

Best Practices for Using HCC’s Planning Center “People” Module

A “best practice” is “a procedure that has been shown by research and experience to produce optimal results.”

Here is why it’s important to follow Harvest City’s best practices when using the People module in Planning Center Online (PCO):

- **To provide consistency of care** – Caring well for everyone in the church starts with being careful and consistent with their information in our database.
- **Team efficiency** – Many people work with the information stored in PCO, for a variety of purposes. Please be *considerate of others* by being careful with the content and format of the information. That helps HCC’s other PCO users find and make use of the information they need without unnecessary extra work.

Membership Type

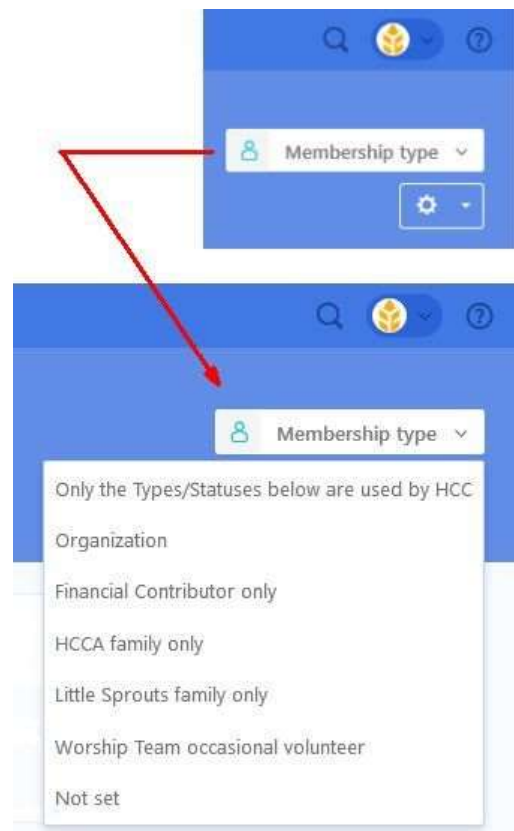
Membership Type (aka *Status*) is a PCO information field that is useful for filtering lists.

Harvest City only uses Membership Type for extraordinary cases, as follows:

NOTE: When assigning the membership types below, if the person should also be excluded from church communications, please indicate that as follows:

1. Open their Personal custom tab;
2. There, click the “Edit answers” button and set the “Communications” field to “Exclude from all notices”.

1. **Organization** – This status should be selected for “people” who are actually an organization of some kind. For example, the PCO Giving module records donations from businesses, other non-profits, etc., so those entities are required to be in the People module. Giving them the “Organization” type makes it simple to exclude them from people lists.
2. **Financial Contributor only** – Some people’s connection to Harvest City is simply that they contribute financially. Giving them the “Financial Contributor only”



membership type helps us avoid bothering them with communications that do not pertain to them.

3. **HCCA Family only** – This membership type is intended for people who have (or support) children in Harvest City Christian Academy, but do not attend Harvest City Church.
4. **Little Sprouts family only** – Similar to the “HCCA Family only” type above, this status should only be applied to individuals who have or support children in Little Sprouts Preschool, but do not attend Harvest City Church.
5. **Worship Team occasional volunteer** – Assign this membership type to people who do not attend HCC, but help with our worship teams from time to time. These individuals need to be left active so they can be scheduled in PCO Services when needed.
6. **Test Person (fictitious)** – These are “people” created for the purpose of testing various aspects of HCC's PCO.

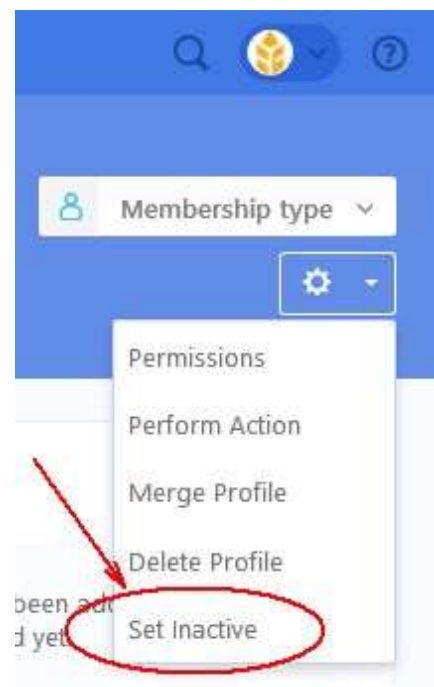
Active / Inactive

A person who is not a regular HCC attender may have been added to our database a number of ways: they may have visited Harvest City and checked their child into Sunday School, or may have registered for an HCC event, etc. So they appear in our PCO even though they are “inactive” – not a regular attender.

Eligible to be Inactive – To keep our information current and accurate, watch for people in PCO who are eligible to be inactive for any of the following reasons:

- a. They were just visiting or came just to attend a Harvest City event (NOTE: use [this procedure](#) to clean up all the inactive attendees after an event);
- b. They have moved away from the area;
- c. They have moved to another church or quit attending church altogether;
- d. They have requested to be removed from our database;
- e. They have no activity for more than a year in any of the PCO modules.

NOTE: To decide whether someone in our PCO is inactive, their activity in all the PCO modules (Check-ins, Giving, Groups, People, Registrations and



Services) needs to be reviewed. Therefore, **unless you have viewing privileges in all those modules, don't set these people to inactive;** instead, use [this form](#) to alert our PCO admins if there is someone who is likely inactive as per these guidelines.

NOT Eligible to be Inactive

- Anyone with a Membership Type listed above should not be made inactive.
- If someone visits only occasionally, but when they do, brings children who attend Sunday School, do not make them inactive.
- If a person's household shows activity, that person may well not be inactive. Notify our PCO admins using [this form](#).
- If the same person appears more than once in PCO (duplicate profiles) do not make one of the profiles inactive. In a case like that, we need to [merge the profiles](#), which combines all information that was put into both profiles. Again, use [this form](#) to alert our PCO admins that there are duplicates to be merged.

Inactive Reasons – When making someone inactive, PCO requires a reason and date. Here are the reasons used by Harvest City:

- No Reason Given (uneditable reason built into the system)
- Moved.....(moved away from the area)
- Different Church.....(moved to another church in the area)
- Deceased.....(uneditable reason built into the system)
- Visitor/Non-Attender (just visited, or attended a Harvest City event — see second note under “NOT Eligible to be Inactive” above)
- Website Contact Only(made an inquiry or sent an unsolicited promotion via HCC's website)
- Dropped.....(either dropped out of attending church, or HCC dropped them from being active for some reason — for example, disciplinary issues)

How to make a profile inactive

NOTE: Do not DELETE profiles unless they are test data or were created by accident.

If you have checked a person's profile against all the above guidelines and are confident you can make the person inactive, then [follow the instructions in this PCO help article](#).

Rest assured... an inactive profile is set back to active if the person uses PCO to give

online, register or check into an event, or join a group.

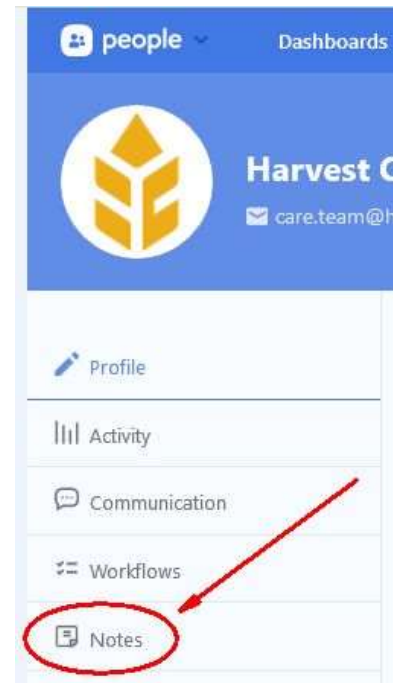
Profile Notes

Notes attached to people's profiles are a very helpful way to keep track of important information and interactions. Not only do notes help you remember; they also give other care team members a better frame of reference as they prepare to minister to the person.

Note Categories

When you're adding a note, you should first select a Category for it. Categories enable us to:

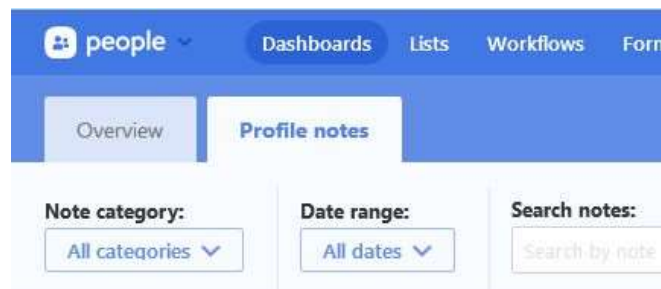
- Limit who is able to view particular kinds of notes – team members are only able to see the note categories that are appropriate for their role;
- Sort and filter notes when creating lists and reports.



Viewing Notes

An individual's Notes can be accessed from their profile (see screen clip above).

If you want to view all notes in a particular category or within a certain date range, or search for a note, those options are available by going to your Dashboards page > Profile notes tab.



Category Explanations

Harvest City's note categories include the following (some of these may not appear on your list, depending on your role's permissions):

1. **General...** Please do not use this category. Unfortunately, it is built into the system such that we cannot delete or edit it.
2. **Admin...** Used for notes about:
 - a. Administrative and financial procedures
 - i. Example: "Left a VM asking whether _____ wants to receive communications from HCC in the future."
 - ii. Example: "TEXT: Hi _____. Tax receipts will be available for

pick up at the church on Jan 17th and 24th; after that if they haven't been picked up they will be mailed out.”

- b. Profile information explanations
 - i. Example: “Called profile’s Home number 306-070-8090; number is not in service.”
 - ii. Example: “Birth year = 1957 on Facebook (in FI was 1969)”
 - c. Technical
 - i. Example: “The ‘person’ Web Admin was created with Manager permissions to help administrate HCC's online activities.”
3. **Benevolence - Financial**... Visible only to those members of the pastoral team who handle requests for financial assistance, so they can keep track of who received what, when, and why.
 4. **COVID-19 Concern Call**... These are notes about contacts made during HCC’s COVID care initiative, which started mid-March 2020 (emails, texts, phone calls, etc. with a brief description and any concerns noted).
 5. **Form Response**... These notes come mainly from the workflows that follow up on PCO form submissions (usually inquiries about ministries, ministry opportunities, or care the inquirers are seeking).
 - a. Example: “2020-03-25 Doug C forwarded this form submission message to David and May”
 6. **Pastoral Care**... This category is where almost all notes from pastoral team members should go. It is for notes about how an individual is doing.
 - a. Confidences – Do not record confidential information in these notes; instead, note confidences without giving away confidential details.
 - i. Example: “Jack Spratt shared some concerns with me in confidence, which I will be following up in the days ahead.”
 7. **Prayer Requests**... This category is for non-confidential prayer requests from people in PCO People.
 - a. HCC’s prayer coordinator is automatically notified of prayer requests entered in this category, the morning after they are entered. The coordinator then decides whether the request will be communicated to HCC’s intercessors.
 - b. If a prayer request is submitted directly to the prayer coordinator, it should also be copied into a note in this category.