

Invalid Mailing Address

SOP# **DSB-1008**

Title: **How to Record Invalid address**

Description: **This Standard procedure outlines the process that should be followed when a family's mailing address becomes undeliverable. This can be found out at the Pastoral Center with the different appeals as well as at the parish with various mailings.**

SOPs Referred To: **DSB-1001, DSB-1003**

SOP Details:
Invalid Mailing Address at Parish

If a family's address is found to be invalid either because the address information is not all there or that it comes back as undeliverable from the post office, then the Family Group for the family should be set to "Invalid Address". For more information on the setting for Family Group refer to SOP **DSB-1001**.

Invalid Mailing Address of Pledge in an Appeal at Pastoral Center

Pledges of Families with invalid addresses will have the appeal code as "Invalid Address" and all statement months will be deselected.

- A pledge is set-up, and the family does not have a correct address.
 - **Accounting Services** - When a pledge is set-up where the family's address is blank and the check with an address does not accompany it, the appeal code will be set as "Invalid Address" and statement months will be deselected.
- The export of statements that have families with missing addresses.
 - **Accounting Services** - When the export of pledges for statements been done, any statement information with missing address fields will be removed from the statement information sent to Direct Connections.
 - **Accounting Services** – If payments have been made on these pledges an effort will be made to locate the check to see if a different address can be obtained.
 - **Accounting Services** - These pledges will have their appeal codes set to Invalid Address and statement months will be deselected.
- Return statements are returned with undeliverable address where some may contain corrected address information.

- **Development Office** – any returned statements with corrected address, will be changed in the AIM Family Directory.
- **Accounting Services** – returned statements with no address changes will have the pledges’ appeal code set to Invalid Address and all statement months deselected.

End of Month

A report will go out to each parish at the end of the month that has families with pledges with invalid addresses. The parishes are instructed to

- Make an effort to contact the families to get the correct address.
- Search the parish database to see if a duplicate record with the correct address could be found and merge the two records together.

The parish will then correct the address in ParishSOFT. Once the parish has corrected the address in ParishSOFT, the parish will contact the DDF Accounting Clerk to inform the address has been corrected. The DDF Accounting Clerk will then change the appeal code back to none and selected the remaining months for statements on the pledge.

Accounting Services will keep a record of families sent to parishes and periodically check to see if the address has been changed.

Invalid Mailing Address with Initial Mailing

The Development Office opens all returned mail including: solicitations, diocesan tax returns, and pledge reminders. Two types of mail pieces are returned to the diocese from the post office those with “insufficient addresses” and those with address updates or forwarding address.

The pieces returned to the diocese with a new forwarding address will be updated in ParishSOFT by the Development Office. The change will be made to the address, a comment will be placed in the notes field stating the date, the first initial and last name of the person making the change, and a short statement about the reason for the change. The address will be updated using the SOPs procedures (see SOP: DSB-1003 for more information).

The returned pieces marked “insufficient address” or “moved” will be reviewed the Development Office. For pieces coded as “insufficient address” the Development Office will review the record to determine the possible missing information. If the record contains a phone number, the Development Office will contact the parishioner for the missing information. If a phone number does not exist the Development Office will try to look for missing information in *Mapquest*. For all records the

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Development Office is unable to “update” the Development Office will code as “Do not solicit”, indicate the date, the first initial and last name of the person making the change, and a short statement about the reason for the change.

Questions about SOP

If there are questions or errors that come up as you are entering in this data please call ParishSOFT at 1-866-930-4774 and dial 2 for support or e-mail or call Eric Kuske at the Pastoral Center ekuske@sbdioocese.org or (909) 475-5403 to resolve before continuing.