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InformationNOW – Households

Overview

A *household* is defined in *InformationNOW* as students and student contacts residing at the same address – those people that define a family unit. Billing attributes are assigned to student members of the household, indicating the household’s responsibility for the specific student. The household may be *Primary Responsible for Bill (Allow Charges and Responsible for Bill)*, *Secondary Responsible for Bill (Allow Charges only)* or *Only Receive a Copy of the Account Statement (Receives Bill Copy)*. The information and records used to create households will also be used to generate the Family Directory

Searching for Households in the Census

Before adding a new Household, it is best to use the Search Households to insure that the Household does not already exist in the database. To do so, select **Census** from the menu items on the left and then click **Households**.

The screenshot shows the 'Search Households' form in the InformationNOW application. The form is divided into several sections for data entry:

- Household Criteria:** Includes fields for Household Name, Household Number, Household Type (dropdown), and checkboxes for 'Include Prospects' and 'Include Inactives'.
- Household Member Criteria:** Includes fields for Member First Name, Member Last Name, Member Number, and Organization (dropdown). It also features radio buttons for 'Any', 'Adult', and 'Child'.
- Mailing Address Criteria:** Includes fields for Address Line 1, Address Line 2, City, State (dropdown), and Zip Code.
- Household Filter Criteria:** Includes a dropdown for Household Filter.

At the bottom right of the form are 'Add' and 'Search' buttons. A left-hand navigation menu is visible, with 'Census' selected and 'Household' highlighted under its sub-menu.

Household Criteria

- **Household Name:** Search by the name of the household.
- **Household Type:** Search by the type of household (*All, AllowChargesOnly, NoMembersOnly, ResponsibleforBillOnly*).
- **Household Number:** Search by the *Household Number*.

Note: The leading *H* in the Household Number is not required for searching. This is different from other search screens throughout *InformationNOW* when searching for Students, Persons or Staff.

- **Include Prospects:** Check this box to include households with a status of *Prospect*. The default Search Results will only display households with a status of *Active*.
- **Include Inactive:** Check this box to include households with a status of *Inactive*. The default Search Results will only display households with a status of *Active*.

Household Member Criteria

The criteria entered in the *Household Member* section will return a list of households where any member meets the selected criteria. For example, search for all households that may have a member with the first name *Karen*, or search for all households that may have a member belonging to a specific organization.

- **Member First Name:** Search using the first name of a household member will return results of all Households that have a member with the first name entered here.
- **Member Last Name:** Search using the last name of a household member will return results of all households that have a member with the last name entered here.
- **Organization:** Search using the *Organization* field will return a list of households in which a member is assigned to an organization in *Student Maintenance*.
- **Radio buttons for Any, Adult or Child:** Search for households with adult-only or child-only members. The default is to search for households with any members.

Mailing Address Criteria

Search for households using the mailing address fields to return results of all households with the specified address criteria.

Household Filter Criteria

Search for households meeting the criteria specified in a household filter. Household filters are explained in the section “Household Filters” on page 12.

Search Results

Regardless of the criteria for the search, the resulting list of households matching the search criteria will display.

The screenshot shows the InformationNOW web application interface. The top navigation bar includes the logo and user information. A left-hand navigation menu lists various system functions. The main content area displays the 'Search Households - Household Result List' page. Search criteria are shown as 'Include Prospects = False | Include Inactives = False | Member Type = Any'. A table lists three household records, each with a checkbox, file number, household name, mailing address, and status. Action buttons for 'Add', 'View', and 'Delete' are present for each record.

<input type="checkbox"/>	File No.	Household Name	Mailing Address	Status
<input type="checkbox"/>	H1001	Adams, David	123 Main Street, Anytown, MO 12345	Active
<input type="checkbox"/>	H1002	Adams, Thomas William		Active
<input type="checkbox"/>	H1003	Commins, Gail	65 North Street PO bos 56796, Rome, MO 87898	Active

- **File No.:** The auto-generated unique identifier for the household. File Numbers beginning with *H* represent households. File Numbers are used throughout *InformationNOW* to identify Students (*S*), Persons (*P*), Staff (*ST*) and Households (*H*).
- **Household Name:** Household Names are user-defined. This field will be used differently in the Family Directory and Mailing Labels than in *InformationNOW* Billing. The Family Directory will be alphabetized by the last name of the household member who is marked *Head of Household*. For *InformationNOW* Billing users, it is recommended that the household names begin with the last name, as shown in the screen shot above. Billing reports will be alphabetized according to Household Name.
- **Mailing Address:** The mailing address of the household member who is marked as *Head of Household*.
- **Status:** The status of the household (*Active, Inactive*).

Adding Household(s)

If the household to be added is not found in the search results, the user may manually add it by clicking the **Add** button. Households may also be added by clicking the **Add** button at the bottom of the *Search Household* form without performing a search.

- To begin creating a household, enter the name of the Household and click **Create**.

Note: For *InformationNOW* Billing users, it is recommended that households be named beginning with the Last Name, e.g., *Adams, David*, referring to the household member who will be the *Head of Household*. It is also acceptable to include both spouses' names in the *Household Name* field, e.g., *Adams, David and Jane*. For those who do not use *InformationNOW* Billing, household names may be more generic, such as *The Adams Household*. While the Family Directory will pull from the household setup, households on the Family Directory will be alphabetized using the last name of the household member marked *Head of Household*.

The auto-generated *File No.* will be created and the **Add** button enabled, allowing for members to be added to the household. The first member to be added to the household should be the record that will be *Head of Household*.

- Click the **Add** button to begin adding members to the household.
- Search the census for person and student records to be added as members to the household.

Regardless of the means of search – *Simple* or *Advanced* – the resulting list of people matching the search criteria will display.

File No.	Name	G	Birthdate
S903682	Dearman, Henry	M	01/21/1998
S903683	Dearman, Ivy	F	06/14/2001
S903681	Dearman, Peyton	M	04/12/1995
<input checked="" type="radio"/> P3080358	Dearman, Randy	M	
S903680	Dearman, Richard	M	12/21/1992
P3080357	Dearman, Rose Marie	F	

- Select the member of the household who will be the *Head of Household* by bulleting the radio button to the left of the desired record and clicking **OK**. This is the member of the household from whom the household will get its *Physical* and *Mailing Address*, *Primary Phone* and *Primary Email* information. This member is also the name that will be used for alphabetizing the household on the Family Directory.

- **Name:** The name of the member as entered on the Contact record will display *Last Name, First Name*.

- **Role:** From the *InformationNOW Relationship* lookups. This field is not required, but allows the user to view each member's role in the household from the **View Household** link on Student, Student Contacts and Staff records.
- **Head of Household:** Check this box for the household member who will be the *Head of Household*. This is the member of the household from whom the household will get its *Physical* and *Mailing Address*, *Primary Phone* and *Primary Email* information.
- **Type:** Person records, or records for those household members who have (*P*) records, will be displayed as *Adults*. For use with *InformationNOW Billing*, at least one person record must be added to the household.
- **Student Billing Attributes:** These checkboxes will only be selected on student members of the household representing the household's billing responsibilities for the specific student. If *InformationNOW Billing* is not licensed, or enabled, these attributes will not be displayed.

After checking the *Head of Household* checkbox, click **Create** to add this record to the household. The **Create** button will change to **OK**. Click the **OK** button.

Add Household: Dearman, Randy

Household

Demographics

Household Number: H1084

*Name: Addressee:

Formal Salutation: Informal Salutation:

Status:

Contact Information

HOH Mailing Address: 1492 Columbus Lane, Anytown, AL 35235, USA
 HOH Physical Address: 1492 Columbus Lane, Anytown, AL 35235, USA
 HOH Primary Phone: (205) 555-1234
 HOH Primary Email: randyandrose@hotmail.com

Household Members

+ Add ✓ View ✗ Delete

<input checked="" type="checkbox"/>	File No.	Name	Adult / Child	Role	HOH	Res. for Bill	Allow Charges	Allow Late Fee	Bill Copy
<input checked="" type="checkbox"/>	P3080358	Dearman, Randy	A	Father	Y				

+ Add ✓ View ✗ Delete

Adding Additional Members to the Household

To add additional members to the household, click **Add** to again search the Census for additional persons or students, or select the first member by clicking the checkbox to the left of the *File No.* and click **View**, or click the **File No.** link displayed in blue. If additional members of the household use the same address in *InformationNOW*, use the **Add Members at Same Address** link in the Manage section in the upper left, as shown below.

Edit Household Member: Dearman, Randy

Household Member

Manage
Add Members at Same Address

*Name:
Dearman, Randy

Role:
Father

Head of Household

Member Type
 Child Adult

Student Billing Attributes
 Allow Charges Responsible for Bill Allow Late Fees
 Receives Bill Copies

OK Close

- Select each person to add as a member to this household and then click **OK**.

People Associated with the Address

Select each person you would like to add as a member to this household.

<input type="checkbox"/>	File No.	Name	G	Birthdate
<input checked="" type="checkbox"/>	S903680	Dearman, Richard	M	12/21/1992
<input checked="" type="checkbox"/>	S903681	Dearman, Peyton	M	04/12/1995
<input checked="" type="checkbox"/>	S903682	Dearman, Henry	M	01/21/1998
<input checked="" type="checkbox"/>	S903683	Dearman, Ivy	F	06/14/2001
<input checked="" type="checkbox"/>	P3080357	Dearman, Rose Marie	F	
<input type="checkbox"/>	ST90584	Dixon, Druscilla	F	

OK Close

Viewing Household(s)

From the search results list of households, select the desired household(s) and click **View**. The completed household record will display, as shown below.

Edit Household: Dearman, Randy

Household

Demographics

Household Number: H1014

*Name: Addressee:

Formal Salutation: Informal Salutation:

Status:

Contact Information

HOH Mailing Address: 1492 Columbus Lane
Anytown, AL 35235
USA
HOH Primary Phone:

HOH Physical Address: 1492 Columbus Lane
Anytown, AL 35235
USA
HOH Primary Email: randyandrose@hotmail.com

Household Members

+ ✓ ✗
Add View Delete

<input type="checkbox"/>	File No.	Name	Adult / Child	Role	HOH	Res. for Bill	Allow Charges	Allow Late Fee	Bill Copy
<input type="checkbox"/>	P3080358	Dearman, Randy	A	Father	Y				
<input type="checkbox"/>	S903682	Dearman, Henry	A			Y	Y	Y	
<input type="checkbox"/>	S903683	Dearman, Ivy	A			Y	Y	Y	
<input type="checkbox"/>	S903681	Dearman, Peyton	A			Y	Y	Y	
<input type="checkbox"/>	S903680	Dearman, Richard	A			Y	Y	Y	
<input type="checkbox"/>	P3080357	Dearman, Rose Marie	A	Mother					

+ ✓ ✗
Add View Delete

Demographics

- Name:** The name of the household. For *InformationNOW* Billing users, it is recommended the household be named beginning with the last name, e.g., *Adams, David*, using the household member who will be the *Head of Household*. It is also acceptable to include both spouses' names in the *Household Name* field, e.g., *Adams, David and Jane*. If *InformationNOW* Billing is not in use, household names may be more generic, such as *The Adams Household*. While the Family Directory will pull from the household setup, households will be alphabetized using the last name of the household member marked *Head of Household*.
- Salutation Fields (*Addressee*, *Formal Salutation* or *Information Salutation*):** these user-defined fields are used only in *InformationNOW* Billing. Billing reports using household names, such as the *Current Household Balance Report* or *Household Statements*, allow for the selection of the household name, including one of the salutation fields—*Addressee*, *Formal Salutation* or *Information Salutation*.
- Status:** The status of the household. This field is only used in *InformationNOW* to identify *Active*, *Inactive* and *Prospect* households. The *Status* may be used to filter the households displayed on certain reports, such as the Family Directory and Mailing Labels. The household's *Billing* status is defined in *Household Preferences* as part of the setup of *InformationNOW* Billing.

Contact Information

When adding members to the household, one contact will be selected as the *Head of Household*. The *Mailing Address*, *Physical Address*, *Primary Phone* and *Primary Email* will auto-populate from that household member's Contact record. This information is not editable on the household record. Changes to this information will be made on the household member's Contact information in **Student Maintenance**.

Household Members

- **File No.:** The auto-generated unique identifier for the household member. File Numbers beginning with *H* represent households. File Numbers are used throughout *InformationNOW* to identify Students (*S*), Persons (*P*), Staff (*ST*) and Households (*H*).
- **Name:** The name of the household member as entered in the *Census*, *Student Maintenance*, *Staff* or *Contacts*.
- **Adult/Child:** Student records are identified as *Child* members; person and student contacts are identified as *Adult* members.
- **Role:** The relationship of the household member to his/her place in the household, e.g., *Father*, *Mother*, *Son*, *Step-son*, *Daughter*, *Step-daughter*.
- **HOH:** The Yes (*Y*) indicates the household member who has been marked as the *Head of Household*. This identifier will be used to provide the *Mailing Address*, *Physical Address*, *Primary Phone* and *Primary Email* fields for the household based on the information provided on that household member's student contact record.
- **Res. For Bill:** Used mainly with *InformationNOW* Billing to indicate *Primary Responsible for Bill*. This billing attribute represents the household's responsibility for the specific student.
- **Allow Charges:** Used mainly with *InformationNOW* Billing to indicate if charges can be assessed to this household for the specific student. This billing attribute represents the household's responsibility for the specific student.
- **Allow Late Fees:** Used mainly with *InformationNOW* Billing to indicate if late fees may be assessed to this household for the specific student; this choice would be de-selected if the household is exempt from late fees. This billing attribute represents the household's responsibility for the specific student.
- **Bill Copy:** Used mainly with *InformationNOW* Billing to indicate that this household will receive a copy of a billing statement for the specific student.

Note: The billing attributes *Responsible for Bill*, *Allow Charges*, *Allow Late Fees* and *Receives Bill Copy* will be selected on student members of the household **ONLY** indicating the household's responsibility for the specific student. For households with multiple student members, the billing attributes will be selected for each student.

- Click the **Add** button to add additional members to the Households.
- **View:** Select a member of the household using the checkbox to the left of the *File No.* and click **View**. Contact information is not editable on the household and changes should be made on the contact record in **Student Maintenance**. See "Viewing Household Member(s)" below.
- **Delete:** Members of a household may be deleted from the household. See "Deleting Household Members(s)" on the following page.

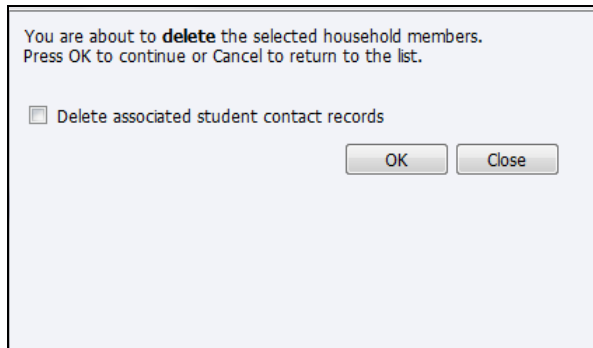
Viewing Household Member(s)

Select a member of the household using the checkbox to the left of the *File No.* and click **View**. This may be used to make changes to the *Role*, *Head of Household* checkbox and billing attributes, where appropriate.

Deleting Household Members(s)

WARNING: If you are using *InformationNOW* Billing, members should NOT be removed from households.

Select a member of the household using the checkbox to the left of the *File No.* and click **Delete**. The following dialog box will display:



- Click **OK** to remove the selected member(s) from the household and return to the household.
- Check the *Delete associated student contact records* checkbox to also delete the record from **Student Maintenance**.

Deleting Household(s)

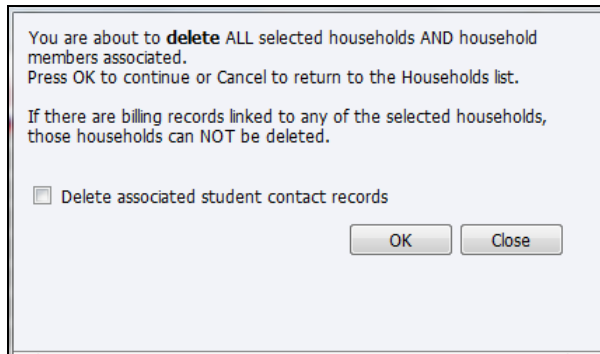
WARNING: If you are using *InformationNOW* Billing, households should NOT be deleted.

From the Household Search results, select the household(s) to be deleted using the checkbox to the left of the *File No.* and click **Delete**.



<input type="checkbox"/>	File No.	Household Name	Mailing Address	Status
<input type="checkbox"/>	H1001	Adams, David	123 Main Street, Anytown, MO 12345	Active
<input type="checkbox"/>	H1002	Adams, Thomas William		Active
<input type="checkbox"/>	H1003	Commins, Gail	65 North Street PO bos 56798, Rome, MO 87898	Active

The following dialog box will display:



- Click **OK** to delete the selected households and household members.
- Check the *Delete associated student contact records* checkbox to also delete the record from **Student Maintenance**.

Household Filters

A filter may be described as a set of criteria that is used to create a subset of records for which reports or searches may be generated. Household Filters are used mainly in *InformationNOW* Billing or when printing the Family Directory.

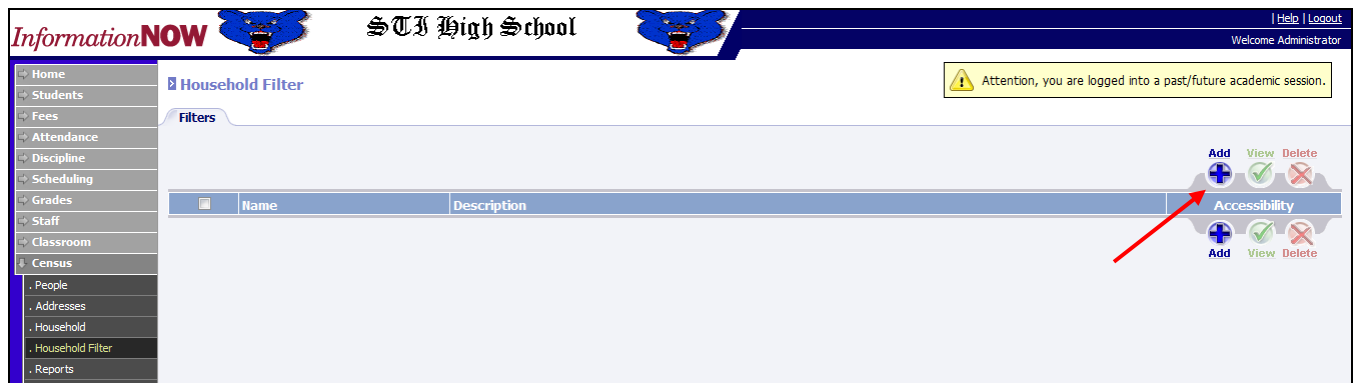
Accessing Household Filters

To access Household Filters, click **Census** from the menu items on the left and select **Household Filter**. A list of existing filters will display, including the filter name, the user who created the filter and the date it was built.

Note: When a filter is used to generate reports or searches, the program will pull the latest list of households that meet the criteria. In other words, whenever it is used, the latest list of households meeting the criteria will be reported. There is no need to rebuild filters once they are created.

Add a Filter

To create a new filter, click **Add** and enter information as described on the following page.



Note: These filter options are “and” options. For example: If a member First Name of *Lisa* is selected and a Household Status of *Prospect* is selected, all households including a household member with the First Name of *Lisa* will be included in the filter.

- **Filter Name:** Enter a meaningful and unique description for this filter. Examples: *Board Members* or *Households with Moms who volunteer*. The filter name is limited to 50 characters.
- **Active:** This is used to determine whether the filter is active or inactive. Once a filter is set inactive by unchecking the box, it will not be available to use for generating reports or executing searches.
- **Public Filter:** Public filters may be viewed and/or edited by any user with the appropriate privileges.
- **Private Filter:** Private filters will be seen only by the user who created the filter.
- **Description:** Optional. Enter a brief description of the filter.

Main Tab

One or more of the following criteria may be specified in a Household Filter:

Note: Search criteria are not case-sensitive.

- **Household Name:** Enter the full or partial first name of the household(s) to be included in the filter. For a list of households whose Household Names begin with the letter A, enter an A in this field.
- **Household Number:** Enter the auto-generated number of the household to be included in the filter (ex.: H1001 or H1094).
- **Addressee:** Enter the full or partial first name of the household(s) to be included in the filter. For a list of households whose *Addressee* fields begin with *Dr.*, enter *Dr.* in this field.

- **Member First Name:** Enter the full or partial first name of the household member to be included in the filter. All households with a household member whose first name matches the criteria entered here will be included in the filter.
- **Member Last Name:** Enter the full or partial last name of the household member to be included in the filter. All households with a household member whose last name matches the criteria entered here will be included in the filter.
- **Member Number:** Enter the auto-generated number of the household member to be included in the filter. For example, the auto-generated *S* or *P* number given to *Students* and Student Contacts (*Persons*).

Note: The following fields are optional multi-select fields. Use *Ctrl*+click or *Shift*+click to select multiple values to be included in the filter. If no value is selected in any of the following fields, all households will be included regardless of their value.

- **Organization:** To filter on *Organization*, select the Organization into which a household Member has been added on their Student Contact record.

Note: For *InformationNOW* Billing users, *Organization* may be used to define households by church membership and number of children, e.g., *Member 2 children*.

TIP for previous School Minder users: The *Organization* field on Student Contact records may be used to replace the *Family Sort Code* fields on School Minder's Family records.

- **Member Type:** To filter on *Member Type*, select the type of the household member of the household to be considered.
- **Household Status:** Select the status of the household.
- **Min. Number Children:** Enter the minimum number of children in a household to be included in the filter. For example, enter 2 to include a list of households with at least 2 children.
- **Max Number Children:** Enter the maximum number of children in a household to be included in the filter. For example, enter 5 to include a list of households with up to 5 children.
- **Academic Sessions Year:** Select the year from the available list. Filters are academic session-specific. For example, if the user creates a filter for academic session 2010, the households listed will be those that have a student member with an enrollment record during the 2010 academic session.
- **Academic Sessions:** Household filters are limited by school. If the user has permission to access more than one school, select the desired school to be tested from the available list.

User Defined Tab

This tab allows users to define a static or fixed list of households to include in a filter. Selected households will be included in the filter unless manually deleted regardless of other filter criteria that may be applied to the filter. To add a household, perform the following steps:

- Click **Add** on the *User Defined* tab.
- Enter search criteria to filter the list of households
- Click **Search**.
- Place a check next to the household(s) to be added to the filter.
- Click **Include**.
- Continue adding households as desired. Click **Close** when finished.

Test/Create Household Filters

Once the criteria are entered, use one of the following options:

- Click **Test** to view the list of Households to be included in the filter. Click Close to return to the filter add screen.

Note: The list includes the *Household File Number, Household Name, Mailing Address* and *Status*.

- Click the **Create** button to save the filter.
- Click the **Cancel** button to cancel the operation and close the filter add screen.

Edit a Filter

To view/edit a household filter, go to **Census | Household Filter**. Then do one of the following:

- Click the filter name, which is a link, under the *Name* column in the *Household Filter List* screen; or
- Check the checkbox(es) in one or more rows and click the **View** button in the *Household Filter List* screen.

Either of these two options will open the edit screen. For a description of the fields, see the section “Add a Filter” on page 12.

Delete a Filter

To delete a household filter, go to **Census | Household Filter**. Place a check next to the name of the filter to be deleted. Click **Delete**.