

Pastoral Center Input of New Families (DSB-1009)

SOP# DSB-1009

Title: Pastoral Center Input of New Families

Description: This standard procedure outlines the processes that will be followed if a new family needs to be inputted into the database.

SOP Details: **Premise on Responsibility of Data Integrity**

The Parish is responsible for maintaining their data in the ParishSOFT software. However if a family contacts the Pastoral Center with an update to their name, address, parish of registration, etc. the Pastoral Center will modify the record, noting the change made in the notes section. Both the Parish and the Pastoral Center must use the SOPs created to keep data integrity at its best.

Addition of New Families

The Pastoral Center may not be able to locate a family upon the receipt of a pledge/payment for two reasons:

- The information on the card does not match the information in ParishSOFT.
- The family's record does not exist in ParishSOFT

If a pledge card is received with a name and address information and cannot be located one will be created. If a payment is received with a name alone or an incomplete address, the payment will be applied to the parish's anonymous account with a note stating the information on the pledge card. The Pastoral Center will populate the record with all the information included on the pledge card. The record will be marked as unregistered and the group will be coded as "Pastoral Center Added", "Bishops Dinner Added", or "Agilis Added". Coding these records as one of those allows the parish to limit the list in the Family Directory to just these families and modify them as needed. Also, if the added record is deemed a duplicate the parish can merge it into the parish's master record for that family.

The Pastoral Center will make every effort to locate an already existing family prior to creating a new record. To assist in this matter parishes are asked to include the FamilyDUID on all DDF pledge cards/payments prior to submitting them to the Pastoral Center. DDF processing instructions are also available by contacting the DDF Coordinator at (909) 475-5462.

Change of Information for a family

The Pastoral Center may update information on a family, when this happens a note will be placed in the notes box to let parishes know when an item has been changed.