



PROCEDURES AND BUSINESS RULES CONCERNING RAISER'S EDGE DATA ENTRY

REVISED MARCH 2022

Adding and 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.
- In the Database view, review the check boxes on the lower part of the search screen to ensure all constituents are included: "Display inactive constituents," "Display deceased constituents," "Check aliases," "Check contact name," "Check nickname." Make sure "Exact match only" is unchecked.

If no record found, select "Add New Individual," then proceed:

Under Bio1 Tab:

1. **Last Name:** required
2. **First Name:** legal name (ie: Robert)
3. **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.
4. **Nickname:** if this is a known only preferred name (i.e. Bob for Robert). Otherwise, enter first name as on the record.
5. **Gender:** if known
6. **Birth date:** if known. Select a date from the calendar icon, or type in the following format: 5/20/1924
7. **Marital Status:** if known (If divorced, please review section 3 under "Changes in Address Information" to see full divorce process). HINT: Wait to enter spouse information until finished with individual record; this will automatically link addresses for you.
8. **Solicit Code:** In the database view, press "F7" on your computer from this field to see the available options. Use the ">" and "<" buttons to select or unselect a code, then click "O.K." (">>" selects and moves all codes over)
9. **Country:** Automatically defaults to United States
10. **Address lines:** It is best to enter one line only. (ie. 123 Main St, Apt 4; NOT 123 Main Street on line 1 [enter] Apt 4 online 2 (Refer to notes on page 5)
11. **Telephone Numbers | Email Addresses | Links | Fax Numbers**

DNC (Do Not contact) This can be selected for phone or e-mail AFTER you enter the number or address. If this is selected, you should consider clicking on the check box below "requests no email." You should also consider selecting from the Solicit code: "Do Not Phone," "Do Not Mail," etc. whichever applies.

- a. Be as accurate as possible with entering phones/emails. You can have as many as you need, but no duplicate types. See chart below regarding definitions:

Phone Type	
Phone	If you are unsure of what type of phone number is it, but it is NOT their primary number.
Home	If the number is to be the primary number (EVEN IF IT IS A CELL NUMBER); Check primary box next to the number. <i>(The Home number is pulled for all contact lists, and is the first number to be used always.)</i>
Cell	If you know it is a cell number AND the number is NOT the primary number
Work	A business number that directly reaches the constituent.
Emails	
Email	A constituent's primary email address, generally a personal email.
Email2	An alternate email. Not a primary email (could be a business email to be used as an alternate as necessary)

FOR EMAIL AND PHONE, PLEASE CHOOSE ONE TO BE DESIGNATED AS PRIMARY. This is a checkbox located to the right of these numbers. Also, if you know a number/email is no longer active, do not simply check the inactive box. Delete the number/email line. **We do not delete old addresses**; we make old addresses alternate/previous while making the new address the primary/preferred address.

Under Bio2Tab:



1. **Constituent code: required.** Constituent codes are used to identify the parish of the Constituent.
 - a. Be sure to indicate a start date.
 - b. If the parish is unknown or outside of the Diocese, select Non-Parish.
 - c. If the Constituent is in the RCIA process, select the parish where he/she is participating.
 - d. If the Constituent is known not to be a Catholic or is not in RCIA, select Non-Catholic.
 - e. 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)
 - f. If constituent already had a constituent code, you need to add an end date to this constituent code. The current constituent code must be on the top of the list. Highlight the code and select the "UP" button to the right to move it to the top.
2. Religion: If you know the constituent is not Catholic, please indicate. If the field is blank we are assuming the constituent is Catholic.

ADDRESSES:

1. Select 'Home' for the address type
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)
3. Confirm 'send mail to this address' is checked
4. Ensure 'set this address to the preferred address' is marked for the appropriate address
5. Valid Dates: Include date of when the address was added or updated in the "Date From" field

Commented [DB1]: Added to Webview notes



IF THERE IS A SPOUSE, YOU MUST LINK THEIR ADDRESSES AFTER CREATING THE RELATIONSHIP OR A NEW CONSTITUENT FOR THE SPOUSE.

Commented [HO2]: How does this work in the webview?

REMINDER: Entering the spouse information after constituent address is entered automatically links the addresses.

For database view: Click on the "Spouse" box.

Under "Gen1" Tab, enter spouse last name (search in the database to see if the spouse already has a record).

If they do, highlight that record and open. It will walk you through the rest.

If they do not have a record (not a constituent), in "Gen1" enter Last Name, First Name, Maiden name (if known), Titles, Suffixes, Nickname (if necessary)

Enter address.

Enter phone and email according to instructions above.

Go to "relationship" box in lower right corner, Type "Spouse" in this field.

Go to "reciprocal" box, Type "Spouse" in this field. **(Do not use Husband and Wife)**

If you know the wedding date, you may enter it into the "Date From" field

Under "Gen2" Tab, enter gender, birthday if you have it.

Click on the Primary addressee box and select using the rules below

Click on the Primary salutation box and select using the rules below

(NOTE: These should be the same as the spouse)

From the top menu bar, Select "Relationship"

From the drop down menu, choose, "Add this Individual as a constituent"

A box will open up for you to enter the "Constituency Code from the drop down menu, and the Date From field.

Save and Close

Return to the spouse's record

To add Head of Household go Bio 1 and Select the Spouse button. In the pop up box, select Head of Household check box. If only one spouse is Catholic, it is recommended that person be marked as Head of Household. Otherwise, the husband should be marked as head of household.

FROM ADDRESSEES/SALUTATIONS TAB:



- 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.
1. 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
 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

If the addresses were not automatically linked (record will show linked, "yes.")
Click on "Constituent" from the top menu bar
From the drop down menu select "→go to (spouse name)"
Go to "Addresses" Tab, Double click to select the address that needs to be shared
From the top menu bar, select "Address"
Highlight "Address Sharing Options"
If there are multiple address, click on the one to be shared. And select OK

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.

In the database view:

1. Open the constituent record
 - a. Select the 'Addresses' tab
 - i. Double-click the address you would like to update
 - ii. Change the address type to "Previous Address" by selecting "Address" from the top menu bar, then select "Copy Preferred Address to Alternate." (This will automatically update dates, etc.)
 - iii. Return to the Preferred address, and fill in the address lines, city, state, and ZIP
 - iv. Select the appropriate address type from the drop down ("Home" is Standard)
 - v. Make sure that the box for send mail to this address is checked
 - vi. If this will be the primary address, check the box for set this address to the preferred address
 - vii. Please select how the address was found in the "Info source" field (i.e. Parish, constituent, Post Office)
 - viii. Add date of when the new address was entered in
 - ix. Save and close. If it is linked to a spouse, you will be prompted to "Change in all shared addresses." Please select this option.
 - x. If the change of address includes a change in parish, return to Bio2 tab and put an ending date in the "Date To" field for the current constituency code; Add the new constituency code and fill in the "Date From" date.

Use the up and down arrows to move the new constituent code to the top line. (This will be the default code).

- b. If there are new phone numbers or emails: DELETE the old phone number or email. NOTE: If it is obvious the old phone number or email is associated with the spouse, please be sure it is in the spouse's record BEFORE you overwrite in the constituent's record.
2. If there is no new address, go to Bio1Tab and mark record as "Had no valid address" to exclude the constituent from mailings. Save and Close the record.
 3. If a divorce is the reason for the address change:
 - a. On Bio 1 Tab:
 - i. Change marital status to Divorced
 - b. Click on Spouse button to edit the pop up box.
 - i. Add an end date to their relationship (keep Relationship and Reciprocal as "Spouse")
 - ii. Under the Relationship Tab at the top, click "Break Link with ----"
 1. Choose the first option which only breaks the link and does not delete the other constituent.
 2. This will remove the HOH option, signifying that they are both the heads of separate households
 - iii. Go to spouse's record. Notice that the relationship has been deleted completely. Add their spouse back to their record as though they are in a relationship.
 1. Fill in the Relationship and Reciprocal boxes as "Spouse"
 2. Add a start date and an end date
 - iv. Repeat step "ii"
 - c. If the spouse is not a parishioner:
 - i. Unmark the Spouse box
 - ii. Change spouse marital status to Divorced
 - iii. Change spouse Constituent code to Non-Parish or Non-Catholic, depending on the case

Deceased constituents

1. Open the constituent record
2. In database view begin with the **BIO 1 Tab and select:**
 - a. Deceased
 - b. If known, please add the date of death.
 - c. Is inactive
 - d. Has no valid addresses
 - e. Click on "Spouse" button, check the box to mark This individual is "Head of Household" (if not already marked this way).
 - f. **NOTE:** There is no need to add anything under the **Solicit Code** in **Bio 1** because the check boxes mentioned above should cancel out any solicitations, mailings, phone calls, etc.
3. In **Bio 2**, please put the current date or the known date of death on the record under Constituent Codes "Date To" field, ending the deceased's membership at their parish.
4. Under **Addresses**, first unlink any shared addresses by double clicking on the address. From the Top menu bar, select "Address." Choose "Address Sharing Options," then "Stop Sharing this Address."
 - a. Select "Address" again, then "Copy Preferred Address to Alternate."
 - b. Select "OK"
 - c. Select "Save and Close"
 - d. Go back to preferred address and delete all fields.
 - e. Unselect "Send mail to this address"
 - f. Mark the "Valid Dates" in the "Date to" box with the current date.
 - g. Save and Close. You will be prompted to update Addressees/Salutations for the spouse record before you can save. Update the Salutation, select "OK."
5. If Deceased Constituent has a spouse, it is good to check their record to ensure the following:
 - a. Surviving spouse has been marked as "Widowed" and "Head of household".
 - b. Address tab shows the address unlinked. If not unlinked, follow directions to unshare an address from above.

Inactivated 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.
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
 4. **NOTE:** If a constituent is inactive from a parish per the parish request, simply end the relationship by putting an inactive date in the Bio2 Tab next to that parish constituent code.

Solicit Codes

In Database View. Solicit Codes are on the bottom left of the Bio 1/Org 1 tab of constituent records (**PRESS F7**). There are several options in this field. If none of the codes meets your need, please email communication@diojeffcity.org.

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 Catholic Missourian

Do Not Solicit CSA; Do Not Mail CSA

Do Not Email—**will receive no email messages from the Diocese**

MMMemo – **to be included in the Monday Morning Memo email addresses**

Solicit codes preferences should be followed by all staff at all time. 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 marked. Do not use the Solicit Codes to indicate this.



If a constituent asks that The Catholic Missourian no longer be mailed to him/her, mark 'Do not Mail TCM.'

To Remove Someone from The Catholic Missourian Mailing List

NOTE: Individuals should only be removed at their own request.

Under Bio1 Tab

Go to "Solicit Codes" Place your cursor in the box. Hit "F7" to open up a drop down menu. Highlight "Do Not Mail TCM," use the > arrow to move this code to the right hand side of the box.

Under Notes Tab

Select "Add new note"

Select Note Type "TCM"

Leave a short note detailing the request and from whom the request came.

If they are linked to a spouse, proceed to the spouse's record and follow the same procedure.

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 record which cannot currently be added from Webview (RE NXT). You are able to view the relationship in RE NXT, and can run reports on the data being entered for a child.

Open database view

Open a parent's record

Click on the "Relationship" Tab from the top menu

Select "New Individual Relationship"

Enter the Child's Last Name (without using the binoculars in this field to search); tab to the First Name field and enter the Child's First Name

If a Nickname applies, enter it in the "Nickname" Field (following the rules outlined for individual records, such as John for Jonathan).

Go to the Relationship Field in the bottom right corner. Use the drop down menu to select Child (not Son or Daughter)



In the Reciprocal Field, enter Parent (not Mother or Father)
Select the "General 2" Tab from the top menu
Use the drop down menu to select Male or Female in the Gender Field
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.)

If you want to enter 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.

