Diocese of Wheeling-Charleston

ParishSOFT Safe Environment Program
Field Guide

September 2019
Notice to readers and users:

This document is not intended as complete formal documentation for all the features and functionality available in the ParishSOFT Safe Environment Program Manager (SEP). Rather, it is a practical field guide for use by those who have a need to document the results of background screening reports, attendance for live and online awareness training, and completion of Policy Forms.

The page images herein are based on the state of the Safe Environment software, the Diocesan Safe Environment Program (SEP) system and the ParishSOFT Family Suite configuration as of April 2016. The software and its accompanying formal documentation are released by ParishSOFT under a practice of continuous improvement, and the Diocese may reconfigure the application as policies and procedures change. Thus, this document, while accurate as of September 2019, may become obsolete as ParishSOFT enhances the products and as the Diocese refines the configuration. If major changes occur that impact this documentation, a new Field Guide will be prepared by the Diocese and released to users.
Overview

The Safe Environment Program Manager (SEP) is a web-based application which collects SEP data about individuals and stores it in a central Diocesan database for easy updating and retrieval. The SEP Manager protects the SEP data, while utilizing address and other basic information provided by the other database users. All users of the database share the name and address record for a person. So, for example, when John Doe, the business manager at St. Mary Parish, moves to St. Joseph Parish as the new business manager, everyone who needs John Doe’s current business address will automatically be updated when his business address is changed to reflect the move. The SEP Manager provides the user with the advantages of both a stand-alone and centralized database system.

The organizational level user process consists of two basic steps:

STEP 1 - Manage Staff Assignments (See Page 7)

Safe Environment data (background screening, status/completion of awareness training, and completion of the Sex Abuse Policy Form) is posted to an individual’s record. This means that the person’s basic record has to be in the database before screening, training, and policy form information can be entered. Since the central database receives name, address and other information from all users, this means that in many cases, that basic record/information will already exist in the database, and the SEP data can be posted to the person’s record immediately. But, in some instances, the SEP user will need to create a record and enter this basic information *before* the SEP data can be posted. The ParishSOFT Program is utilized to accomplish the task of adding individuals whose records do not already exist within the system.

The ParishSOFT Program allows the Administration level user to manage the staff assignments for his/her specific organization efficiently through a secure online website. The user has the ability to add new staff and volunteer records through this interface and assign them the appropriate position for screening purposes. The user will also have the option to edit existing staff and volunteer records if information changes for an individual – for example, if phone number, address, or email changes, or if the person leaves his/her current position.

STEP #2 - Locate and Review Existing Screening Record (See Page 10)

As an organizational user you will want to monitor existing screenings within your organization for any impending expirations as well as outstanding data that may still be needed on an individual. The Safe Environment Program Manager provides a user friendly interface with easily identifiable status icons and standard reports to assist the user in the monitoring process. You may also search the global system for a user applying for a position with your organization that may have already completed their screening at another location within the diocese. This reduces the cost and duplication of work while allowing you to manage your responsibility in maintaining a safe environment within your organization.
Prerequisite

- You will need a username and a password in order to log into the ParishSOFT Program and Safe Environment Program Manager secure websites. This will be provided to you by the Diocesan Safe Environment office. Please make sure you keep your login and password in a safe place.

- You must have permissions assigned to the organization (parish, school, organization, or program) you want to add the staff member to. For example, if you are a member of St. Michael’s Parish, you must be assigned permissions for St. Michael’s.

- You can log into the ParishSoft program from any web browser.
  
  https://wheelingcharleston.parishsoftfamilysuite.com

Step #1 Manage Staff Assignments

A. Verify that the person you need to create an assignment for has a record in your parish/school:

  - Click on the Family Directory tab, then click Family List and search for the family/person using either the fuzzy search or filter icon.
  - The fuzzy search is a “contains” search and the filter icon allows you to do an exact search.
    - If you find the family/member exists in your database proceed to section C.
    - If you need to add the family/member proceed to section B.
B. Add a new Family, click the **Add New Family** button.

i. The **Find Family** window is displayed to enable you to search the database to see if the family is already in the system (the entire diocesan database).

*Before adding a new family, you must conduct a search to make sure that the family is not already in the database and registered to another parish in the diocese. Searching for a family before adding its records to your organization helps to reduce the number of duplicate records in the system.*

![Find Family Window]

ii. In the **Find Family** window, enter the family or member's last name (required), first name, and city. Then, click **Search**.

The application does the following:
- If no match is found, no families are listed.
- If a match is found, the application displays a list of families. The turquoise highlighted rows identifies families registered in the selected organization.

![Find Family Search Results]

*This search is based on how the “Family” is registered in ParishSOFT. It is not an individual members search. For example: The family record above for Katherine Alger may contain 5 individuals. To view or edit details for a family, click the underlined name. You can also slide the scroll bar at the bottom of the search results to view additional information such as address, phone number and email address.*
Do one of the following:

- If the family you want to add appears in the list:
  - Select the family.
  - Click **Move Selected Family** and then select the option to add the family to the parish as unregistered or registered. When prompted, click **OK** to confirm.
  - Click **OK** to dismiss the message confirming the move.

- If the family you want to add does not appear in the list:
  - Click **Add New Family** to display the **Add New Family** form:

  Complete the fields on the form. An asterisk (*) indicates required information.

  - You must specify at least one family member as the head, husband, or wife for **Type**.
  - The application provides instant address validation and suggests alternative addresses, when possible, if an error is discovered.
  - You can use the numeric keypad on your keyboard to enter numeric data into the form's fields.

    - (optional) To add another member, click the link **Add Another**. Use this to add a spouse or children to this family record.
    - (optional) Click **Auto Fill Family Names**.

    - To save you text entry time, the application pulls information from the member records in your database and inserts the information in the e-mail address and formal and informal name fields in this section.
➢ Do one of the following:
  ✓ Click **Save & New**. The **Find Family** window opens to enable you to search your database to determine whether or not the family you want to add already has a record in the system. Complete the form, and then click **Search** to conduct a search.
  ✓ Click **Save & Edit** to add the family to the database. The form remains in edit mode to enable you to continue entering information.
    o Click **Save & Finish** to add the new family and exit the form.
    o Click **Cancel** to cancel and exit the form without saving changes.

C. Add Assignment Record

• Click on **Administration**, then on **Manage Staff**
• Search to see if the person already has a staff assignment.

In the toolbar, click the “+” sign (the + sign will take you to the screen to find or add a record).

💡 **Please note:** once you get to the Find Member screen, a red asterisk (*) indicates required information. Blanks with red asterisks must be filled in or you cannot progress through the system.
In one or more of the **Find Member** fields, type your search criteria. Then, click [Search].

(Please note how some names may be entered into the system versus how you know or address a person: for example, “Mike” may be entered as “Michael”; “Susie” may be “Susannah”; “Kate” may be “Catherine” and so on. If you enter “Mike” along with a last name and receive no results, you may want to try entering “Michael”, or you may simply just enter the last name with no first name and then peruse the list of members that pops up.)

- **By sliding the scroll bar at the bottom of the search results to the right, additional information may be viewed.**

- The Member Search window will open to show a list of members in your diocesan database that match the criteria provided.

<table>
<thead>
<tr>
<th>Member Name</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lambert, Alphon</td>
<td>Alphon</td>
<td>Lambert</td>
<td>5053 Inland Dr</td>
<td></td>
</tr>
<tr>
<td>Lambert, Melvin</td>
<td>Melvin</td>
<td>Lambert</td>
<td>4037 Gilhouse F</td>
<td></td>
</tr>
<tr>
<td>Lambert, Linda</td>
<td>Linda</td>
<td>Lambert</td>
<td>4037 Gilhouse F</td>
<td></td>
</tr>
<tr>
<td>Lambert, Catherine</td>
<td>Catherine</td>
<td>Lambert</td>
<td>443 Ridgecrest</td>
<td></td>
</tr>
<tr>
<td>Lambert, Cathy</td>
<td>Cathy</td>
<td>Lambert</td>
<td>103 Arbor Dr</td>
<td></td>
</tr>
<tr>
<td>Lambert, Alphon</td>
<td>Alphon</td>
<td>Lambert</td>
<td>5053 Inland Dr</td>
<td></td>
</tr>
<tr>
<td>Lambert, Melvin</td>
<td>Melvin</td>
<td>Lambert</td>
<td>4037 Gilhouse F</td>
<td></td>
</tr>
<tr>
<td>Lambert, Linda</td>
<td>Linda</td>
<td>Lambert</td>
<td>4037 Gilhouse F</td>
<td></td>
</tr>
<tr>
<td>Lambert, Catherine</td>
<td>Catherine</td>
<td>Lambert</td>
<td>443 Ridgecrest</td>
<td></td>
</tr>
<tr>
<td>Lambert, Cathy</td>
<td>Cathy</td>
<td>Lambert</td>
<td>103 Arbor Dr</td>
<td></td>
</tr>
</tbody>
</table>

- Select the Member by clicking the little circle next to his/her name
  - **Click [Accept]**
    - A message is displayed either to inform you that the member was added to your organization’s staff or that the member was already added.
  - **Click [OK]** to dismiss the message.
  - Do one of the following:
    - If the system added the member to your staff, the **Staff List** is displayed. The newly added member’s name appears in the **Staff List** grid.
If the system reported that the member is already on your staff, it returns you to the Member Search window. Click to exit to go back to the Staff List grid.

- Always make sure you are in the correct organization. The one you want the Safe Environment information entered for.

- If you are entering a “user” who is really not going to log in to any program, **you do not want them to get an email with login information.** Therefore you will enter a user name (first initial/last name) and your email address. This way the initial log in email will go to you. After the staff assignment has been added and the email is sent to you, go back to the person record in Family Directory. Click on the Members Detail Tab and then on the individuals name. Click Edit Details and add their real email to the form.

- You will not be adding any access rights to this person if they are being added solely for Safe Environment. But you do need to add their Position(s).

- Click on the Positions tab.

  - Unknown will be the default position. Put a check mark in All Positions they are qualified for and click Save & Close.
- You must add ALL positions so each Safe Environment requirement is listed in the Safe Environment program for that person.

  Click and drag the position to the Primary position to the top of the list. Then uncheck “unknown” to remove it from a position. Click save and click close to accept all changes.
STEP #2 - Locate and Review Existing Screening Record

As an organizational user you will want to monitor existing screenings within your organization for any impending expirations as well as outstanding data that may still be needed on an individual. The Safe Environment Program Manager provides a user friendly interface with easily identifiable status icons and standard reports to assist the user in the monitoring process. You may also search the global system for a user applying for a position with your organization that may have already completed their screening at another location within the diocese. This reduces the cost and duplication of work while allowing you to manage your responsibility in maintaining a safe environment within your organization.

A. Safe Environment Program Manager

- Launch Internet Explorer
- Enter the following URL: https://aimsync.parishsoft.net/wheelingcharleston/bkgrdck
- You will get a server password prompt that will look similar to the screen below. Enter the username and password provided to you by the Office of Safe Environment for the SEP site. Note you will receive two separate user names and passwords; one for the SEP Server and the other to access the SEP Program.

![Connect to aimsync.parishsoft.net](image)

- After entering the server connection information you will be brought to the main Safe Environment Program Manager login screen, like the one below, and asked to enter in your specific username and password. This is the same username and password supplied to you by the Safe Environment office at the diocese for the ConnectNow Staff Management login.
B. Searching for Existing Screening

After logging into the Safe Environment Program Manager you will be directed to the main Search screen similar to the one below. The individuals with assignments to the organizations that you have permissions for will be listed on this main search screen. From this main screen you can view the quick status icons on the right of each record and search for specific individuals using various filters available from the top of the screen.

There are four status icons that you may encounter from the main screen. As you can see in the example below there is a blue question mark which indicates a pending or unknown status, a green check mark which indicates all requirements have been completed successfully, a red X which indicates at least one requirement will need further explanation from the diocesan Safe Environment office and the final icon is a yellow shield that indicates to the user that one or more requirements on that record are approaching expiration or have expired.
C. Viewing Specific Requirement Details

Some users will have the ability to access the details on specific requirements for the staff members within their own organization. If you have the appropriate user permissions you will be able to click on a specific name from the main search screen like the one above and a details screen similar to the one below will open. You will then be able to select the desired requirement from the upper right hand corner of the screen and review the information for that particular record. If you find an error in the data or have questions regarding this individual’s screening information, please contact the Safe Environment office at the diocese.

D. Reporting

You also have the ability to run reports for the organizations which you have permissions to access in order to monitor expirations and incomplete screenings within those organizations. To generate a report click on the Reports button on the menu bar at the top of the screen and choose your desired report. Below is a sample of the reports menu. The reports available to you will be based on your user permissions. In order to print reports you will need to make sure you have any pop-up blocking software disabled.
Additional Resources

- For additional information about functionality and use of the Parishsoft Safe Environment Program Manager please refer the to the user guide for this module. You may download a copy or the most recent user guide from the Support section of the ParishSOFT website.

- Please visit www.dwc.org, under the “Diocese” tab, then under “Parish Resources” for additional information.

You may contact ParishSoft technical support at support@parishsoft.com.

If you have any questions about ParishSOFT Family Suite or duplicate records, please contact Dee Dean by telephone at 304-230-1531 or email at ddean@dwc.org.

If you have questions about policy or procedures related to the Safe Environment process in the Diocese of Wheeling-Charleston, please contact Sharon Goudy by telephone at (304) 230-1504 or by email at sgoudy@dwc.org.