Go to **File** – **Keywords** – **Family Keyword Names**. Best practice is to keep keywords to a minimum by clearing any that are obsolete. Add Family Keywords the updates listed below occur for a family record.

Family Keywords that must always be saved to produce monthly DIOMAIL reports for the Diocese of all changes to the parish roster are as follows:

> DM Add Family
> DM Change Address
> DM Change Email
> DM Change Name
> DM Change Name Divorced
> DM Change Name Spouse Deceased
> DM Change Phone
> DM Delete Changed Parishes
> DM Delete Duplicate
> DM Delete Inactive (usually means requested removal)
> DM Delete Last Member Deceased
> DM Delete Left the Church (usually means the Catholic Church in general)
> DM Delete Moved Out of State
> DM Delete Moved Out of Town
> DM Do Not Send Mail or Contact

Go to **Family Reports** – **Listing Reports** - **Family Quick Listing** – **Copy** then name the new report DIOMAIL.
Go to **Modify the List of Fields to Print** to include the following:

> Fam Second ID Number
> Fam Name
> Fam Address Block
> Fam Phone List
> Fam Keyword Description

Go to **Select Families – List of Selections**: **Add a Selection Named Diocesan Deletes**. Include only <u>Inactive</u> Families, sorted by Name. In **Additional Selections, add one selection**: Fam Keyword.Description is in list: Then select every Family Keyword that contains **DM Delete** in the description – preview the report and save as a .pdf file to be emailed to the Diocese.

Repeat the steps above to **add selections** named **Diocesan Adds** and one named Diocesan Changes. For Diocesan Adds, include only <u>Active</u> families, sorted by Name. In **Additional Selections, add one selection** for the families you are adding: Fam Keyword.Description is in list: then check **DM Add** Family. For **Diocesan Changes**, you need to include both <u>Active & Inactive</u> families, sort by name and the **Additional Selection** will be: Fam Keyword.Description is in the list: then check the box for all Keywords that contains **DM Change** in the description – preview each file and save them as separate .pdf files it to be emailed to the Diocese.

Each month, you will have (3) .pdf files to email to <u>Census@rockforddiocese.org</u>: DM Deletes, DM Adds & DM Changes.

After the reports are sent to the Diocese, use the reports to manually go into each family that is on the reports and delete the DM keyword so they don't' appear on the next month's updates.