Re-Census Tracking in PDS

You've already created your response form and have sent out your re-census letters to all your families. Now, you'll want a system to track responses.

Step #1 – Create a Family Keyword to Track Responses

To facilitate this, you'll create a Family Keyword, like 'We Gather Census Response'.

Select File | Keywords | Family/Fund Keywords | Family Keyword Names

File			lini	stration
Setup	•	General Keywords		
Sacrament 9	Setup •			
Keywords	•	Family / Fund Keywords		Family Keyword Names
Safe Enviro	nment •			Family Status Names
Sale Enviro	- interne	Member Keyworde		Family User
System Pro	ocesses 🕨 🤤	Member Reywords		Fund Keywords

That will bring up a list of your current Family Keywords that will look something like this:

Fa	Family Keyword Names (17 Entries)				
••					
	Description	^			
Þ	17 Stewardship of Talent				
	Belongs to Other Parish				
	Do Not Publish Name				
	Do Not Publish Name/photo				
	Do Not Send Email Statements				
	Gives Indirectly				
	No Appeals/Solicitations				
	No directory listing				
	No Quarterly Reports	Υ.			
	Combine Keywords				
Print Clos					

- Click on the Sector is a new keyword and then type in 'We Gather Census Response'.
- Click SAVE/OK and then CLOSE.

Step #2 – Update Family Information & Add New Family Keyword

- As you receive responses to your survey form, make any needed changes to the family contact information and then add the new 'We Gather Census Response' keyword in the bottom right corner of the Family screen.
- If a family responds that they are no longer actively involved in your parish, change their Family Status to 'Archived for Deletion', check their INACTIVE checkbox and add the 'We Gather Census Response' keyword in the bottom right corner of the Family screen.