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## DATA INTEGRITY AUDIT

FELLOWSHIP ONE

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## INTRODUCTION

The Church Champions Data Integrity Auditor tool can detect many common data integrity issues with your people information in Fellowship One. In a large number of those cases, the tool can automatically repair them as well. This document describes exactly what can be detected, what can be repaired and what rules are followed by the tool to make that happen.

This tool is run as a part of a larger Data Integrity Audit which also examines areas beyond the scope of the tool. The tool results are incorporated into a full Audit report for the church to assess the areas that need the most attention to correct inconsistent data.

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## NEEDED FROM YOU

Before the audit can occur, we need a couple of things from you.

### DEDICATED LOGIN

Please create an F1 user login for our use. Since the Integrity Audit covers many areas of Fellowship One, including Giving, please grant this user account full security permissions. That way we can make any adjusts that are necessary and investigate any issues we encounter without hitting any roadblocks. This account will also be used to execute the automatic repairs if you choose to authorize them.

Please email those credentials as soon as they are created.

## DATA POLICY QUESTIONS

The Data Integrity Auditor tool can be customized to fit your data management policies, so we have a few questions in that area. If you don't have an established policy for a specific question, now is not the best time to create one. It's best to just use the recommended value.

- 1. WHAT MARITAL STATUS DO YOU ASSIGN TO CHILDREN?**  
Typical values are "Child/Youth", "Single" or blank.  
*Child/Youth is Recommended.*
- 2. AT WHAT AGE DO YOU DECIDE THAT AN OLDER CHILD IN AN EXISTING FAMILY SHOULD BE SPLIT OUT INTO THEIR OWN HOUSEHOLD?**  
Typical values would be 18, 19, or 20.  
*20 is Recommended.*
- 3. WHAT WOULD BE THE YOUNGEST AGE YOU WOULD ALLOW A CHILD TO BE THE HEAD OF THEIR OWN HOUSEHOLD IF THEY CAME WITHOUT THEIR PARENTS?**  
This means the church has no problem communicating directly with them, bypassing their parents.  
Typical values would be 16, 17, or 18.  
*16 is Recommended.*
- 4. IF YOU HAVE A PAST HISTORY OF ONLY ENTERING 7 DIGITS OF A PHONE NUMBER, WHAT DEFAULT 3 DIGIT AREA CODE SHOULD BE PREFIXED TO THOSE NUMBERS TO MAKE THEM A FULL 10 DIGIT PHONE NUMBER?**  
You can also decide to only flag these 7 digit numbers for manual review.
- 5. WHEN A MARRIED ADULT DIES, WHAT HOUSEHOLD POSITION DO YOU NORMALLY CHANGE THEM TO?**  
Typical values are "Other" or "Spouse".  
*Other is Recommended.*
- 6. WHAT DATE WOULD YOU LIKE TO INSERT FOR STATUS DATE WHEN IT IS MISSING?**  
Typical values are "First Record Date", "Today's Date", or leave blank & flag for manual review.  
*First Record Date is Recommended.*
- 7. WHEN A MARRIED ADULT BECOMES A MEMBER, WHAT STATUS DO YOU ASSIGN TO THEIR SPOUSE?  
WHAT STATUS DO YOU ASSIGN TO THEIR CHILDREN?**
- 8. WHAT STATUS DO YOU ASSIGN TO A VISITOR/GUEST?  
TO THEIR CHILDREN?**

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## HOUSEHOLD POSITION/ROLE ISSUES

The position or role this person plays in the family. Possible values are: Head, Spouse, Child, Other and Visitor.

## AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

### **No HEAD - 1 PERSON HOUSEHOLD**

Sometimes a household will get created or changed over time so that the only 1 person remains. If they are an adult but they are not the Head, they should be because there is no one left to claim the household. The tool will look for this condition and set that person as the Head when found.

### **No HEAD – 1 SPOUSE HOUSEHOLD**

The best practice is to always have a Head; even if there is no Spouse versus having a Spouse with no Head. Reporting and other areas of Fellowship One assume that every household will have a Head. If the tool finds a household with no Head but having a Spouse, it will change the position of that Spouse to Head.

### **MISSING PARENT**

When a household only has 1 adult marked as Head or Spouse AND there are Children, each child is examined to see if they are missing married parent. The tool will conclude that one of the children is actually one of the parents when the following criteria are met:

- The child is the opposition gender of the known adult
- The child and known adult share the same Last Name
- Both the child and adult must be old enough to be an Adult based on their DOB
- The ages of the child and adult must be within 10 years of each other
- The marital status of the child is Married OR unknown

When these criteria are satisfied, the Male is set to be the Head and the Female is set to be Spouse.

### **OLDEST ADULT CHILD MADE HEAD**

Sometimes a household consists of only children, one or more of which are actually of an Adult age. In this case, the oldest child who has reached the age of adulthood (as defined by the church) is changed to the Head position.

### **MISSING NEW CHECKIN PARENTS**

When a new household is entered at the time of Checkin, it is recommended that both the parents and the children be added to the new household to have a complete family picture. However sometimes, the parents end up being entered as children along with their real children. This leaves the new household with no identified Head or Spouse. The tool will look for the following criteria in an attempt to identify the adults:

- A household has one or more children with DOBs that confirm they have a Child's age.
- That same household also contains a person marked as a Child having a status of New Checkin AND has No date of birth OR who's DOB confirms they have an Adult's age.

The presence of DOBs on some children along with the absence of DOBs on other children, all created at the same time at Checkin, is a strong indicator that the children without a DOB are actually the parents. The Male will be set to Head and the Female set to Spouse.

### **TWO HEADS/SPOUSES**

Sometimes the Head and Spouse both end up getting assigned to a Head or a Spouse position. Fellowship One generally doesn't handle that situation very gracefully. It expects one Head and one

Spouse. The tool will look for the following criteria to see if two Heads or two Spouses should actually be a Head and a Spouse:

- A household contains exactly 2 Heads or 2 Spouses; no more and no less.
- Neither Head/Spouse can have a DOB that indicates a Child age.
- Neither Head/Spouse can be Deceased.
- The gender of the Heads/Spouses cannot both be Male or Female
- The ages of the Heads/Spouses must be within 10 years of when both DOBs are present
- Both Heads/Spouses must share the same Last Name
- Both Heads/Spouses cannot be Separated or Divorced

When all of these criteria are satisfied, the Male is set to be the Head and the Female set to be the Spouse.

### **MALE-HEAD & SPOUSE-FEMALE**

Traditional cultural norms expect that household names of a family begin with the husband's name with the wife's name following. Fellowship One computes a household's name using the Position; not the Gender. The Head's name will appear first and the Spouse's will follow. This creates a scenario where the wife could be set to the Head and the husband set to be the Spouse resulting in a household name with the wife's name appearing first followed by the husband's. The tool will look for this condition and switch the positions to ensure the Male is set to the Head and the Female is set to be the Spouse.

This is configurable action and does not have to take place.

### **CHILD DOB IN A HEAD/SPOUSE POSITION**

When a person is in the Head or Spouse position BUT their DOB indicates they are a Child, the tool will look at their marital status to break the tie. When that marital status indicates an Adult, the record is flagged as an Invalid DOB for review as explained [here](#). However, if the marital status is Child/Youth along with the Child DOB, that's enough evidence to conclude this is a Child and the Position is switched to Child.

### **DECEASED INTEGRITY**

When a Head or Spouse of a married couple dies, their status is usually and correctly set to Deceased. However, many times the positions of both people remain untouched. For reporting consistency and data integrity, the surviving adult should have their position changed to Head if it isn't already. The deceased adult should have their position set to *Other* if it isn't already. The tool looks for this condition and will change the positions of both people accordingly when found.

### **FLAGGED FOR MANUAL REVIEW**

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

### **CHILD WITH ADULT DOB (OLD CHILDREN)**

When a person is in the Child position BUT their DOB indicates they are an Adult, the person likely needs to split out as a Head in their own household. This usually happens when a minor child is originally created under their parents. As they get older and grow into adulthood, they have to be

manually detected and moved out into their own household. Fellowship One doesn't do this automatically.

### **DIVORCED/SEPARATED ADULTS**

Usually when two married people separate or get divorced, they are split apart into their own household within Fellowship One. However sometimes users either don't have the security permission to do that or they simply forget so they change the marital status of both people and then leave them in the same household. The tool looks for this condition and flags both people for manual review when they are found.

### **NO HOUSEHOLD HEADS**

If after all repair attempts have been made, a household still has no identified Head, the Household will be flagged for manual review. If the household only contains minor children, this may be accepted as normal but the recommendation would be to collect the parents' names whenever possible so a complete family picture will be available in Fellowship One.

### **MULTIPLE HOUSEHOLD HEADS**

If after all repair attempts have been made, a household still has more than 1 Head, the Household will be flagged for manual review and repair. One of the Heads should be moved to a different position.

### **MULTIPLE HOUSEHOLD SPOUSES**

If after all repair attempts have been made, a household still has more than 1 Spouse, the Household will be flagged for manual review and repair. One of the Spouse should be moved to a different position.

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## **FIRST NAME ISSUES**

The first name of a person.

### **AUTOMATIC DETECTION & REPAIR**

These are the conditions that can be automatically detected & repaired for this field.

#### **CAPITALIZATION**

Probably the single biggest problem faced by churches that allow their congregation to maintain their own information via the web, is capitalization issues. People enter their name in all sorts of ways that need to be standardized. In general, a leading capital followed by all lower case letters is used.

The tool does support two word first names like Peggy Sue or Peggy-Sue but either a single space or hyphen is enforced between them. The following changes will be made:

- john, JOHN, JOhn, => John
- Mary - Jane , mary-jane => Mary-Jane
- Peggy Sue , PEGGY SUE , peggy sue => Peggy Sue

There is also support for names like PeggySue if they are formatted like that already. However, the tool will not push two separate words together in that manner not will it capitalize a value like Peggysue => PeggySue.

## INITIALS

Both single initial and double initial names are supported. A standard format of **A.** or **A.J.** is enforced whenever initials are detected. The following changes will be made:

- A or a => A.
- Aj , Aj , aJ , or AJ => A.J.
- AJ , a\_j , a.J , A.j. , a...j... => A.J.

There are exceptions for special two letter first names such as Al, Ed, Sy, etc. In those cases, the first letter is capitalized and the second is lower cased. No periods are used.

## UNKNOWN VALUE

First Name and Last Name are required fields for a person. Sometimes people will enter in all kinds of things just to get a record to be created. The tool looks for common patterns and values to determine if the name is fake or missing. In those cases, it will substitute a standard value of “\_\_ unknown \_\_” in the field to clearly label those people who have an unknown value. The following changes will be made:

- None => \_\_ unknown \_\_
- unknown => \_\_ unknown \_\_
- AAAA => \_\_ unknown \_\_
- missing => \_\_ unknown \_\_
- N/A => \_\_ unknown \_\_
- Don't know => \_\_ unknown \_\_

***A blank is simply inserted for every field except for First & Last Names. The unknown value is only used for required fields.***

## EMBEDDED GOES BY

Fellowship One has a dedicated goesby/nickname field. Many people don't realize that so they enter that value in first name field after the real first name. It is usually surrounded by quotes, or parentheses. The tool can find these instances and relocate the enclosed value to the **Goes By** field. The **First Name** value is then stripped of this embedded text. The following changes will be made:

- Johnny "john" => Johnny      John is stored in Goes By.
- Johnny (John) => Johnny      John is stored in Goes By.
- Johnny 'Jo' => Johnny      Jo is stored in Goes By.
- Johnny `JOHN BOY` => Johnny      John Boy is stored in Goes By.

## EMBEDDED MIDDLE NAME/INITIAL

Fellowship One has a dedicated middle name field. Sometimes, a middle name or middle initial will get entered in the first name. There are 2 conditions under which the tool can know the second word is a middle name versus a second first name.

1. The name is in the format T. John. This usually means that the **First Name** is “T.” and “John” is the **Middle Name**, which the person actually goes by. The tool will relocate the word “John” to the **Middle Name**, copy the word “John” to the **Goes By** field and then update the **First Name** to “T.”.

2. The name is in the format of Timothy J. The “J” part is always the middle initial. The tool will relocate it from the **First Name** to the **Middle Name**. “Timothy” will remain as the **First Name**.

**NOTE:** The Goes By Name will not be changed if there is a value already present.

### EMBEDDED PREFIX

Fellowship One has a dedicated **Prefix** field. Sometimes a “Mr”, “Mrs”, “Ms” or some other prefix value is entered before the real name in the First Name field. These values are relocated to the **Prefix** field and the **First Name** value is then stripped of this embedded text. The following changes will be made:

- Mr. Johnny => Johnny            Mr. is stored in Prefix.
- Mrs Betty => Betty            Mrs. is stored in Prefix.
- Ms Joan => Joan            Ms. is stored in Prefix

### EMBEDDED SUFFIX

Fellowship One has a dedicated **Suffix** field. Sometimes a “Jr”, “II”, “Sr” or some other suffix value is entered after the real name in the First Name field. These values are relocated to the **Suffix** field and the **First Name** value is then stripped of this embedded text. The following changes will be made:

- Greg Jr. => Greg            Jr. is stored in Suffix.
- William II => William            II is stored in Suffix.
- Richard, Sr => Richard            Sr. is stored in Suffix.

### EMBEDDED QUESTION MARKS

Sometimes handwritten names can’t confidently be read by the person entering the data. So they enter what they can read and then follow that up with one or more question marks. They are trying to communicate that they aren’t sure that the value is correct. Unfortunately, those question marks appear in reports, postal mailings and emails with first name variables because they are a part of the actual first name. It would be better to remove the question marks and just leave the “best guess” value. It can be changed later if it is determined the value is incorrect. When the question marks are present, you can be guaranteed that the value is wrong. The **First Name** value is stripped of these question marks. The following changes will be made:

- Maverick ?? => Maverick
- ???? Jim => Jim

### FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

### TWO PEOPLE NAMES

When congregants create a new account online, sometimes they don’t realize that each person should be created separately; not together in a single record. When the tool sees a First Name such as John & Jane, it will flag that condition as a 2 People Name. These examples will be flagged.

- John & Jane
- John and Jane
- JOHN AND JANE



- john & jane
- john /jane
- John or jane

## UNUSUAL VALUES

When all attempts at repairing the first name still don't produce something that looks like a known value, the tool will flag it as an Unusual Name. Generally these values aren't really a first name and should be manually cleaned up.

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## MIDDLE NAME ISSUES

The middle name of a person.

## AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

## CAPITALIZATION

[See same section in \*First Name\*](#) for explanation of the rules.

## EMBEDDED GOES BY

[See same section in \*First Name\*](#) for explanation of the rules.

## INITIALS

[See same section in \*First Name\*](#) for an explanation of the rules. The only exception is that double initials are not supported for *Last Name*; only single initials are.

## EMBEDDED QUESTION MARKS

[See same section in \*First Name\*](#) for an explanation of the rules.

## UNKNOWN VALUE

[See same section in \*First Name\*](#) for an explanation of the rules.

## FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

## UNUSUAL VALUES

[See same section in \*First Name\*](#) for explanation of the rules.

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## LAST NAME ISSUES

The last name of a person.

## AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

### CAPITALIZATION

See same section in **First Name** for an explanation of the rules. This field also adds capitalization checks for special type of last names in addition to the standard rules. When the text matches one of several known values, a hardcoded capitalized version is substituted. For example the following changes will be made:

- ste marie => St. Marie
- vander Ploeg => Van Der Ploeg
- delarosa => De La Rosa
- de Los Marcos => De Los Marcos
- dacosta => DaCosta
- deFoe => DeFoe
- LACLAIR => LaClair
- leMaster => LeMaster
- OBoyle => O'Boyle
- ocasey => O'Casey
- Mcmaster => McMaster
- Machern => MacHern

### HYPHENATED NAME

It's a common practice now for married women to mix their former name with their current husband's last name with a hyphen between them. When the tool detects this condition, it enforces a standard format of Name1-Name2 with no space between the names and the hyphen. If the hyphen is missing, it will be added. The following changes will be made:

- Smith - Taylor => Smith-Taylor
- smith-taylor => Smith-Taylor
- Smith Taylor => Smith-Taylor
- Smith\Taylor => Smith-Taylor

### EMBEDDED FORMER NAME

Fellowship One has a dedicated field for holding the former or maiden last name of a married women. It is displayed in a prominent location in the Portal. However, some users don't know about it so they enter the former name in **Last Name** field itself following the current & correct value. These former names are usually enclosed in parentheses, double or single quotes. When the tool finds this condition, the enclosed value is relocated to the **Former Name** field and the **Last Name** is stripped of the value. The following changes will be made:

- |   |                                   |
|---|-----------------------------------|
| • <u>Smith "Taylor"</u> => Smith        | Taylor is stored in Former Name.  |
| • <u>Matthews (Pringle)</u> => Matthews | Pringle is stored in Former Name. |
| • <u>Ferguson 'Arter'</u> => Ferguson   | Arter is stored in Former Name.   |
| • <u>Langston `McCall`</u> => Langston  | McCall is stored in Former Name.  |

## INITIALS

[See same section in \*First Name\*](#) for an explanation. The only exception is that double initials are not supported for **Last Name**; only single initials are.

## EMBEDDED SUFFIX

[See same section in \*First Name\*](#) for an explanation of the rules.

## EMBEDDED QUESTION MARKS

[See same section in \*First Name\*](#) for an explanation of the rules.

## UNKNOWN VALUE

[See same section in \*First Name\*](#) for an explanation of the rules.

## FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

## UNUSUAL VALUES

[See same section in \*First Name\*](#) for explanation of the rules.

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## FORMER NAME ISSUES

The maiden name of a married woman or her former last name after she was remarried.

## AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

### REPEAT OF FIRST OR LAST NAME

The design of the **Former Name** field is such that it is intended to only hold the former last name of the person; not their first name or their current last name. Not everyone understands this. As a result, sometimes the full first and last name of the person are entered. Sometimes the current last name is entered again here. The tool enforces the proper usage of the **Former Name** field by stripping the current first or last name of the person from this field when found as being repetitive. The following changes will be made:

- Jane Doe has Jane Brown entered => Brown
- Jane Doe has Doe entered => removed/blank
- Jane Doe has Jane Doe entered => removed/blank
- Jane Doe has Jane Smith-Doe entered => Smith

## CAPITALIZATION

[See same section in \*Last Name\*](#) for an explanation of the rules.

## HYPHENATED NAME

See same section in [Last Name](#) for an explanation of the rules.

## EMBEDDED QUESTION MARKS

See same section in [First Name](#) for an explanation of the rules.

## UNKNOWN VALUE

See same section in [First Name](#) for an explanation of the rules.

## FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

## UNUSUAL VALUES

See same section in [First Name](#) for explanation of the rules.

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## GOES BY NAME ISSUES

The nickname a person prefers to be called by instead of their formal First Name.

## AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

## REPEATS FIRST OR LAST NAME

The design of the **Goes By Name** field is such that it is intended to only hold the name the person prefers to be called IF it is different from the formal first name. Not everyone understands this. As a result, sometimes the same value is entered in both First Name and Goes By. Sometimes the last name is also included in this field. This results in a confusing display of values in the Portal. The tool enforces the proper usage of this field by stripping the current first & last names of the person from this field when found, as being repetitive. The following changes will be made:

- Jane Doe has Jane entered => removed/blank
- Jane Doe has Jane Doe entered => removed/blank
- Jane Doe has Janie Doe entered => Janie

## WRAPPING CHARACTERS

Fellowship One automatically wraps the Goes By in double quotes when displaying it next to the formal first name. Not everyone knows this so they enter double quotes or some other characters around the value in the field itself. When these are found, they are removed.

- "Frankie" => Frankie
- (Frankie) => Frankie
- 'Joe Bob' => Joe Bob

## CAPITALIZATION

[See same section in \*First Name\*](#) for an explanation of the rules.

## EMBEDDED QUESTION MARKS

[See same section in \*First Name\*](#) for an explanation of the rules.

## UNKNOWN VALUE

[See same section in \*First Name\*](#) for an explanation of the rules.

## FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

## TWO PEOPLE NAMES

[See same section in \*First Name\*](#) for explanation of the rules.

## UNUSUAL VALUES

[See same section in \*First Name\*](#) for explanation of the rules.

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## GENDER ISSUES

The person's gender: Male or Female.

## AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

## STANDARDIZATION

Fellowship One only allows three values for this field: **Male**, **Female** and blank. The tool ensures one of these three are stored. It will erase any value that doesn't comply.

## ASSIGNMENT

When there is no gender on file for a person, the tool will attempt to assign one in two ways.

1. The tool examines the First Name and concludes a likely probability that name is either Male or Female. If that probability is above 86% (which the lowest level experience has determined that the correct gender can confidently be deduced), the gender will be assigned.
2. If the probability is lower than 86% or a gender couldn't be matched to a name at all, the Prefix will be examined and used. Mr. will result in Male. Mrs., Ms. and Miss will result in Female. Other prefixes won't result in a gender assignment because they are gender neutral.

## FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

## MISSING VALUE

Gender is such a vital demographic field for performing data analysis that the tool will flag each person that has a blank value for this field. This will provide some insight into how many records are affected by this condition and hopefully initiate some discussion about how to more consistently capture this field.

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## MARITAL STATUS ISSUES

The person's marital status.

### AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

### STANDARDIZATION

Fellowship One only allows eight values for this field: **Child/Youth, Single, Married, Separated, Divorced, Widow, Widower** and blank. The tool ensures one of these three are stored. It will erase any value that doesn't comply although it will convert a value of Widowed into one of the two valid choices.

This process also includes ensuring that all Children have the same value. By default, that value is Child/Youth. However it is changeable into other values such as Single or even blank. The side effect of this enforcement is that no Adults should have a Child's marital status value either. So when that condition is detected, the marital status is changed to a more appropriate value. The following changes will be made:

- Widowed and Gender is Male => Widower
- Widowed and Gender is Female => Widow
- blank or Single, DOB is unknown, Position is Child => Child Marital Status (Child/Youth)
- Child/Youth, DOB is Adult Age, Position is Head/Spouse => Single
- DOB is Child Age, Position is Child, Other or Visitor => Child Marital Status (Child/Youth)

### MARRIED INTEGRITY

When a household has both a Head and a Spouse of adult age and opposite genders, the tool will ensure they both have a marital status of Married unless one of them are separated, divorced or deceased.

### ASSIGNMENT

When there is no marital status on file for a person, the tool will attempt to assign one based on the value in the **Prefix** field. See that section for an explanation.

### DECEASED INTEGRITY

When a Head or Spouse of a married couple dies, their status is usually and correctly set to Deceased. However, many times the marital statuses remain untouched. For reporting consistency and data integrity, the surviving adult should have their marital status changed to Widow or Widower based on their gender. The deceased adult should have their marital status erased. They are no longer married.

The tool looks for this condition and will change the marital status of both people accordingly when found.

### FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

### MISSING VALUE

Gender is such a vital demographic field for performing data analysis that the tool will flag each person that has a blank value for this field. This will provide some insight into how many records are affected by this condition and hopefully initiate some discussion about how to more consistently capture this field.

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### PREFIX NAME ISSUES

The value preceding the person's First Name.

### AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

### STANDARDIZATION

The tool has a fixed list of known prefix values which when found are substituted with a specific abbreviation which is pre-capitalized. If the value found is not matched to one of these known values, it is flagged as an unusual value.

A few of the more common values include **Mr. , Mrs. , Ms. , Dr. , Rev. , Miss , Jdg.** and several military ranks.

### ASSIGNMENT

When there isn't a prefix on file for the person, one can be confidently assigned to them based on their gender, first name when gender is missing, marital status and date of birth. Generally, the tool will try to assign a prefix to every adult but not children. The following rules are used:

- Adult Male => Mr.
- Adult Married Female => Mrs.
- Adult Female that is not Married => Ms.

### CROSS FIELD ALIGNMENT

Cultural norms expect First Name, Gender, Marital Status and Prefix to remain in alignment with each other but Fellowship One doesn't require it. For example, a married female named Holly should have a Prefix of Mrs. If she should divorce, it should be moved to Ms. If a child female had Miss, it should be changed to Ms. when she later becomes an adult. A Mr. shouldn't be a female. John should be a male. The tool evaluates all of these fields and attempts to determine the correct value when one of them is in conflict with the others by using a "majority rules" process.

- Prefix is Mr., Gender is Female, First Name is John => Gender is changed to Male
- Prefix is Mr., Gender is Female, First Name is Mary, Marital is Single => Prefix is changed to Ms.

- Prefix is Mrs., Gender is Male, First Name is John => Prefix is changed to Mr.
- Prefix is Mrs., Gender is Female, First Name is Mary, Marital is Divorced => Prefix is changed to Ms.

### FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

### UNUSUAL VALUES

[See same section in \*First Name\*](#) for explanation of the rules.

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## SUFFIX NAME ISSUES

The value following the person's Last Name.

### AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.

### STANDARDIZATION

The tool has a fixed list of known suffix values which when found are substituted with a specific abbreviation which is pre-capitalized. If the value found is not matched to one of these known values, it is flagged as an unusual value. This process will also convert "close matches" such as 111 and III to the correct standard value of III.

A few of the more common values include **Jr.** , **Sr.** , **II** , **III** , **IV** , **M.D.** , **Ph.D.** , **C.P.A.** and **Esq.**

### EMBEDDED PREFIX

Sometimes the user will get the prefix and suffix fields confused. The tool will look for valid prefix values in the Suffix field and relocate them when found.

### FLAGGED FOR MANUAL REVIEW

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

### UNUSUAL VALUES

[See same section in \*First Name\*](#) for explanation of the rules.

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## DATE OF BIRTH ISSUES

The date the person was born.

### AUTOMATIC DETECTION & REPAIR

These are the conditions that can be automatically detected & repaired for this field.



## **BIRTH YEAR 1900 OR 1796**

In some cases, people have been entering 1900 or 1796 for the birthdate year when a birthdate was required. When this condition is detected, the value is simply deleted because it is incorrect for the person, skews age demographic reports and can create problems for them when registering. It is better to have no date of birth than to have the wrong one.

## **FLAGGED FOR MANUAL REVIEW**

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

### **IN THE DISTANT PAST**

When the DOB occurs more than 120 years ago, AND the person is not deceased, the person's record will be flagged for review. It's unlikely there is anyone still alive older than 120 years. The DOB most likely needs to be repaired.

### **IN THE FUTURE**

When the DOB occurs in the future for someone, that is impossible and indicates that the DOB needs to be repaired.

### **ADULTS WITH CHILD DOB**

When a person is in the Head or Spouse position, their marital status is Single, Married, Separated, Divorced, Widow or Widowed, BUT their DOB indicates they are a Child, the DOB is likely incorrect since the Position and Marital Status both indicate they are adult. Only manual review by someone can determine what needs to be changed to bring everything back into alignment.

### **MISSING VALUES**

DOB is such a vital demographic field for performing data analysis that the tool will flag each person that has a blank value for this field. This will provide some insight into how many records are affected by this condition and hopefully initiate some discussion about how to more consistently capture this field.

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## **PHONE ISSUES**

The tool examines four types of phone numbers: Home Phone, Mobile Phone, Work Phone and Emergency Phone.

## **AUTOMATIC DETECTION & REPAIR**

These are the conditions that can be automatically detected & repaired for this field.

### **STANDARDIZATION**

Fellowship One does not enforce any kind of format standardization which allows the congregants to enter anything. For readability, most people prefer a standard format of 999-99-9999 to be stored. The tool will strip out anything that is not a digit and format the rest to this standard.

Any values that have a leading 1 before 10 digits, the 1 will be removed. This was the old-style long-distance dialing sequence that is no longer in use.

Any values that don't contain any digits will be erased.

## **COMMENTS**

Each phone number also has an associated comment field which should contain text explaining the number in the phone field. Sometimes people will enter text in the phone number field along with the number itself instead of using the Comment field. For Emergency Phone numbers, the tool will preserve this text and relocate it to the Comment field. If something is already present in the Comment, the existing text will be appended to the text from the phone number field and the Comment will be updated to hold the new value.

## **MISSING AREA CODE**

In some cases, a church from a more rural area has been storing 7 digit phone numbers without the area code because there was only one in effect in their area. This was very common 15 years ago. Today with the proliferation of mobile phones, multiple area codes are in use in almost every location. This requires 10 digits to be stored for every phone number. The tool can take any 3 digit area code the church wants to provide and prepend it to all 7 digit phone numbers it finds to create a 10 digit number.

## **DECEASED INTEGRITY**

When a person is deceased, any personal phone number such as Mobile, Work and Emergency Phone are deleted to ensure they will never be called. If the only people in the household are deceased, any Home Phone will be deleted too.

## **HOME PHONE MANAGEMENT**

A home phone is created when needed to increase phone reporting completeness.

If the Household has multiple people in it, a Head or Spouse has a mobile phone, one of the other Head, Spouse or Children does not have a mobile email AND there is no home phone on file, one will be created using the Spouse mobile or Head mobile.

F1 preferred phone in reports will be blank if a person has no mobile or work phone AND the home phone is blank. This change increases the likelihood that an appropriate phone number will be listed for more people.

## **DUPLICATE MOBILE PHONE MANAGEMENT**

Sometimes a Head's mobile phone or Spouse's mobile phone is also entered as the mobile email on other family members; giving all of them the same phone number. The best practice way to accomplish this is to use home phone instead. When this condition is found, the mobile email for the Head/Spouse is kept but the duplicated values in the other profiles are deleted. A home phone is then created using that value when one is not already present.

## **FLAGGED FOR MANUAL REVIEW**

These conditions will be flagged in a separate area of the results and will require manual review and repair if necessary.

## **NOT 10 DIGITS**

When a phone number contains more or less than 10 digits after all repair attempts, the tool will flag that number for manual review and repair.

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## **EMAIL ISSUES**

The tool examines two types of email addresses: Personal Email and Home Email.

### **AUTOMATIC DETECTION & REPAIR**

These are the conditions that can be automatically detected & repaired for this field.

### **STANDARDIZATION**

Fellowship One does enforce a standard something@something.com/org/net/etc. type format. However, it doesn't pay attention to capitalization which allows all upper-case emails and other difficult to read mixed case values. To promote consistency and readability, the tool will lower case all email values.

### **DECEASED INTEGRITY**

When a person is deceased, any Personal Email address is deleted to ensure they will never be used. However, the F1 API will not permit InFellowship Email addresses to be changed or removed so they will remain intact. If the only people in the household are deceased, any Home Email address will be deleted too.

### **HOME EMAIL MANAGEMENT**

A home email is created when needed to increase successful email deliveries.

If the Household has multiple people in it, a Head or Spouse has a personal email address, one of the other Head, Spouse or Children does not have a personal email AND there is no home email on file, one will be created using the Spouse email or Head email.

The F1 email tool uses the home email if no personal email is present when emailing an individual. If neither are present, no email is attempted for that person. This change increases the likelihood that a key person in the family will be reached with your message when targeting someone. Preferred Email in reports will also be populated for them instead of being blank.

### **DUPLICATE EMAIL MANAGEMENT**

Sometimes a Head's email or Spouse's email is also entered as the personal email on other family members; giving all of them the same email address. The best practice way to accomplish this is to use home email instead. When this condition is found, the personal email for the Head/Spouse is kept but the duplicated values in the other profiles are deleted. A home email is then created using that value when one is not already present.

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## **STATUS ISSUES**

The member/people status of the person. This value reflects their engagement level in the church.

## **AUTOMATIC DETECTION & REPAIR**

These are the conditions that can be automatically detected & repaired for this field.

### **MISSING STATUS DATE**

The date is intended to hold the point in time when the person achieved the current status level. When captured, it can tell a church how long a person has been holding at that status. Some churches have built assimilation processes around this date. It is therefore recommended that a church capture this date whenever a status is changed.

The tool can insert the First Record Date OR the current date into the Status Date for people that don't have a status date if you so choose. Otherwise they will simply be flagged for Manual Review. This option allows reports to work when they require a status date to be present.

### **FLAGGED FOR MANUAL REVIEW**

These are the conditions that can be automatically detected & repaired for this field.

### **MISSING SUBSTATUS**

When a church is using the SubStatus to denote the home campus of each attendee, it can be useful to know which people are missing a SubStatus designation. The tool can return those people that don't have one for non-System status people.