



Planning Center Database Health Audit

A review of the People database as of October 11, 2026, covering duplicate profiles, households, contact details, inactive records, and membership values. Each finding has a count, examples, and the cleanup steps we recommend.

7,686

profiles in People, 7,233 of them active

2,322

households

4,822

records flagged across seven checks (some appear in more than one)

Findings at a glance

Finding	Records	Priority	First step
Duplicate profiles Two profiles for the same person, which splits giving, attendance, and group history.	119	▲ High	Merge each pair from the Potential duplicates list on the People dashboard, keeping the older profile.
Adults likely missing from a household Adults with no household who share a last name with a household created within a few days of their profile. 906 active adults have no household in all, and most of them are single adults, which is expected.	338	● Medium	Review each match and add the person to the family's household.
Children not linked to a parent or guardian Active children with no household, so check-in labels, parent pickup, and family emails cannot reach a parent.	77	▲ High	Find the parent from check-in history and add the child to that household.
Recently active adults missing an email or phone Adults with activity in the last 12 months who are missing an email (439), a phone number (668), or both (131).	976	● Medium	Ask for missing details at the next connect card, check-in, or group sign-up.
Active profiles with no recorded activity in two years Profiles marked active with no check-in, gift, group attendance, serving, or form activity since October 2024.	2,037	● Medium	Have staff review the list, then inactivate with a reason using a bulk action.
Nonstandard membership values Adults whose membership value is outside the four standard types: 924 use the retired value Visitor, 154 are blank, and 120 are spelling or capitalization variants.	1,198	▽ Low	Agree on the standard list, then update each group of records with a bulk action.
Adults still marked as children Profiles flagged as a child with a birthdate showing age 18 or older.	77	▽ Low	Clear the child flag so they appear in adult lists and communications.

Priority reflects risk to ministry: High items affect child safety or split a person's giving and attendance history. Every count comes from the People export and the activity history in Check-Ins, Giving, Groups, and Services. The matching findings workbook lists every record.

Duplicate profiles

We found **119 pairs** of profiles that belong to the same person. Duplicates split a person's history: a gift may land on one profile while their group attendance sits on the other, so giving statements, serving schedules, and follow-up lists each show only part of the picture.

How the pairs were matched

Same name and email		45
Same name and birthdate		42
Same name and phone		24
Nickname match, and birthdate		4
Nickname match, and email		4

Where the newer profile came from

Connect card form		92
Staff entry		16
Check-in station		11

Most duplicates were created by the connect card form. Planning Center matches a form entry to an existing profile by name and email, so a returning attender who uses a nickname or a different email gets a new profile. Planning Center describes this in its help article on how duplicates are created.

Examples

Profile to keep	Created	Duplicate	Created	Source	Match
Erin Richardson (140631)	Feb 2022	Erin Richardson (249001)	Oct 2026	Connect card form	Same name and email
Timothy Collins (110823)	Dec 2019	Tim Collins (249150)	Sep 2026	Connect card form	Nickname match, and birthdate
Luis Patterson (178345)	Jan 2024	Luis Patterson (238877)	Sep 2026	Staff entry	Same name and email
Cynthia Hunter (135410)	Jun 2019	Cindy Hunter (249513)	Aug 2026	Connect card form	Nickname match, and email
Owen Phillips (250320)	Jun 2025	Owen Phillips (236338)	Aug 2026	Staff entry	Same name and birthdate
Paisley Tucker (148224)	Sep 2020	Paisley Tucker (250557)	Aug 2026	Check-in station	Same name and birthdate

Recommended cleanup

1. Open the Potential duplicates list on the People dashboard. Planning Center's duplicate detector flags exact names, similar-sounding names, and common nicknames.
2. For each pair in the workbook, keep the older profile, which usually holds the household and giving history, and merge the newer one into it. Merging cannot be undone, so confirm the pair first.
3. After merging, check recurring gifts on the kept profile. Planning Center moves active recurring donations to the kept profile, but saved payment methods do not move, so the donor may need to add one again in Church Center.
4. Add a nickname field to the connect card, or ask for a phone number, so future entries match existing profiles more often.

Households and family links

983 active profiles are not in a household: 906 adults and 77 children. Many adults without a household are single, and that is fine. The two groups below are the ones that need attention.

Adults who likely belong to a household (338)

These adults share a last name with a household that was created within three days of their own profile, which usually means a spouse or adult child was entered separately from a connect card. When a spouse is not in the household, giving statements, family emails, and the church directory treat them as a separate person.

Name	ID	Created	Membership	Last activity
Roy Carpenter	100377	Jun 11, 2019	Attender	Oct 2026
Christopher Morales	101091	Jun 11, 2019	Member	Oct 2026
Julie Arnold	101127	Jun 11, 2019	Members	Oct 2026
Reid Gutierrez	101457	Jun 11, 2019	Member	Oct 2026
Frank Wagner	101632	Jun 11, 2019	Member	Oct 2026

Children not linked to a parent or guardian (77)

Active children with no household cannot be matched to a parent at check-in, and parents will not receive kids ministry emails about them. 31 of these are second profiles created at a check-in station for children who already have a profile in a family household, so they should be merged rather than linked.

Name	ID	Created	Age	Last activity
Charlotte Weaver	250181	Sep 28, 2026	None	Sep 2026
Charlotte Weaver	238034	Sep 14, 2026	8	Sep 2026
Victoria Evans	239087	Sep 14, 2026	6	Oct 2026
Paisley Tucker	250557	Aug 4, 2026	9	Aug 2026
Anna Holmes	250572	Jul 4, 2026	None	Jul 2026

Recommended cleanup

1. Work the children first. For each child, look at the check-in history to see which adult checked them in, then add the child to that adult's household, or merge the child into the existing profile.
2. For each adult on the likely-household list, confirm with the family or a staff member who knows them, then add them to the household.
3. Ask the kids ministry team to add new children through the family's existing household at the check-in station, so a separate profile is not created.

Contact details and inactive records

Recently active adults missing contact details

Of the 2,725 adults with activity in the last 12 months, **439** have no email address, **668** have no phone number, and **131** have neither. People with neither cannot receive a follow-up call, a serving request, or a giving statement by email.

Name	ID	Created	Membership	Email on file	Phone on file
Ashley Holloway	240206	Oct 7, 2026	Guest	No	No
Adam Owens	240363	Oct 6, 2026	Guest	No	No
Matthew Smith	239179	Sep 23, 2026	Guest	No	No
Dustin King	238531	Sep 17, 2026	Guest	No	No

Active profiles with no recorded activity in two years (2,037)

These profiles are marked active, but Planning Center shows no check-in, gift, group attendance, serving, or form activity since October 2024. They inflate list counts and make it harder to see who is actually connected.

Created in the 2019 import		843	Children		762
Guests since October 2023		977	Marked Member		188
Other older records		217			

Planning Center can only see what is recorded. An adult who attends every week but never checks in a child, gives online, joins a group, or serves will look inactive here. That is why the 188 profiles marked Member should go to the pastors for review before anything changes.

Recommended cleanup

1. Send the list to pastoral staff for a two-week review and remove anyone they know is still attending.
2. Inactivate the rest with a reason, using a bulk action from a People list. Inactivation can be reversed, keeps giving and attendance history connected, and removes the person from groups and future serving plans.
3. Do not delete these profiles. Planning Center recommends deleting only test data or accidental profiles, because deletion disconnects donation history.
4. For contact details, add the missing fields as required questions on the connect card and group sign-up forms.

Membership values and age flags

The membership field should hold one of four values: Member, Regular Attender, Guest, or Child of Member. Among active adults, 1,198 records hold something else. Lists and reports that filter on Member miss anyone entered as "member", "Members", or "Member " with a trailing space.

Value as entered	Active adults	Standard	Change to
Guest	1,384	Yes	Keep
Member	1,203	Yes	Keep
Regular Attender	949	Yes	Keep
Visitor	924	No	Guest
(blank)	154	No	Review each record
guest	36	No	Guest
Child of Member	21	Yes	Keep
First Time Guest	20	No	Guest
Member (with a trailing space)	16	No	Member
Members	14	No	Member
Attender	8	No	Regular Attender
Covenant Member	8	No	Member
regular attender	6	No	Regular Attender
Regular Attendee	6	No	Regular Attender
member	6	No	Member

The 924 Visitor records come from the old connect card, which set the membership to Visitor until March 2025. The new form sets Guest, so Visitor can be retired once these records are updated.

Adults still marked as children (77)

These profiles are flagged as a child but their birthdate shows they are 18 or older. Lists and reports that filter for adults leave them out, and they are counted with the children in any age-based report.

Name	ID	Age	Membership	Last activity
Joshua Wright	167728	25	(blank)	None found
Autumn Elliott	153440	24	(blank)	None found
Jameson Dixon	161145	24	Child of Member	None found

Recommended cleanup

1. Confirm the standard membership list with the executive pastor, then review the membership type options under Customize fields in People.
2. Build a People list for each nonstandard value and use a bulk action to change the membership status for the whole list at once.
3. Clear the child flag on the aged-out profiles, and add a yearly reminder to check for students who turned 18.

Cleanup plan and how this audit was done

The order below puts child safety and history-splitting problems first, then the larger but lower-risk items. The estimates assume one person working in Planning Center with this workbook open.

Order	Finding	Who	Hours
1	Children not linked to a parent or guardian	Kids ministry director	3
2	Duplicate profiles	Database administrator	6
3	Adults likely missing from a household	Database administrator	5
4	Nonstandard membership values	Database administrator and executive pastor	3
5	Adults still marked as children	Database administrator	1
6	Active profiles with no recorded activity in two years	Pastoral staff, then database administrator	8
7	Recently active adults missing an email or phone	Connections team (ongoing)	4
Total			30

How the audit was done

The audit uses a full People export (profiles, households, membership, status, and created dates) together with activity history from Check-Ins, Giving, Groups, Services, and Forms. Each check is a rule that can be run again: duplicates match on last name plus email, phone, or birthdate, with common nicknames treated as the same first name; household matches look for a shared last name and creation dates within three days; inactivity means no recorded activity in the 24 months before the audit date.

Nothing in Planning Center was changed during the audit. Every flagged record is listed in the findings workbook with a suggested action and a status column, so staff can track progress and the Summary sheet updates as items are marked done.

Keeping the database clean

1. Run the same checks every quarter. After the first cleanup, each round usually takes an hour or two.
2. Review the Potential duplicates list on the People dashboard each month.
3. Keep the connect card and check-in station setup consistent, since most new problems start there.

Planning Center features referenced

Merging duplicate profiles and the duplicate detector: help.planningcenter.com, "Merge duplicate profiles." How duplicates are created: help.planningcenter.com, "How and why duplicate profiles are created." Inactivating profiles, inactive reasons, and the effects on Groups, Services, and Giving: help.planningcenter.com, "Inactivate or delete a profile." Bulk actions from a list: help.planningcenter.com, "Update people with bulk actions." Membership type fields: help.planningcenter.com, "Manage membership."