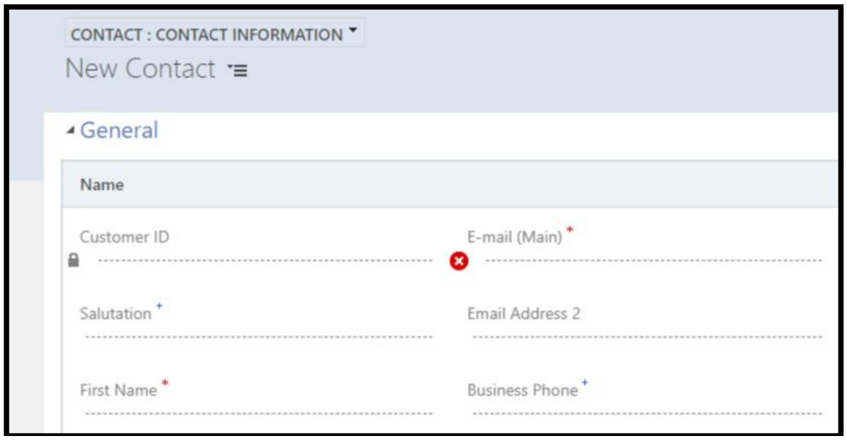
Result: A drop-down menu of application options displays.



5. Select **Contact**.

*Result: A new **Contact** record opens.*

6. Scroll to the **General** pane.



7. Populate the following fields with details from the Student Application form:
    a. **First Name**
    b. **Last Name**
    c. **Job Title**
    d. **Account**—Enter the Agency/Organization Name
    e. **E-Mail (Main)**
    f. **Business Phone**
    g. **Mobile Phone**
    h. **Street /PO Box**
    i. **City**
    j. **State/Province**
    k. **Zip/Postal Code**
    l. **Country/Region**—Auto populates as United States
    m. **Originating Source**—Enter **Onsite**

8. Scroll right to the **Single Sign On** panel.

9. At **SSO User?**, change the default **No** entry to **Yes.**

10. Scroll down to the **Contact Types*** panel and click in the panel.

***Result**: A field displays with a .*

11. Click the .

***Result**: A drop-down menu appears.*

12. Choose from these options depending on student registration type from the application:

- ND: NVTI-DVOP
- NG-NVTI-DOL Grantee
- NL: LVER
- NM: NVTI-Manager/Supervisor
- NT: NVTI-Other, such as USERRA

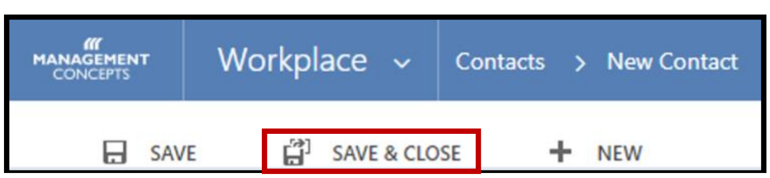
13. Scroll down to the **NVTI User Specifics** pane.

14. At the **NVTI News Letter User** field, change **No** to **Yes**.

15. In the **Date of Position** field, type the date the student will begin their training program.

***Result**: The date will display.*

16. Scroll up and click the **Save & Close** button.



***Result**: The Student Contact Record saves and closes.*

Continue with: Enroll a Student in an NVTI Class