










110 - WALKING THRU CAMINO

 **CAMINO MAIN MENU OPTIONS:** (listed on the left panel of Camino's main screen)

Camino's Main Menu can list up to 7 options to choose from. These are listed and detailed below:

-  Households
-  Members
-  Community Members
-  Administration
-  Contributions
-  Formation
-  Reports
-  Notifications

 **HOUSEHOLDS-** Provides a listing of Households in your parish based on your selection of type of households you want to see.

Households are listed 10 at a time and you can click through the list by accessing the Next and Prior arrows at the bottom right of the screen.

The total number of Households listed is also shown. The total number of households in the list will vary if you decide to use the Search Bar (a specific name) or the Status Selection (a specific status) to narrow down the results. These are explained on the next page.

➤ **FIELDS ON THE HOUSEHOLD LISTING SCREEN** – The following fields appear on the screen for each Household listed:

- Household ID #
- Last Name (of Household)
- Household Street Address
- Household Phone Number
- Head of Household First Name
- Head of Household Cell phone number and Work phone number

- Co-Head First Name
 - Co-Head Cell phone number and Work phone number
 - Envelope # (assigned by the parish to the Household)
 - Status (of Household). The Status has 4 valid values and icons.
 - Active (icon is Green Check Mark)
 - Inactive/Lapsed (icon is Red X in Yellow Circle)
 - Archived (icon is Manila Folder)
 - Deceased (icon is Black Ribbon)
- **USING THE SEARCH BAR** – The Search Bar can help narrow down your search for a particular Household or group of Households. You can enter in any string of characters to search on. The best searches to try include:
- Last Name
 - Last Name <space> First Name (of either the Head of Household or Co Head)
 - Last Name <space> First letter(s) of First Name (to pick up spelling variations)
 - Street Address (either full or partial street name by itself or number and street)
 - Phone Number (if you know it but exclude the area code)
 - Email Address (if you know it – partial is better than full)
- **USING THE SEARCH BAR FOR A DEDICATED SEARCH** – There are 3 types of dedicated searches which can be done in the Household Search Bar. They are documented in the information circle to the right of the search bar on the screen. These will find exact matches and won't bring up additional partial matches. They are documented below:
- Dedicated Envelope Number Search: E=999 or e=999
 - Dedicated HH ID Number Search: ID=99999 or id=99999
 - Dedicated Last Name Search: L=LastName or l=LastName
- **STATUS SELECTION** - For the household listing, the default selection status is ALL and appears at the right of the Search Bar. This means all households regardless of status will appear in the list. The selection status can be changed to any of the following on the Status dropdown menu to narrow down your search:
- ALL
 - ACTIVE
 - ACTIVE and INACTIVE
 - INACTIVE

- ARCHIVED
- DECEASED
- ARCHIVED and DECEASED

➤ **ACTION BUTTONS** – The Action Buttons appear on the upper right corner of the screen. The only Action Button provided on the Household Listing Screen is:

ADD NEW HOUSEHOLD – How to use this feature is detailed later in this manual.

TYPES OF HOUSEHOLDS

There are several types of Households stored in our database:

- A Household can either be an individual, a couple, a couple with children or some other dependents living with them. A dropdown menu is provided with available choices.
- There may also be the case when 2 adults are living together (related or not) and want to be recorded as 2 separate households. This means a parish can have more than 1 household with the same address.
- Children who turn 18 can be split off into their own household. Here again, a parish may have more than 1 household with the same address. (Often, young adult children remain in their childhood households until they contribute on their own, move away from home, get married, or finish with their post-secondary education or training.)

Member records are kept for each member of a household. Once a Household is displayed, the members of that household can be viewed by choosing the Members tab. More details can be viewed by selecting a particular member. This includes contact information (including phone numbers and email addresses), sacramental information, talents the member may have, and ministries the member is involved in at your parish.

(Pledges and Contributions are recorded and can be viewed only at the Household level by choosing either the Pledges or Contributions tab).

STATUS OF HOUSEHOLDS

There are 4 types of status that a Household can have:

1. Active – These are registered households that the parish considers active at the parish in some way (i.e. attending church or events, volunteering for the parish, financially

contributing to the parish, is still considered active in some other way, etc.). When a new household is added, it is given the default status of Active.

- a. This status is shown as a Green Check Mark
2. Inactive – These are registered households that the parish considers lapsed in the parish but are still registered with the parish. These may be households which the parish never sees or hears from.
 - a. This status is shown as a Red X in a Yellow Circle
 3. Archived – There are 2 types of Archived Households.
 - a. A registered household that officially “un-registers” with the parish. This is different from an Inactive Household (lapsed household) since the parish doesn’t know whether Inactive Households still consider themselves parishioners or not. Households may “un-register” with a parish for various reasons: they move out of the area, move to another church (either Catholic or not), or for some other reason.
 - b. In the case of a household that officially “un-registers” with the parish, they may come back and re-join the parish in the future. In this scenario, that household can be un-archived with the Restore option.
 - c. If that household registers with another parish in the diocese, the new parish can record the Household as Active and will have access to its household and member information. This includes sacramental information but does not include contributions made to the former parishes. *(A parish will only see contributions made to its own parish, not contributions made to other parishes).*
 - d. The Archived status is shown as a File Folder
 4. Deceased – When the last living member of a household dies and that death date is recorded in the database, the Household is now considered Deceased.
 - a. This status is shown as a Black Ribbon

The same Household can be Active at one parish and Archived at another, etc. These are independent settings within each parish and are stored independently in the database.

A Household status can be changed at any time by a parish when it is appropriate. For example:

- A household that is Active can be changed to Inactive or Archived, and then back to Active.
- A household that is Active can be changed to Inactive, and then later to Archived.
- An Archived Household can be changed back to Active as explained in the example above.

HOUSEHOLD MEMBERS

The user can view members of a specific household by first selecting that household (as explained above) and then choosing the Household Members tab.

Once a specific member is selected from the listing, more information will be displayed:

- Contact Information
- Demographic information (birth date, age, religion, etc.)

Sacramental information for a member can be viewed by selecting the Sacrament tab. A summary of recorded sacraments is shown first. Details of each sacrament are stored separately under their own tab:

- Baptism
- First Reconciliation
- First Communion
- Confirmation
- OCIA (formerly RCIA)
- Marriage
- Anointing of the Sick
- Funeral / Death

A user can view the details of a specific recorded sacrament by clicking on that sacrament in the Summary List or by clicking on the specific sacrament tab. To record a new sacrament, the user can click the specific sacrament tab.

There is a procedure to record sacraments in a batch fashion (all at once) for quicker entry when more than 1 member received the same sacrament on the same date (for example, the sacraments of First Communion or Confirmation). This procedure is listed under the Administration option as Procedures. This process is more fully detailed later in this manual.


STATUS OF HOUSEHOLD MEMBERS

Members can also have any of these 4 status types. When a new member is added, it is given the default status of Active.

A Parish can mark individual members:

- Active – If that member is active at the parish
- Inactive – If that member is lapsed at the parish
- Archived – If that member has left the parish even though others in Household remain Active
- Deceased – If that member is deceased and date of death and/or funeral information has been record

A member's status can also be changed back to Active or other settings, if need be (just like Households). However, the only way to change a Member from the Deceased status is to RESURRECT the member. This feature will be explained later in this manual.

 **MEMBERS** – Provides a listing of all Household Members in your parish regardless of Household. This is different than when you look at members through a Household where only the members in that Household will be shown.

This option allows you to search for and view members without going through the Household first. It can be very useful in finding members who aren't Head of Household or Co Head.

The default selection status is ALL and appears at the right of the Search Bar and can be changed to any of the available choices (more information on this is found elsewhere in this manual).

➤ **FIELDS ON THE MEMBER LISTING SCREEN** – The following fields appear on the screen for each Member listed:

- Member ID #
- Member First Name
- Member Middle Name
- Member Last Name (which could differ from the Head of Household's last name)
- Member Type
- Relation (to Head of Household)
- Cell and work phone numbers
- Personal and work email addresses
- Occupation and Employer
- Grade and School (if a child)
- Member status
 - Status (of Member). The Status has 4 valid values and icons.
 - Active (icon is Green Check Mark)

- Inactive (icon is Red X in Yellow Circle)
- Archived (icon is Manila Folder)
- Deceased (icon is Black Ribbon)

➤ **USING THE SEARCH BAR** – The Search Bar can help narrow down your search for a particular Member. You can enter in any string of characters to search on. The best searches to try include:

- Last Name
- Last Name <space> First Name
- Last Name <space> First letter(s) of First Name (to pick up spelling variations)
- Phone Number (if you know it - exclude the area code)
- Email Address (if you know it – partial is better than full)

➤ **STATUS SELECTION** - For the Member listing, the default selection status is ALL and appears at the right of the Search Bar. This means all members regardless of status will appear in the list. The selection status can be changed to any of the following on the Status dropdown menu to narrow down your search:

- ALL
- ACTIVE
- ACTIVE and INACTIVE
- INACTIVE
- ARCHIVED
- DECEASED
- ARCHIVED and DECEASED

➤ **VIEWS** – For the Member listing, the View feature appears to the right of the Status Selection in the Search Bar. The View feature can be used to narrow down the Member search even further by only showing members with certain criteria. This can be useful in some searches of members. The types of views are listed below:

- **ONLY FORMATION** – Will only list members who are listed in the Formation program (this feature is only applicable to parishes who have the Formation Function set up).
- **ONLY SACRAMENTS** – Will only list members who have sacraments recorded in the system.

◆ **COMMUNITY MEMBERS** - Provides a listing of Community Members stored in the database by your parish. Community Members can only be Active or Archived (as opposed to Inactive or Deceased).

In our Diocese Database, Community Members primarily are the businesses and organizations associated with each parish. As Community Members, they are not stored in the same place or in the same way as households. They are considered part of the Community but won't be given envelope numbers. Businesses and organizations won't be receiving sacraments either. These should be given the Community Member type of Organization.

There are some exceptions, though, where Community Members may be Individuals or Families who aren't stored as Households. This is up to the discretion of the parish. However, if there is ever a chance that the individual or family might join the parish or might receive a sacrament at your parish, it is best to enter them as a Non-Parish Household as opposed to a Community Member.

- **INCLUDE ARCHIVED box** - This listing will only show the Active Community Members unless the INCLUDE ARCHIVED box is checked (appears to the right of the Search Bar). This is different than how the Households and Household Members listings are displayed (there are more choices with those as noted above).

These fields in the Community section are similar to those in Households:

- Physical Address
- Mailing Address
- Phone number
- Email address


These fields are different than those in Households:

- Contact Person and Title, instead of Head of Household
- Community Member type – Usually an Organization
- Sacraments cannot be recorded in Community Member records


The following information can also be recorded for Community records:

- Pledges
- Contributions

- Tags


 **ADMINISTRATION** – Provides access to the Administration functions of the system which includes the following list. There are also sub-lists or sub-tabs for some of the functions below (as listed below):

- ROLES – Lists the different User ID Roles that you have created for you parish; A role defines what a user can access in the database
- PARISH – Contains your parish information (address, phone number, etc.)
- USERS – Lists Users for your parish in the system and the role each is assigned
- LISTS
 - COMMON CITIES
 - COMMON PLACES OF BIRTH
 - COMMUNITY TAGS
 - HOUSEHOLD MEMBER TAGS
 - HOUSEHOLD TAGS
 - MINISTRIES
 - NON-MEMBER CLERGY
 - TALENTS
- PARISH PARAMETERS – Show
- PARISH FUNDS – List all funds defined for your parish
- PROCEDURES
 - GRADE PROMOTION
 - FORMATION CLASS PROCESSING
 - SACRAMENT BATCH
 - BATCH TAGS
 - TAGGING
 - IMPORT FILES
 - CURRENT GRADE PROMOTION
 - HISTORICAL GRADE PROMOTION
- EMAIL SETTINGS
- FORMATION SETTINGS


 **CONTRIBUTIONS** - Provides access to the Contributions functions of the system which includes the following list:

- IMPORT ONLINE GIVING FILE
- BATCH CONTRIBUTIONS
- LOOSE CONTRIBUTIONS


- BATCH PLEDGES
- DIOCESE FUND TOTALS

 **FORMATION** – Provides access to the Formation functions of the system which includes the following list:


- CLASSES
- ONLINE REGISTRATION

 **PORTAL ADMINISTRATION** – Provides access to the On-line Portal feature where updates from parishioners can be reviewed and accepted.

- NEW MEMBER REQUESTS
- CONFIRM ACCESS

 **REPORTS** – Provides access to the Reports functions of the system which includes the following tabs and sub-tabs (as listed below):

- QUERY
- PREVIEW
- EMAIL
- DOCUMENTS
 - PARISH DOCUMENTS
 - SYSTEM DOCUMENTS
- FIELDS

 **NOTIFICATIONS** – Provides a list of changes made to contact information in household records by other parishes associated with those households.