Diocese of Wheeling-Charleston
ParishSOFT Standard Operating Procedures

Families Registered at a Parish

A family can only be "registered" at one parish at a time, yet families can and often do participate in many parish communities. In order to accommodate this, ParishSOFT allows for multiple parishes to "share" a main family record through synchronization (synching). The parish of registration is the main family record and as such, is responsible for updating the census and sacramental details for the family. All census and sacramental updates to a family should be sent to the parish of registration to record these changes.

A. Searching for a Family Registered at another Parish

When adding a new family into the database, the user needs to perform a search to see if the family already exists somewhere in the database from a prior registration. Finding a family already in the database assists both you and the other parish greatly. It saves time by decreasing data entry, accidental duplicate family records and also promotes greater communication within parishes with regards to the status of each family.

When searching for a family to add, be careful of nicknames. Pay attention to address and phone numbers. When in doubt, click on the underlined name to view the existing parish soft record. If duplicate records show in the search results, please contact the Diocesan data specialist to merge these records before proceeding.

B. Sharing Information with a Registered Parish

A parish may "share" a family who is registered at another parish without registering them in their database in order to:
- Post contributions or track Pledges;
- Add a member/s to Ministry Scheduler;
- Send a contribution envelopes;
- Add a student to a Religious Education class
- Track safe environment information

Any contributions, participation in ministries/groups, and Religious Education information are saved in your local database only and are not shared with another parish via synchronization. The ONLY information shared via synchronization is the census and sacramental information about the family and members. (The synchronizing information fields will appear greyed out when you are sharing a record, as a reminder that the information cannot be changed locally.)

C. Registering a Family at your Parish

When a family has officially registered at your parish, (via filling out a registration form) you can change their record depending on the following circumstances:
1. If they are a current "shared" family record, you can change the Currently Registered Family flag to indicate that they are registered at your parish. This will change the family registration status to un-registered in their former parish and make your record the prevailing record for diocesan updates and synchronization.

2. If you do not have the family in your system and they appear when searching at another parish, you can select the Register button when adding the family to your database. This will also change the family registration status to unregistered at the former parish and make your record the new registered family record. ***Out of courtesy, it is recommended that an email be sent notifying the other parish (former parish of registration) that this particular family has chosen to now be registered at your parish.***

   Changes to your database can be monitored by reviewing the Notification page in ParishSOFT. It is located on the home screen as well as on the administration tab. This serves as a source of communication to keep you updated about changes made to family records in the organizations you manage. A notification appears on this page whenever any one of the following events occurs:

   Change in a family's registration from one organization to another.

   Change in a family's address.

   Updates to a family's or member's record resulting from a duplicate merge.

   A member is exported into their own record.

3. When entering a family which is not listed in another parish, you can enter them in your database and the flag for Currently Registered Family will automatically indicate that they are registered at your parish.

D. Registration using My Own Church

My Own Church integrates seamlessly with all the programs in the ParishSOFT Family Suite. New members visit your My Own Church site to register with your parish. 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.

Prospective users of ParishSOFT Family Suite must first register to become authorized users of the software. Users can log in only after an administrator approves the registration request and activates the account.

New registrations using My Own Church will appear on the Home Screening in Family Suite. The tabbed interface guides you through the process of reviewing and finalizing new user registration requests. The process consists of three main steps, indicated by the tabs located at the top of the right panel. By following the steps in the order given, you can make decisions to accurately process registrations without creating duplicate records. In the final step, you

will either add the individual as a new user to the software or associate the individual with an existing record in the database.

New user registration should be checked at a minimum of once a week.

Additional instructions can be found at Parish Soft Support
https://support.parishsoft.com/hc/en-us/articles/14637384000283-PSFS-Administration-Suspense-How-to-approve-My-Own-Church-Registration-requests

**** 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.