

## Checklist 07D

### Adding and Modifying a Person Category

#### Checklist 07D: Separating a Category (For industry Only)

To separate an existing person category of a record that you no longer require a security relationship with follow the steps below:

- | Step | Activity                                                                    |
|------|-----------------------------------------------------------------------------|
| 1.   | Log in as a User.                                                           |
| 2.   | Click Select Person (column on left).                                       |
| 3.   | Enter the person's SSN.                                                     |
| 4.   | Click the Display Maintain Person radio button.                             |
| 5.   | Click the gray Display button.                                              |
| 6.   | Scroll down to the Modify category section.                                 |
| 7.   | Select the category you wish to modify from person category drop down menu. |
| 8.   | Input separation date format (YYYYMMDD) or use calendar widget.             |
| 9.   | Select separation reason from Separation drop down menu.                    |
| 10.  | Click save when done.                                                       |

