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# CX: UPDATING AND CREATING RECORDS

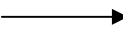



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## Context

- Start with the assumption that the record already exists
- Time required to merge duplicate IDs is significant
- Universal Data Update
- Dirty Data
- Data Consistency

## Verify the Records

Use common sense before you edit or create a new record

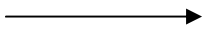

- Search thoroughly to prevent duplicate entries
- Verify that the son's birthday is after the father's
- "Display detail window" allows you to check:  
  - o 1<sup>st</sup> and 2<sup>nd</sup> relationships
  - o Involvements
  - o Other Names
- "ID Types" button will provide associations  

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## UPDATING RECORDS

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Once you have found and verified that you are looking at the correct record, you will need to switch to Update Mode in order to edit its information.

This is done by pressing "Update the Current Row" button  

- Existing records have primary "owners" that will be notified if a record is changed
- Please update all known information; the more accurate information, the better
- Notice message line for formatting information for each cell
- Cancelling and Saving changes to a record

## Names

Name entry follows very specific formatting rules and causes a great deal of confusion.

- o The name field follows this format: **Last, First M, Generational Suffix**
  - E.g., William D. Smith II is entered as Smith, William D, II
  - E.g., David W. Smith, Jr. is entered as Smith, David W, Jr

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**NOTICE:** There are two commas and a space before Jr

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- o Other Names
  - Use "End" date if the name is no longer active

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**TIP:** "T" followed with an enter will auto-fill with today's date

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- o Maiden Names, preferred names, nicknames, and etc.
- o del Torro and other last name rules details can be found on page 7 of the CX Standards booklet

## Addresses

### Address Formatting Rules

- No punctuations
- Use standard USPS abbreviations (see CX Quick Sheet)

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**TIP:** Look for **abbr** before updating the address shown on the main screen

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### What if the address does not fit on ONE line (24 characters)?

- If the address has a unit designator (e.g., Suite, Building, Apartment, and etc.), then separate it from the main street address.
- Move from specific to general
- Example:




12345678 North Washington Street, Suite 123

Should be entered as follows:

STE 123

12345678 N Washington St

### What if the address does not fit on TWO lines?

- Change **Alternate Address Code** from PERM to ABBR
  - PERM indicates that this address is the actual address
  - ABBR indicates that the address on the main record is not the actual address
- Click the “detail” button and select “Other Address”, then click OK → 
- Click the “Insert” button to create a new address entry → 
- In the new Other/Alternate Address window, set **Code** to PERM
- This Alternate Address window allows addresses of 32 character
  - All ID’s must have an address with a PERM code
  - All address fields need to be included to create a complete alternate address record
- **Begin** marks the address as active
- **End** marks the address as inactive
- Click the “Finish” button to save the new alternate address → 

### What do I do with email addresses?

- Add as an alternate address using the appropriate address code. If code is not known, use *eml1*
- Term old email addresses

### Incomplete Address Resources

The following links will help you convert partial address information to complete information

- [www.usps.com](http://www.usps.com)
- [www.411.com](http://www.411.com)
- [www.google.com/maps](http://www.google.com/maps)
- [www.switchboard.com](http://www.switchboard.com)

## MAINTAINING RELATIONSHIPS

### Understanding Relationships

- Just like people have relationships with other people or organizations, so should their records
- Relationships in CX allow us a way to connect two IDs
- The more accurate relationship data is, the better
- First Relationship


First Relationship						
Record 1 of 1						
The person selected above is on the LEFT side of the relationship code.						
Rel ID	Name	Code	Begin	End	Prt	Mnt
106929	Sheets, Shaun Mich	HW	Husband / Wife	06/24/1998	Y	Y

- Second Relationship

Second Relationship						
Record 1 of 1						
The person selected above is on the RIGHT side of the relationship code.						
Rel ID	Name	Code	Begin	End	Prt	Mnt
5012	Sheets, Nelson F	PC	Parent / Child	11/02/1989	N	N

- Relationship Code Examples
  - HW -> (H)usband and (W)ife
  - PC -> (P)arent and (C)hild
  - CP -> (C)hurch and (P)astor

### Modifying Relationships

- Enter "Edit Mode" for the record
- Select the "Display Detail Window" button and select 1<sup>st</sup> Relation
- Update existing Relationship
  - Change "Code"
  - Provide a relationship "End" date
  - Change label print order (Prt)
  - Select (Mnt) to maintain addresses across relationships
- Adding Relationships
  - Click the "Insert" button → 
  - Provide the ID number of the related record (Rel ID)
  - Select the Relationship "Code" that describes how the two records relate to each other
  - Provide a "Begin" date to activate (if not know use today's date)
  - Update Prt and Mnt as necessary
  - The relationship will be updated on both records
- Verify Relationship Maintenance Prompts
  - Prompts you to verify that you want to update the address of each "address maintained" related record

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## FLAGGING A RECORD “DECEASED “

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Changing a record status to deceased requires several steps






- Edit the record and change “Deceased” to “Y”. Enter the deceased date if known
- End relationships by adding an “End” date (see above for editing relationships)
- Change maintain address (Mnt) flags to N (see above for editing relationships)
- Look up the spouse’s ID and change “Marital” to (S)ingle or (W)idowed
- End Subscriptions: Click on “Display details window” and select “Subscriptions”
- End Involvements: Click on “Display details window” and select “Involvements”

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## CREATING A RECORD

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Only after thorough searching, should a new record be created. Primary departments creating new records are: ITS, Human Resources, Development, Admissions, and Accounts Payable.

- Return to Query Mode → 
- Click the “Find ID” button → 
- Click cancel without entering search criteria → 
- Click the “Insert a new row” button → 
- Enter the new data following standard formatting and click “finish” → 

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## REPORTING DUPLICATES

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What if I discover multiple records that refer to the same individual?

- Note the ID numbers of each
- Try to determine which record is the most accurate
- Navigate to Utilities -> Data Maintenance/Lookup -> Record Duplicate Pair
- Enter the corresponding IDs and add a comment and submit the request
- A CX administrator will merge the two records