

In our continuing efforts to clean up parishioner data, our team has reviewed your parish demographic data from the PDS PARISH UPDATE extract and made every effort to correctly match your parishioner data with the records in the Archdiocesan database.

Prior to our final data matching, we have created two reports for you to review. These reports highlight areas that need to be addressed, along with hints on how to format your data into the required format. Please use the report in BOX to make updates to your existing PDS database. Once those edits are complete, please import the 2<sup>nd</sup> ID into your database, if needed. Detailed instructions are listed below. Please contact us if you need assistance importing the 2<sup>nd</sup> ID into your database. After your review and updates have been completed in PDS, we will need the updated copy of your backup data uploaded to BOX to finalize data matching.

We will continue using BOX to transport data files securely. All files will be in the ACA DATABASE folder we have used for PDS updates. The link below will work for a limited time. If you need other access permissions, please let us know.

*Please email Suzanne for a link and permissions to the Box.*

	<b>Reports to Review</b>	<b>Summary</b>
<b>1</b>	“Review and Update PDS”	Look for “Notes” column which explains data in PDS that needs to be corrected or updated.
<b>2</b>	“Not on Roster”	There are parishioners in the Archdiocese database attributed to your parish that did not appear on your parish roster. Please confirm their membership in your parish.
<b>3</b>	“Back to Parish All Arch IDs”	This file is from the Archdiocese back to the Parish and when imported updates each parishioner record with the Archdiocese ID number. (2nd ID number)

### **1. Review and Update PDS**

There is a Notes column explaining what may need updating. We have included several Check columns that identify PDS fields that have conflicting information and need your assistance in clarifying and correcting. If there is an X, then information needs to be validated.

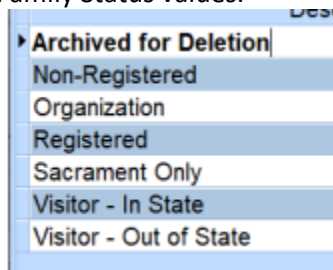
- **Family Name** - does not match Head1 name in file.
- **Address** - Archdiocese DB Address Different or Address marked Invalid, please confirm. Some parishes take this time to call or email to verify information.
- **Marital Status** - Try to show the Status between the Head of Household members please
- **Head1** - Different or Missing
- **Head2** - Different or Missing
- **Gender** - Different
- **Date of Birth (DOB)** - Shows under 18 or partial data

There is a common occurrence in PDS where the Member Names are missing or do not match in the Parish Update export file. When names do not match then manual review is required. To clarify, below is what the data represents in the file:

- Only Members that have Type: **Head of Household** or **Spouse/Significant Other** are sent in the Parish Update file and are used for Archdiocese mailings.
- Fam First Name & Fam Last Name = Head of Household name from Family Screen
- Head1 First Name/Last Name = Type: Head of Household or Spouse/Significant Other on Member screen
- Children, Young Adults, or other members should **NOT** have Type: Head of Household or Spouse/Significant Other.

When updating PDS, please check the Family Name field on the Family Overview Screen to be sure the Head of Household(s) are represented, then review Member screen so that the member with Type: Head of Household matches.

Family Status values:



Marital Status values:

- Divorced
- Divorced/Annulled
- Engaged
- Married
- Married - Civil
- Separated
- Single
- Widowed

## 2. Not On Roster

There are parishioners in the Archdiocese database that did not appear on your parish roster. Please review PDS to confirm that they are no longer registered with your parish, update the column in the file with 'No' and upload those records to the shared BOX location above and we will update in our database.

## 3. Back to Parish All Arch IDs

This file is used to update all PDS records with the Archdiocese ID, which goes in the 2nd id field. Import instructions are attached to the bottom of this email.

After all your parish records have been reviewed and updated, an additional pull of data from PDS will be needed for a final review. The easiest process is to upload a copy of your PDS backup file into your BOX location under ACA Database. Suzanne Clark is notified from BOX each time a file is uploaded and can send a confirming email after received.

HOME

IMPLEMENTATION

TRAINING

COMMUNICATIO

PARISH SURVEY (PRE-WAVE)

PARISH TIMELINE IN DETAIL

MIGRATION PLANNING AND DATA CLEANUP >

FAMILY DATA CLEANUP

MEMBER DATA CLEANUP

CONTRIBUTION DATA PREPARATION

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Thank you in advance for your hard work on making the corrections as outlined in these reports and for collaborating with us. You can find additional information on the PARISHIONER ENGAGEMENT website.