



DATA INTEGRITY

Implement consistency within your team

Familiar with the phrase Garbage In = Garbage Out? Your Fellowship One database is a melting pot of information from all different departments of your church. In this session, you will learn how to maintain all of the information about your congregation effectively.

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DATA INTEGRITY

Implement consistency within your team

Are you sure that you have the most relevant information in the system? The information is going to be only as good as it's entered. During this session, we will discuss best practices for ensuring that your information is as relevant as possible.

We will be discussing the following topics:

- Data Entry Certified
- Fellowship One Management
 - Fellowship One Champion Team
 - Data Integrity Team
- Security Rights
- Data Collection
- Data Entry Standards in Fellowship One
- Attributes Best Practices
- People Statuses
 - Usage
 - Status Changes
- Duplicate Individuals
- Data Integrity Reports

DATA ENTRY CERTIFIED

There's a wide range of stances that churches will have on who can enter new individuals and households into Fellowship One. In some churches only 1 individual can enter and update records, while at other churches everyone can. Both ends of the spectrum are not the best approach to having data entered into the system. When there's only 1 person, that person becomes the bottleneck. When everyone has the ability to enter and update information, there's more of a chance for bad data entry practices to happen.

To ensure that you have the correct individuals entering information in Fellowship One, the church should develop a way to certify that the person has the training and understanding to perform the data entry.

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Minimally, you'd want the following performed prior to be given certain security permissions that allow data entry:

- Completion of eUniversity Online Training Classes
- An understanding of the churches standard for data entry

THE F1 CHAMPION TEAM

These players are the F1 experts within the church organization. They know the most about the features, how different needs can be translated into specific F1 implementations, how reports work, and not only know the standing F1 data policies; but enforce them as well. They are the people that promote the use and benefits of using F1 throughout the church. They are the data answer people, coaches, and torch bearers for F1 within the church. They are the champion team.

All of the church staff should be trained on F1 as everyone will be users of the system. However, not everyone will be using F1 every day. The people on the champion team will. This team consists of two subgroups: Champion Team Leaders and Champion Team Members.

The entire team should meet at least monthly to review and develop effective F1 use policies.

Champion Team Leaders

This is a select group consisting of 2 to 3 people for the whole church. They hold the security permissions to F1 administration and are the most knowledgeable and capable within the team.

Combined, their responsibilities include:

- Meet with the Executive Leadership to develop the most effective F1 use strategies that will result in the information needed by the Executive team
- Communicate the F1 use strategies to the Champion Team Members and ensure their execution
- Develop regular processes that maintain high database integrity. Some of these include resolving duplicates, identifying missing information and analysis of assigned people statuses.
- Be the most knowledgeable about F1 and all of its features within the church
- Provide training and documentation about Fellowship One to the Champion Team Members

- Research and answer questions about F1 best practices from the church staff
- Provide daily support to users with technical issues. Identify problems, provide corrective actions, document problems, follow-up with FT Support until resolution and communicate resolution as appropriate
- Maintain positive relationship with and be primary contact for FT Support
- Coordinate with Finance department to ensure F1 processes meet financial/audit standards
- Provide and comment on F1 enhancement ideas to FT
- Review, analyze, communicate and train the Champion Team on all F1 Release Notes and F1 Enhancements

Although not impossible, it is rare that a church have a single person available that is qualified to perform this role. Even if one did, it is not advised. The church is exposed to great risk if only one person possesses the knowledge and understanding to execute the Champion Team Leader role. When they leave, the church is invariably crippled in their ability to use F1 effectively until a new person can be trained up to replace them. FT has seen this happen several times to client churches over the years. The results are not pretty.

Instead, we have proposed that at least 2 if not 3 people share these responsibilities. The combined skills of the group should allow the church function very effectively without becoming dependent on a single person. These Champion Team Leaders can work out the division of labor without having to dedicate 100% of any one person's time to the job. It's the perfect application of the "divide and conquer" strategy.

When one of these leaders "moves on to other things", the remaining leaders can carry the load without much disruption as a new person is brought along side and trained up to fill in the gap. Most likely this will be one of the Champion Team members being promoted into this role.

Champion Team Members

This is a group consisting of 1 to 2 people from every ministry area within the church who will act as the F1 Champion(s) for their specific department. Together with the Champion Team Leaders, they comprise the F1 Champion Team. The members will be the most knowledgeable about how F1 is used within their respective department.

It's recommended the Champion Team Leaders coordinate with each department head to select the most appropriate people that would serve well in this role. Many times it

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falls to the pastoral administrative staff. They are usually the best fit for the following profile.

Combined, their responsibilities include:

- Be the most knowledgeable about F1 and all of its features within their department. Answer how-to-questions about F1 use and capabilities from department staff.
- Be the point of contact for technical issues passed along to the Champion Team Leaders from department staff
- Meet with the Champion Team Leaders to learn, develop and execute the most effective F1 use strategies for their ministry area that will result in the information needed by the Executive team. Communicate those strategies to department staff.
- Create new and update existing F1 activity/event configurations, people assignments, WebForms and reports in support of the needs of the department.
- Learn and execute data entry policies from the **Data Integrity Team**
- Create and update people records in F1 on behalf of department staff in compliance with data entry policies. General staff will not have people edit permissions.
- Provide and comment on F1 enhancement ideas to Champion Team Leaders

Generally speaking, the Champion Team Members are the F1 coordinators for their department and do the heavy management, data editing, and execution. If someone in the department needs a congregant's record added or changed, the members will do it for them. This will ensure adequate data integrity control. When everyone on a church staff has these permissions, integrity cannot be assured.

FT recommends that no more than 2 people serve in this role for any department as integrity becomes difficult to maintain as the size of the overall Champion Team grows.

DATA INTEGRITY TEAM

This group of people are most likely already serving on The Champion Team as a leader or member; but perhaps not. They have a specific set of responsibilities that transcend the Champion role which focus solely on policies and procedures that maintain data integrity within F1. The policies established by this team must be followed throughout the organization. This is generally accomplished though the Champion Team Members.

Some procedures will only be executed by the members of this team and enforced via F1 security permissions. If a church has a dedicated group of people who only perform data entry duties, typically one or more of them are serving on the Data Integrity team. It depends on how the duties are divided among the church staff.

The size of this group is typically 4 to 5 people including at least 1 Champion Team Leader.

Combined, their responsibilities include:

- Establish procedures to follow when adding new people in the Portal and via Check-In
- Develop data entry standards for the church covering names, phone numbers, addresses, people status usage, volunteer designation, etc.
- Establish and define all people statuses to be used and when they should be used
- Establish policies that govern how System status records such as New Check-in, New from Website, New from Small Group should be reclassified to a permanent status
- Establish policies that govern people status promotion and demotion such as movement from Visitor to Attendee to Member AND Attendees/Members/Visitors to Inactive statuses
- Establish policies that govern the detection, elimination and prevention of duplicate records
- Establish and monitor Ministry, Activity, and Schedule naming policies
- Establish policies that govern when children are promoted to adults
- Establish policies that govern the splitting and joining of households
- Document and communicate all policies to Champion Team and determine who is responsible for executing which policies

Combined, they should possess these skills:

- Strong desire to have accurate data
- Very detail oriented mixed with a spirit of exactness. Likes order and rules.
- Strong process thinker. Can devise a series of steps that when followed will leave nothing to chance.
- Can see the larger picture of how all the data interacts together across all departments

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DATA INTEGRITY TEAM

It's best to have a Data Entry Certified person in each Ministry. This allows for several key individuals that can enter and update information in the system. These individuals would also be key in meeting with the Fellowship One Champion to determine data entry standards. Below are common tasks for Data Integrity Team Members.

Weekly Data Integrity Team Tasks

- Meeting weekly initially to establish training guidelines and come up with a list of authorized data input specialist.
- Weekly meetings to establish how and in what format data will be tracked in Fellowship One. I.E. Will we use attendance or attributes to track baptisms?
- Establishing minimum information required to input a record in Fellowship One
- Establishing and approving any data capture methods such as first time visitor cards, registration cards, and volunteer applications.
- Running duplicate individual reports and merging down any duplicate records.
- Checking the system status queue in the duplicate finder and reducing the number of system status records to zero each week.
- Training classes for any potential data input specialist on staff or volunteers that want to help with data input responsibilities.
- Contributions Data Integrity team member match any unmatched checks in Giving Area

Monthly Data Integrity Team Tasks

The first two items in the list should diminish over time and move to monthly then quarterly meetings.

- Checking the database for inactive records. Maintaining the integrity of the database through more advanced data mining techniques such as more elusive duplicate records.
- If you have multiple campuses, associate individuals with correct campus status per Standard Operating Procedures

Periodic Tasks

The Data Integrity Team should meet after the announcement of a large event at the church to discuss how information will be gathered and tracked. They should also meet with the Fellowship One Champion team to coordinate their efforts.

SECURITY RIGHTS

It is important that the Fellowship One champion understand the power of the following security rights in relation to adding and editing households in Fellowship One:

Add/Edit Permissions

People Edit – Allows user to Create Households and Add Individuals. This also allows users to add new Communication and Address Values (not edit existing Communication and Address values) in addition, to changing existing requirements and attributes.

Communication Edit – Allows user to Add/Edit Communication values. You can choose all values or specific communication types.

Address Edit — Allows user to Add/Edit Address values. You can choose all values or specific address types.

Advanced Permissions

The following permissions are for advanced Data Entry Individuals. These would allow them to change or add information for a large number of individuals, as well, manage households and individuals through the Merge/Manage/Split utilities. Make sure to only provide these permissions to individuals on the Data Integrity Team. The important thing to understand is that there is no “undo” button once you’ve merged duplicate records.

Mass Action—gives users the ability to mass change status or mass create assignments. Additional security rights are required: Ministry Write (to the particular ministry where the activity exists) is required to create assignments and People Edit is required to update statuses.

Merge Individual Records—ability to merge duplicate records. This access right allows users to see two menu options beneath the Merge/Split menu option on the People tab—Merge Individual and Duplicate Finder.

Move Individual Records—ability to move individuals from one household to another. This access right allows users to see two menu options beneath the Merge/Split menu option on the People tab—Move Individual and Split Household.

Note: If the user does not have either of these access rights he or she will not see the Merge/Split menu option on the People tab.

Note: Answer ID 70 – “How do I get started assigning security rights to assign in Fellowship One users?” will give you a kick start in understanding all of the security permissions in Fellowship One.

Inactivating Portal User Accounts

One important policy to set up is when Portal User Accounts should be inactivated. This is very important for two reason: 1) For churches that are limited to a certain number of portal user accounts it frees up valuable Portal User Accounts and 2) Make sure that only authorized users have access to the system.

Department/User Last Login Time		
Lindsley Demo Church		
	Created	Last Login
John Doe	12/30/2005	1/28/2008 12:16 AM
Jeff Rice	1/31/2008	1/31/2008 9:44 PM
Winnetta Byford	2/28/2008	3/17/2008 8:24 AM
Mark Lindsley	9/22/2005	3/20/2008 4:01 AM
Lindsley Demo Church		
Have Not Logged On		
	Created	Last Login
Ursula Lindsley	7/26/2006	
Dave Smith	9/29/2005	
John Smith	6/19/2006	
Bill Wheaton	9/1/2006	

- Monthly run the A1045 – Portal User Last Login report. This report will show you the last time that someone has accessed Fellowship One.
- Ensure that you are notified if someone on staff or a volunteer is no longer working or serving at the church. Their Portal User Account should be inactivated to eliminate their access to Fellowship One and to free up a valuable user account.

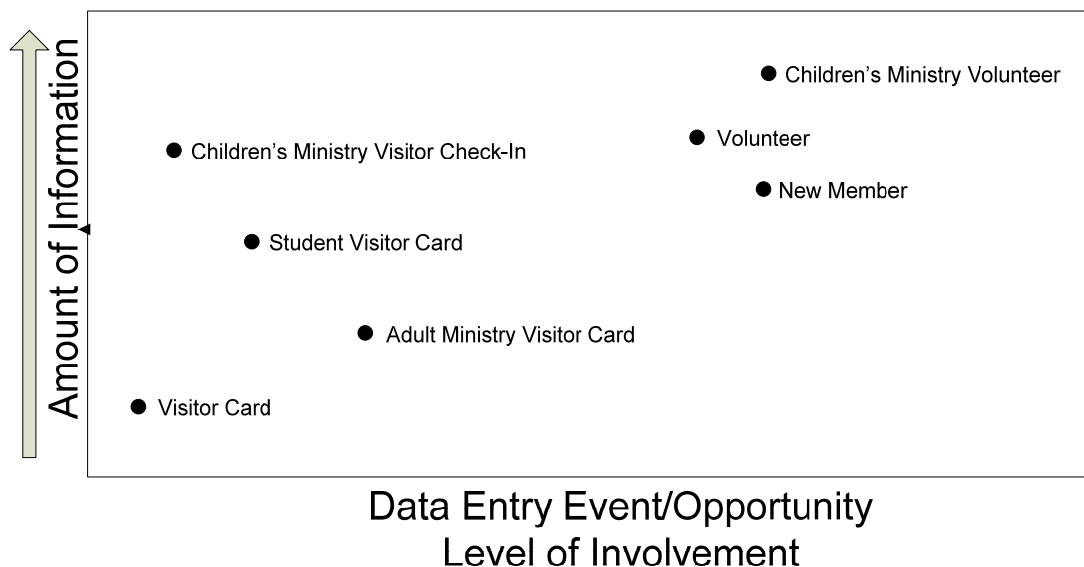
As a note, Portal User accounts are inactivated and cannot be deleted. The reason for this is that the inactivated portal user account might have tasks, notes, etc. that were created under their name. If the portal user account was deleted there would be no record of this valuable information.

DATA COLLECTION

Data collection is vital in ensuring the ability to communicate with the church congregation. It's important to determine the minimal amounts of meaningful information to create and maintain on an individual's record in Fellowship One.

When an individual or family is attending a church there are events that are implied permission points to request meaningful information. Each of these events are varying based on what the individual is attending and/or how long they've been attending the church. For example, if the individual is attending the main worship service they will probably give minimal information on the Visitor Card. However, if their children are being ministered to in the Children's Ministry, the implied permission for information is increased.

Implied Permission for Information



When creating an individual in Fellowship One, the absolute minimal information required are **First Name**, **Last Name**, **Household Member Type**, and **Status**. Listed below are additional recommended informational items to request of individuals.

Based on the Implied Permission for Information, individuals will only give the amount of information that they're comfortable with providing. Because of this, it's important to choose wisely what you ask, so that you're not asking for too much information.

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Please see [Best Practice – Multi-Campus](#) for discussion on the use of SubStatus for each individual based on their home campus.

Data Quality Letters

Some churches choose to provide a Data Quality Letter to their congregants. The Data Quality Letter lists household information as an area to provide updated information. This letter can be mailed or handed out and then returned when completed. Below are some of the Data Quality Letter reports:

A1200 – Data Quality Letter By Status - Provides a formatted letter containing household information for verifying data quality.

A1201 – Data Quality Letter By Status with No Logo - This report provides a formatted letter containing household information for verifying data quality. This report is much like A1200; however, there is no logo used and the date is left justified rather than right.

A1202 – Data Quality Letter By Status for Seasonal Locales - Provides a formatted letter containing household information for verifying data quality. Information for Seasonal Locales.

A1203 – Data Quality Letter with No Logo by Head Status - This report provides a formatted letter containing household information for verifying data quality. This report filters for Status based on Head of Household and if there is no Head of Household then it is filtered on Spouse's Status.

A1204 – Data Quality Letter By Status and Contribution with No Logo - This report provides a formatted letter containing household information for verifying data quality based on Status and Contribution Filters.

DATA ENTRY STANDARDS IN FELLOWSHIP ONE

The key to a useful database is consistency. Fellowship One thrives on structure. It is your responsibility to create consistent processes for maintaining the data you already have in your Fellowship One database. Document these policies and communicate, communicate, communicate.

Establish procedures to follow when adding new people in the Portal and via Check-In

Determine that there is no record for an individual existing in Fellowship One. Then enter the new record for that individual or family, following consistency standards.

Searching for a person in Fellowship One:

- Use the People Search function in the upper left hand corner. Use the 3 & 3 method! First 3 letters of the first name and then the first 3 letters of the last name. This usually will reduce the search results to what you're looking for.
- If the person's name is Bob, try entering Rob instead.
- If you don't find the person by the 3 & 3 method, try the following:
 - Partial last name
 - Partial address **OR**
 - Partial phone or email

Search for the person several different ways to ensure that they are not already in the database. Again, keep in mind that someone with the name Elizabeth, may be in the database as Liz, Beth, or Elizabeth.

Enter a new "household":

<u>Primary Address</u>	Use proper capitalization and standard postal street abbreviations (i.e. Fifth St. Ave. Cir. Etc.)
<u>Primary/Home Phone Number</u>	When entering the phone number include dashes 469-555-1234. Do not enter parentheses around the area code. (You'll want to decide how you want this information formatted, as the phone number is not automatically formatted.)
<u>Household Email Address</u>	Determine if you will be using Household Email Addresses. Some churches choose not to have a Household Email Address and rely solely on the Individual Email Address.
<u>Household Member Type</u>	The first person entered for the household should be the "Head". If you are entering a married couple, the "Head" should be the man and the woman is the "Spouse". If the woman is married but we are not entering the husband in the database, enter the woman as "Head" in this case. The children added to the household will be "Child".

<u>Prefix</u>	Mr. Mrs. Ms., Miss, Dr. etc. for "Head" and "Spouse" only. No prefixes for "Child" (under 18 years old)
<u>Status</u>	Using the People Status Plan document, determine what Status that you'll use for new individuals.
<u>SubStatus</u>	The Sub Status is most commonly used for Multi-Campus Churches. If so, then each individual record needs a SubStatus (home campus) entered. Default to all family members attending the same campus unless otherwise known.
Status Date	Enter Status Date as the date the record is being entered. Type "T" and the record will be populated with today's date
Marital Status	Enter Marital Status, if known. If the person you are entering is married but the person's spouse is not being entered into the database, still choose married status for the person being entered into the database. For a child (under 18), you have the option of using Child/Youth.
Gender	Enter the Gender. If the gender isn't obvious, don't guess.
Date of Birth	Enter the Date of Birth. Must include Year of birth.
Phone Numbers	Enter Mobile (cell) and Work numbers. Phone numbers default to listed. If noted as unlisted, you can designate it as such.
Email Addresses	Enter Individual's Email Address here. Email addresses default to listed. If noted, as unlisted, you can designate it as such.
Web Address	Web address is helpful if that person has a blog, twitter account, work web address, etc.
Goes By Name	To add a "goes by" name to a member of the household, click on the person's name and then click on the "edit" button in the lower right corner of the screen.

Establish policies that govern how System status records, such as New Checkin, New from Website, New from Small Group, should be reclassified to a permanent status

Establish policies that govern people status promotion and demotion such as movement from Visitor to Attendee to Member AND Attendees/Members/Visitors to Inactive statuses

If you're using Visitor, you have to have some determination to be able to move an individual from Visitor to an Attendee. That's why a lot of churches choose to use solely the Attendee status. Use an Involvement Report to find individuals that don't have any involvement so that they can be identified and moved to an Inactive Status.

Establish policies that govern the detection, elimination and prevention of duplicate records

Duplicate Finder: Run weekly checking for New From Check-In and New from Website. If you wait too long, the duplicates will accumulate tremendously.

Establish and monitor Ministry, Activity, and Schedule naming policies

This is important for reporting purposes. It's also very key for multi-campus churches.

Establish policies that govern when children are promoted to adults

Most churches will promote Children (Child/Youth) to Adults (Single) when they turn 18. This would also involve splitting them off into their own household.

Establish policies that govern the splitting and joining of households

PEOPLE STATUSES

Usage

Fellowship One (F1) provides a classification mechanism called a People Status to group individuals within the church into one of several categories. Each person can only belong to a single people status. The one selected for a person should reflect the primary reason why that person exists in the database at all. The reason usually determines the types, subject matter and frequency of mail outs, emails and phone calls placed to that specific group of people. In other words, the people status should reflect the types and reasons a church will be communicating with large segments of people within the database.

For example, members and regular attendees might receive Monthly letters and "We Missed You" letters while missionaries would receive correspondence focused on their needs. However, Inactive people may only receive notices about major upcoming events. When used this way, people statuses become an effective tool in targeting the correct group to receive the correct communication from the church.

Statuses should not reflect a specific ministry program or department. People's involvement in the various activities within the church will be tracked using other mechanisms within F1.

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Status Changes

With the help from the People Status Plan document, define each Status name. What does it take to become an Attendee, Contributor Only, or a Member? Create a plan for status progression. Document the process and communicate this to all household creators and editors. This is especially important with multi-campus databases.

Tip! In the case of using a single Fellowship One database for multiple campuses, consider using a sub-status to associate the congregant with their “primary campus”. Create a 2 or 3 letter abbreviation for each campus and use these abbreviations as sub-status names under each status. For example:

Member (status)

- FTW (sub-status)
- ATL (sub-status)
- DAL (sub-status)

Attendee (status)

- FTW (sub-status)
- ATL (sub-status)
- DAL (sub-status)

Status Promotion

Most churches will have a standard process in how someone becomes a member. Once an individual or group of people meet the membership requirements, you can report on them. When doing so, you can choose the output type of Temporary Group. This will allow you to create a Temporary Group that can be used in the Fellowship One Portal. In the Fellowship One Portal, you’ll then be able to use the Mass Action function to promote all of the reported individuals to the Member Status.

There are several reports that will identify individuals that might be active or inactive based on GAAC – Giving, Assignments, Activity, and Contact. You can perform a search on GAAC or Involvement to see the reports that will assist with this status cleanup.

A great report to run to see if someone should be promoted is the **P1062E – Status Promotion** report. This report was designed to give a specific listing of households who might require manual status change on the user's part. It will list families in the church who have met some requirements for status change:

1. Have attended a certain activity as a New From System/Check In Status a certain number of times during the date range
2. Given a contribution at least X times during the date range
3. Has X contact items in the date range selected
4. Has a family member serving in a ministry who is not currently a member.

P8520 – Household Connected Not Connected Report - This report will display households if any individual in the household gave, attended, or had a participant/staff assignment during the selected date range. This report follows the principle if one person in the household is attending then all are attending.

Status Demotion – Inactive Individuals

There are several reports that will identify individuals that might be active or inactive based on GAAC – Giving, Assignments, Activity, and Contact. You can perform a search on GAAC or Involvement to see the reports that will assist with this status cleanup.

P1029E – Individual Inactivity - This report will display individuals that have not given in the date range specified, have no assignment to the selected activity, and lack an active staffing assignment.

P1025E – Individuals by Household Inactivity for Date Range - This report was designed to show households with a specific level of inactiveness in the church to help reach out and contact those who are not giving in the date range specified OR who are not attending any activities in the given date range.

P6100 – Individuals with No Attendance No Assignments No Giving - This report is designed to display individuals that have not given in the date range specified, have no assignment to the selected activity, and have no attendance.

ATTRIBUTES BEST PRACTICES

Attributes are created under the Admin tab so it's under the control of the Fellowship One Champion. Attributes are used to store information that is not stored in common areas of Fellowship One. In other databases they're referred to as custom fields. With the ability of creating Attributes only through the Admin tab it allows a capability of standardization of how the Attributes will be displayed.

- **Elementary/Student Grades** – If the Grade (8th, 9th, 10th grade, etc.) needs to be recorded somewhere other than at the Room, Location, Class (RLC) location, then consider recording it as the Graduation Year as shown below. This is very helpful to identify children/youth that might not be an active participant of the children/youth activities. Yearly, you would just change the names of the Individual Attributes to reflect the current grade that the individual would be in.
 - Attribute Group: Graduation Year
 - Individual Attribute: 2008 (12th Grade)
 - Individual Attribute: 2009 (11th Grade)
 - Individual Attribute: 2010 (10th Grade)
- **Hobbies** – It is quite common for Men's Ministries, Women's Ministries and other ministries to want to create their own set of hobbies. However, it would be more beneficial to have this created under one Attribute Group of Hobbies so that it could be more easily searched on.
- **Sensitive Information** – Need to record sensitive information for an individual such as Costume Sizes? Individual Attributes will probably not be the best location for this information as any Portal User can view Individual Attributes listed. This information would probably be best suited under Note Types. Note Types can then be assigned to specific individuals that need to have access to that information.

MAIL RETURNED/INCORRECT

When postcards or mailings get returned, it's important to change the Primary Address to Mail Returned/Incorrect. This ensures that no future mailings be mailed to the incorrect address. It also provides a history for that family. This history helps the Accounting Dept know that even though there's a new address, it's actually the same family that's in the system. This practice avoids duplicate records being created in the system.

MERGING DUPLICATES BEST PRACTICES

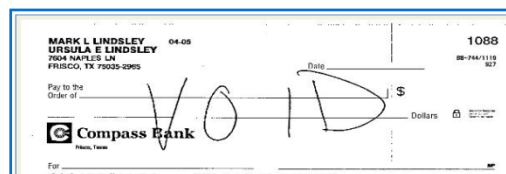
As mentioned earlier, the Data Integrity Team is best suited for handling duplicates. This section is not intended to explain how to merge duplicates as that's already outlined in the Fellowship One Training Manual. However, this section is to point out Best Practices for Merging Duplicates.

Source of Duplicates

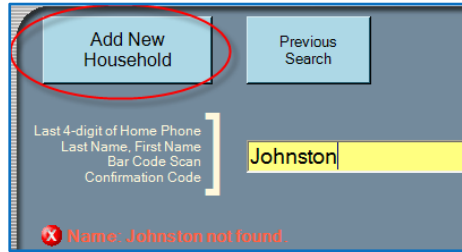
First of all, where do duplicates come from? Duplicates come from a wide range of entry points. The most common are listed below:

- **Visitor Cards** – When individuals or households are created at the point of entering Visitor Cards, duplicate individuals could be inadvertently created. This is why the Search function is very prominent in the **Add New Household** screen.

- **Contributions** – The Finance Department will have the ability to add new Individuals and Households so that Contributions can be attributed to the correct person. If they don't take the time to search for that person or household, they might create a duplicate record.



- **Check-In Application** – Well meaning Check-In Volunteers might add a family if they cannot find them in the system. This happens when they cannot find them based on the last 4 digits of their home phone number or by searching on their name. The use of barcodes on key cards will reduce this introduction of duplicate records.



All volunteers should be trained to only add new people to Check-in so duplicates are minimized. Volunteers should also know how to update phone numbers, add one-time visitors, and find one-time visitors to increase data integrity in the system. Since Check-in is designed to collect limited data a first time guests should fill out a Check-in Registration form to give the data entry team a chance to complete the family information.

- **WebLink** –These intentional duplicates are created when individuals first create a WebLink User ID for themselves to use Online Giving, Activity Registration, Small Group tools, etc. The intentional duplicate is created for a couple of primary reasons:
 - Ensures that someone cannot be impersonated by a person with less than honorable intentions. For example if the Senior Pastor already has a Web User ID, you'll be able to see that a different Web User ID is being created for him and that might not actually be requested for him.
 - As well, the creation of this duplicate ensures that the most up to date information is obtained from the end user. We can assume that whatever information that they entered to create the Web User ID is the most current information.

A screenshot of a web application interface titled 'Dynamic Church Log In'. The main content is a 'Create Account' form. The form is divided into several sections: 'Personal Information' with fields for Position, First Name, Last Name, Gender, Marital Status, Date of Birth, Country, Address 1, Address 2, City, County, State, and Postal Code; 'Contact Information' with fields for Home Number, Work Number, Mobile Number, and Email; 'User Name / Password' with fields for Desired User ID, Password, and Re-enter Password, with a note that passwords must be 6-15 characters and are case sensitive; and 'Password Reminder' with a dropdown menu for a challenge question (currently set to 'WHAT WAS THE NAME OF YOUR ELEMENTARY SCHOOL?') and fields for Response and Re-enter Response. At the bottom of the form is a 'Create your account' button.

Small Group Leaders – Small group leaders must be trained to only add new people to the Fellowship One database if they are sure that they aren't in the system. Encourage them to check for the individuals in at least two (2) ways before adding the household to Fellowship One. Leaders must be careful to update communication information for their group appropriately. Please note that you have to specifically give the Individual's record access to the permission of "Can Add Individual in WebLink". This is done under the individual's record.

HOW TO MERGE DUPLICATES

Now that we know where duplicates come from we can strategize on the best way to reduce them and clean up the system.

- **Duplicate Finder** – Use Duplicate Finder when possible.
 - This is best for when duplicates are created via the Check-In application, WebLink, and/or the Small Group Manager. The Duplicate Finder will allow you to search by status and clean up the duplicates that were created by that source. For example, if a duplicate record is created via WebLink it will have a Status Group of System and a Status of New from Website. By focusing on a status such as New from Website, you'll be able to clean up all of the duplicates created from that source.
 - Another advantage of using Duplicate Finder is that it will allow you to merge multiple duplicates into one master individual record.
- **Frequency of Merging Duplicates** – When and how often should you be reconciling duplicate records?
 - You'll want to check out "New Checkin" duplicates weekly when your church is using the Check-In for weekend activities.
 - When you initially launch a new offering on your web page for use with WebLink you'll have an increase of "New from Website" possible duplicates. You'll want to check these daily after the initial launch so that individuals can take advantage of what they visited the website for; such as Online Giving, Small Group Manager, and Activity Registration. Once the initial rush is over then you can taper it back to once a week.
- **Merge Individuals** – Once the broad stroke of merging duplicates is done by using the Duplicate Finder, you can dig deeper by using a Duplicate Individuals report and the Merge Individuals tool.

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- **Households – Who to Merge First?** The best practice to follow when needing to merge an entire household is to merge all of the children first, the spouse, and then the head of household. This ensures that none of the children are orphaned by themselves and the giving records are kept with the Head of Household.

DELETING PEOPLE

Fellowship One does not give any functionality to support deleting individuals or households. If it did, then all of that person's attendance records, giving and assignments would be removed from the system through the deletion, leaving holes in the information previously gathered.

Sometimes deleting makes sense – the individual's information may not have attendance, giving, assignments, contacts or even contact information. They may only have first and last name, or be deceased. In cases like these, consider merging the extraneous individuals with a record created specifically for this purpose.

Create an individual named Recycle Bin. Make sure the status is inactive or deceased so they are excluded from reports and labels. **Merge any of the people that need to be deleted with the Recycle Bin individual record.** This will keep any contributions, contact items associated with the extraneous person in your system.

If someone is merged with Recycle Bin, the previous name will display in the Duplicate Queue. This method leaves all of the information gathered from that person in Fellowship One, minimizing any opportunity for holes in information previously collected in contributions and attendance.

DATA INTEGRITY REPORTS

You can find Data Integrity type of reports by using the tags of Administration, Data Quality, and/or Data Validation. Below are some reports that will be helpful in making sure that the data is maintained optimally.

Households Missing Head

A1015 – Households Missing a Head Member Type – This report will list all households in the church's database that do not have a head of the household assigned.

It's a best practice for each household to have the Household Member Type of Head. This ensures reports that need the Head of Household will work correctly. Also, in the case of children or youth, having the parents' information in place will allow you to be accountable for the children in your care.

Child Attending X Missing Head of Household

M1092E – Child Attending X Missing Head of Household – This report returns the name, address, school, home phone and email address of children attending an activity when there is no head of household listed.

Again as stated in the previous report, it's very important to have the parent's information correctly listed.

Households with Multiple Head or Spouse

A1017E – Households With Multiple Head or Spouse – This report was designed to list households that have multiple individuals listed as head or spouse.

A single Head or Spouse is needed for each household so that reports and mailings based off the Household Name are listed correctly.

Individuals Missing SubStatus

A8004E – Individuals Missing SubStatus – This report is designed to show individuals missing SubStatus.

This report is a must for Multi-Campus Church configurations. In these type of configurations, the SubStatus is the primary Campus that the individual attends. This will be used in reports and mailings.

Individuals Missing Basic Information

P7000E – Individuals Missing Basic Information – This report provides a list of individuals who are missing some type of Basic information. This refers to the Basic tab on the People edit screen that lists their First Name, Last Name, Prefix, Suffix, Gender, Date of Birth, Status, Occupation, etc.

This report will display information that is missing from an individual's record.

Individuals Missing X Value

P7001E – Individuals Missing X Value – This report provides a list of individuals who are missing one of the following values: Address, Home Phone, Work Phone, Cell Phone, or Email. You have the ability to filter by a specific activity.

This report will display information that is missing from an individual's record.

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Individuals Missing Communication Value By RLC

P7006E – Individuals Missing Communication Value By RLC – This report was designed to show individuals and the communication values they have and are missing from Home Phone, Cell Phone, Work Phone, or Email Address based on Participant and Staffing assignment.

This report is very helpful in making sure that you have key communication items for individuals in a specific Activity – Room, Location, Class (RLC).

Volunteers Missing a Birthday

A3005E – Volunteers Missing a Birthday – This report was designed to give a listing of all volunteers who do not have a birth day recorded in the system.

Most churches will want to have the date of birth recorded for volunteers. This report allows you to choose a specific ministry, such as the Children’s Ministry.

Participants of X Age Checked into X Room-Location

M2000 – Participants of X Age Checked into X Room-Location – Provides a list of participants, of a certain age, who were checked into a Room-Location. This report is intended to help you find participants who are referred to the wrong class. For example 4 year olds, being checked into a class that is really intended for 3 year olds.

This report will assist the Children’s Ministry to ensure that children are assigned to the correct room based on age.

People with Tag Comments

A9200E – People with Tag Comments – This report was designed to give a listing of individuals who have Tag Comments.

This report is great for Children’s Ministries to run to make sure that there isn’t any questionable content in the Default Tag Comment field. The Default Tag Comment will print out on the Check-In Name Tag anytime the person checks in for an event at the church.

Individuals Missing Photos By Activity

A1023E – Individuals Missing Photos By Activity – This report was designed to list individuals having or missing a picture who have attended an activity within a certain date range.

This report is helpful for ministries that are trying to have a photo in place for each individual within their ministry.