

210 - HOUSEHOLDS FIELDS

The Diocese Camino Database is set up with Households in place of Families. Although the Diocese will be on one database, each parish will only have access to its own parishioners and won't be able to see all parishioners in the Diocese.

However, each household only has one record in the database which the parishes share. For example, if a household is registered at more than 1 parish, then its household record will be visible to all parishes where that household is registered. However, that household's contributions will only be visible to the parish where the contributions were made.

Households have:

- Household members
- Pledges (Other parishes and the Diocese Offices have no access to parish pledges)
- Contributions (Other parishes and the Diocese Offices have no access to parish contributions)
- Tags (tags are like keywords and will be explained more fully later)

Households contain members, just like Families contain members.

Household members have:

- Sacraments - Baptism, First Reconciliation, First Communion, Confirmation, OCIA (Formerly RCIA), Marriage, Anointing of the Sick, Funeral
- Talents - tracks what skills and talents a member has that could be useful to the parish
- Ministries - tracks which parish ministries the member participates in
- Tags - tags are like keywords and will be explained more fully later

HOUSEHOLD STATUS – The Diocese Database supports 4 types of Household status:

- Active – Households actively participating in the parish
- Inactive/Lapsed – Households that are considered lapsed in the parish
- Archived – Households that have officially left the parish (tells parish they are leaving)
- Deceased – The last living member of a household becomes deceased

HOUSEHOLD IDENTIFIERS WITH CHECK BOXES - There are 3 check box fields on the right hand side of the screen which can be checked to identify households as how they are classified. This can take the place of the current envelope numbering scheme which many parishes use or can be used in conjunction with that numbering scheme. They are:

Parish Household – This box will automatically be checked when a new household is added. It can be unchecked if the household you are adding is a non-parishioner.

School Household – This box can be checked to signify that this household has members who attend the parish school. It can also be either a parish or a non-parish household.

Formation Household – This box can be checked to signify that this household has members who are in the formation program. It can also be either a parish or a non-parish household.

The other 3 check box fields are:

Online Giving – This box can be checked to signify that this household makes online contributions.

No Envelopes – This box can be checked to signify that this household does not need printed envelopes.

Subscribe to Paper – This box will automatically be checked when a new household is added. They will then receive the Messenger paper. You can also at any time view and see who from your parish is receiving the Messenger paper. For the most part, this box should not be unchecked when adding a new household, since the goal of the Diocese is for all households, that it has contact with, to receive the Messenger.

It's good to note that a parish can subscribe an existing household to the Messenger at any time. Typically, if a household wants to be un-subscribed from the Messenger, they will contact the Messenger staff directly. If the household instead asks the parish to un-subscribe them, the parish must contact the Messenger staff and allow the Messenger staff to handle the un-subscribe request for better monitoring and analysis of their overall readership.

NON-PARISH HOUSEHOLDS

There are several types of non-parish households that we store in the Diocese Database.

- **School Households** may be non-parish households if the household belongs to another parish or no parish in the Diocese, but their children attend your parish school.
- **Formation Households** may be non-parish households for the same reason mentioned above, and their children attend your CCD or RCIA program.

The other types of non-parish households include:

1. Individuals or families who attend your parish masses regularly, but don't want to officially register with the parish.
2. Individuals or families who contribute regularly (may or may not want envelopes), but don't want to officially register with the parish.
3. Individuals or families who are having a sacrament performed at your parish (for example, baptism, marriage, funeral, etc.), but don't want to officially register with the parish.
4. Individuals or families who are visiting your parish and make a contribution. You may want to record that contribution under their name instead of entering it as Anonymous. This will vary on a case-by-case basis.
5. Individuals or families who make a memorial gift to your parish in the name of a deceased parishioner. More than likely, you will want to record this under their name as opposed to Anonymous. Again, this may vary from case-to-case.

If an individual or family has formed a relationship with your parish, regardless of how small or extensive (could be as small as coming to your parish to receive one sacrament), include them in the database as a household. Keep in mind, these can be recorded as non-parish households.

- For examples 1 and 2 above, those households will most probably be considered **Active**.
- For example 3 above, that household may be considered **Active**, **Inactive**, **Archived** or even **Deceased**, if the funeral of a non-parishioner is held at the parish.
- With the **Parish Household** box unchecked, these households won't have to be assigned an envelope number just to keep track of them as a "non-parishioner" in the database. They also will not be reported as parish households.

SPECIAL NOTE: When recording a sacrament received by a child, never mark the child as head of household. The child's parents should be recorded as Head of Household and Co Head. (A child should never be recorded as head of household in any household.)

PHONE NUMBERS – The phone numbers in the Diocese Database are formatted when entered. Therefore, you only need to enter the numerical part of a phone number such as 8595556789. The formatting with parentheses and dashes will appear as (859) 555-6789.

PLEASE NOTE: If you copy and paste a phone number onto the screen, the system may tell you the format is not valid. If this happens, you may have to delete a space from the end of the string you copied in order for the system to recognize the number as valid.

EMAIL ADDRESS – Email addresses are editing as to format when they are entered, but not to the email actual existence. The system will check to make sure all 3 parts of an email address are entered. For example: _____@_____. If one of these parts of a standard email address is missing, the system will flag it as invalid.

OTHER HOUSEHOLD FIELDS – The other household fields are for the most part self-explanatory. Some have drop down lists to choose from. Some of the lists are standard across the Diocese and allows for consistency across parishes. Others can be customized by each parish. More on these customizable lists later in this manual.

The **Parish Notes** field is viewable by the Diocese Office. The **Confidential Notes** field is not viewable by the Diocese Office.

ADDRESS FIELDS

Physical Address fields – This is where the household resides physically even if they can't receive mail at this address. The standard abbreviations for the street address should be used here so that this address complies with bulk mail requirements, for example, Ln instead of Lane. The city should be spelled out in full, for example, Fort Mitchell instead of Ft. Mitchell. It is preferable to use the 9 digit zip code by including the zip + 4. Be aware that the zip + 4 can change within a street, so it should be checked for accuracy using the Zip + 4 website from the USPS.

PO Box addresses should be entered in the Mailing Address fields unless you don't also have a physical address.

Mailing Address fields – This is where a household requests its mail to be delivered. It could be a PO Box or could be a different street address than their physical address.

Seasonal Address fields – This is a seasonal address that the household may use during a particular season or time of year. For example, households that spend the winter in Florida may want their parish mail and the diocese paper delivered to that address for that time period. The time period during which the household wants parishes to use that address can also be entered. The Seasonal Address will only be used if a time period is specified and only if the time period is in effect.

ADDRESS FIELD SPECIFICS – Since the address fields will be used for mailings (sometimes bulk mailings), following the USPS standards and abbreviations is necessary to reduce the amount of returned mail.

Address Line 1 and Address Line 2 – In most situations, only Address Line 1 will be populated whether it's a street address or a PO Box. When an apartment, condo unit, or suite number is specified, that should be entered on Address Line 1 after the street address. The apartment or condo unit number should not be listed on Address Line 2 because it will not work with bulk mail.

When bulk mail is read, it is read from the bottom up. If the apartment or condo unit number is listed on Address Line 2, USPS will read that number before the street address and will reject it. Having the apartment or unit number on Address Line 2 works in first class mail, but not in bulk mail. So for consistency and since these addresses are used for both first class and bulk mail, putting the apartment or unit number on the same line and following the street address is necessary.

Also, don't put the Apt number on Address Line 1 and the street address on Address Line 2. Only Address Line 1 shows up on the Household Listing screen. And the USPS prefers both the street address and any apartment, unit, or suite number to follow the street address on Address Line 1.

So when is Address Line 2 used? Very seldom. It would only be used if Address Line 1 has to be bumped down.

- For example: If Address Line 1 has a "care of" designation like "c/o John Smith." This might show up in a Mailing Address (if one was specified). Then the street address would be stored in Address Line 2.
- Another example: If Address Line 1 has the name of a facility specified. This isn't always necessary and for most residential living is not required (for example: it is not required for most senior living facilities). Then the street address would be stored in Address Line 2.
- A Final example: If Address Line 1 has the name of the organization or business specified. This is much more like to happen when addresses for Community members are specified. For example: The name may say: Mr. Jeff Wyler. Address Line 1 may say: Jeff Wyler Honda. In this case, the street address would be stored on Address Line 2.

City – The city should be spelled out instead of abbreviated. For example, Fort Mitchell instead of Ft. Mitchell.

State – The state should be abbreviated with the 2 letter state designation and be chosen from the dropdown menu. The system will only allow abbreviations. For example: KY instead of Kentucky, OH instead of Ohio.

Zip Code – It is best to use a nine digit zip code – the first 5 digits which are usually the same throughout a city. However, the zip+4 (the last 4 digits) will vary within a city based on the exact address. It can even vary within a street. Most people know the first 5 digits of their zip code, but most don't know the zip+4 (the last 4 digits). It is not required for first class mail, but is often required in bulk mail. In either case, it speeds up the processing, sorting, and delivery of USPS mail. There are times when bulk mail is returned to the sender if the zip+4 is not specified. Always using the zip+4 in either first class or bulk mailings helps reduce the amount of returned mail.

The system will supply the zip+4 as part of the valid address check. This is good for several reasons:

- Since most people only know the first 5 digits of their zip code, the last 4 digits will be automatically populated.
- When a household moves within the same city (which often happens), the new zip+4 digits will be automatically populated.
- When a household moves to another city (which also happens), the new entire 9 digit correct zip code will be automatically populated.

ADDRESS VALIDATION FEATURE – When an address is entered, it will be validated against the addresses available through USPS once Save is clicked. All you need to do to accept the validated address (which may change from what you entered) is to click YES. Please check the validated address before clicking YES. An explanation is below:

The system will check for:

Valid street number and address – if the USPS says the Address is Not Found, you can override the address, if you are sure it is valid, by clicking YES.

Valid street suffix – the USPS requires the use of abbreviated street suffixes for bulk mail and prefers it for first class mail. For example: if you enter Road or road, the validation process will change it to Rd - If you enter Boulevard, the system will change it to Blvd – Notice that the period after the street suffix is eliminated and is not used in standard USPS mailings.

PLEASE NOTE: The system will capitalize street names and suffixes if you enter them in all lower case (a nice convenience). It will also supply the correct zip code as long as you enter a number for the first digit.

often times an apt, unit or suite number is designated with a pound sign in front of it. For example: #15. Using the pound sign in the street address will cause an error. Instead use Apt, Unit, or Ste (for suite). If you don't know which one is the correct one to use, choose Unit since it is the most generic of the 3.

Often times, an apt, unit or suite number is designated with a pound sign in front of it. For example, #15. Using the pound sign in the street address will cause an error. Instead use Apt, Unit, or Ste (for suite). If you don't know which one is the correct one to use, choose Unit since it is the most generic of the 3.

Valid city – if the USPS associates a different city with that address, it will show up in the validation message block. You can override the city used in cases where a household wants to use Latonia instead of Covington, or Southgate instead of Newport. The easiest way to handle this situation is to Save the validated address and then go back and re-type the city name and Save again. This way you will still have the validated parts of the address and the correct zip+4. The second time you Save it, you will need to reject the validated address to keep the city as you entered it.

Valid state – if you have mistakenly put in the wrong state (for example, selected KS instead of KY), but you have the correct zip code (a Kentucky zip code), the validation process will correct the state for you.

Valid zip code – if only the first 5 digits of the zip code is entered, the system will supply the zip+4. Also, if you are changing an address and the new address uses the same first 5 digits of the zip code, the system will update the zip+4. (The zip+4 varies within a city and can even vary within a street).

NOTE ABOUT REQUESTING ADDRESSES FOR USE IN REPORTING – Although this will be covered under Reporting and Exports later, it is worth noting here that when addresses are pulled it will be in the following manner:

If you request the **Physical Address fields** in reports, the report request will use only the Physical Address fields.

If you request the **Mailing Address fields** in reports, the report request will look at the addresses in the following sequence in order to provide you with the most accurate address to use in a mailing:

- Check the Seasonal Address – if populated and the date range supplied is in effect, this address will be used, otherwise

- Check the Mailing Address – if populated, this address will be used, otherwise,
- Physical Mailing Address will be used.

To summarize, when asking for addresses in a report or export in order to mail something to households, please request the Mailing Address fields.

ADDRESS FIELDS IN WP – There are 3 sets of address fields in the Cov Dio Database for the parishes to use when recording the address for a household.

Physical vs. Mailing Address fields - Under most circumstances, only the physical address fields need to be populated because most people live at their physical address. In these cases, the Mailing Address fields should remain blank.

In the case that the household wants their mail delivered to a different address than where they live, the Mailing Address fields should be populated with that different address. In addition, the Physical Address fields should be populated with the physical address.

The Mailing Address could be a different street address or could be a PO Box address. Keep in mind that a PO Box address should never be entered in the Physical Address fields even if the parish doesn't know the household's physical address (since no one can live at a PO Box address). If this is the case, the Physical Address fields should remain blank.

Mailing vs. Seasonal Address fields – The difference between Mailing Address and Seasonal Address fields is that the Seasonal Address fields are used when a household is living out of the area for a specified amount of time during each year.

The most common example of this are "Snowbirds" which are those households that reside in Florida or another warm part of the country during the winter months. In these cases, their local Physical Address has not changed, but they will be residing somewhere else for several months during the year.

That different address should be stored in WP in the Seasonal Address fields along with the dates that the household will be residing there. You can store the seasonal address without the start and end dates. If those are left blank, the seasonal address will not be used. If those are populated, the seasonal address fields will be used in a report / export during that specified time period. Since a year is not entered into WP as a part of the date, the system will understand if a start date appears to be later in the year than the end date.

Often times, households will call the Messenger to have their paper delivered directly to their seasonal address when they are living there since it is a weekly paper. When this happens, the Messenger staff will update the seasonal address and enter the effective dates. The parishes will then have access to those seasonal addresses for mailing lists during that time. The reverse is also true if the household contacts the parish to alert the parish that they will be residing

elsewhere for a period of time and when. The Messenger will automatically use the seasonal dates when it runs a mailing list.

A PO Box can be stored in the Seasonal Address fields, if the household specifies that as their Seasonal Address. The purpose of storing a Seasonal Address is twofold:

1. The local physical address will not need to be changed each year to reflect the seasonal (or temporary) address or changed back again when the household returns.
2. Using the Seasonal Address when sending the household mail will allow them to receive the mail sooner than if the mail is forwarded through the USPS system. There is always a delay taking that route.

HOW ADDRESS FIELDS ARE PULLED FOR REPORTS AND FILES – Whenever you ask for address fields in WP for a mailing, you should select the Mailing Address. WP will check for addresses in the following order: Seasonal Address (based on date range), Mailing Address, then Physical Address. The sequence is detailed below:

When you request the **Mailing Address fields** in reports, WP will look at the addresses in the following sequence in order to provide you with the most accurate address to use in a mailing:

- Check the Seasonal Address – if populated and the date range is in effect, this address will be used, otherwise
- Check the Mailing Address – if populated, this address will be used, otherwise
- Physical Mailing Address will be used.

To summarize, when asking for addresses in a report or export in order to mail something to households, please request the Mailing Address fields.