Data Entry Standards for Salutations & Addresses

SOP#   **DSB-1003**

Title: **Data Entry Standards for Salutations & Addresses**

Description: This standard procedure outlines the process that should be followed when a parish is going to add a new family or change a family's information in the Family Directory. These data entry standards should be used to ensure the proper formatting for mailing lists, letters, and emails by using the proper formatting of salutations and addresses. By correctly spelling a family's name along with the inclusion of member birthdates will also help in the reduction of duplicate entries. Changes can be made by the Pastoral Center and Parishes. SOP was created after reviewing and taking into consideration all USPS regulations.

SOP Details: **Adding a New Family**

When adding a new family, the system performs an automatic look-up to see if that family is already within the diocesan database. A more detailed description is in DSB-1001 on page 4 in the section called "To Prevent Duplicates". But do use "due diligence" for this aspect. Also do check to see if the family might be listed under a wrong spelling. If you are unsure that it is the correct family, then add the family as new.

To input information into ParishSOFT use the following formats. These formats don't apply to just the Mailing Name and address but for the rest of the fields as well. We only talk about the Mailing Name and address here because it is used most commonly but the thought process applies to the other fields.

Family with Unknown Address

If the family has an unknown address, then type **Unknown** into the address field and use the parish's zip code as the zip code. When saving the family, you will get an error that the address is not valid click on ok to allow.

Mailing Name input (aka Salutation)

The Mailing Name in ParishSOFT is used as the Salutation in most mailings for the Pastoral Center and for Parishes and should reflect language of preference (i.e. Mr. John Smith for primarily English speaker or Señor Juan Lopez for primarily Spanish speaker). All caps should never be used when entering names or addresses instead use upper and lower case. To indicate a couple you should use the word "and" but do not use

an ampersand (&) because it generally gives a better impression to the readers of the document. Try not to use characters such as forward slash or back slash. Hyphens can be used but use them only when necessary.

Below are some examples of proper and improper formatting of the Mailing Name.

For a Single Male:

Mr. John Smith

Señor Juan Lopez (Do not abbreviate as Sr. because can be confused with English meaning Sister)

For a Single Female:
Ms. Jane Smith

Sra. Maria Lopez

For a Woman Religious:
Sr. Jane Smith

Hermana Maria Lopez

For a Male Religious:
Fr. John Smith Padre Juan Lopez
Msgr. John Smith Monseñor Juan Lopez
Bishop John Smith Obispo Juan Lopez

For couples:
Mr. and Mrs. John Smith Sr. y Sra Juan Lopez
John and Jane Smith Juan y Maria Lopez
Mr. John Smith and Ms. Jane Doe Sr. Juan Lopez y Sra. Maria Paz

Two doctors:

Dr. John and Dr. Mary Smith *or* Drs. John and Mary Smith

She is a doctor and he is not:

Mr. John and Dr. Mary Smith

Do not put Mr. and Dr. John Smith

He is a doctor and she is not:
Dr. and Mrs. John Smith

Below are examples of the incorrect way to enter names in to ParishSoft with the correct ways listed next to them:

Incorrect	Correct
~~Mr. & Mrs. John Smith~~	Mr. and Mrs. John Smith
~~Mr. & Mrs. John & Jane Smith~~	Mr. and Mrs. John Smith
~~Sr. y Sra. John y Jane Smith~~	Sr. y Sra. John Smith
~~M/M John Smith~~	Mr. and Mrs. John Smith

Address Input

The following is good information to know and understand but the system does do a check of the addresses against the current USPS database. If the system shows an invalid address message box you can use the suggested address or use the entered address. Unless you know it's wrong you will want to use the suggested address.

The following should never or rarely be used in address: "." or "-". The second line for address should be used only if necessary.

Incorrect Formatting	Proper Formatting:
12-345 Apple Street	12345 Apple St
Post Office Box	PO Box
P.O. Box	PO Box
Apartment	Apt
Suite	Ste
Space	Spc
Building	Bldg
Room	Rm
Floor	Fl
Street	St
Boulevard	Blvd
Avenue	Ave
Lane	Ln
Court	Ct
Drive	Dr
Road	Rd
Directions:	
North	N
South	S
East	E
West	W
Northeast	NE
Northwest	NW
Southeast	SE
Southwest	SW

Below are examples of the incorrect way to code invalid or moved addresses in ParishSOFT. For accurate coding procedures review SOP # DSB-1001

Do not write "Get new address" or ?????????? next to the names.
Do not use all caps, should be upper and lower case.