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Participants–Prepare

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ACSTechnologies.

"Tracking" Fields

- **Households/Families Page**
  - Congregation/Parish
- **Contacts Page**
  - Contact Status
- **Participants/Members Page**
  - Participant/Member Type ⭐
  - Member Status
  - Participant Engagement
- **Donors Page**
  - Donor Level
  - Donation Frequency

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Congregation/Parish 📍

Page
- Households/Families

Management
- Manual (by default)

Purpose
- To show where a household attends worship / is registered

Special Considerations
- Family registration
- Global filters

What location is this family worshiping at?

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Contact Status 💡

Page
- Contacts

Management
- Manual (by default)
- Required

Purpose
- On/off switch

Special Considerations
- Manually managed vs automated

Is this person involved at all right now?

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Member Status 🏅

Page
- Participants/Members

Management
- Manual
- Not required

Purpose
- Church polity
- Formal process
- Not necessarily dependent on activity

Has this person officially joined your church?

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Participant/Member Engagement 📷

Page
- Participants/Members

Management
- Automated

Purpose
- Daily summary of database activity
- Use in conjunction with other tracking fields

Special Considerations
- Customization available through Professional Services

What does this person's participation look like in this season?

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Participant/Member Type 🛠️

Page
- Participants/Members

Management
- Manual
- Required

Purpose
- Depends on how it is managed… but we have MP best practices for how to do it!

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Best Practices

- Keep the list small (5-7 items if possible)

- Make the options broad

- Avoid options that require interpretation (i.e. regular attender)

- Avoid using this field for membership or registration data

- Use in conjunction with contact status and member status to create sub-categories

- Make sure you know your default value (configuration setting)

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Best Practices

- Decide your internal protocol on how this field is assigned when contacts are created*:
    - Use *ChangeMe* or *Temp Participant Type*?
    - Use a *New* or *Guest* type?
    - Make a judgement call on each entry?
- Create a plan for how this field will be managed moving forward

Try to create options that help you answer the question:
How is that person participating in the life of your church?

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Standard Examples

- *ChangeMe

- Guest

- Attendee

- Church Family

- Dropped

- Other

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Other Examples

- College Ministry Alumni
- Sacrament Only
- Out of Town Guest
- Leader
- Contributor Only
- Missionary
- Event Prospect
- Parent of Attendee

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Management Tips

- Define your list of participant types in *Lookup Values*
  - Take advantage of the description field - make it extra clear
- Setup a view notification for your placeholder participant type (*Temp Participant / *ChangeMe)
  - Consider including a field for who updated it
- Spot-check participant type as you make other changes

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Scenario

Contact Status 💡	Participant Type 🛠️	Member Status 🥇	Participant Engagement 📸
Active	*ChangeMe	Member	Fully Engaged
Inactive	Guest	Former Member	Engaged
Homebound	Attendee	Faithful Non-Member	Observing
Deceased	Church Family		Lapsing
Temporarily Away	Dropped		Lapsed
	Other		

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Person 1

Contact Status 💡	Participant Type ⚒️	Member Status 🏅	Participant Engagement 📷
Active	*ChangeMe	**Member**	Fully Engaged
Inactive	Guest	Former Member	Engaged
Homebound	Attendee	Faithful Non-Member	Observing
Deceased	**Church Family**		**Lapsing**
Temporarily Away	Dropped		Lapsed
	Other		

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Person 2

Contact Status 💡	Participant Type 🛠️	Member Status 🏅	Participant Engagement 📸
Active	*ChangeMe	Member	Fully Engaged
Inactive	Guest	Former Member	Engaged
Homebound	Attendee	Faithful Non-Member	Observing
Deceased	Church Family		Lapsing
Temporarily Away	Dropped		Lapsed
	Other		

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Person 3

Contact Status 💡	Participant Type 🛠️	Member Status 🏅	Participant Engagement 📷
Active	*ChangeMe	Member	Fully Engaged
Inactive	Guest	Former Member	**Engaged**
Homebound	**Attendee**	Faithful Non-Member	Observing
Deceased	Church Family		Lapsing
Temporarily Away	Dropped		Lapsed
	Other		

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Person 4

Contact Status 💡	Participant Type 🛠️	Member Status 🏅	Participant Engagement 📷
Active	*ChangeMe	Member	Fully Engaged
Inactive	Guest	Former Member	Engaged
Homebound	Attendee	**Faithful Non-Member**	Observing
Deceased	**Church Family**		**Lapsing**
Temporarily Away	Dropped		Lapsed
	Other		

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Person 5

Contact Status 💡	Participant Type 🛠️	Member Status 🥇	Participant Engagement 📷
Active	*ChangeMe	**Member**	**Fully Engaged**
Inactive	Guest	Former Member	Engaged
Homebound	Attendee	Faithful Non-Member	Observing
Deceased	**Church Family**		Lapsing
Temporarily Away	Dropped		Lapsed
	Other		

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View Title	**First Visit to First Group Timeline**
Description	Shows dates of 1st sunday milestone and start date of first group, with the number of days in between, to help follow-up and make other needed updates in MP.
Page	Participants
Field List	Contact_ID_Table.[Display_Name] AS [Display Name], Participant_Type_ID_Table.[Participant_Type] AS [Participant Type], (CONVERT(date,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = **[1st sunday / guest milestone ID here]** AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished))) AS [First Visit], (CONVERT(date,(SELECT TOP 1 Start_Date FROM Group_Participants GP WHERE GP.Participant_ID = Participants.Participant_ID ORDER BY Start_Date))) AS [Joined First Group], DATEDIFF(day,(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = 3 AND PM.Participant_ID = Participants.Participant_ID ORDER BY Date_Accomplished), (SELECT TOP 1 Start_Date FROM Group_Participants GP WHERE GP.Participant_ID = Participants.Participant_ID ORDER BY Start_Date)) AS [Days Between]
View Clause	(SELECT TOP 1 Date_Accomplished FROM Participant_Milestones PM WHERE PM.Milestone_ID = **[1st sunday / guest milestone ID here]** AND PM.Participant_ID = Participants.Participant_ID) IS NOT NULL

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View Title	**Participant Type Changes - Last 90 Days**
Description	Shows details of most recent change in a participant's participant type.
Page	Participants

Field List	Contact_ID_Table.[Display_Name] AS [Display Name],
	Contact_ID_Table_Contact_Status_ID_Table.[Contact_Status] AS [Contact Status],
	Participant_Type_ID_Table.[Participant_Type] AS [Current Participant Type]
	, (SELECT TOP 1 Previous_Value from dp_Audit_Detail AD
	    JOIN dp_Audit_Log AL ON AD.Audit_Item_ID = AL.Audit_Item_ID
	      WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID
	 AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Previous Type]
	, (SELECT TOP 1 New_Value from dp_Audit_Detail AD
	    JOIN dp_Audit_Log AL ON AD.Audit_Item_ID = AL.Audit_Item_ID
	      WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID
	 AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Changed To]
	, (SELECT TOP 1 User_Name FROM dp_Audit_Log AL
	    JOIN dp_Audit_Detail AD ON AL.Audit_Item_ID = AD.Audit_Item_ID
	      WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID
	 AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Changed By]
	, (SELECT TOP 1 On_Behalf_Of_User_Name FROM dp_Audit_Log AL
	    JOIN dp_Audit_Detail AD ON AL.Audit_Item_ID = AD.Audit_Item_ID
	      WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID
	 AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Change By (If APIUser)]
	, (SELECT TOP 1 Date_Time FROM dp_Audit_Log AL
	    JOIN dp_Audit_Detail AD ON AL.Audit_Item_ID = AD.Audit_Item_ID
	      WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID
	 AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) AS [Date Changed]

View Clause	(SELECT TOP 1 Date_Time FROM dp_Audit_Log AL
	    JOIN dp_Audit_Detail AD ON AL.Audit_Item_ID = AD.Audit_Item_ID
	      WHERE AL.Table_Name = 'Participants' AND AL.Record_ID = Participants.Participant_ID
	 AND AD.Field_Name = 'Participant_Type_ID' ORDER BY Date_Time DESC) >= dp_DomainTime - 90

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KB Articles To Review

- Contact Tracking
- Participant Tracking
- Managing Household/Family Congregation/Parish
- Donor Tracking - there are two automated "tracking" fields on the Donors page that we did not cover today.
- Contact Status Management Routine
- COMMON Configuration Settings

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