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ADVANCED RECORD MANAGEMENT

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ADVANCED RECORD MANAGEMENT

- **Key Points**

- Planning for Data Integrity
- Managing Duplicate Individuals
- Managing Households
- Data Compliance
- Portal User Accounts and Rights



ADVANCED RECORD MANAGEMENT

- **Planning for Data Integrity**
 - Data Integrity Team
 - Determine required and ideal information
 - Define standard for forms and data collection



ADVANCED RECORD MANAGEMENT

- **Planning for Data Integrity, cont'd.**
 - Create search policies and procedures for adding new people to Fellowship One
 - Create status plan for promotion and demotion, especially System status
 - Effective communication and training



ADVANCED RECORD MANAGEMENT

- **Managing Duplicate Individuals**
 - Deleting people records
 - Search for duplicates
 - Ranking
 - Merging duplicate records



ADVANCED RECORD MANAGEMENT

- **Managing Duplicate Individuals, cont'd.**
 - Difference between radio button and check box
 - Available options for household giving
 - Override values
 - Statuses of duplicate queue



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ADVANCED RECORD MANAGEMENT

- **Managing Households**

- Difference between split and move
- Split a household
- Move individual records
- Merge is for duplicate individuals, not households



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ADVANCED RECORD MANAGEMENT

- **Data Compliance**

- Query for incorrect and incomplete information
- Data quality letters
- Returned mail, On the phone, Submitted forms
- Limit number of individual attributes and status
- Data integrity reports



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ADVANCED RECORD MANAGEMENT

- **Portal User Accounts and Rights**
 - Security access rights to add/edit household and individual records
 - Advanced permission security rights
 - Deactivate a Fellowship One user account



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ADVANCED RECORD MANAGEMENT

- **Recap**
 - Planning for Data Integrity
 - Managing Duplicate Individuals
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 - Portal User Accounts and Rights



THANK YOU

For more information:
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Thank you so much!!!

