

200 - HOW TO... HOUSEHOLDS

How to View a Household – Viewing a household

- Step 1 – Search for the household (on the HOUSEHOLD Listing screen) by using one of the following fields to search by:
 - A. Household ID number assigned by the system. This is the first number listed on the Household screen. The system will dedicate the search to Household ID numbers if in the search area, you specify id=xxxx. For example, id=3454
 - B. Household Envelope number assigned by the parish. This is the number listed on the right side of the Household screen. A dedicated Envelope number search can be achieved if in the search area, you specify e=xxxx. For example, e=384
 - C. Last Name of either the Head or Co Head.
 - D. Last Name (space) First Name of either the Head or Co Head.
 - E. Street address or partial address street address of the Household.
 - F. Any field on the Household screen (phone number, email address, city, mailing address, etc.)
 - G. Keep in mind that your results will be many or few based on your search string.
- Step 2 - Once you see the Household you were looking for, Click on that Household. The Household's main screen will display the Household's contact information and notes at the bottom of the screen (you may need to scroll down).
- Step 3 – There are other tabs on this screen that you can go to. Each of these tabs will be explained later in this manual. They are:
 - Household Members – Shows all members of the Household
 - Pledges – Shows pledges made by the Household
 - Contributions – Shows contributions made by the Household
 - Tags – Shows which Household Tags have been assigned to the Household
 - Letters – Will allow you to produce a letter or document for the Household. (The letter or document template must already be stored in the system.)

How to Update a Household – Updating a Household is a 3 step process:

- Step 1 – Search for the household (on the HOUSEHOLD Listing screen) by using one of the following fields to search by as described above.
- Step 2 – Update the information on the main Household screen:
 - A. Key in the new information for the household.
 - B. Be sure to then Click the Action Button **SAVE** before leaving that screen.
 - C. The fields on this screen are explained later in this manual.

- Step 3 – Access information under one of the following Household Tabs:
 - A. Information can be viewed and updated under each of these tabs. These tabs are explained further in this manual:
 - Household Members
 - Pledges
 - Contributions
 - Tags
 - B. Household Members gives a list of the members in the Household with primary information. Click on a specific member to view that Member's additional information.
 - C. Pledges and Contributions are shown under their respective tabs. Pledges and Contributions can be updated or added through the Household (as opposed to using the batch options under CONTRIBUTIONS).
 - D. Household Tags can be assigned under this tab from the List pre-defined by your parish.
 - E. Letters is part of the Reporting function where a letter or document can be created for a single household.

How to Add a Household – Chose the Households Application (from the left panel) to add a Household and follow this 3 step process:

- Step 1 – The pre-screening process (Does the household exists at another parish?)
 - A. Click on the HOUSEHOLD option on the left panel of the main screen
 - B. Click on the Action Button **ADD A HOUSEHOLD**
 - C. Enter the Last and First Name of the Head of the Household you are adding (do not enter any other information because the system looks for an exact match)

For best results, you should only enter the Last Name and the First Name of the household you want to add. The system will look for an exact match on the Last Name, and a partial or exact match on the First Name.

You may need to enter a variation of the First Name just like you would when searching for an existing Household or Member in your own parish.

For example, if looking for Joseph and Elizabeth Smith:

<i>Enter</i>	<i>Last Name: Smith</i>	<i>First Name: Joseph</i>
<i>If no households are found, try:</i>	<i>Last Name: Smith</i>	<i>First Name: Joe</i>
<i>If still no luck, try:</i>	<i>Last Name: Smith</i>	<i>First Name: Elizabeth</i>
<i>Or even:</i>	<i>Last Name: Smith</i>	<i>First Name: Beth</i>

- D. Click the [NEXT] button at the bottom of the screen

- E. Any households with a member with the name you entered will appear on the right side of the screen
- F. You can Click on any of those households to see if it is the household you are looking for. This will give you more information about other members in the household.
- G. If more than one household showed up in the search, you can return to the original search results by Clicking [Back to search results]
- H. If you find the household you are looking for, Click [This is the same household. Visit this household.] to add that household to your parish. Once you add the existing household to your parish, all the common information for the Household and Members of the household will already be populated, and you can skip Steps 2 and 3 below and go right to **How to Update a Household** (later on this documentation)
- I. If you don't find the household you are looking for, Click [This is not the same household. Continue to add a new household.] to add a new household and follow Steps 2 and 3 below:

➤ Step 2 – Adding household information for the new Household

- A. The Last Name for the household will already be supplied from the pre-screening process.
- B. Identify the Household as a Parish, School, or Formation Household by Checking the boxes next to those identifiers. All may apply, or some, or none. When adding a household, the system will default the household as a Parish Household (the box will be checked), but you can uncheck that box if it doesn't apply.
- C. The Subscribe to Paper box is automatically checked for Parish Households.
- D. Enter the contact information for the household including:
 - a. Main phone number and email address to use for the household (other emails can be entered for each member in Step 3).
 - b. Physical street address where the household members live.
 - c. Mailing Address if different from physical address (i.e. a PO Box or alternate address where all mail should be delivered).
 - d. Seasonal Address if the household spends part of the year at another residence. This address won't be used by the system unless the Start and End month and day of month are populated and are in the range of the current day of the year.
 - e. Other demographic information and Notes can also be entered.
 - f. Before a household can be saved, at least one member needs to be added to the household (the head of household). Following Step 3 below:

➤ Step 3 – Adding a Member to the Household

- A. Click on the Action Button **ADD NEW HOUSEHOLD MEMBER**

- B. The Last Name and First Name of the member you entered back in the pre-screening process will be automatically entered.
- C. Always enter the following fields for a member:
 - a. Title (even for children – enter either Mr. or Miss)
 - b. Gender
 - c. There are also other fields that can be entered on the Member screen
 - d. Sacraments can also be entered
- D. Click the Action Button **SAVE**. This will save the Household and the first member.
- E. You can add other Household Members, including the Co Head, by repeating Step 3 above. For additional members, you will also need to enter:
 - a. Member Type (other than Head of Household)
 - b. Relationship to Head of Household

Even though Title is not a required field for a Member, please enter a title for the person regardless of age. This field is used in the Formal Mailing Name for letters and mailing labels at the Diocese and Parish levels.