Diocese of Wheeling-Charleston
ParishSOFT Standard Operating Procedures

Data Entry Standards when Adding a New Family

Data entry standards assist in the proper formatting of your data so that the database fields function properly and reports correctly produce the data you need. The following are key fields to focus on when entering in a new family who is not already registered at another parish.

A. Family and Member Names

Please verify the family and member names for accuracy before entering information into the database. This will help to ensure that any search performed to check if a family is present in your own or the diocesan database will reveal the correct results. The following fields will be needed in order to completely record a family and its members.

Family Last Name = family last name commonly used (this field can hold 100 spaces and can be used for hyphenated and/or two last names.)

First Name of Family = first name of spouses, male and female, separated by an 'and' or the Head of household's first name. Listing the spouse's name is VERY important; the database will automatically set 2 names listed together with an 'and' to be first the Male/Husband and then the Female/Wife in the members tab. It's always advisable to double-check and make sure that the names appear correct. **Please use formal names in this field.** If for some reason an informal name needs to be entered, please put it in parenthesis. Example: John (J.R.) Smith or Elizabeth (Lizzy) Jones. This field is instrumental in having accurate search results. Names should not be removed, even if deceased or inactive.

Nick Name = is the field reserved for one's nick name which is different from one's formal name. ***Nick names should NOT be entered into fields assigned for formal/proper names.***

Mailing Name = how the family wishes to be addressed in mailings. It is recommended that you use the Auto fill to create your salutations and addressees.

Family Address = may include home, mailing, and other seasonal addresses. The primary address flag designates which address to use for mailings.

Member First Name = member's formal name

Member Nick Name = name the member uses every day, if different than the formal name

Member Last Name = members legal last name if different than the family's name.

(Member's Maiden Name: Please put maiden name of wife in this field and not the middle name field unless they have chosen to keep their maiden names as part as their name when they got married.)

Member's   Gender

Member's Date of Birth

There are 4 family mailing name fields used in ParishSOFT. **The Mailing Name field is used on most parish reports and is the customizable parish field which should reflect the wishes of how the parish family would like to be addressed.** The other family mailing name fields will be auto generated after the members are in the system.

B. Address Types

Home – defaulted address, should consist of the main physical address of the family

Mailing – can be used for PO Boxes, Office address, etc. If this should be the Primary address for mailings, please indicate by switching the Primary Address field to Mailing when first entering in the family.

Other – used for a second location, such as a temporary or seasonal address. Must enter a month and date range for this address or the computer will not be able to use it. If this address is in use, the Primary Address field on the family record will indicate Other.

*DO NOT DELETE mailing addresses for individuals who are deceased or who have moved out of the parish. By changing their status (to either moved or deceased), those working in the system would know that their mailing address would not be current. If parishioners have moved to a new address, please make sure to input the new address information. If you do not know their new address, it is best to leave their last known address.

Please use upper and lower case to fill in the addresses and follow all the other US Post Office guidelines as much as possible. The US 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. A standardized USPS address is one that is fully spelled out, abbreviated only using the Postal Service standard abbreviations (most common listed below) and which has no punctuation listed in the address line:

Typical Address:
2965 Anywhere Lane, Apt. B
Middleton, WI 53562

USPS Standardized Address:
2965 Anywhere Ln Apt B
Middleton, WI 53562-1456

The following are the most common Street Suffix Abbreviations:

For	Use	For	Use
Avenue	Ave	Pike	Pike
Boulevard	Blvd	Pine	Pine
Circle	Cir	Plaza	Plz
Court	Ct	Post Office Box	PO Box
Drive	Dr	Road	Rd
Heights	Hts	Route	Rte
Isle	Isle	Shore	Shrs
Junction	Jct	Square	Sq
Lane	Ln	State Roads	State Rd
Mount	Mt	Street	St
Park	Park	Terrace	Ter
Parkway	Pkwy	Trail	Trl

The following are the suggested County, State & Local Highway abbreviations suggested by USPS: (Note: this is where the State, County or Highway is the primary address designation)

Examples in Use	Standard to Use
County Hwy 60	County Highway 60
CTH 60	County Highway 60
County Rd 41	County Road 41
CR 41	County Road 41
Hwy 14	Highway 14
Highway 14 bypass	Highway 14 Byp
I-10	Interstate 10
Interstate Hwy 680	Interstate 680
Rd 5A	Road 5A
Rte 88	Route 88
State Hwy 60	State Highway 60
SR MM	State Route MM
US Hwy 44	US Highway 44

C. Entering Email Addresses

Because of the easy and widespread use of electronic communications it is very important to include email addresses for both family and member records. Using email as your first choice of communication assists in lowering postage costs and keeping additional information updated. (People typically don't change their email address when they move)

Since most people have multiple email addresses, please request what email to use for family communications and what email should be used for individual communications.

The family email is the default for most communication in ParishSOFT, however, there are times when the member email can be used instead of the family email, namely in the Ministry Scheduler and Religious Ed modules. In these instances, if you are working with children who do not have an email address, it is advised that you enter the Family Email Address into the children's Member Email address field so that the family can receive the appropriate information related to their children's involvement in specific groups or activities.

Multiple Email Addresses in One Field
To list multiple email addresses in one field, place a semicolon (;) and no spaces after the first email address. (Example: demo@parishsoft.com; demo2@parishsoft.com)

D. Family and Member Roles

Roles are used to assign relationships within a family as well as categorize families and members. When you are using the AutoFill option for family salutations, it will look at these Member Role to create the proper salutation.

Every member must be given a role and every family record MUST include one of the following roles for the program to work properly: Head, Husband, or Wife.

If a married couple is in the parish, assign them the roles Husband and Wife.
A single head of household, with or without children, should be given the role Head.

Please be sure that if you are changing a member's role to husband/wife, that you also change their marital status to that of "married." Conversely, if you change the marital status to "divorced", please be sure to export one of the individuals into their own record.

A member that is a child under the age of 21 will have one of the following member roles: Foster Son/Daughter, Grandchild, Grandson/Granddaughter, Son/Daughter, Stepson/Stepdaughter, or Stepchild. When you assign roles in this way, children will automatically be linked to their parents' records.

**When children reach the age of 21 and are considered adults, they should be exported into their records. However, children with special needs may remain on their parent's family record after the age of 21. *Please follow this additional step:*
    Special Needs: Check the box to indicate that the member has a special need. Then, in the textbox below, enter a description of the special need (for example, peanut allergy; requires wheelchair access; hearing impaired).

E. Non-Catholic or Non-Participating Members of a Family

Please enter in all members of a family so you create an accurate representation of the family for the staff and pastor at the parish using this information. Spouses or members that are non-Catholic whether they participate or not can be indicated on the Members screen as either "ActOther" or "Inactive" along with their role in the family and religion. If members are deceased, it is also helpful to have that information saved in the family rather than deleting the member from the system.

F. Essential Member Fields for Census Reports

Birthdates, Genders, and Religion are key census fields which provide critical pieces of information for many census reports used in your database. Searching and updating any missing date of birth for active parishioners in the system will save time when census reports are needed and run. Please also verify that each of your active members have a gender in their member record. As well, try to list the religion for each member. If you have a non-Catholic member who goes through the RCIA program, please remember to change their religion as well.

G. Additional Member Fields

The following fields are helpful to track, if possible, in ParishSOFT:

Language – indicates the main language spoken for each member. No default, field must be chosen by user.

Ethnicity – please select from the pre-filled standard ethnicities or add in notes if desired.

Graduation Year - indicates high school graduation year, based off birth date (birth date + 18).   If this is changed, the system will automatically update it based off of the changed information tracked in the system each year.

Grade - grade is the highest grade level in school (K-12) which the member is currently in based off the graduation year. This year can be changed by adjusting the Graduation Year drop down.

School - fill in with the school the member most recently attended (or is attending)

Education - the parishioner's highest level of schooling or their degree.

H. Census Updates Through My Own Church

My Own Church integrates seamlessly with all the programs in the ParishSOFT Family Suite. Current members can log in anytime they like to sign up for classes or ministries, view their giving history, or submit changes to their records. Once your parish accepts those member submissions, their records are instantly updated in your ParishSOFT Family Suite. Family information updates can be found on the home screen in Family Suite.

These updates need to be reviewed on a weekly basis. Once you have approved or denied the changes, the members will be able to see how you managed it. Please note that occasionally parishioners will add information in a way that does not meet our standards of operations. Please make the appropriate adjustments to maintain data integrity and diocesan policy.

Please note: We never delete or remove any parishioner census information or giving history from the ParishSOFT system. These records have a permanent retention based on diocesan records retention policy.