ParishSOFT Family Suite Standard Operating Procedures

DIOCESE OF WINONA-ROCHESTER

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ParishSOFT by Ministry Brands®

Family Suite

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Introduction

ParishSOFT is an integrated parish census data system that allows for synchronization of parish records with the diocese. The demographic, sacramental, and limited financial information inputted and managed by the parish is then consolidated at the diocesan level. The Diocese uses this information for *The Courier,* CMA Campaign Materials, Youth Events, Educational Workshops, Capital Campaigns, TV Mass, Respect Life Mailings and other diocesan office contacts.

This document provides parishes with the Diocese of Winona-Rochester's Standard Procedures to guide in the entering of data and maintain the quality of entries to ensure accurate information and reporting.

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Family Suite
Family Directory

Family List/Member List

Adding a Business or Organization

Title: Adding a Business or Organization to ParishSOFT Family Suite

Description: In addition to family donors – there are Organizations and Businesses that will be contributors or donors. This procedure covers the recommended way for tracking these entities in your system.

Details: The following information indicates how to create an Organization or Business within ParishSOFT Family Suite for recording and reporting purposes.

Currently, there is no specific designation for an Organization or Business within the program. You must track these entities using a Family Group of Organization/Business.

There are fields such as prefix and role that are required by the program when entering a new record. Follow the guidelines below to add an Organization or Business to your system.

Enter the organization as follows:

- Prefix: Mr
- Last Name: Knights of Columbus
- First Name: . (period)
- Role: Head
- Gender: Male (default)
-

Enter the address as you would for any record.

! Registration Status = Unregistered

! Family Group = Organization/ Business

! **Do not use auto fill** for the salutations. This will be a manual entry

- Formal Mailing Name: Knights of Columbus
- Informal Mailing Name: Knights of Columbus
- Formal Salutation: Knights of Columbus
- Informal Salutation: Knights of Columbus

You may add a member record if you want to track the primary contact person of the organization.

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Registering a Family

Title: Assigning Registration Status to Family

Description:

A family may be REGISTERED in only **ONE** parish but can be Active in many. The following describes how the Diocese recommends parishes determine the "Home" parish for a family where they should be registered.

Details:

The recommended method for registering a family with a parish involves gathering basic registration information from the family through the use of a registration form.

This form would include the following information for each family member:

- Previous Parish
- Full Legal Name
- Address
- Marital Status
- Preferred Name and Maiden Name (if applicable)
- Date of Birth
- Religion
- Sacraments Received (baptism, communion, confirmation, marriage
- Occupation/Employer
- Phone Number (land-line and cell)
- E-mail address
- Preferred method of financial support (weekly envelopes, monthly envelopes, online giving, direct donations-ACH)
- Children/Dependent Information including school and grade
- Additional information (interests, talents, former ministries, etc.)
- There should be a signature section for Agreeing to actively support the parish through participating in liturgies and through sharing time, talent and treasure.
- There may also be a consent area giving permission for child(ren) to be photographed for parish publicity.

Family Suite
Adding a new family

Title: Adding a new family to Family Suite

Description: This procedure outlines the process that a parish should use when adding a new family to the family directory. Data entry standards should be used to ensure the proper formatting of mailing lists, letters, and emails. Correct spelling of a Family's name along with the inclusion of member birthdates helps in the reduction of duplicate entries. When adding a new family, the system performs an automatic look-up to see if that family is already within the database. **When doing a name search less is more. Starting with a simple last name search is recommended.**

Details: If the family is already within the database, you have the option of adding the family to your data as registered. This process will change the family's church of registration to your parish and remove them as a registered member within the parish where they were previously registered (if any). **Please be sure to contact the parish where the parishioner was originally registered to let them know that the parishioner is no longer in their parish.**

A parish may import a family from another parish into their database, without registering them for the purposes of:

- Posting Contributions
- Sending Contribution Envelopes
- Registering them for Parish Events or Activities

Only the parish of registration can modify family and member detail information. All updates to this information must be sent to the parish of registration for addition or deletion.

When adding a new family (not already in the system), at all times use the proper spelling and punctuation. Otherwise, mistakes cause duplicate records. **Before** entering the family name that is to be added to the database, always check to see if the family is already listed or listed incorrectly in your database. If the family is listed but spelled incorrectly, go into the family details page and correct any misspellings. Always check your entries for accuracy before leaving the record.

When adding addresses, phone numbers, and email addresses, you have the option to publish or not publish them in reports. You can make a decision for your parish and make all entries the same, or you can ask individual members for their preference.

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Family Suite

Family Name Standards

Title: Data Entry standards for family names

Description: Data entry standards should be used to ensure the proper formatting for mailing lists, letters, and emails.

Good data entry practices such as searching for the family record before adding it, using correct spelling of a family's name and adding member birthdates will all help in preventing the introduction of duplicate entries.

Details: When adding a new family, proper spelling and punctuation should be used at all times. Please use the full legal name.

You must always check to see if the family already had a record in the database. Use proper case when searching the record.

If the family is listed, but spelled incorrectly, go into the Family Details page and correct any misspellings. It is important for data integrity that you do not add a new record.

The following best practices should be followed:

- When adding a family that is not present in the database, be sure to capitalize the first letter of each first name as well as the first letter of the last name. Failure to adhere will cause unprofessional appearances of the name when sending mail merge letters or other communications to the family.
- Every family record must have a member record with the role type of Head, Husband or Wife. These member roles are synonymous.
- Upon entering member information, a married couple is to be entered as husband and wife, whereas a single person would be head of household.
- If the wife chooses to retain her maiden name along with her husband's surname, enter the member last name for the wife as she wishes it to appear. For example:

Husband	**John Doe**
Wife	**Jane Dixon-Doe**

- Use of Autofill will create the following naming convention for each field listed below:

Mailing Name	**Mr. John Doe and Mrs. Jane Dixon-Doe**
Informal Mailing Name	**John Doe and Jane Dixon-Doe**
Formal Salutation	**Mr. Doe and Mrs. Dixon-Doe**
Informal Salutation	**John and Jane**

- The system requires complete gender, role, and first and last name on each member record.
- Best practice for autofill purposes is to also complete the title, nickname and suffix fields on the member record.
- Do not use spaces in names beginning with Mc, Mac, etc. Use: McDonald, MacDonald, not Mc Donald
- Do not use spaces in hyphenated names. Use Mary Owens-Jones, Not Mary Owens – Jones.

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- Do not use all capitals for the names. Use proper upper and lower case so that merged documents will look the same.
- Do not_use a character such as forward slash (/) to indicate a couple.
- Do not use an ampersand (&) in place of the word "and".

Standard Member Title **Standard Member Suffix**

Mr.	Jr.
Mrs.	Sr.
Miss	II
Ms	III
Dr.	IV
Sr.	CPPS
Rev.	CSSR
Rev. Mr.	M.D.
Rev. Msgr.	OFM Conv
Very Rev.	PhD
Br.	esq.
Capt.	OSF/S
Most Rev.	OSF/T
	OSFS
	OSU
	RSM
	SJ
	SND
	VF
	VG
	VJ

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Family Suite

Unmarried couples living in same household

Title:	Data entry standards for unmarried adults living in the same household
Description:	What is the best way to handle unmarried adults living in the same household in terms of Family Suite records?
Details:	Two, or more, single adults that live together should have separate family records, all with rolls of Head.

Family Suite

Handling Divorce Situations

Title: Data entry standards for divorced couples

Description: This procedure outlines the processes that should be followed when addressing a divorced couple situation.

Details: There are situations where husband and wife become divorced or separated. The original family record should be split into two records. The following scenario chart lists how to handle a particular situation.

If children are involved, they should only be listed under one family group. The question should be asked of the members which parent is the custodial parent. If joint custodians, the question asked should be, under which parent's profile the child(ren) should stay.

There are situations when you need to maintain contact with both parents after a divorce or separation. Creating a work group for divorced parents is the best way to handle this situation. The work group should be created for the parent that does not have the children listed in their family group. A separate workgroup allows for quick identification and communication of information regarding the couple's children.

Family Suite

Scenario	*Family Record*	*Family Workgroups*	*Children's Member Record*
Divorced/Separated with children. One parent leaving parish.	Create a new family record for the spouse that is leaving and export their member record out of the original family record into the new single-family record. Adjust the role of the remaining spouse to "Head".	If this spouse wishes to continue to receive communications from you about their children's activities at the parish, add this family record to your Divorced Parents workgroup	Children should be listed under the family record requested by the parents.
Divorced/Separated with children. Both staying at your parish.	Create a new family record for the spouse that is leaving and export their member record out of the original family record into the new single-family record. Adjust the role of the remaining spouse to "Head".	If this spouse wishes to continue to receive communications from you about their children's activities at the parish, add this family record to your Divorced Parents workgroup. Review your family workgroups to see if this new family record should be added to any of the workgroups they were previously a part of when in their combined family record.	Children should be listed under the family record requested by the parents.
Divorced/Separated with no children. One spouse leaving parish.	Create a new family record for the spouse that is leaving and export their member record out of the original family record into the new single-family record. Adjust the role of the remaining spouse to "Head"	NA	NA
Divorced/Separated with no children. Both staying at your parish.	Create a new family record for the spouse that is moving to a new address and export their member record out of the original family record into the new single-family record. Adjust the role of the remaining spouse to "Head".	Review your family workgroups to see if this new family record should be added to any of the workgroups they were previously a part of when in their combined family record.	NA

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Family Suite

Family Groups

Title: Assigning a Family Group

Description: Family Groups allow for the quick sorting and filtering of various types of family data that resides in your ParishSOFT Family Suite. <u>A family can only be assigned one Family Group.</u> Make sure it is the group that represents the primary engagement with the parish.

*Best Practice: every family record must contain a Family Group assignment.

Details: *Recommended Registration status is listed in parenthesis for each Family Group type

Definition of Default Family Groups

Active (Registered)	Active families are those where one or more members are also designated as active; Those families that are actively participating in many activities with the parish. Recommended family status is Registered.
Contributor Only (Unregistered)	Family is contributing but not registered in this parish. Recommended family status is unregistered; they are giving but have never formally registered.
Moved (Unregistered)	Family has moved out of the diocese. Family status is unregistered.
Inactive (Registered or Unregistered)	A family is considered inactive when all members are designated with a status of inactive (or whatever criteria the Diocese and/or Pastor decide upon). This family group can be used to manage your census data and track those families that have shown no participation in parish. Think of this group as another opportunity for engagement. Family status can be registered or unregistered depending on the circumstance.
Religious Ed Only (Unregistered)	The family participates only in the religious education program but is not registered in this parish. Recommended family status is unregistered.
Sacrament Only (Unregistered)	Family is there to receive a sacrament, however is not a registered member of your parish and does not affect your census. (A bride wants to get married at her childhood home parish, or the parents who want to have their baby Baptized in the grandparent's parish.) Family status is unregistered.

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Staff (Unregistered)	Member of the staff who is not registered in any parish. Family status is unregistered.
School Only (Unregistered/Registered)	Family is there for their children to attend the Catholic School. Unregistered is the suggested status unless registration is required for school attendance.
Visitor (Unregistered)	Usually for out of town or first-time visitors.
Deceased (Unregistered)	When **all** members of the household have a member status of Deceased. Family status is unregistered.

! **These values are global. If you would like to request an additional value be added, please contact your Diocesan Administrator.**

Family Suite

Member Status

Defining Member Status

Title:	Selecting the proper member status.
Description:	This standard outlines the use of proper member status within the family record. Often families will contain members that are not Catholic or are no longer actively participating in the church.
Details:	There are four standard member statuses within the system: Active, Inactive, ActOther, and Deceased.

Active

This member is actively participating in the parish. When using this designation, the religion field should reflect Catholic.

Inactive

This member is not actively participating in the parish. This could be a college student away from home, or some other scenario where the member is no longer participating.

ActOther

This is used for members that are actively participating in the parish but are not Catholic. When using this designation, the religion field should reflect the religion of this member, e.g. John Doe is Catholic, his member status is Active, his religion is Catholic, Jane Doe is Episcopalian, her member status is ActOther and her religion is Episcopalian. This is an opportunity for evangelization and contributes to the parish statistics.

Deceased

This member status is used when a family member dies. When status is used a date of death should be completed. **Member and family records of deceased people should not be removed or deleted from your Family Directory. The records should be maintained for historical tracking purposes.**

- Note: The Date of Death field is only editable when the member status has been set to Deceased.

! **These Member Status fields cannot be modified.**

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Family Suite
Family Directory

Revision #:
Revision Date:

Member Status Interaction with Family Groups

Parishioner Scenario	Family Registration Status	Currently Registered box ☒	Family Group	Member status
Active/Registered Standard active registered family	Registered	Yes	Active	All members – active OR Individual Members may be a combination of Active, ActOther, Inactive or Deceased
Non-Catholic member of Standard Registered family	Registered	Yes	Active	ActOther
Standard **Inactive** family	Not Registered	No	Inactive	Inactive
All members of the family are **Deceased**	Not Registered	No	Deceased	Deceased
Deceased (Married) only one spouse died	Stays the same	Stays the same	Stays the same	The deceased member's status changes to Deceased and the date of death must be entered. Must change: Spouse status to Widowed, Family mailing name both informal and formal to the surviving spouse. Salutation changes to remaining spouse.
Non Member	Not Registered	No	Inactive	Inactive
Registered Family that has moved away	Not Registered	No	Moved	Inactive
Registered in Another Parish Active in Your Parish	Registered at (Parish Name)	No	Active	Active
Contributor	Not Registered	No	Contributor	Inactive or Active
Organization/Business	Not Registered	No	Organization/Business	Inactive
Sacrament Only Family	Not Registered	No	Sacrament Only	Inactive
School Only	Not Registered (unless required to register to attend)	No, (unless they are required to register to attend	School Only	Student: Active Rest of Family: Inactive

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Staff	Either registered or not registered depending on circumstances	Yes/No depending on circumstances	If registered, active; if not, Staff	If registered, active; if not, inactive
Visitor	Not Registered	No	Visitor	Inactive/Active

Family Suite

Address Standard

Title:	Data Entry standards for addresses
Description:	This procedure outlines the process that should be followed when a user is attempting to add a new address to the family directory. This standard follows ParishSOFT Family Suite and US Postal Service regulations. Data entry standards should be used to ensure the proper formatting of mailing lists, letters and emails.
Details:	Definition of Home, Mailing and Other – Function of CASS validation

Home Address

The physical local residence.

Mailing Address

The alternate address to which mail is delivered. This is generally a P.O. Box

Other Address

The away address typically used for seasonal residents or snowbirds. This address provides the ability to enter dates in which this alternate address is valid. Note: the system will automatically change to this address during the period listed.

Standardized Address Format

A standardized address is one that is spelled out fully or is abbreviated by using the Postal Service standard abbreviations (sample and the table below).

For both mailing and street addresses, use upper and lower case – not all capitals. Post Office Equipment reads mail from the bottom of the address to the top. Therefore, the most important information (the zip code) should be the last thing in the address line.

Family Suite

Address Guidelines

Rev James Brown OSM
St Paul Catholic Church
22222 Anywhere St
Winona, MN 55987

Mr and Mrs James Smith Jr
2965 Anywhere Ln
Winona, MN 55987

For more information, visit USPS address guidelines: http://pe.usps.gov/text/pub28/welcome.htm

Street Suffix Abbreviations

For	*Use*	*For*	*Use*
Avenue	Ave	Pike	Pike
Boulevard	Blvd	Pine	Pine
Heights	Hts	Road	Rd
Highway	Hwy	Route	Rte
Isle	Isle	Shore	Shrs
Junction	Jct	Square	Sq
Lane	Ln	Station	Sta
Mount	Mt	Street	St
Park	Park	Terrace	Ter
Parkway	Pkwy	Trail	Trl

Change of Address

Title: Change of address

Description: When a family moves, or changes their address.

Details: When a family moves, or changes their address the address record should be updated as soon as possible. If the parish staff feel it is necessary, the old address may be saved in the Family Notes in case it is needed for future reference.

Family Suite

Entering Email Addresses and Phone Numbers

Title:	Entering E-mail addresses for families and members.
Description:	Because of the ease and widespread use of electronic communications, it is imperative to include email addresses for both family records and member records. Using email as your first choice of communication assists in lowering postage costs and keeping additional information updated. People do not always change their email address when they move.
Details:	Most people have multiple email addresses; therefore, when adding a new family or member ask: • What email to use for family communications? • Which email to use for individual member communications? • Do you want only electronic communications? • Do you want only paper communications? • Is it okay to show this information on reports?

Types of Emails

Family Record Email
This email address is for the family.

Member Record Email
This email address is for an individual family member. Each member can have a unique email address.

This field shares data with the email address field on the Assignment/Position Details screen. A change on one screen carries over to the other screen.

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Family Suite

Title: Entering Phone number information for families and members.

Description: Because of the ease and widespread use of electronic communications, it is helpful to include cell phone information for both family records and member records.

With the increased use of texting for communication, having the cell phone records helps to get your information out quickly and efficiently to your members.

Details: When adding a new family or member ask:

- What cell phone number to use for family communications?
- Which cell phone number to use for individual member communications?
- Do you want only electronic communications?
- Do you want only paper communications?
- Is it okay to show this information on reports?

Types of Phone Numbers

Family Record Phone Number

This phone number is for the family and may be a landline number. It is entered in the Primary Phone field of the Family Record.

Member Record Phone Number(s)

If entered, the Primary Phone number will self-populate the Home Phone field in the member records for the Family.

The Cell Phone field would be used for each member's cell phone number (if any).

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Family Suite

Publications & Privacy Settings

Title: Standards for publication and privacy of the family record.

Description: Identifying the areas of publication and privacy within family screen

Details: There are several selections within the family screen that are optional.

Send Magazine

Diocese should determine the settings desired for this field and when it is used.

Send Mail

If left unchecked, it will stop all mail from being sent at any level. This field can be unchecked if all members of the family are deceased.

Send Contrib. Env.

If left unchecked, it indicates that the family does not want to receive contribution envelopes.

Publish Address

When checked will allow the address to be printed in rosters and directories left unchecked the address will be concealed on all roster directories and other printed material.

Publish Phone

When checked will allow the phone number to be printed in rosters and directories. Left unchecked, the address will be concealed on all roster directories and other printed material.

Publish Email

When checked will allow the e-mail address to be printed in rosters and directories. Left unchecked the email-address will be concealed on all roster directories and other printed material.

Publish Photo for Pictorial Directory

When checked will allow the family photo to be printed in rosters and directories and used in My Own Church, if left unchecked the address will be concealed on all roster directories and other printed material.

Title: Map Codes

Description: The system provides an area in which to detail family location.

Details: Utilization of this field will support evangelization efforts, ministry and strategic planning efforts.

Member Roles

Title:	Assigning member roles within the family
Description:	Family member roles are based on how they relate to the Head, Husband or Wife in the family record. For instance, if the husband's mother moves in with them, her role would be Mother because she is the Mother of the husband, **not** Grandmother to the children.
Details:	If you have questions about roles, please contact, parishsupport@dowr.org

Head – Husband – Wife
Each record must have one of these three primary roles assigned. Head would be single adult.

Single Adults

Two single adults that live together, such as brother and sister, should have separate family records, both with roles of Head.

Daughter and Son
Daughter and Son are used for children along with Foster Daughter, Foster Son, and Stepchild, based on the circumstance.

Unknown
This role would only be used until you can determine the correct role for this individual. **This should NOT be a permanent role.**

Non-Catholic or non-participating spouses – **Enter spouses that are non-Catholic** whether they participate in Church activities with the family or not as well as spouses that choose not to participate in any religious activities. All members of the family should be entered in the family record, so you are creating an accurate representation of the family. Choose each person's status in the Status field. If the non-Catholic spouse does not participate, you can label them as Inactive and then complete the Religion field.

Please be complete as possible for the member information:

Birth Date, Marital Status, Religion are all fields that are used in other areas of the program and statistics and must be accurate as possible.

Family Suite

Member Info

Maiden Name

Title:	Tracking maiden name
Description:	A maiden name should be included in the record where possible. This field is used when creating sacramental records and certificates. It must be present to run certificates for Baptism of associated children. This assists with genealogical record keeping and to ensure the proper tracking of an individual from birth to death despite a name change due to marriage.
Details:	This field should be completed when entering Baptismal records

Family Suite

Sacrament Register

Title: Recording sacramental data

Description:

The electronic ParishSOFT entries **DO NOT** replace the physical Sacramental Register. Data entries must be *completed in a timely manner* and contain complete information.

Keeping electronic sacramental records provides both the parish and diocese with a disaster recovery backup should a catastrophic event occur.

- Update the sacraments when updating other information on the member record.

Details: All Sacraments should be **recorded in BOTH** the register book and maintained electronically

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Family Suite

Entering Information regarding Sacraments for Members

Title: Recording sacramental data for Members

Description: This standard procedure outlines the process that should be followed when entering information regarding sacraments for members.

Details: Parishes are required to maintain complete and accurate sacramental details performed in the parish in the paper Sacramental Register and to keep the Register current based on changes as they occur. Entries should always be made promptly in the Register.

What to Enter: Specific information for reporting and certificate purposes must be entered into ParishSOFT; however, not all data in the Register is added to ParishSOFT. These electronic ParishSOFT entries DO NOT replace the physical Sacramental Register. As with Register entries, ParishSOFT entries must be made promptly for future reporting purposes.

No information marked as “confidential” in the Sacramental Register should ever be entered into ParishSOFT, nor any reference to, or information about, adoptions.

Do not share any sacramental history or records with anyone other than the person who received the sacrament, the priest, the guardian, or a parish/diocesan representative. If your parish has any questions about documenting sacraments, canonical questions, or the paper copy Sacramental Register, please contact the diocese.

Entering historical sacramental details for members is strongly encouraged.

Adoptions: Adoptions are very complex and extremely confidential. The parish must follow the criteria set by the USCCB for registering baptisms of adopted children. No notes, identification, or comments about adoption should exist in ParishSOFT, regardless of the reason. When adoptions are involved, please follow the requirements for entering information properly into the paper copy Sacramental Register.

Sacramental Register: Remember, the hard copy Sacramental Register is for parishes to document sacraments performed at that parish. For easy cross-referencing in ParishSOFT, always complete the Registry Volume, Registry Page, and Registry Number fields. (Note: manual cross-referencing must happen when any certificates are created from ParishSOFT.)

Required fields to complete are:

- **Matrimony**: Completed, Status, Annulment Field, Maiden Name, the Canonical, Former Marriage, Mixed Religion, and Disparity of Cult fields, Date, Parish, Celebrant, Best Man and Maid of Honor. (Please see detailed instructions for entering a marriage sacrament by searching the knowledge database at [ParishSOFT Success Labs]
- **Funeral**: Completed, Date of Death, Next of Kin, Funeral Celebrant, and Cemetery Name (there is also a place to enter the lot/grave information). You must complete the Date of Death. Don't forget to change the family and member status also.
- **Baptism**: Completed, Date, Parish, Celebrant, Faith of Baptism, and Sponsors.
- **RCIA**: Completed, Date, Prep Year (if known), and Parish. If an RCIA is complete there should be information listed in the Baptism fields, as well.
- **Reconciliation Prep**: Completed, Date, Prep Year (if known), and Parish. This information is used only for the religious education tracking purposes – see the "Important information about certificates" section below.
- **First Eucharist**: First, middle, and last Name, father and mother's name, baptism information, Completed, Date of First Eucharist, Prep Year (if known), Parish, and Celebrant.
- **Confirmation**: Completed, First, middle, and last name, Prep Year (if known), Parish, and Celebrant.
- **Holy Orders**: Completed, Date, Place, and Celebrant on each tab and all fields on the Diaconate Tab except Laicization Date.
- **Religious Profession**: Completed, Place, Celebrant, and Religious Order.
- **General Tab**: (not a sacrament but within the sacrament screen used for creating certificate information)

Important Information

Unlike other certificates, the Certificate of Baptism is a canonical document that indicates the person's canonical status in the Church. When completed it must be verified against the Sacramental Register and include full and accurate notations on the reverse side.

Parishes should not delete any sacramental history from individual records in the Sacrament Register or ParishSOFT; however, parishes should NOT enter confidential or inappropriate data from the Sacramental Register into ParishSOFT. If confidential or inappropriate information has been entered into ParishSOFT, it must be deleted.

In general, reporting of sacraments takes place by the parish where the sacrament was conferred (an exception is possible for confirmation). The parish must create a record for all sacraments conferred; regardless of whether the person is a member.

Family Suite

Selecting Proper Faith Type

Title: Selecting Proper Faith Type

Description:

This standard procedure outlines the process that should be followed when a parish is attempting to add sacramental details about a family member within the family directory in ParishSOFT. Within the member information tab, a person's religion type is recorded. If the person is active, it is assumed that the person is Catholic, and the default in the Faith of Baptism field is Catholic. On the main Member tab, if the individual is designated as ActOther, a field appears so that you may select that person's religion. The sacramental details tab for each member shows information concerning the baptism of that individual as well as the faith under which that person was baptized. It is acceptable to be listed under the Catholic religion but have baptism information listed as a different faith.

Details:

All Sacraments should be **recorded in BOTH** the register book and maintained electronically.

As sacramental details are being captured, it is important to note the faith of the baptism. Within the sacraments tab, there is a sacramental details button that shows specifics about the member's baptism. Under the baptism tab, the faith must be selected. If the person was baptized in a Catholic Church, you might leave the religion as Catholic; however, if the person was baptized in a Baptist church, then the faith type would need to be changed to Baptist. Use the choices that are available in the drop-down box; only use Christian or Other if no other specific choice applies.

For more information about the proper recording of Sacramental data, please see the following links:

Sacramental Handbook

Sacramental Record Keeping Quick Guide

Family Workgroups

Title: Using Family Workgroups

Description: Family workgroups are user-created groupings of families-not individuals-in your database. Family workgroups are teams composed of families that share a common mission, interest, or responsibility. There is no limit to the number of workgroups you can create and use. The Family Workgroups page enables you to create and manage your family workgroups.

Details: The Family Workgroups page is a list of all of your organization's workgroups and workgroup members.

- Workgroups: The workgroup section allows you to manage your workgroups. Each workgroup is listed in this section and selecting the workgroup allows you to see the families assigned to that workgroup in the Families in Workgroup section to the right. You can add, remove or combine workgroups.
- The Families in Workgroups section on the right lists the names of families that belong to the workgroup currently selected in the Workgroups section. In this section you are able to select families for a group email, mail-merge, or export the list to a CSV file. You are also able to add families, and manage the families on the list. The system will also create quick reports such as mailing labels and a Family Workgroup member list.

Family Suite
Member Workgroup

Title: Using Member Workgroups

Description: Member workgroups are user-created groupings of individuals in your database. Member workgroups are teams composed of members that share a common mission, interest, or responsibility. There is no limit to the number of workgroups you can create and use. The Member Workgroups page enables you to create and manage your member workgroups.

Details: The Member Workgroups page is a list of all of your organization's workgroups and workgroup members.

- Workgroups: The workgroup section allows you to manage your workgroups. Each workgroup is listed in this section and selecting the workgroup allows you to see the members assigned to that workgroup in the Members in Workgroup section to the right. You can add, remove or combine workgroups.
- The Members in Workgroups section on the right lists the names of members that belong to the workgroup currently selected in the Workgroups section. In this section you are able to select members for a group email, mail-merge, or export the list to a CSV file. You are also able to add members, and manage the members on the list. The system will also create quick reports such as mailing labels and a Member Workgroup member list.

Family Suite

Offertory

Batch Standards

Title:	Naming standards for batch creation
Description:	When entering batch names, it is helpful to format all the batches the same and use a specific system. There are times when you will need to search for a batch by the name it was given and using the same system will facilitate that process for your.
Details:	It is suggested to keep the batch names as simple and short as possible. When searching for a batch in the contribution section, if the name is long, the entire name will not display in your search window which can cause problems finding the specific batch you seek. The suggested method for naming batches is this: YYYY-MM-DD, Mass Time or purpose of deposit if the deposit is for money in an office deposit. Within the batch search fields under batches, the name of the batch may be used but the easiest search is using the Batch ID # assigned by the program when the batch is created. Make sure to note this number on the counter sheet for the mass batch being entered.

Posting Standards

Title: Posting standards

Description: Proper count procedures enable the person responsible for posting to quickly create and post a balanced batch. If the parish is linked from Family Suite to Accounting, this provides an additional safeguard to make sure that the mass count deposit total matches the contribution batch in offertory and also the deposit made in ParishSOFT Accounting.

Details: All parish offertory income is entered into ParishSOFT. If there are non-contribution funds in a deposit, appropriate funds can be added to the fund list so that the entire batch may be entered and tied to the deposit total.

All batches must be closed once balanced to the batch total. Unclosed batches do not post to the donor records so it is critical to make sure that every batch is closed.

Please use the following for your procedures:

- Select the fund that will have the largest number of entries in the offering batch (usually Adult Support).
- The Description is the batch name, please standardize your naming method (see previous page).
- If you are linked with Accounting, you will choose the bank account and deposit date for the batch. It is recommended to use the date of the collection as the deposit date.
- If you are not linked with Accounting, you will choose the default contribution date. It is recommended to use the date of the mass.
- It is recommended to check the **Display Check Number in Posting**, and **Display Memo in Posting** boxes. Check numbers will help the donors identify their donations on their contribution statements in case of errors. The Memo section may be used for additional information about the donation.
- If you are using pledges in the system, you will need to check the Batch uses pledges box as well.

- Using Envelope Number & Family Name for the default lookup will save time for a mixed batch of envelopes and loose checks.
- You may use either the traditional batch entry process (With the traditional posting method, data is validated as it is entered into each field in a contribution record, and you must correct any errors before saving the contribution), or check the box for the **Batch Uses Quick Posting** option. If you choose to use the Quick Posting method, the system checks the values in a contribution record after all the data in a record is entered, which can help speed data entry. If the system finds errors, you are not forced to correct them before saving a contribution record. Therefore, your workflow is not interrupted, allowing you to complete data entry and go back later to correct any errors the system flags. With the Quick Posting method, if you are especially proficient at data entry, you can enter contribution data as quickly as your typing skills allow.
- The system will automatically count the entries so no entry is needed in that field.
- The Contribution Amount entered in the second column should be the total for the deposit.
- Click on Save once the batch details have been entered.
- Once the batch is saved, click on the  to begin entering the contributions.
- Remember to enter check numbers into the system. This can assist in verify contribution statements with donors who have questions at the end of the year.
- Enter the envelopes from the collection first, remembering to change the fund as needed for different types of contribution envelopes. If someone notes that their contribution is to go to multiple funds, you must enter the gift that way splitting the amounts and funds out in your batch entry. Each entry/fund would have its own line in the batch detail.
- If the check is from someone registered at another parish within the diocese, import the family from that parish as unregistered. If they are not registered anywhere in the diocese add the family to your database as an **unregistered contributor**.
- Set up an unregistered contributor only record named “Offertory” for any loose cash entries.
- When the batch balance is zero and you have completed entering the batch, a batch detail report can be run to verify the batch information.
- Once the batch is verified, you may move it to review by clicking on the  at the top right of the page. When the batch is in review you are still able to make changes before the batch is closed.

- When you feel the batch is complete, click on the check mark at the top right of the screen to close the batch.
- The person entering the batch should not be a counter and they should not be involved in taking the deposit to the bank.

Offertory

Posting Corrections

Title: Making corrections after batch is closed

Description: Correction batches are used to record audited transactions to closed batches.

A correction batch is used when items are returned from the bank such as NSF checks or adjustments that are required to parishioner giving.

There are two types of correction batches.

Details: Correction batches must be done as a detailed posting entry.

If you are correcting for something that was returned from the bank as an NSF transaction, you would create a normal batch through the batch process in Offering.

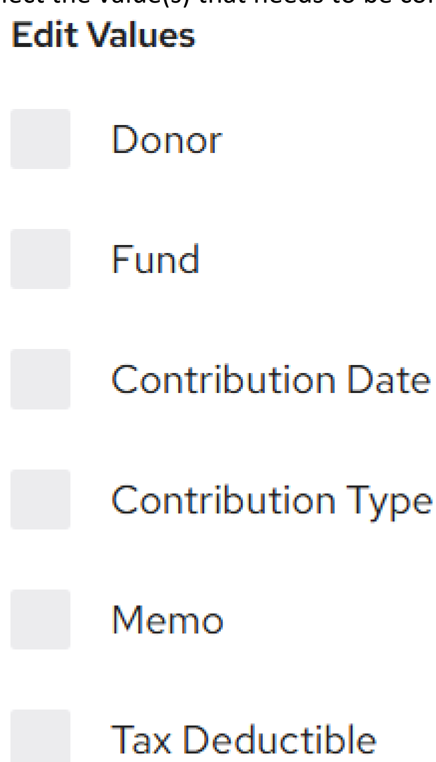
- This batch would use the same date as the bank transaction reversing the check.
- The batch contribution amount would be negative to match the amount reversed by the bank.
- When entering the reversal, note NSF check in the memo field. This will show on the donor statement.

Entering a correction batch to correct Donor, Fund, Contribution date, Contribution type, Memo or the Tax Deductible designation can all be done through correction batches using the following process:

- Go to contributions and search for the contribution(s) that need to be corrected. You are able to search by date of Contribution, family, Contribution member, Envelope Number, Fund, Batch Name, Amount, or Giving Source.

- Once you identify the contribution(s) that needs to be corrected, place a check mark in the box next to that contribution.

- Check on the double check marks at the top right of the screen
- This will open up the Create Correction Batch screen where you can select the value(s) that needs to be corrected.



- Once you select the values to correct, those fields will be available to make the needed corrections.
- Create a correction batch name- suggested format: YYYY/MM/DD Mass time Correction.
- Enter a reason for the correction and click on Save.
- This will put the correction batch into review. If you are linked with accounting, you will need to enter the bank account and deposit date (if possible, use the original deposit date for the batch).
- Click on the grid to see the detail for the batch and then you are able to close the batch. The correction goes in as a negative amount for the incorrect section values and a positive amount for the correct values. If

you are linked with accounting, the batch will generate a zero amount deposit correcting the GL accounts as needed.

Family Suite
Offertory

Fund Creation

Title: Creating funds in the ParishSOFT Offering

Description: Funds are to be set up to represent the different types of monetary donations received from the donors. If the parish is linked to accounting, these funds will also include funds for the types of items in office deposits.

Details: When naming the funds, give enough detail in the name so that it is clear to anyone entering the batch. For instance, "Faith Formation Donations" is clearer than just a fund labelled "Donations".

The Fund ID is generated by the system once the fund is saved. When entering funds in ParishSOFT Giving, make sure to enter the fund ID in the Code field.

The Account Number field is required. Some parishes use the natural account number for this field. This field is not tied to ParishSOFT Accounting and has no bearing on the integration between Family Suite and Accounting.

The External ID and Diocesan ID may be left blank.

If you are linked to accounting, you will need to link the fund to the GL account in the accounting system. The drop-down list for the accounts is organized by the long account number, not the short-cut. The order they are listed in is: Assets, Expenses, Income, Liabilities.

If you have a particular fund with a project code, be sure to enter it in the Fund Project field. When the entries come over to accounting, they will come with the fund project code as well.

Make sure to check the Fund is Active box. Using fund dates is optional.

You are able to set the dates for a Pledge end and also check the box to require pledges for anything posted to this fund.

The "This fund received tax-deductible gifts" box defaults to checked. If the fund is not tax deductible, uncheck the box.

The Fund Accepts Sustaining Gifts checkbox is more for Diocesan use than parish use. It is recommended that this box be unchecked.

Offertory

Reporting

Title: Batch and offertory reporting

Description: Many parishes print of the batch reports to keep with the batch detail. This is not required since the reports are always available to be printed from the system

Details: A detailed posting report will need to be provided if requested in an internal audit along with the packet of envelopes and detail for selected batches. Referencing the batch ID number on the count sheet for the collection batch will help in accessing the report from ParishSOFT.

Title:	Accounting Integration
Description:	ParishSOFT Family Suite can be easily integrated with ParishSOFT Accounting to provide a seamless process from counting the offering to posting in Accounting.

Details:

It is recommended to turn on the integration between Family Suite and Accounting. There are several reasons for this:

- Better control of the process between counting the collections, entering the collection into Family Suite and the accounting deposit generated by that closed batch in Family Suite.
- Data entered into accounting by Family Suite references the contribution batch in Family Suite for easy access to the supporting data for the deposit.
- There is a trail for verifying that the collection was correctly entered into Family Suite through analysis in accounting of large or unusual entries.
- This also encourages prompt entering of the contribution batches.

To set up the integration, follow the directions at Setting up Integration with Accounting.

Title:	Suspense Items: User Registrations, Family Directory Updates, Suspense History.
Description:	The Suspense section stores changes or updates processed through My Own Church. My Own Church is the web portal for the members to view their family record in Family Suite and make updates as needed.

Details:

It is first important to understand how My Own Church works. My Own Church allows families to access their family record and giving in Family Suite. In order to access My Own Church, the person needs to go to the main log-in screen for Family Suite and click on the New User link.

This will take them to a screen to register as a new user to the program. They will choose their organization from the drop-down list, create a user name and enter their personal information. The form also allows them to enter current and past email addresses to help the system match their registration with an existing member record.

Once the registration form is submitted, the information goes to **User Registrations** in the Suspense list.

Once there, a staff member needs to process the request:

- Click on the new user
- Confirm the match with their family in the family directory
- Review the information and determine if any changes need to be kept
- Approve/Finalize the registration

It is important to process these requests quickly so it is a good idea to check the suspense list frequently.

The next item on the Suspense List is **Family Directory Updates.** This is where existing My Own Church users' changes to their family record information would be reviewed and processed. The screen will show, Family Information Updates, Family Address Updates and Family Member Data updates. The staff member needs to review the updates and approve or deny each one. Once finished, clicking on the "Process Actions" button will make the changes in the database.

Lookup Tables

Title: Look up tables are a combination of "global" and local tables. Lookup tables can be managed centrally at the diocesan level and/or locally at the parish. These are used to provide consistency in information tracking and ease of reporting.

Description: In order to support the strategic goals of the diocese the lookup tables listed in the "Details" section below will be managed centrally by the diocese. Should you identify a lookup value that you believe should be added to any of these lists, please contact Parish Support at parishsupport@dowr.org to submit that entry as part of a change request process. Once approved, the new entry will be available globally for all parishes using the system.

Details: Lookup Tables that may be changed by Parishes (Parish System Administrators only):

- Schools
- Celebrants:
    - For celebrants, please use the following format:
    -

Lookup Tables that may not be changed by Parishes:

- Career Types
- Ethnic Background
- Event Category
    - Events
- Faith of Baptism
- Family Group
- Language
- Member Education Level
- Member Strengths
- Religion
- Solicitation Group
- Staff Position Type
- Suffix
- Title

Family Suite

System setup

Title: System Setup Options

Description Options available under System Setup that are set at the Diocesan Level

Details: Organization Licensing lists the organizations and organization ID # within our Diocese.
System Administration lists the data for our Diocese
Organization Administration has the control for Mail Merge file type settings.

Organizations

Title: Organizations

Description Organizations is a list of all the organizations in the Diocese

Details: The list contains the Organization Details (including the POL # which is needed in the Integration between On-line Giving and Family Suite). The location does have the ability to edit some of the information.
Editable fields include:

- Organization Website
- Display Name
- Parishes Online Alias
- Local Org ID
- Organization Email
- Child of (contact Diocesan parish support before changing this field)
- Organization Type
- School
- Grade Change Over (month/day)
- Primary Address – Additional Addresses
- Telephone

Staff Management

Title: Setting up and maintaining staff records

Description: This standard procedure describes the process that should be followed when a parish is setting up a staff record. This procedure also applies when new staff members join and when a staff member leaves. It is necessary to keep information within the staff directory current to utilize the background check most effectively.

- Best Practice: keep records of all staff and volunteers in your parish

Details: The following process should be followed:

- Add **all** staff members (whether they are parishioners or not) into the family directory.
- The staff member must have a family record present in your family directory. **If they are registered at another parish, import the record as unregistered**.
- Non-Catholic staff members must have a family record. The family would be **unregistered** and the family group ***Staff.*** It is helpful to use some combination of the first and last name for the user name such as:
    - First Initial/Last Name
    - First Name/Last Initial
- To add additional assignments, choose the Add Assignment button under Assignments and select the parish you wish to add to the list. You will then need to add the access rights for that location as well by selecting it from the dropdown on the Access Rights screen.
- The correct position should also be chosen from the dropdown for the staff person on the Positions tab.
- After the individual is added to the staff list, the system administrator must then select the access rights for that user. Keep in mind that some staff and volunteers may not need access to the ParishSOFT Family Suite.
- The options for access are the following:
    - Organization Administrator: Gives full access to all modules of Family Suite for the parish. At least one staff member per location needs this access.

- Module Only: It is possible to give access only to certain modules as needed. For instance, the Faith Formation staff would need access to Family Suite, Religion Education and Tuition but probably not Offering or Ministry Scheduler (if applicable).
    - Only give access to the module necessary for the staff member to perform their job duties.
    - You **must check the box "Grant Login Privileges"** in order for the staff member to be able to log into the program.
    - When the staff member leaves and no longer needs access please click the checkmark in the "Assignment Deleted" box. This will remove the access for the staff member and remove them from the active staff list.
- Please check your list of Staff regularly and remove those who no longer need access promptly.

Module Settings

Title:	Module settings and configuration of tabs
Description:	There are module settings available for My Own Church, Census, and Administration.

Details:

My Own Church New User Registration:

- Automatic Approval: These options allow members to potentially more quickly gain access to My Own Church (MOC).
  - If Enabled: Allows a new user registration that meets the defined matching criteria to receive access information WITHOUT requiring manual approval in Administration.
  - If Disabled: New User Registrations REQUIRE manual approval in Administration > Suspense.
- Match CURRENT email? CURRENT Email Matching Criteria:
  - New User Registration — Existing Member Record
  - First Name or Nickname — First Name or Nickname
  - Last Name — Last Name
  - Current Email — Family or Member Email
- Match PRIOR email? This setting is disabled for all.

Census > Secure Fields (Diocesan Level Only)

- Secure Field Setup: Secure fields allow Diocesan staff to collect sensitive member-specific data. The fields are located on the Secure Information tab in Member Details. Due to the sensitive content, only staff at the Diocese with Secure Field Access permission can see and enter data into secure fields. By default, the Secure Information tab in Member Details is hidden. To enable staff with Secure Field Access permissions to see the tab and read or edit data in the secure fields, select Enable.
- Secure Field Labels: Data label fields from 1-10 may be entered here.
- Sacraments: Sets the list of Sacraments that will be shown for all organizations. Also gives the ability to give delete Sacraments permission
- Import: Allows assignment of Import Contact Information permission by Organization Admins.

Family Suite

Administration

- Merge Utility:
    - Prefer completed sacraments whichever sacrament is marked as completed will be saved in a merge. If both sacraments are marked as completed, the master's will be saved.
    - Prefer fields with data. When the master member's sacrament has no data in a field, the duplicate member's data will be used.
    - Force selections. Where conflicts arise (both the master and duplicate fields have data), force the user to choose the preferred data.
- Lookups:
    - By default, when merging lookups in the Celebrant and Faith of Baptism tables, the system keeps the original look up value in all existing sacrament records. In doing so, the system maintains consistency and the referential integrity of the data in those records. The configuration choices here allow you to display a prompt before a merge asking users to decide whether they want to keep the original lookup value or replace it with the new lookup value in their existing records.

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Utilities

Merging Records

Title: Standards for merging duplicate records

Description: Parish Administrators have the ability to merge internal parish duplicates but the diocese must handle the merges for cross parish duplicates.
The diocese will only merge duplicates in which there is a clear match. The data match includes:

- Name
- Address
- Birthdate

If there is any question regarding the ability to match a record the diocese will contact the parish involved and possibly the parishioner.

Details: It is the responsibility of the parish to thoroughly research possible duplicate records and notify the diocese so they can be merged.
There are two types of duplicates:

- Internal parish duplicates (duplicates within your own parish data)
- Cross parish duplicates (duplicates between your parish and another parish)

! Once records are merged they cannot be undone. Research must be accurate and thorough.

Notifications

Title: Notifications of record changes by another organization

Description: Notifications are generated to the parish when activity happens on a record to which your parish has a connection.

These notifications include:

- Export Member
- Family Merge
- Member Merge
- Change of Parish of Registration
- Registered/Registered Duplicate Message
- Change of Address

Details:

The system administrator should review the notifications and insure that necessary adjustments to the record are completed. Next, the notification should be marked as read or deleted.

Adjustments could include removal of such items as send envelopes, ministry participation, family or member workgroups, and changing family group status.