

DIOCESE OF  
Jefferson City

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TOGETHER

# PROCEDURES AND BUSINESS RULES CONCERNING RAISER'S EDGE **NXT** DATA ENTRY

REVISED MARCH 2022

## Adding an Individual Constituent Record

Always search for an individual constituent prior to adding them as a new constituent. Attempt to check alternate spellings; spouses name, search by address; etc.

- Check for spouse's/partner's name in addition to the individual's name if known.

From the Home page, under the "Tasks" Module, select "+ Add constituent." Select "Individual" Select "Add New Individual," then proceed:

1. **Title** DO NOT USE HONORIFIC TITLES such as Mr., Mrs. Or Miss, unless the constituent expressly requests the honorific title. Only use ecclesial, professional or military titles (Father, Bishop, Monsignor, Dr., Cpt., etc.) For ecclesial titles – Father, Monsignor, Bishop, Archbishop, Sister, Deacon, Abbess, Brother, etc. – do not use abbreviations.
2. **First Name:** legal name (ie: Robert)
3. **Last Name:** required
4. **Preferred name:** if this is a known only preferred name (i.e. Bob for Robert). Otherwise, enter first name as on the record. This field must have an entry, even if it is the same as the First name for other features to work, such as email.
5. **Former name:** Maiden name if known.
6. **Gender:** if known
7. **Date of Birth:** if known. Select a date from the calendar icon, or type in the following format: 5/20/1924

Select "+Add address"

8. **Address Type:** Select "Home"
9. **Valid From:** Select today's date or type in the following format: 5/20/2020
10. **Address** It is best to enter one line only. (ie. 123 Main St, Apt 4; NOT 123 Main Street on line 1 [enter] Apt 4 on line 2  
The post office requires the spelling out of the word "Saint" in the name of a city, ie, Saint Martin's, Saint Thomas, etc.
  - a. Capitalize the first letter of each word
  - b. Abbreviate when possible
  - c. Use Ave, not Avenue. Use St, not Street.
  - d. Use N, not North. Use SW, not South West



e. Do not use periods or commas (Post Office requirement)

11. **Click on Star Icon** to make this address the primary address.

12. Select "Done"

Select "+Add phone number"

13. **Phone Type:** Select "Home" even if it is a cell phone. All primary phones are marked "Home" and "Primary" for other features to work such as lists and workflows

14. To enter the phone number you do not need to enter spaces, parenthesis, or dashes, NXT will automatically format this for you.

15. **Click on Star Icon** to make this address the primary phone.

Select "+ email address"

16. **Email Type:** Select "Email." MMMemo is only used for addresses that want to receive the Monday Morning Memo. If the primary email is the same as the MMMemo email address, both entries still need to be made so that they will have two email address entered. If you have ANY alternate email address, enter it at Email Type: Email 2. This should be rarely used. They may have a work and personal email, find out which one they want to receive messages from the diocese.

17. **Click on Star Icon** to make the "Email Type" the primary. MMMemo Type or Email 2 should never be marked primary.

Select "+Add a constituent code" **THIS IS REQUIRED FOR ALL CONSTITUENTS.**

18. Using the dropdown menu, select the parish by city name.

19. **Start date:** Choose today's date from the calendar, or enter manually using the following format: 5/20/2020

- a. If the parish is unknown or outside of the Diocese, select Non-Parish.
- b. If the Constituent is in the RCIA process, select the parish where he/she is participating.
- c. If the Constituent is known not to be a Catholic or is not in RCIA, select Non-Catholic.



- d. Constituent Codes for people who are not parishioners are:
  - i. Anonymous
  - ii. Non Catholic
  - iii. Non Parish (Do not know the religion of the individual)
  - iv. CCCNM Non Parish (For Catholic Charities purposes only)
  - v. Missions Non Parish (Gave to Missions Appeal and do not know the religion of the individual)
  - vi. Seminarians
  - vii. Catholic MO only (for the newspaper)

If there is not a spouse, proceed to Primary Name Format Guidelines below. If there is a spouse, Select "Save" and you will be directed to the individual's dashboard. Here you can enter the spouse in the relationship field. Wait to add Name formats; and continue with "Relationships – Spouse."

## *Relationships- Spouse*

IF THERE IS A SPOUSE, YOU MUST LINK THEIR ADDRESSES BY CREATING THE RELATIONSHIP

Go to Relationship box. Select "Add," select "Individual Relationship." (It will prompt you to search to ensure the spouse does not already have a record.) Select "Spouse" from the drop down menu for both the husband and wife. DO NOT select "husband" and "wife." Check [relationship name] is the spouse box. The box will prompt you to choose one record as the "head of the household." Choose the husband's record as Head of Household unless the husband is non-Catholic.

Go to spouse's record by clicking on the Relationship name in blue to the left of their name in the relationship box. Go to "Contact information" module, select "Edit," select "Address," Select "+Add a **shared** address." It will prompt you to select the spouse record that you want to share the address with. Select the record, and chose "next." It will prompt you to select which address to share if there are multiple addresses. Select the proper address, then choose "Finish."

In the Relationship tile, click on the ellipse (...) next to the spouse's name, select "Edit Relationship" This will allow you to verify or to mark the husband as the "Head of Household." Unless specifically requested, the husband should be the Head of Household.



Primary Name Format Guidelines:

Make the appropriate selection from the drop down menu:

- When the couple has two different last names, use First Last & First Last
- If one person has two last names, or a hyphenated last name, treat as two different last names.
- Ensure that the full preferred last name is in the 'Last Name' field of the general tab.
- When the couple has the same last name, use First & First Last.
- Use nicknames unless constituent asks to be referred to otherwise.

Addressee: First and Last name. Please review the section on titles above regarding use of titles in Addressee. Note ALL religious sisters and brothers will have initials as a suffix (for their order); some priests and bishops may also. Deacons do NOT belong to religious orders.

For the non-HOH, put their name first on their record (Ex. Helen and John Osman / Helen and John).

Examples:

- a. John and Helen Osman
- b. Father Abraham B. Brown
- c. Brother Jason T. Doke, Info
- d. Sister Helen Osman, Info
- e. Bishop Peter A. Smith
- f. Monsignor Robert T. Elder
- g. Deacon John and Helen Osman

If your selection does not appear in the drop down menu, you may manually enter the addressee and salutation by selecting the "Custom" box to the right of each field. **NOTE:** This should be used rarely. If you use a custom/manually entered name, this will NOT automatically update when changes are made. If a change is needed, you will have to remember to go in and manually change these two fields anywhere this information exists.



2. Salutations use only nickname (or first name) except for religious brothers and sisters, bishops, priests (including Monsignors) and deacons. Note that religious sisters and brothers and deacons use first names in the salutations; all others with ecclesial titles use last names.
  - a. Johnny and Helen
  - b. Brother Jason
  - c. Sister Helen
  - d. Deacon John and Helen
  - e. Bishop Smith
  - f. Monsignor Elder
  - g. Father Brown

Once all this data is entered, Select "Save" and you will be directed to the individual's dashboard. Here you can enter solicit codes, relationships, custom fields and notes.

### *Solicit Codes*

To add a solicit Code, Select "Edit"  
Select "+ Add a solicit code"  
Choose from the drop down menu appropriately:  
"Valid from" select today's date or enter the date manually using this format: 5/20/20

Solicit Codes available:

Do Not Acknowledge—**for anonymous gift givers**  
Do Not Remind  
Do Not Phone  
Do Not Invite  
Do Not Solicit—**will receive no solicitations for money; but can receive other communications**  
Do Not Mail—**will receive no mail from the Diocese**  
Do Not Mail TCM—**to be excluded from the Catholic Missourian mailing.** Individuals should only be removed at their own request.  
Do Not Solicit CSA; Do Not Mail CSA  
Do Not Email—**will receive no email messages from the Diocese**  
Do Not Mail MMMemo – **to be excluded from the Monday Morning Memo email messages**



**NOTE:** Solicit code preferences should be followed by all staff at all times. They represent a communicated preference from the constituent. If specific phone numbers, postal addresses and email addresses are not to be used, these should be excluded from all lists.

## **Divorce**

In the Constituent summary Tile, Select "Edit," then "Personal Info" to update Marital status to divorced. Then, select "Name formats" to update the Addressee field and Salutation field.

In the Notes Tile, Select "Add note" to add the information on the former spouse's name: Note Type will be "Removed Spouse." (**NOTE:** Because the spouse's name will not be associated with the record, you will need to enter the Spouse's name in the notes Summary for historical purposes.) Select "Save."

In the Address Tile, Select "Add new address" to update the address information. (**NOTE:** Even for the spouse who might be keeping the same address, you will need to do this to make the primary, home address one that is not shared with the former spouse.)

New address will be address type, "Home"

Select the green star to make this address the primary address.

Select the red circle with the line through it to make all other addresses "Do not mail."

Verify that all other addresses are address type "Previous Address"

**NOTE:** Using the pencil icon next to any address allows you to edit any part of an address.

In the relationship tile, click on the three dots next to the spouse's name, select "Delete Relationship." If you are unable to delete the relationship with your security roles, select, "Edit relationship" and put an ending date in the "relationship ends" field.

Then uncheck the box that says, "[spouse's name] is the spouse. (This will make both records the Head of Household.)

Repeat these steps for the spouse's record.

## **Changes in Address Information**


NEVER delete any address.

Make an invalid address the "previous address" and Add a new address, making the new address "Send Mail" and "Preferred Address" and "Home" type.




1. Search and open the Constituent record.
2. Go to Contact information module, select "Edit." From the dropdown menu, choose "Addresses."
3. Select "Add new address" and enter the new address, naming the type "Home."
  - a. If the address is shared with a spouse, select 'Add a shared address.'
4. Select the green star icon to make the new address the primary address. (This will automatically remove the previous address as primary.)
5. Edit the old address by selecting the pencil icon and change Address Type to "Previous Address."

If there is no new address:

1. Select "Pencil Icon" to edit the address.
2. Select the  "Do not mail" next to this address
3. Change Address Type to "Previous Address."
4. Select "Valid to" date as today's date from the calendar or enter it manually using the following format: 5/20/2020

### *Deceased constituents*

1. Open the constituent record
2. Select "Mark As" Choose "Inactive" from the drop down menu
3. Return to "Mark As" and choose "Deceased" from drop down menu
4. Fill in date of death (if known); or enter today's date.  
IF THERE IS A SPOUSE: Use the drop down menu to update the spouse's addressee and salutation fields as prompted.
5. Select "Mark deceased" to save
6. In "Contact information" Select "Edit."
7. Choose "Address"
8. Select "Pencil Icon" next to current address to edit.
9. Change this Address Type to "Previous Address" – Select "Done"
10. Select "+Add new address" (**not shared address**)
11. Choose "Home" as Address Type
12. Enter date of death in the "Valid from" field
13. Select the  "Do not mail" next to this address only
14. Select "[Enter address without search](#)" to enter a blank address.
15. Select "Done"; Select "Save"





If there is a spouse it is good to go back to their record to verify surviving spouse is: 1) marked Head of Household; 2) Spouse is marked widowed; 3) Spouse address is not marked ☒

### *Inactive records*

There are only three reasons to inactivate an individual's record:

- Incomplete Name – anyone without both a first and last name should be marked inactive.
- No Contact Information – if we have no way of contacting (via mailing address or active phone/email) a constituent AND they have not donated or contacted us in any way in 4 years they are inactive.
- Deceased – if a constituent passes away, their record will become inactive. Review the section above on how to update the deceased's spouse information.

In Webview, open the record. Select "Inactive" from the "Mark As" drop down menu.

1. **All inactive records need a note added to the Notes Tab indicating the reason for the status.**
2. Include a date of when the record was made inactive.
3. If you feel a record should be inactivated that does not fit one of the three reasons, email [communication@diojeffcity.org](mailto:communication@diojeffcity.org)
4. **NOTE:** If a constituent is inactive from a parish per the parish request, simply end the relationship by filling in a "Date to" next to the current parish constituent code. You can alternatively assign them a constituent code that may still apply such as "Non-Parish," "Catholic Missourian Only," etc.

### *To Remove Someone from The Catholic Missourian Mailing List*

Bishop Shawn McKnight has a policy that all registered parishioners receive a copy of The Catholic Missourian (TCM). If a parishioner wants to opt out, we may honor their request.

Go to the **Solicit Codes** tile, select "Edit."  
Select "+Add a solicit code"



From the drop down menu, select "Do not mail TCM" and enter the date in the "Valid from" field.

Go to the **Notes** tile; select "+ Add note"

Select "Save."

From the drop down menu, select "TCM" in the "Type" field

Enter today's date in "Date" field

Leave a brief note as to why this person is removed from the list.

Select "Save"

**NOTE: If this individual is married, you will need to do the same for spouse's record since their address will be linked**

### *To Add Child(ren) to Parent Records*

**NOTE: Children should not have their own record until they become the Head of a Household.**

These instructions are for adding a child and tracking their information in the parents' relationship.

Go to the "Relationship" Tile

Select "+Add," then "Individual Relationship"

Select the "+" next to the search magnifying glass to add the child's name

Enter Child's First Name, Middle Name, Last Name (required),

If they have a nickname (Joe for Joseph), enter this in "Preferred name."

Select "Male" or "Female" from the Gender field

If known, Enter Birth Date in this Field (if known) by finding the date on the calendar icon, or using the format 00/00/0000. (When you tab, it will calculate the age for you automatically.)

In the Addressee Field, select the first and last name configuration

In the Salutation Field, select first name only\*

\*NOTE: if there is a 'Preferred name,' enter this in the Salutation Field.

Enter the parent's relationship is the "Parent." DO NOT use "mother" or "father"

Enter the child's relationship is the "Child." DO NOT use "son" or "daughter."

**NOTE: To add Sacrament and Education information, you must access database view.**

Open database view

Open a parent's record

Click on the "Relationship" Tab from the top menu



Find the child's name and click on the name to open the data fields  
For Sacraments, Select the "Attributes/Notes" Tab from the top menu  
Use the drop down menu in the "Category" Field to select "Sacraments"  
Tab to the "Description" Field to enter the name of the Sacrament, using the drop down menu  
Tab to the "Date" Field and enter the date the Sacrament was received, using the format  
00/00/0000.  
Tab to the "Comments" Field to enter the parish where the Sacrament took place. You may  
also use this space to enter other data, such as the location of the entry in the Sacramental  
Records Book.

Use this format: **Parish Name** (with Saint abbreviated)-(Hyphen, no space between)**Parish  
City** (With Saint abbreviated here too), **ST** (two letter state code), **any additional info you want  
in any format** (this format will not matter).  
Press Save and Close.

**NOTE: A child and all their data must be added to both the Mother and Father's record.  
Repeat this process for the other parent where applicable.**