Introduction

Transaction TXC4 (Person Activity Logging) allows users to add, change, view and delete activity information for a person who does not have an existing borrower or account record on the COMPASS system. Users can log correspondence that is coming in from or going out to persons requesting Consolidation or NSLDS information, for example, and do not have an account on the system to which activity can be logged.

> **NOTE**: Activity information for persons with existing borrower or account records on COMPASS cannot be logged using this transaction. Refer to [DD0024-Activity Records - TD2A](#) for instructions on logging activity for these persons.

Add a Person Activity Record

1. At the **MAIN MENU** (J0X01), select **COMMON MODULES**.

2. Press Enter.

The **SUBSYSTEM LEVEL COMMON MODULES** screen (J0X06) is displayed.

1. Select **PERSON ACTIVITY (NON-COMPASS)**.

2. Press Enter.

The **SUBSYSTEM LEVEL PERSON ACTIVITY (NON-COMPASS)** screen (J0X02) is displayed.

1. Enter **A** (Add) in the **MODE** field and **TXC4** (Person Activity Logging) in the **TRANSACTION ID** field.

2. Press Enter.

The **PERSON ACTIVITY LOGGING** search screen (T1X01) is displayed.

1. In the **PERSON ID** field, enter the person's nine-digit Social Security number. This ID cannot exist on any COMPASS transaction other than TXC4. *This is a required field.*

   > **NOTE**: This is a 10-byte field; however, only nine-bytes will be accepted.

2. Press Enter.

The **PERSON ACTIVITY LOGGING** screen (TXXC6) is displayed.

The following message is displayed at the bottom of the screen: **01021 ADD NECESSARY DATA AND PRESS ENTER**.

The **BORROWER SSN** field displays the person's nine-digit Social Security number entered on the search screen.

1. In the **NAME** field, enter the borrower's first, middle and last names, followed by the last name suffix. *This field is required if this is the person's first activity record being created on TXC4.*

NOTE: If this is not the first activity record being created, the **NAME** field will be populated already and protected.

2. In the **TEXT** field, enter all activity, including incoming or outgoing correspondence or phone calls. Up to 858 characters of free form text may be entered in this field. *This is a required field.*

3. Press Enter.

The following message is displayed at the bottom of the screen: **01004 RECORD SUCCESSFULLY ADDED**.

NOTE: When an activity is first logged to TXC4, the status fields do not display on the new record. In order to view the status fields on the new record, the user must access the **PERSON ACTIVITY LOGGING** screen (TXXC6) in Change, Delete or Inquiry modes.

4. To view the new record, press F12=CAN to return to the **SUBSYSTEM LEVEL PERSON ACTIVITY (NON-COMPASS)** screen (J0X02) and access the **PERSON ACTIVITY LOGGING** screen (TXXC6) in Change, Delete or Inquiry modes.

The **PERSON ACTIVITY LOGGING** screen (TXXC6) is displayed showing the status fields.

The **STATUS** field displays **ACTIVE**. This record is available to change, view or delete.

The **DATE CREATED** field displays the date the activity record was created.

The **USER** field displays the ID of the user who created the activity record.

Change or View a Person Activity Record

1. At the **MAIN MENU** (J0X01), select **COMMON MODULES**.

2. Press Enter.

The **SUBSYSTEM LEVEL COMMON MODULES** screen (J0X06) is displayed.

1. Select **PERSON ACTIVITY (NON-COMPASS)**.

2. Press Enter.

The **SUBSYSTEM LEVEL PERSON ACTIVITY (NON-COMPASS)** screen (J0X02) is displayed.

1. Enter **C** (Change) or **I** (Inquiry) in the **MODE** field and **TXC4** (Person Activity Logging) in the **TRANSACTION ID** field.

NOTE: Change mode is used in this example.

2. Press Enter.

The **PERSON ACTIVITY LOGGING** search screen (T1X01) is displayed.

1. In the **PERSON ID** field, enter the person's nine-digit Social Security number. This ID cannot exist on any COMPASS transaction other than TXC4. *This is a required field.*

2. Press Enter.

The **PERSON ACTIVITY LOGGING SELECTION** screen (TXXC5) is displayed.

This screen is not displayed if only one activity record exists for the person ID entered on the search screen.

If more than 12 activity records exist, **MORE: +** displays in the upper-right corner of the screen. Press F7=BKWD or F8=FWD to page backward or forward through the list of activity records.

The **PERSON ID** field displays the person's nine-digit Social Security number that was entered on the search screen.

The **PERSON NAME** field displays the person's first, middle and last names, followed by the last name suffix.

All records display in order, first by status, then by the created date. Active records display first in descending order by date, followed by inactive (changed or deleted) records, also in descending order by date.

The **STATUS** field displays **ACTIVE**, **CHANGED** or **DELETED**.

The **CREATED** field displays the date the activity record was created.

The **TEXT** field displays the first 54 characters of the text that was entered when the activity record was created.

1. Select an active record to view. Enter an **X** in the **SEL** field to make a selection.

   NOTE: In Change mode, only one active record may be selected at a time. In Inquiry mode, use the **SELECT ALL** field (not shown), or enter an **X** in more than one **SEL** field to select more than one active, changed or deleted record.

2. Press Enter.

The **PERSON ACTIVITY LOGGING** screen (TXXC6) is displayed.

The following message is displayed at the bottom of the screen: **01022 MAKE DESIRED DATA CHANGES AND PRESS ENTER**.

   NOTE: In Inquiry mode, if more than one activity record was selected on the selection screen, **MORE: +** (not shown) displays in the upper-right corner of the screen. Press F7=BKWD or F8=FWD to page backward or forward through the activity records. All fields are protected in Inquiry mode and cannot be updated by the user.

The **BORROWER SSN** field displays the person's nine-digit Social Security number entered on the search screen. This field may be used to navigate to another person's activity records. Simply type an SSN over the existing one and press Enter. If only one activity record exists for the person, the activity record will display. If more than one activity record exists, the **PERSON ACTIVITY LOGGING SELECTION** screen (TXXC5) is displayed.

The **NAME** field displays the borrower's first, middle and last names, followed by the last name suffix.

The **STATUS** field displays **ACTIVE**.

> **NOTE**: In Inquiry mode, the **STATUS** field may also display **CHANGED** or **DELETED**.

The **DATE CREATED** field displays the date the activity record was created.

The **USER** field displays the ID of the user who created the activity record.

The **DATE UPDATED** field (not shown), displays the date the activity record was last updated. *This field is displayed in Inquiry mode only.*

The **USER** field (not shown), displays the ID of the user who last updated the activity record. *This field is displayed in Inquiry mode only.*

The **TEXT** field displays the activity that was entered when the activity record was created. Up to 858 characters of free form text may display in this field.

1. Made the desired data changes and press Enter.

The following message is displayed at the bottom of the screen: **01005 RECORD SUCCESSFULLY CHANGED**.

If only the **NAME** field is changed, the status of this record remains active and only the name is updated. This record is available to change, view or delete.

If the **TEXT** field is changed, the status of this record is updated to **CHANGED**. This record is no longer active and a new, active record is created in its place.

> **NOTE**: When a change is made to activity text, the current activity record is inactivated and a new active record is created in its place. However, only the text change is displayed when Enter is pressed. In order to view the active and inactive records, the user must access the **PERSON ACTIVITY LOGGING** screen (TXXC6) in Change (active record only), Delete (active record only) or Inquiry modes.

2. To view the active and inactive records, press F12=CAN to return to the **SUBSYSTEM LEVEL PERSON ACTIVITY (NON-COMPASS)** screen (J0X02) and access the **PERSON ACTIVITY LOGGING** screen (TXXC6) in Change (active record only), Delete (active record only) or Inquiry modes.

If the active record was selected on the selection screen, the **PERSON ACTIVITY LOGGING** screen (TXXC6) displays the new, active record.

> **NOTE**: This record can be displayed in Change, Inquiry and Delete modes.

The **STATUS** field displays **ACTIVE**.

The **DATE CREATED** field displays the date the activity record was created. (This is the date the inactive record was last updated.)

The **USER** field displays the ID of the user who created the activity record. (This is the ID of the user who last updated the inactive record).

The **TEXT** field displays the new text.

If the inactive record was selected on the selection screen, the **PERSON ACTIVITY LOGGING** screen (TXXC6) displays the old, inactive record.

    NOTE: This record can be displayed in Inquiry mode only.

The **STATUS** field displays **CHANGED**.

The **DATE UPDATED** field displays the date the activity record was last updated.

The (updated) **USER** field displays the ID of the user who last updated the activity record.

The **TEXT** field displays the original text.

Delete a Person Activity Record

1. At the **MAIN MENU** (J0X01), select **COMMON MODULES**.

2. Press Enter.

The **SUBSYSTEM LEVEL COMMON MODULES** screen (J0X06) is displayed.

1. Select **PERSON ACTIVITY (NON-COMPASS)**.

2. Press Enter.

The **SUBSYSTEM LEVEL PERSON ACTIVITY (NON-COMPASS)** screen (J0X02) is displayed.

1. Enter **D** (Delete) in the **MODE** field and **TXC4** (Person Activity Logging) in the **TRANSACTION ID** field.

2. Press Enter.

The **PERSON ACTIVITY LOGGING** search screen (T1X01) is displayed.

1. In the **PERSON ID** field, enter the person's nine-digit Social Security number. This ID cannot exist on any COMPASS transaction other than TXC4. *This is a required field.*

2. Press Enter.

The **PERSON ACTIVITY LOGGING SELECTION** screen (TXXC5) is displayed.

This screen is not displayed if only one activity record exists for the person ID entered on the search screen.
If more than 12 activity records exist, **MORE: +** displays in the upper-right corner of the screen. Press F7=BKWD or F8=FWD to page backward or forward through the list of activity records.

The **PERSON ID** field displays the person's nine-digit Social Security number that was entered on the search screen.

The **PERSON NAME** field displays the person's first, middle and last names, followed by the last name suffix.

All records display in order, first by status, then by the created date. Active records display first in descending order by date, followed by inactive (changed or deleted) records, also in descending order by date.

The **STATUS** field displays **ACTIVE**, **CHANGED** or **DELETED**.

The **CREATED** field displays the date the activity record was created.

The **TEXT** field displays the first 54 characters of the text that was entered when the activity record was created.

1. Select an active record to delete. Enter an **X** in the **SEL** field to make a selection.

    NOTE: In Delete mode, only one active record may be selected at a time.

2. Press Enter.

 The **PERSON ACTIVITY LOGGING** screen (TXXC6) is displayed.

The following message is displayed at the bottom of the screen: **01023 PRESS ENTER TO DELETE**.

1. Press Enter to delete the activity record.

The following message is displayed at the bottom of the screen: **01006 RECORD SUCCESSFULLY DELETED**.

    NOTE: When an activity record is deleted, it is inactivated and no longer available to change or delete. In order to view the inactive record, the user must access the **PERSON ACTIVITY LOGGING** screen (TXXC6) in Inquiry mode.

2. To view the inactive record, press F12=CAN to return to the **SUBSYSTEM LEVEL PERSON ACTIVITY (NON-COMPASS)** screen (J0X02) and access the **PERSON ACTIVITY LOGGING** screen (TXXC6) in Inquiry mode.

The **PERSON ACTIVITY LOGGING** screen (TXXC6) displays the inactive record.

The **STATUS** field displays **DELETED**. The record is no longer available to change or delete.

The **DATE UPDATED** field displays the date the activity record was deleted.

The (updated) **USER** field displays the ID of the user who deleted the activity record.