



## **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:**

<b>County District Nbr</b>	Type a six-digit county-district number. This field is required.
<b>Member Name</b>	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.
<b>Region</b>	Click  to select the two-digit Education Service Center (ESC) region number. This field is required.
<b>Vendor</b>	Type a valid vendor name or number. If the vendor number is not known, click  to select a vendor from the <a href="#">Vendors directory</a> .  The Vendors directory is populated from the vendor records established on the <a href="#">Finance &gt; Maintenance &gt; Vendor Information &gt; Vendor Name/Address</a> tab. This field is required.
<b>Status</b>	Click  to select the member's status (i.e., <i>Active</i> or <i>Inactive</i> ). This field is required.

Under **Main Contact:**

<b>Title</b>	Click  to select a legal title for the contact person.
<b>First</b>	Type the contact's first name. This field can be a maximum of 50 characters.
<b>Last</b>	Type the contact's last name. This field can be a maximum of 50 characters.
<b>E-mail</b>	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:**

<b>EFT E-mail</b>	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.
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<b>Bank</b>	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 <a href="#">Finance &gt; Tables &gt; Bank Codes</a> tab. Select a bank code. If the bank code or name is not known, click  to select a bank from the <a href="#">Banks lookup</a> or press the SPACEBAR to view a list of banks.
<b>Bank Acct Nbr</b>	Type the corresponding bank account number for the selected bank.
<b>Bank Acct Type</b>	Select the account type for the selected bank and bank account number. <ul style="list-style-type: none"><li>• 2 <i>Checking account</i></li><li>• 3 <i>Savings account</i></li></ul>
<b>PreNote</b>	Select to generate a <a href="#">prenote</a> to the bank.

Click **Save**.



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