

Registration Status for Family

SOP# DSB-1001

Title: Recording family status

Description: This standard procedure outlines the process that should be followed when a parish is adding or modifying a family's Registration Status and Family Group. There are several scenarios that could occur within a parish that must be identified and properly recorded in the ParishSOFT software. Keep in mind that how we define a registered family to a parish as a Diocese is not the same in the ParishSOFT software.

SOP Details: The terms Registered and Un-Registered have two meanings:

1. The first is what they mean to us as a Diocese
2. The second is what they mean in the ParishSOFT program

Below is the definition to us as a Diocese:

Registered Family: This is a family that fills out a registration form at the parish which states that they would like to become a registered family at the parish.

Un-Registered Family: This is a family that tells the parish that they no longer want to be a registered family at the parish.

Before we can relate the above definitions to the ParishSOFT software we need to understand some items in the ParishSOFT software:

In the ParishSOFT software currently there is:

- a check box for "Registration Status"
- a read only text box for "Church of Registration"
- a drop-down box for Family Group

These will look like the following at the parish level:

Church of Registration: St Pius X Parish, Ann Arbor
Details Modified On: Tuesday, October 31, 2017 4:21 PM
Family Group: Active <input type="text"/>
Registration Status: <input checked="" type="checkbox"/>

In the ParishSOFT software a particular Family can only have the check box "Registration Status" checked at one parish at a time and this parish is then listed in the "Church of Registration" text box, however they can then be listed at other parishes with this check box being unchecked but the "Church of Registration" will be listed as the parish that has the check box

“Registration Status” checked and they will only be able to change certain items with that family.

Each parish controls what is selected in the “Family Group” drop-down box which can then be set to indicate the status of the family at the parish.

So, in general:

“Registration Status check box”: If checked indicates that this is the parish of registration and that this parish controls the information for this family. If uncheck indicates that this family’s information is controlled by the Parish that is listed in the “Church of Registration” text box.

“Family Group drop-down box” is the parish’s way to further classify the family’s registration status in the parish.

Since the “Registration Status” checkbox for a family can only be checked off by one parish at a time and according to our Diocesan definition of registration status a family can be registered to more than one parish, in ParishSOFT it takes the combination of the “Registration Status” checkbox and the “Family Group” drop-down box to know if the family is “Considered Registered to the parish” according to the Diocesan definition.

The following chart indicates how the combinations of “Family Group” and “Registration Status” in ParishSOFT are interpreted.

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Standard Operating Procedures
Of ParishSOFT Software (Web Version)**

Family Group	“Registration Status check box” selection	Explanation	Considered Registered to this parish
Active:	Checked	This family is involved with this parish	Yes
	Not checked	This family is registered to this parish but has another primary parish	Yes
Inactive:	Checked	Indicates that the family is registered but not actively involved at parish	Yes
	Not checked	Indicates that the family is not registered to this parish	No
Registered Inactive	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	Indicates that the family is registered but not actively involved at parish	Yes
Invalid Address:	Checked	indicates that the address is no longer valid	Yes
	Not checked	indicates that the address is no longer valid	Yes
School Only:	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	They are listed only because they are at the school	No

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Family Group	“Registrati on Status check box” selection	Explanation	Considered Registered to this parish
Ministers Only:	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	indicates that they are listed only to be ministers at the parish	No
Staff:	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	This indicates that the family is only listed in your data because they have a member that is part of your staff. If this family is considered registered to your parish then the family group should be something else.	No
Religious Ed Only:	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	They are only listed to go to Religious Ed	No
Visitor:	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	Only listed because they visit the parish on occasion and need to be in the data	No
Sacrament Only:	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	Listed because they received some type of sacrament	No

Family Group	“Registrati on Status check box” selection	Explanation	Considered Registered to this parish
Contributor:	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	Listed because they made contributions to the parish and parish wants to record it	No
Archived:	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not checked	Families added to data to record their sacramental records	No
Moved	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not Checked	Indicates that the family physically moved to an area way outside parish boundaries	No
Pastoral Center Added	Checked	“Registration Status check-box” should not be checked for this type of family	Yes (These should be changed to proper status codes)
	Not Checked	Indicates that the family was added to the parish because they gave a pledge to the DDF Campaign.	No

Now we can relate the Diocese definition to the ParishSOFT software:

To Prevent Duplicates:

As you read through the following information on how to do this please keep in mind that these steps are intended to help prevent duplicates from being created in our data both at the Parish and at the Pastoral Center. Please exercise “due diligence” when performing these steps. A little extra time now saves a lot of time later.

In general, a registered family can be marked in several ways but before you can set these settings for a family the family has to be in your database. If they already are then you can skip to the next section. If they are not, then you must add the family. After clicking on the “Add New Family” button type in some basic information about the family (Last name, first name & city), there is also an option to “Filter by Organization”, but I suggest leaving this set to all. After clicking on “Search” it will show you possible matches from across our Diocese.

The results list will show below the search criteria and show you possible matches. If nothing shows you may want to clear the city and reduce the number of characters to as few as three in the last name and first name to ensure that the family does not exist before adding a new family. Also, this may be done to ensure that someone did not accidentally spell the name wrong. Please exercise the concept of “due diligence” when looking for a family. The system does allow you to click on the “Family Name” to see more details about the family and members. If you are not sure that the family listed is the family you want then it is better to add a new family, however, please exercise “due diligence.” If you find that there are duplicates, then you will need to follow the instructions for how to combine duplicates together.

If you find the family, then click on the circle next to it.

- If the family already belongs to your parish then a message will come up and you should then close out of add new family and find the family in the family list to edit it.
 - Otherwise there are two ways you can add the family to your parish. By clicking on the Move Selected Family select the choice that is most appropriate: *Note: To assist with this it may be beneficial to know if the family considered your parish as the parish of registration or the other parish and that will help you determine how to pull the family into your parish.*
1. As Registered: The family can be added as a registered family to this parish and that will automatically change the family to unregistered from the other parish
 2. As Unregistered: The family can be added as an unregistered family to this parish and to indicate that they are registered the family group would be set to Active.

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The following example scenarios show how a person may be represented at the Parish with the ParishSOFT software.

Scenario	<input checked="" type="checkbox"/> Registration Status	Family Group	Parish of Registration	Considered Registered to this parish
1. Active registered family at this Parish only	Checked	Active	This parish	Yes
2. Active registered family at this parish and other parish(s) but considers this their primary parish	Checked	Active	This parish	Yes
3. Active registered family at this parish and other parish(s) but this is not their primary parish	Not Checked	Active	Primary Parish	Yes
4. Nonregistered family that contributes and you want to record their contributions	Not Checked	Contributor		No
5. Visitor, active in other church	Not Checked	Visitor	Primary Parish	No
6. Clergy, religious, not registered? We currently don't have this family group in our db but it can be added do we need this?	Not Checked	Clergy / religious		No
7. Staff Family that is an active registered family to this parish should be treated as above in scenarios 1, 2 or 3				

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Scenario	<input checked="" type="checkbox"/> Registration Status	Family Group	Parish of Registration	Considered Registered to this parish
8. Staff Family that is not a registered family to this parish	Not Checked	Staff	Depends on if they are in another parish's Database already	No
9. All Members in family are deceased	If checked then uncheck	Inactive	Depends on if they are in another parish's Database already	No

If there are questions or errors that come up as you are entering in this data please call ParishSOFT at 1-866-930-4774 and dial 2 for support or e-mail or call Eric Kuske at the Pastoral Center (909) 475-5403 (ekuske@sbdiocese.org) to resolve before continuing.