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Create member records

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Grants and Projects > Tables > SSA Members > Member Information

Add and maintain member information. As a fiscal agent, you can use the Security Administration application to limit the users who can view this information. Member Information records cannot be deleted; however, they can be set to inactive.

☐ Click **Add** to add a new member record.

☐ Under **Member Information**:

County District Nbr	Type a six-digit county-district number. This field is required.
Member Name	Type the member name. This field can be a maximum of 35 alphanumeric characters. Special characters are limited to the following: apostrophe, colon, comma, and dash. This field is required.
Region	Click ⌄ to select the two-digit Education Service Center (ESC) region number. This field is required.
Vendor	Type a valid vendor name or number. If the vendor number is not known, click ⋮ to select a vendor from the Vendors directory. The Vendors directory is populated from the vendor records established on the Finance > Maintenance > Vendor Information > Vendor Name/Address tab. This field is required.
Status	Click ⌄ to select the member's status (i.e., *Active* or *Inactive*). This field is required.

☐ Under **Main Contact**:

Title	Click ⌄ to select a legal title for the contact person.
First	Type the contact's first name. This field can be a maximum of 50 characters.
Last	Type the contact's last name. This field can be a maximum of 50 characters.
E-mail	Type the contact's e-mail address. This field can be a maximum of 100 characters.

☐ Click **Save**.

Grants and Projects > Tables > SSA Members > Bank Code

Add and maintain member bank information for EFT payments processed in the Grants and Projects application. If the member uses the same account information for vendor EFT payments, this page does not need to be completed. The bank information hierarchy is as follows: This page will serve as the primary source of bank information for grant payments. If this page is blank, the system will reference the Finance > Maintenance > Vendor Information > Vendor Miscellaneous tab. If the Vendor Miscellaneous tab is blank, a check is issued.

☐ Under **Bank Information**:

EFT E-mail	Type the member's email address to send EFT payment information. The field can be a maximum of 100 characters. This field is required when adding a bank information record.

Bank	Begin typing a bank code or name. As you type the data, a drop-down list of corresponding data is displayed. The bank information must exist on the Finance > Tables > Bank Codes tab. Select a bank code. If the bank code or name is not known, click ⋮ to select a bank from the Banks lookup or press the SPACEBAR to view a list of banks.
Bank Acct Nbr	Type the corresponding bank account number for the selected bank.
Bank Acct Type	Select the account type for the selected bank and bank account number. • *2 Checking account* • *3 Savings account*
PreNote	Select to generate a prenote to the bank.

☐ Click **Save**.