

CCB Best Practices:

Creating Profiles:

- Take note of potential duplicates as info is being entered. Make best effort to determine if it is actually a duplicate or if profile should be created.
- Make sure names and addresses are capitalized appropriately. Do NOT use question marks when unsure, make your best guess and put a note. Also, ask someone else to look at it with you, sometimes a second set of eyes helps.
- Enter all profile info (gender, marital status, etc.) Sometimes info provided is limited, but certain things such as gender for standard names and marital status if you have info from husband and wife. Assumption can be made that they are Single if under 18 years old. There is probably a less than 1% chance you would be wrong.
- Only attach children under 18 or special needs that would need to remain linked to parents
- Only use OTHER for businesses connected to family (Other affects family profile changes and other family reporting).
- Children should be listed as child even if not the family's child
- Unmarried individuals living together should have separate family profiles

Profiles created at Kid's Check In:

- Follow same profile guidelines as above
- Make sure that address is populated for all family members (especially when adding additional info after the initial creation)
- Put gender and grade (if available)
- Do **NOT** put phone numbers and emails on Kid's profiles
- Do **NOT** put additional authorized kid pick up individuals on the family profile. Create a new family and then use the Authorized Pick-Up option in Check in to give them the access.

Merging Duplicates:

- Take some time to review information and confirm if profiles are duplicates. If info is different, make a note of data that is being removed in the notes.

Matching Forms:

- Verify if there is any change to information and update accordingly.
- Make note of info that was removed.
- If there is an address change, be sure to apply change to whole family.

Maintaining Up to Date Database:

- Consider using queues and membership types to track all new profiles created with some follow ups in place to keep profiles from getting lost in the system.
- Run other report on a regular basis to catch any profiles that are listed as other. Remove any necessary profiles and apply to correct family units.