Data Entry Standards when Adding a New Family

Data entry standards assist in the proper formatting of your data so that the database fields function properly and reports correctly produce the data you need. The following are key fields to focus on when entering in a new family who is not already registered at another parish.

A. Family and Member Names

Please verify the family and member names for accuracy before entering information into the database. This will help to ensure that any search performed to check if a family is present in your own or the diocesan database will reveal the correct results. The following fields will be needed in order to completely record a family and its members.

- **Family Last Name** = family last name commonly used (this field can hold 100 spaces and can be used for hyphenated and/or two last names.)
- **First Name of Family** = first name of spouses, male and female, separated by an ‘and’ or the Head of household’s first name. Listing the spouse’s name is VERY important; the database will automatically set 2 names listed together with an ‘and’ to be first the Male/Husband and then the Female/Wife in the members tab. It’s always advisable to double-check and make sure that the names appear correctly.
- **Nick Name** = is the field reserved for one’s nick name which is different from one’s formal name. Nick names should NOT be entered into the fields assigned for formal/proper names.
- **Mailing Name** = how the family wishes to be addressed in mailings
- **Family Address** = may include home, mailing, and other seasonal addresses. The primary address flag designates which address to use for mailings.
- **Member First Name** = members formal name
- **Member Nick Name** = name the member uses every day, if different than the formal name
- **Member Last Name** = members legal last name if different than the family’s
- **Member’s Gender**
- **Member’s Date of Birth**

There are 4 family mailing name fields used in ParishSOFT. The **Mailing Name** field is used on most parish reports and is the customizable parish field which should reflect the wishes of how the particular parish family would like to be addressed. The other family mailing name fields will be auto-generated after the members are in the system.

The Family’s First Name field will need to be corrected if the Head/Spouse of the family uses a Nick Name, as that field may still list their legal name. All other Mailing fields on the Family tab will automatically update to list the Nick Name if this is entered in the Member screen and if the Auto Fill button is selected.

B. Addresses Types

- **Home** – defaulted address, should consist of the main physical address of the family
- **Mailing** – can be used for PO Boxes, Office address, etc. If this should be the Primary address for mailings, please indicate by switching the Primary Address field to Mailing when first entering in the family
Other – used for a second location, such as a temporary or seasonal address. Must enter a month and date range for this address or the computer will not be able to use it. If this address is in use, the Primary Address field on the family record will indicate Other.

*DO NOT DELETE mailing addresses for individuals who are deceased or who have moved out of the parish. By changing their status (to either moved or deceased), those working in the system would know that their mailing address would not be current. If parishioners have moved to a new address, please make sure to input the new address information. If you do not know their new address, it is best to leave their last known address.

Please use upper and lower case to fill in the addresses and follow all the other US Post Office guidelines as much as possible. The US Post Office equipment reads mail from the bottom of the address to the top. Therefore, the most important information, (the zip code) should be the last thing in the address. A standardized USPS address is one that is fully spelled out, abbreviated only using the Postal Service standard abbreviations (most common listed below) and which has no punctuation listed in the address line:

Typical Address:
2965 Anywhere Lane, Apt. B
Middleton, WI 53562

USPS Standardized Address:
2965 Anywhere Ln Apt B
Middleton, WI 53562-1456

The following are the most common Street Suffix Abbreviations:

<table>
<thead>
<tr>
<th>For</th>
<th>Use</th>
<th>For</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avenue</td>
<td>Ave</td>
<td>Pike</td>
<td>Pike</td>
</tr>
<tr>
<td>Boulevard</td>
<td>Blvd</td>
<td>Pine</td>
<td>Pine</td>
</tr>
<tr>
<td>Circle</td>
<td>Cir</td>
<td>Plaza</td>
<td>Plz</td>
</tr>
<tr>
<td>Court</td>
<td>Ct</td>
<td>Post Office Box</td>
<td>PO Box</td>
</tr>
<tr>
<td>Drive</td>
<td>Dr</td>
<td>Road</td>
<td>Rd</td>
</tr>
<tr>
<td>Heights</td>
<td>Hts</td>
<td>Route</td>
<td>Rte</td>
</tr>
<tr>
<td>Isle</td>
<td>Isle</td>
<td>Shore</td>
<td>Shrs</td>
</tr>
<tr>
<td>Junction</td>
<td>Jct</td>
<td>Square</td>
<td>Sq</td>
</tr>
<tr>
<td>Lane</td>
<td>Ln</td>
<td>State Roads</td>
<td>State Rd</td>
</tr>
<tr>
<td>Mount</td>
<td>Mt</td>
<td>Street</td>
<td>St</td>
</tr>
<tr>
<td>Park</td>
<td>Park</td>
<td>Terrace</td>
<td>Ter</td>
</tr>
<tr>
<td>Parkway</td>
<td>Pkwy</td>
<td>Trail</td>
<td>Trl</td>
</tr>
</tbody>
</table>

The following are the suggested County, State & Local Highway abbreviations suggested by USPS:
(Note: this is where the State, County or Highway is the primary address designation)

<table>
<thead>
<tr>
<th>Examples in Use</th>
<th>Standard to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>County Hwy 60</td>
<td>County Highway 60</td>
</tr>
<tr>
<td>CTH 60</td>
<td>County Highway 60</td>
</tr>
</tbody>
</table>
C. Entering Email Addresses
Because of the ease and widespread use of electronic communications it is very important to include email addresses for both family and member records. Using email as your first choice of communication assists in lowering postage costs and keeping additional information updated. (people typically don’t change their email address when they move)

Since most people have multiple email addresses, please request what email to use for family communications and what email should be used for individual communications.

The family email is the default for most communication in ParishSOFT, however, there are times when the member email can be used instead of the family email, namely in the Ministry Scheduler and Religious Ed modules. In these instances, if you are working with children who do not have an email address, it is advised that you enter the Family Email Address into the children’s Member Email address field so that the family can receive the appropriate information related to their children’s involvement in specific groups or activities.

Multiple Email Addresses in One Field
To list multiple email addresses in one field place a semicolon (;) and no spaces after the first email address. (Example: demo@parishsoft.com;demo2@parishsoft.com)

D. Family and Member Roles
Every family record MUST have one of the following roles for the program to work properly: Head, Husband or Wife.

Head is only used for non-married persons. Two single adults that live together, such as a brother and sister, who wish to receive only one set of mail from the parish should be listed in one family record. One will need to be designated as Head and the other as Adult. If both members wish to receive mailing or are not related, they should each be set up in their own family and tied together by using the Extended Family tab with documentation on their relationship.

For consistency, married couples are added as role Husband for the man and Wife for the woman.

Members’ roles are always seen in relationship to the Head, Husband or Wife record in the family. As such the roles indicate the relations status to the main members of the family. Daughter,
Son, Foster Daughter, Foster Son, etc are used for all children in a family. If another family member
moves in, say a Mother in Law, then her role is Mother to the Husband/Wife/Head, not Grandma to
the children. If a role is Unknown, please indicate and note this role until it can be investigated and
properly identified.

Please be sure that if you are changing a member’s role to husband/wife, that you also change their
marital status to that of “married.” Conversely, if you change the marital status to “divorced”, please
be sure to export one of the individuals into their own record.

E. Non-Catholic or Non-Participating Members of a Family
Please enter in all members of a family so you create an accurate representation of the family for the
staff and pastor at the parish using this information. Spouses or members that are non-Catholic
whether they participate or not can be indicated on the Members screen as either “ActOther” or
“Inactive” along with their role in the family and religion. If members are deceased, it is also helpful
to have that information saved in the family rather than deleting the member from the system.

F. Essential Member Fields for Census Reports
Birthdates, Genders, and Religion are key census fields which provide critical pieces of information
for many census reports used in your database. Searching and updating any missing date of birth for
active parishioners in the system will save time when census reports are needed and run. Please also
verify that each of your active members have a gender in their member record. As well, try to list
the religion for each member. If you have a non-Catholic member who goes through the RCIA
program, please remember to change their religion as well.

G. Additional Member Fields
The following fields are helpful to track, if possible in ParishSOFT:

- **Language** – indicates main language spoken for each member. No default, field must be chosen
  by user.
- **Ethnicity** – please select from the pre-filled standard ethnicities, or add in notes if desired.
- **Graduation Year** - indicates high school graduation year, based off of birth date (birth date +
  18). If this is changed, the system will automatically update it based off of the changed
  information tracked in the system each year.
- **Grade** - grade is the highest grade level in school (K-12) which the member is currently in based
  off of the graduation year. This year can be changed by adjusting the Graduation Year drop
  down.
- **School** - fill in with the school the member most recently attended (or is attending)
- **Education** - the parishioner’s highest level of schooling or their degree.