Reason for Change Setup

The Diocese asks that all parishes use the "Reason for Change" feature on family records, to help with an information trail for all changes.

To enable this feature in PDS Church Office

- 1. On the Ribbon, click the **File** menu.
- 2. Under Setup, click Initial Setup.
- 3. Select the Ask for Reason on Significant Changes option.

Initial Setup					
Sharing Data Default Picture Subdirectory: Federal ID # for Statements: Automatically Update: Default Documents Subdirectory: Program Options Family / Member	Check in 1 week	_			
Program Options Weekly is Weekly on Sunday Warn if Change ID or Name Save Order when Exit Program Processe Ohrout Affect Fenily I Ask for Reason on Significant Ch	Disable Add Head/Spouse when Add Family Disable Family/Member Name Change Help Default to Show Totals for All Funds Processes Should Affect Member Date Changed anges Rates can be Charges or Payments Default Envelope User to True Split M/M if Spouse has Different Last Name				
Sharing Data Options Share Church Inactive Flags Share Church Family Keywords Fund Recap Defaults Fund Recap Defaults to Totals to	Share Church Date Registered Share Church Family Remarks O Date Fund Recap Defaults to Grand Totals				
	Save/ <u>OK</u> Cancel				

4. Click Save/OK, then Close.

Logging Reason for Changes

The reason for changes logs occurrences of important changes to family data and the reasons for the changes.

Reason	for Change to 1 - Van Loon,Jeff(Jean	ne),M/M		
Type of Change:	Synchronize With Diocese Changed			
General Reason for Change:	Other	•		
More Info. for the Change:	Typographical Error Call from Parishioner			
Original Value:	Census Update Spouse Died			
New Value:	Deceased Divorce / Separation Marriage			
	Moved Moved to Another Parish	Log/ <u>O</u> K Cancel		
	Noved to Assisted Living USPS Request			
	Other			

The reasons for changes display in red if they were made in another PDS program that is sharing data with PDS Church Office.

File Information Pe	🖤 🛱 🗂 🥅 🐌 🍇 😭 rsonnel Sacramental Regisi	🙀 🖕 Parish Data Sy: ters Reports Proc	esses Administration	-	
Dashboard Families	Members Contributions	Search Order by: ID/Env Num	Members	O Add Family Delete Family	
Primary Information IDI Other Addresses Partily Recop Relationships Partily Recop Letters, Visits, Etc. Stit Indextorn Still - Lobel Stit Resons for Changes Ad Listing Screen Cit Processes Exit Program	View Reasons fo Date & Time 10/14/2016 11:21:47 AM 10/14/2016 11:22:04 AM	ri Changes to 1 - Van Type of Change Street Address Changed TJ Synchronize With Dioc 0	Loon,Jeff(Jeane),M/M Reason for Change rpographical Error-Correct Apt # fr ther-Synchronize with Diocese	am 20 to 30	
	T Order by: Logged → I I I I I I I I I I I I I I I I I I I	Log <u>R</u> eport	Eilter Clear Filter Manual Log Entry	Close	

The Reason for Changes applies when making changes to the following family information:

- Family Name
- Lines 1 and 2 of the Street, Mailing or Alternate addresses
- City/State
- Zip/Postal
- Deleting Email addresses
- Information to be synched with the diocese
- Family Status (active or inactive)
- Deleting a family or member

Useful Information

You can view logged changes and reasons from three locations within the program:

- The Reason for Changes link in the Families navigation pane
- The View Log of User Activity dialog box
- The Synchronize with Diocese/Metropolis process