

Select your User Name from the Drop Down selection window (Click on the V/ arrow).

You may change your Password at any time.

However, when you log in for the first time, ParishSoft will ask you to change your password

– Please note that this password is in addition to the Citrix password.

ParishSoft uses Icons to save and close windows.

Do NOT use the Windows “X” to close a window

– this has been known to cause corruptions in the Parish’s program.

NEWCAS ParishSoft Family Directory

Family Directory

Family Info Staff Modules Reports Utilities About

Last Name Search: Advanced Search

Abbey, William and Elizabeth

eMerge Info (highlight text, then right-click to copy...)

Mr and Mrs William Abbey
9956 Astro Drive
Houston, TX 77062

Membership Display: Registered

Fam Group & ID Display: All Groups

Diocesan ID:

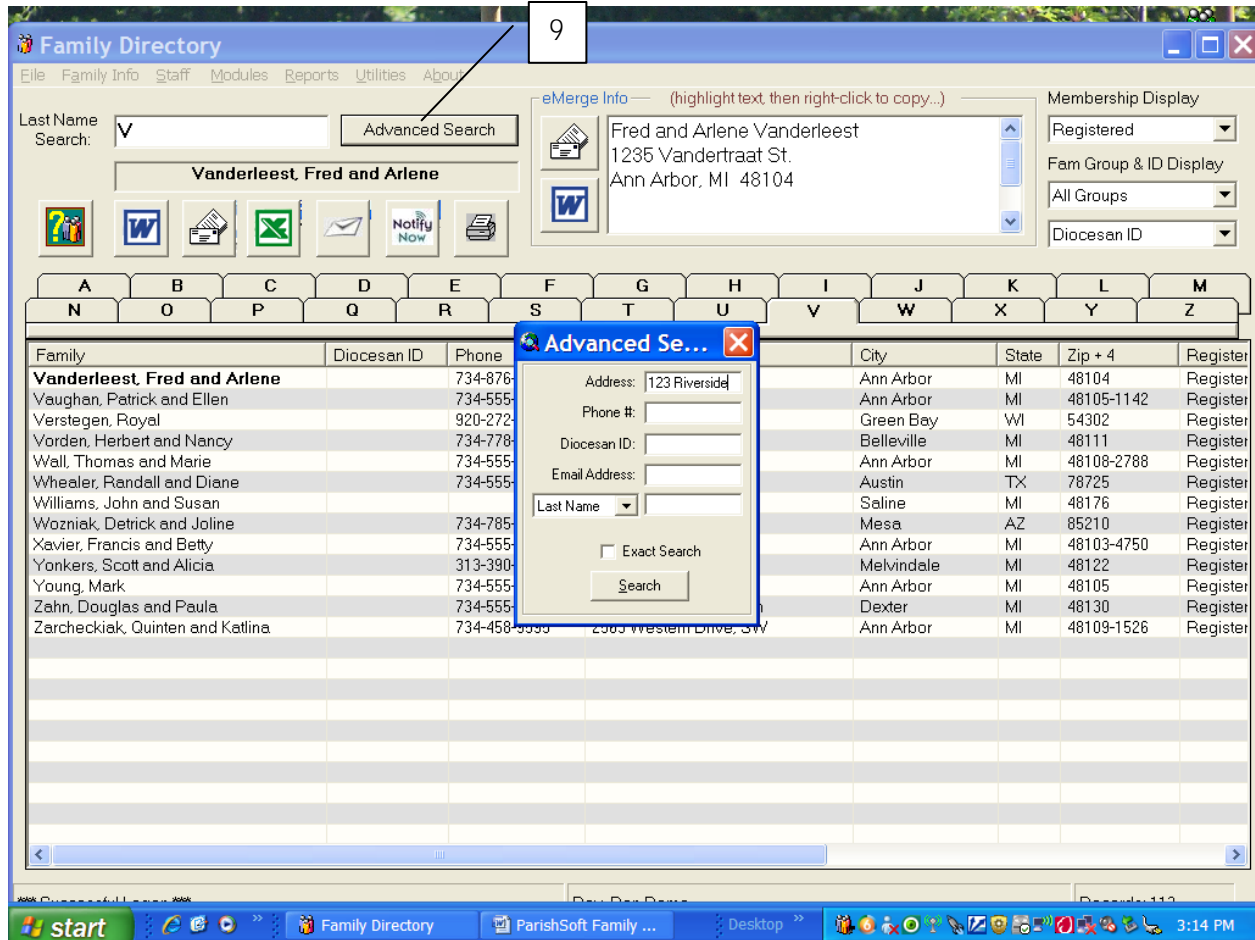
Family	Diocesan ID	Phone	Address	City	State	Zip + 4	Regi:
Abbey, William and Elizabeth		734-555-8397	9956 Astro Drive	Houston	TX	77062	Regi:
Adams, Henri and Carole		313-456-1299	490 Cobo Lane	Detroit	MI	48221	Regi:
Allen, Mark and Tonya		734-492-9384	899 Poply Road	Ann Arbor	MI	48109	Regi:
Amorgawiz, Bobby and Sandra		555-541-5566	534353 Main St. North	Russell Island	MI	48001	Regi:
Anderson, James & Martha		734-985-5468	2983 W. Monroe St.	Ann Arbor	MI	48108	Regi:
Anderson, Matthew and Barbara		810-753-7563	731 Johanna	Brighton	MI	48116	Regi:
Bailey, Todd and Nancy		734-555-1168	403 Keech Ave	Ann Arbor	MI	48103-5534	Regi:
Biczak, Paul and Sharon	34-51235	734-519-5189	2583 LaFayette Court	Scio Township	MI	48103	Regi:
Bokong, Matthew and Linda		610-555-5664	13904 Grandpoint Dr	Cement City	MI	49233-9648	Regi:
Bonzak, George		734-458-9658	2345 Jonesville Rd	Ann Arbor	MI	48108	Regi:
Brinks, Jim and Shirley		555-555-5555	7313 Next Street South	Plymouth	MI	48170	Regi:
Camp, George and Marian		734-555-1881	3600 Jackson Ct	Ann Arbor	MI	48103-9572	Regi:
Coffman, Daniel and Fran		734-332-0489	3293 S Ridgeside Cir	Ann Arbor	MI	48105	Regi:
Coulter, Adam and Elyse	34-51283	734-931-8386	71531 LaFayette Circle	Scio Township	MI	48103	Regi:
Creighton, Daniel and Christina		734-934-9344	101 Greenlake	Ann Arbor	MI	48107	Regi:
Davis, Scott and Mary Lou		734-555-3536	131 Murray Ave	Ann Arbor	MI	48103-4358	Regi:
Demo, Dan		734-489-1199	11 Main St.	Ann Arbor	MI	48105	Regi:
Derida, Ives and Debra		734-654-0456	677 Pikerell Terrace	Plymouth	MI	48170	Regi:
Dwight, Helene		810-456-5456	755 Trinity Circle	Brighton	MI	48114	Regi:
Eagle, Kim and Darlene		734-555-4806	1000 W Delhi Ct	Ann Arbor	MI	48103-9409	Regi:
Edwards, Keith and Karen		734-234-9899	1650 Barkley St	Ann Arbor	MI	48103	Regi:
ElWetting, Rebab		734-384-9900	3163 Ireland	Ann Arbor	MI	48104	Regi:
Englebert, Loreene		734-519-5135	P.O. Box 13581	Mesa	AZ	85211	Regi:

Successful Logon Rev. Dan Demo Records: 113

ParishSoft is a Family-driven membership program.

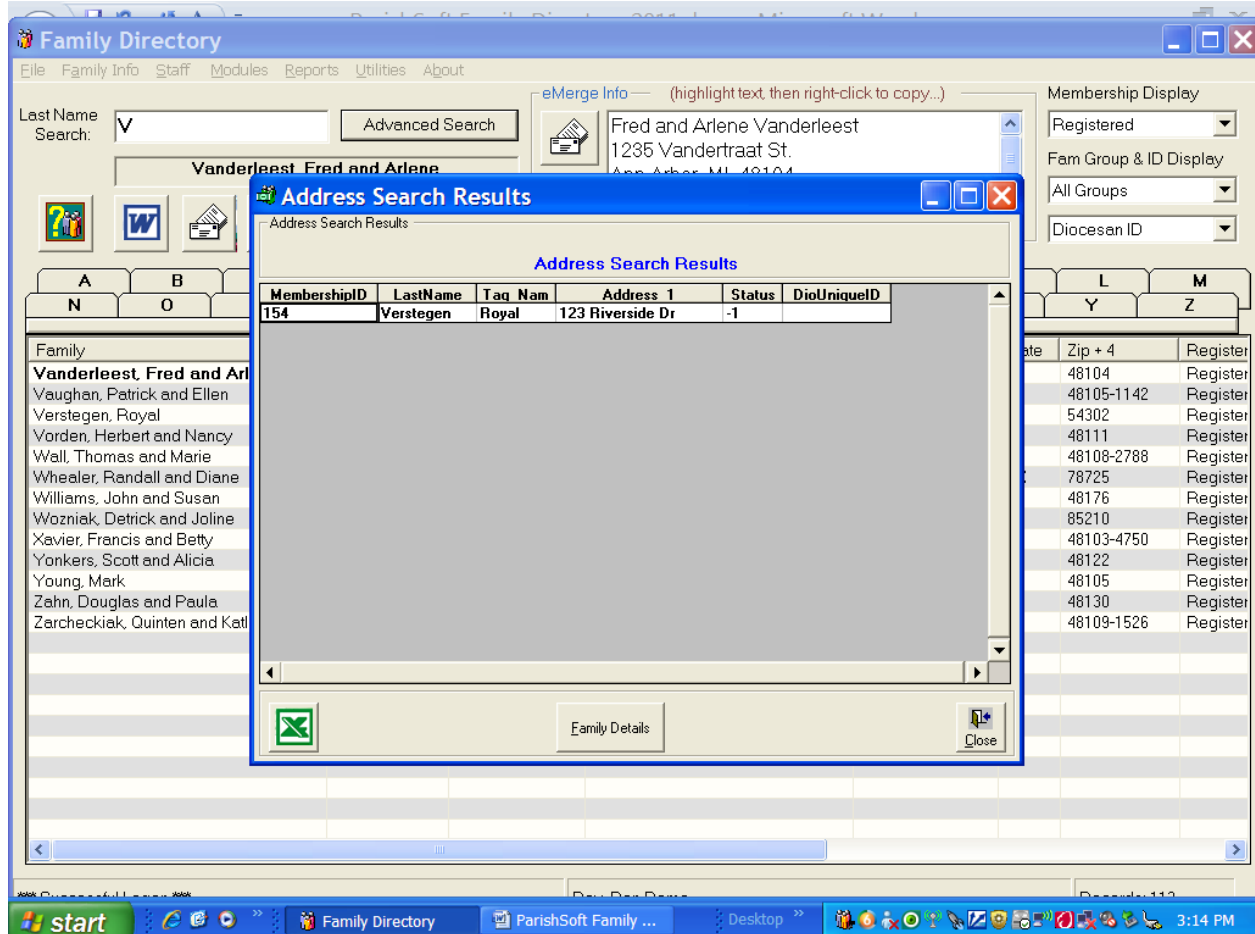
- Rows are listings of parish family names (family list), by default the listing is sorted by last name and then by first name.
- Rows display additional information about families: Telephone Numbers, address, city, state, zip, status, family group and family email address.
- Click on any column header to sort the family list by another category.
- Drag any column header to reposition it on the family list.
- Scroll right to see additional columns.
- To move through the family list faster, click on alphabet tabs.
- The selected family from the family list appears in the highlight box.
 - From here the user can send an email (using the Letter/Envelope Icon button) or e-merge into a Word document by clicking on one of the icons located to the left of the highlight box.
- To search for a family utilize the Last Name Search field.
 - As you type in the field the family list automatically sorts to bring up the name.
 - For most searches, type the first 2-3 letters and then select the family that you want.
 - Using this technique helps eliminate duplicates because of misspelling.

NEWCAS ParishSoft Family Directory



9. To search based on criteria other than last name, click on the Advanced Search button.
 - a. Enter the information to be used for the search and click on the Search Button.
 - b. At least one of the fields must be filled in, but more than one field may be entered to limit the search.

NEWCAS ParishSoft Family Directory



10. From the Address Search Results window you can select the family that you were searching for by clicking on the appropriate row.
 - a. Then you can click on the Family Details button to view family and member information.
 - b. If your search does not result in the family that you need, close the window by clicking on the Close Button (door graphic) at the lower right hand of the window.
 - c. You can also export the demographic information to Excel by clicking on the Excel button.

NEWCAS ParishSoft Family Directory

11

Family Directory

File Family Info Staff Modules Reports Utilities About

Last Name Search: Advanced Search

Verstegen, Royal

Membership Display: Registered

Fam Group & ID Display: All Groups

Diocesan ID:

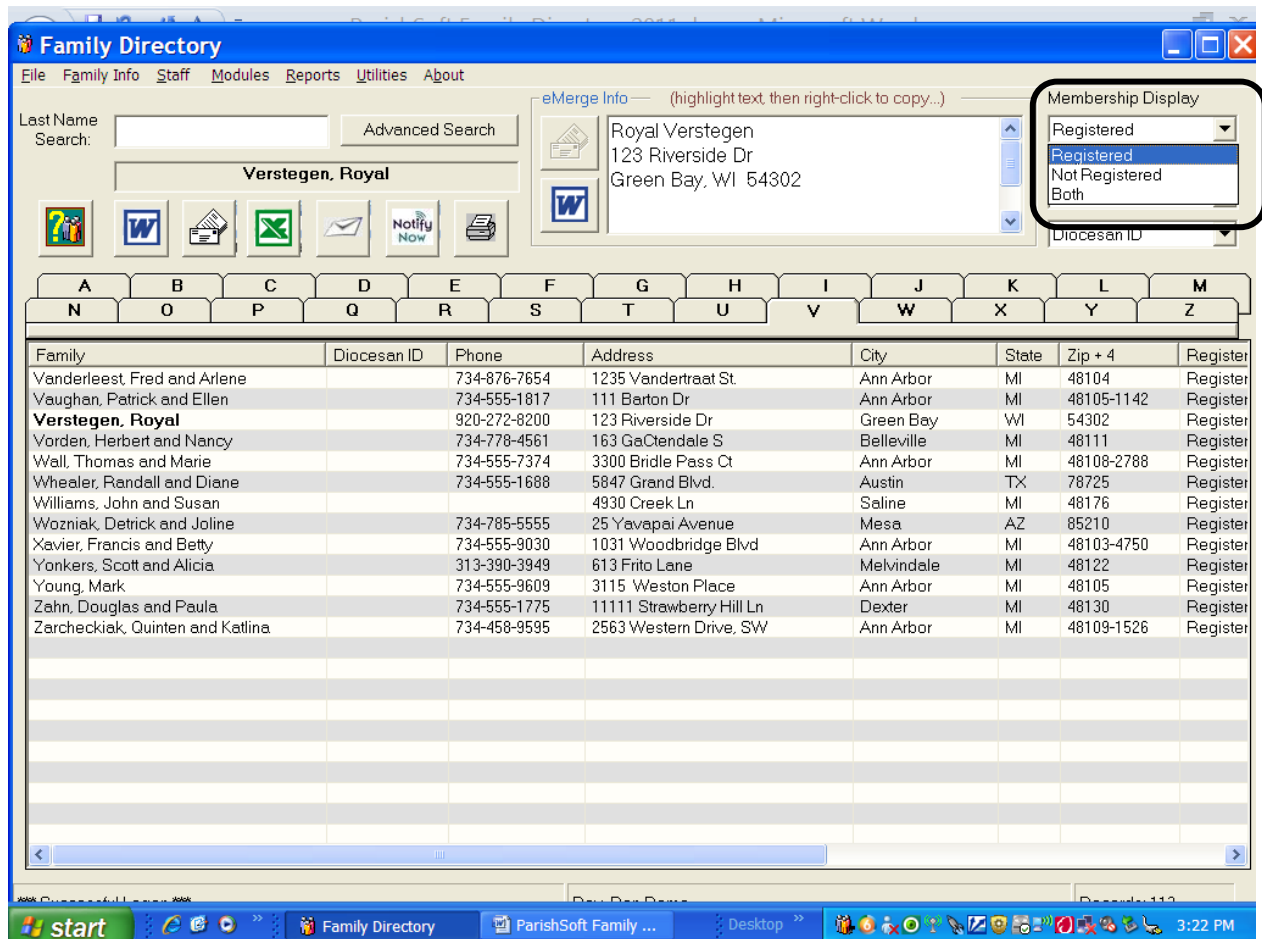
Family Directory Table:

Family	Diocesan ID	Phone	Address	City	State	Zip + 4	Register
Vanderleest, Fred and Arlene		734-876-7654	1235 Vandertraat St.	Ann Arbor	MI	48104	Register
Vaughan, Patrick and Ellen		734-555-1817	111 Barton Dr	Ann Arbor	MI	48105-1142	Register
Verstegen, Royal		920-272-8200	123 Riverside Dr	Green Bay	WI	54302	Register
Vorden, Herbert and Nancy		734-778-4561	163 GaCtendale S	Belleville	MI	48111	Register
Wall, Thomas and Marie		734-555-7374	3300 Bridle Pass Ct	Ann Arbor	MI	48108-2788	Register
Wheeler, Randall and Diane		734-555-1688	5847 Grand Blvd.	Austin	TX	78725	Register
Williams, John and Susan			4930 Creek Ln	Saline	MI	48176	Register
Wozniak, Detrick and Joline		734-785-5555	25 Yavapai Avenue	Mesa	AZ	85210	Register
Xavier, Francis and Betty		734-555-9030	1031 Woodbridge Blvd	Ann Arbor	MI	48103-4750	Register
Yonkers, Scott and Alicia		313-390-3949	613 Frito Lane	Melvindale	MI	48122	Register
Young, Mark		734-555-9609	3115 Weston Place	Ann Arbor	MI	48105	Register
Zahn, Douglas and Paula		734-555-1775	11111 Strawberry Hill Ln	Dexter	MI	48130	Register
Zarchekiak, Quinten and Katlina		734-458-9595	2563 Western Drive, SW	Ann Arbor	MI	48109-1526	Register

11. The ParishSoft Users Guide is always available by clicking on the “?” button.

- a. Please remember that this Users Guide does not take into account that the Parish’s information is being stored at a secure, hosted site.
 - i. This means that some instructions may not be appropriate for use in the Diocese of Green Bay.
 1. Example: Celebrant lists are maintained by the Diocese to avoid duplicates. Although the instructions in the User’s Guide indicate that a user may add Celebrants at any time, this would not be appropriate in our environment.

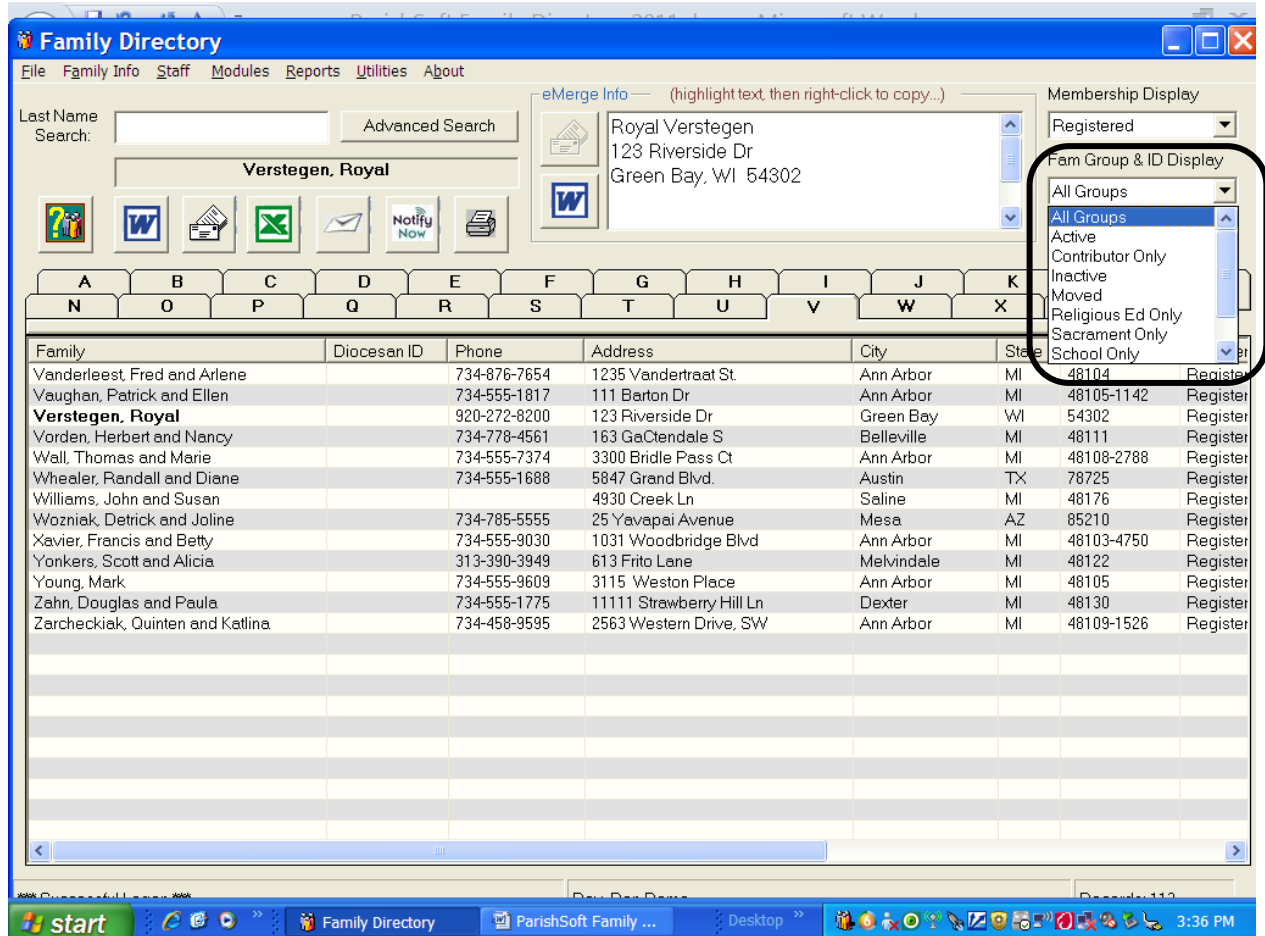
NEWCAS ParishSoft Family Directory



12. To limit the size of the family list, use Membership Display filters that appear at the upper right hand side of the window.

- a. There are only two statuses that are available for any family: Registered or Non-Registered.
 - i. Each family may only be “Registered” to one parish within the Diocese of Green Bay. This parish is their primary parish.
 - ii. Families may have multiple relationships with parishes within the Diocese, but other parishes would list them as “Non-Registered” members.
 - iii. The Family determines which parish is to be the “Registered” or primary parish.

NEWCAS ParishSoft Family Directory



13. Additional filters for the list are available in the Fam Group & ID Display.

a. Family Groups that are available are:

- i. All Groups
- ii. Active
- iii. Alumni
- iv. Inactive
- v. Religious Ed Only
- vi. Sacraments Only
- vii. Contributions Only
- viii. Deceased
- ix. PreSchool Only
- x. School Only
- xi. Staff
- xii. Volunteer
- xiii. Unknown

b. Every family must be assigned to one of these Family Groups.

NEWCAS ParishSoft Family Directory

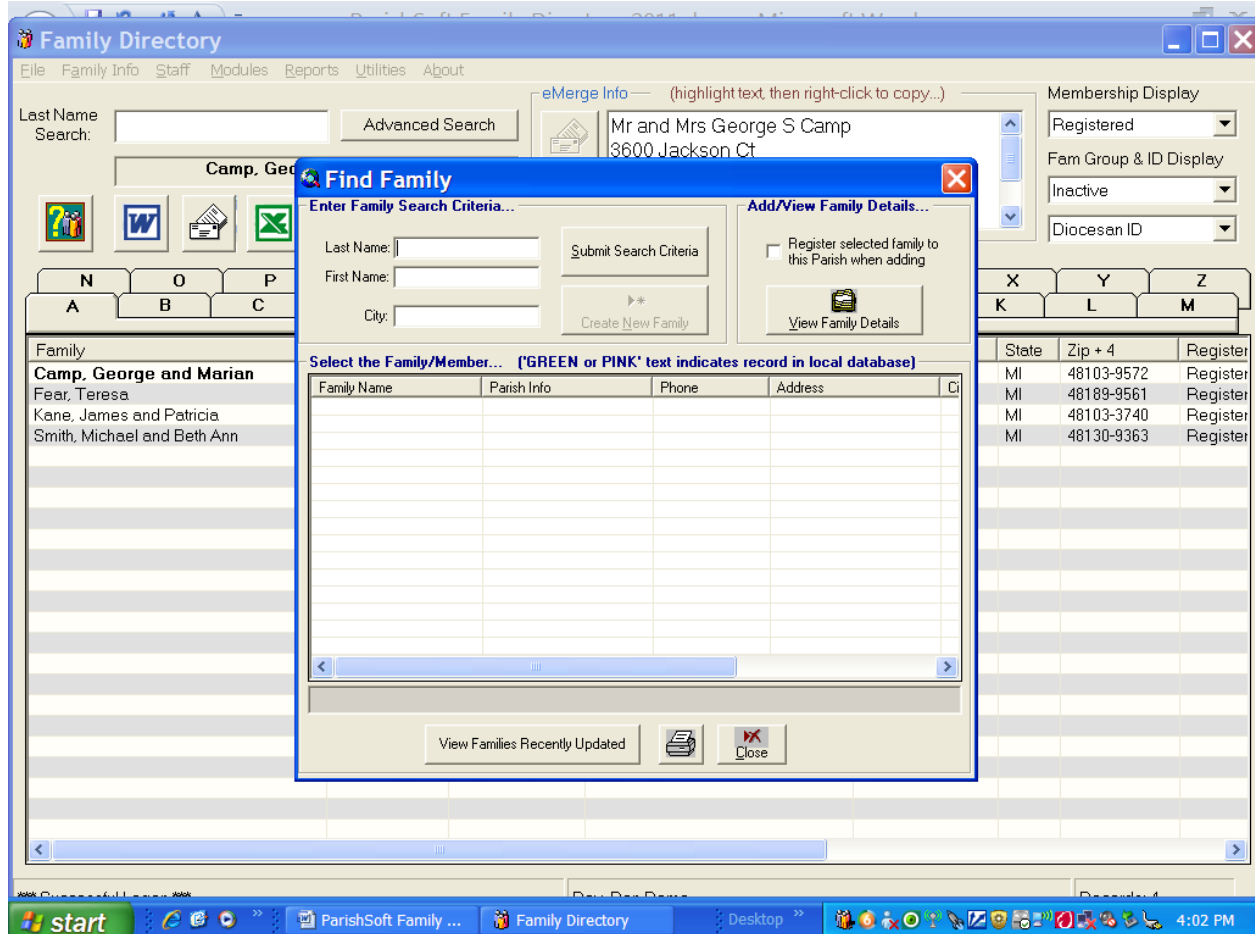
The screenshot shows the 'Family Directory' application window. At the top, there's a menu bar with 'File', 'Family Info', 'Staff', 'Modules', 'Reports', 'Utilities', and 'About'. Below the menu, there's a search section with 'Last Name Search:' and an 'Advanced Search' button. A dropdown menu shows 'Verstegen, Royal'. To the right, there's an 'eMerge Info' section with a list of family details: 'Royal Verstegen', '123 Riverside Dr', 'Green Bay, WI 54302'. Further right, there's a 'Membership Display' section with dropdowns for 'Registered', 'Fam Group & ID Display', 'All Groups', 'Diocesan ID', and a list of 'Diocesan ID', 'Envelope #', and 'Family ID'. Below these sections is a table with columns for Family, Diocesan ID, Phone, Address, City, State, Zip + 4, and Register. The table lists several families, including 'Vanderleest, Fred and Arlene', 'Vaughan, Patrick and Ellen', 'Verstegen, Royal', 'Vorden, Herbert and Nancy', 'Wall, Thomas and Marie', 'Wheeler, Randall and Diane', 'Williams, John and Susan', 'Wozniak, Detrick and Joline', 'Xavier, Francis and Betty', 'Yonkers, Scott and Alicia', 'Young, Mark', 'Zahn, Douglas and Paula', and 'Zarchekiak, Quinten and Katlina'. At the bottom, there's a Windows taskbar with the 'start' button, several icons, and the 'Family Directory' application icon. The system clock shows '3:44 PM'.

Family	Diocesan ID	Phone	Address	City	State	Zip + 4	Register
Vanderleest, Fred and Arlene		734-876-7654	1235 Vandertraat St.	Ann Arbor	MI	48104	Register
Vaughan, Patrick and Ellen		734-555-1817	111 Barton Dr	Ann Arbor	MI	48105-1142	Register
Verstegen, Royal		920-272-8200	123 Riverside Dr	Green Bay	WI	54302	Register
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Williams, John and Susan			4930 Creek Ln	Saline	MI	48176	Register
Wozniak, Detrick and Joline		734-785-5555	25 Yavapai Avenue	Mesa	AZ	85210	Register
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Zarchekiak, Quinten and Katlina		734-458-9595	2563 Western Drive, SW	Ann Arbor	MI	48109-1526	Register

14. Every family can be displayed with one of three different ID numbers that are in the ParishSoft system:

- Envelope Number
 - Assigned by the parish.
- Family ID Number
 - Assigned by ParishSoft when a family is added.
- Diocese ID Number
 - Assigned when the parish information is synchronized with the Diocese.
 - Once parish data is migrated to ParishSoft each parish has several weeks in which to review the member data and make any additions before the member records are synchronized with all of the other families in the Diocese.

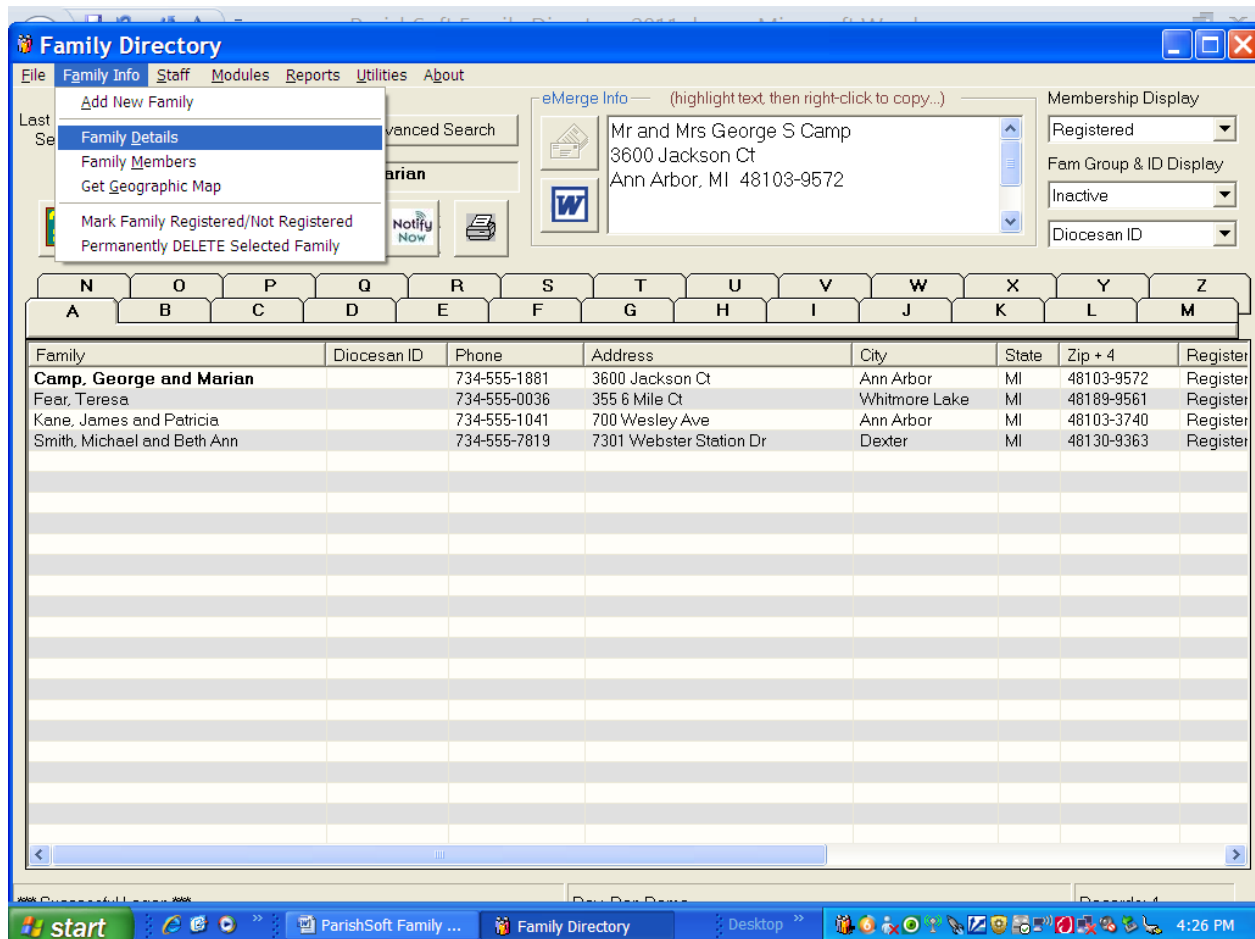




17. Family Info: Add New Family (continued)

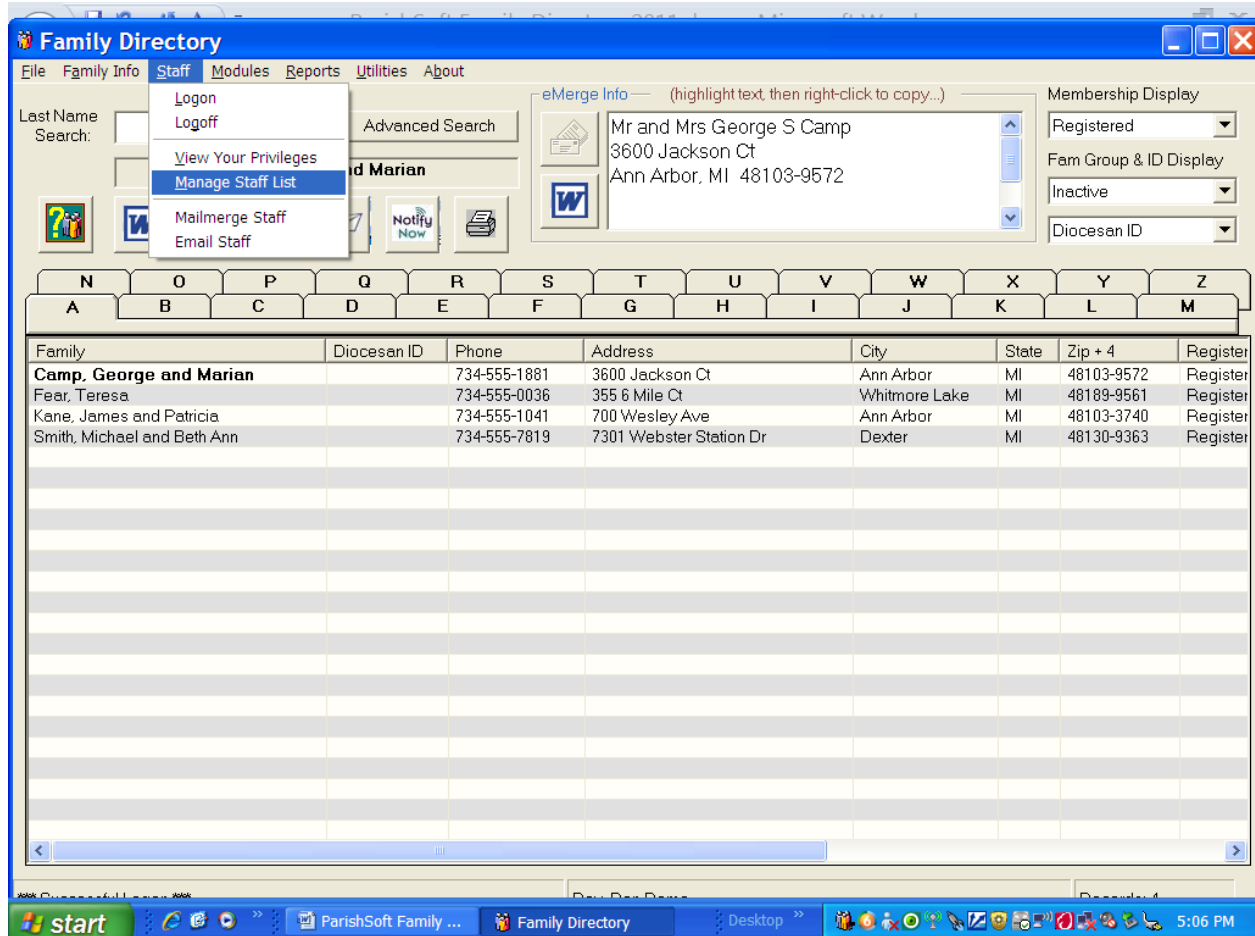
- a. The user must enter at least the first 2-3 letters of the last name or a full last name and **other criteria**, then click on the “Submit Search Criteria” button.
- b. This will bring up a list of families that may match the family that is to be added.
- c. Review the lists carefully to avoid duplicate records.
 - i. **Families registered in other parishes will be available to “transfer”.**
- d. If the correct family is displayed then highlight that line and click on the
 - i. View Family Details button to find information about individual family members.
 1. This search may take a minute or two because it will also search the entire Diocese database as well as the parish database.
- e. If the family is not displayed, another option is to search for recent entries by clicking on the “View Families Recently Updated” button.
- f. **Once a search has been made, the “Create New Family” button will be available.**
 - i. Use this option only if none of the families that are available match the new family’s record.

NEWCAS ParishSoft Family Directory



18. The “Family Details” selection from the Menu will open the Family details record for the family that is highlighted on the Family Listing.
19. The “Family Members” selection from the Menu will open the Family Member details record(s) for the family that is highlighted on the Family Listing.
20. The “Mark Families Registered Non-Registered” option will change the families listed in the window to the opposite registered status that is showing in the Membership Display field.
 - a. Not recommended.
21. The “Permanently DELETE Selected Family” option should only be used during the initial conversion clean-up when duplicate families are identified.
 - a. If a family is associated with contribution records it can not be deleted.
 - b. Families that move away from the Diocese may not be deleted – they should only be marked as Inactive.
 - c. Families where all members are deceased may not be deleted.
 - i. The Family should be inactivated.
22. The Geographic Map is not being used at this time.

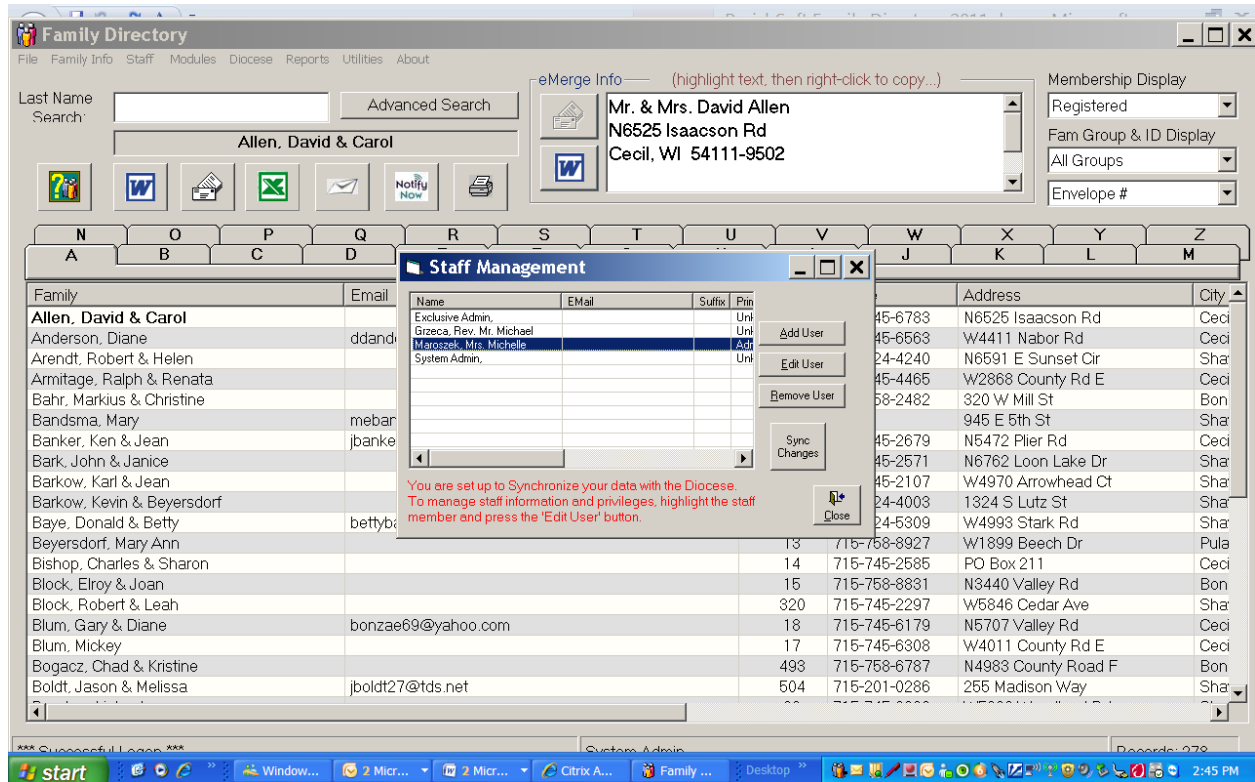
NEWCAS ParishSoft Family Directory



23. The Staff menu is used to:

- a. Allow staff members to log on to ParishSoft and log off of ParishSoft without having to re-log in through Citrix.
- b. View Your Privileges allows members to see what areas they have access to within ParishSoft.
- c. Manage Staff List is used by Administrators to add/delete staff members and assign/change staff access rights in ParishSoft.
 - i. Before anyone is able to be added as a staff person, they must at least be listed as a Non-Registered, Staff member of the parish.

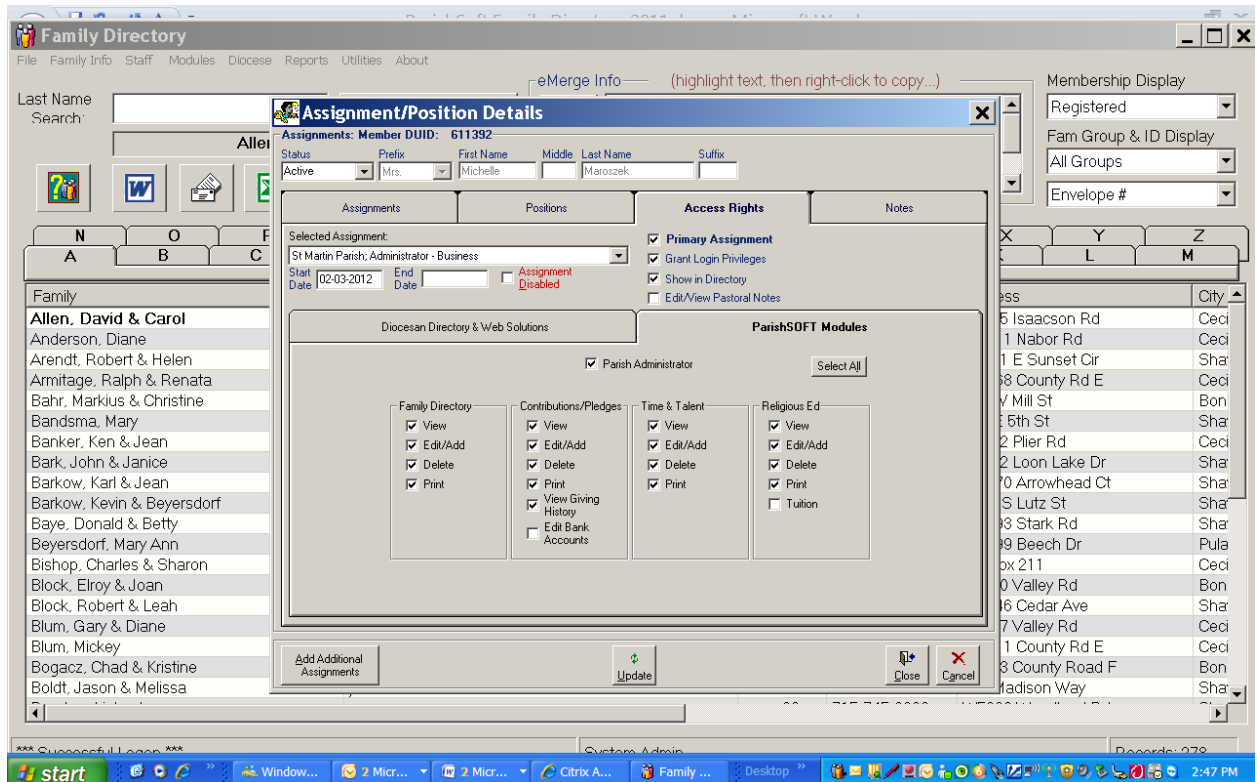
NEWCAS ParishSoft Family Directory



24. Staff Management Window

- Begin by adding a staff member to the parish Family Directory before going to the Staff Management Window.
- Then click on the Add User button to select a staff member from the Family List.
- Once a staff member is available on the Staff Member Listing,
 - Highlight a staff member's name.**
 - Once a name is highlighted Click on the Edit User button.

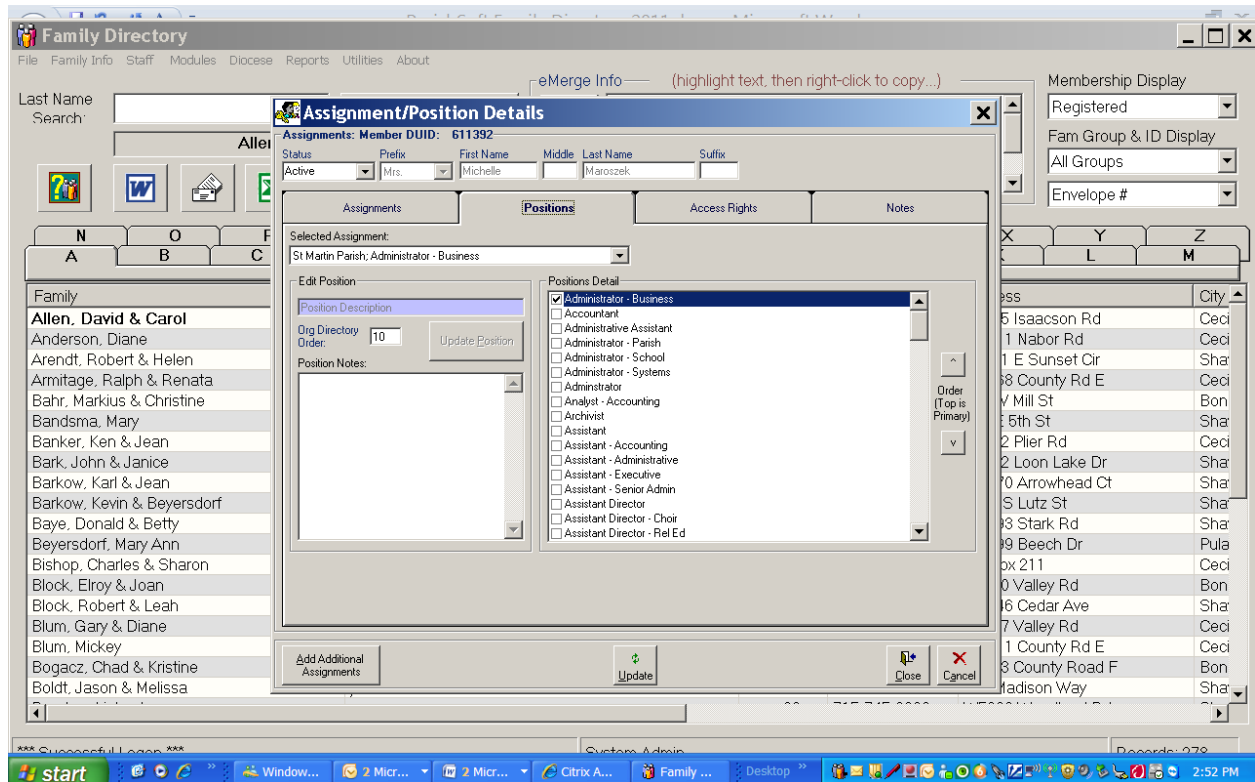
NEWCAS ParishSoft Family Directory



- iii. Click on the box(es) in front of the right(s) that are needed by this staff member.
- iv. Note that there are check boxes for, Primary Assignment, Grant Login Privileges and Show in Directory.
 1. Only staff who will be entering or using ParishSoft data need to have Login Privileges.
- v. Generally the ParishSoft Modules rights should include View for the Family Directory at a minimum for staff with Login Privileges.

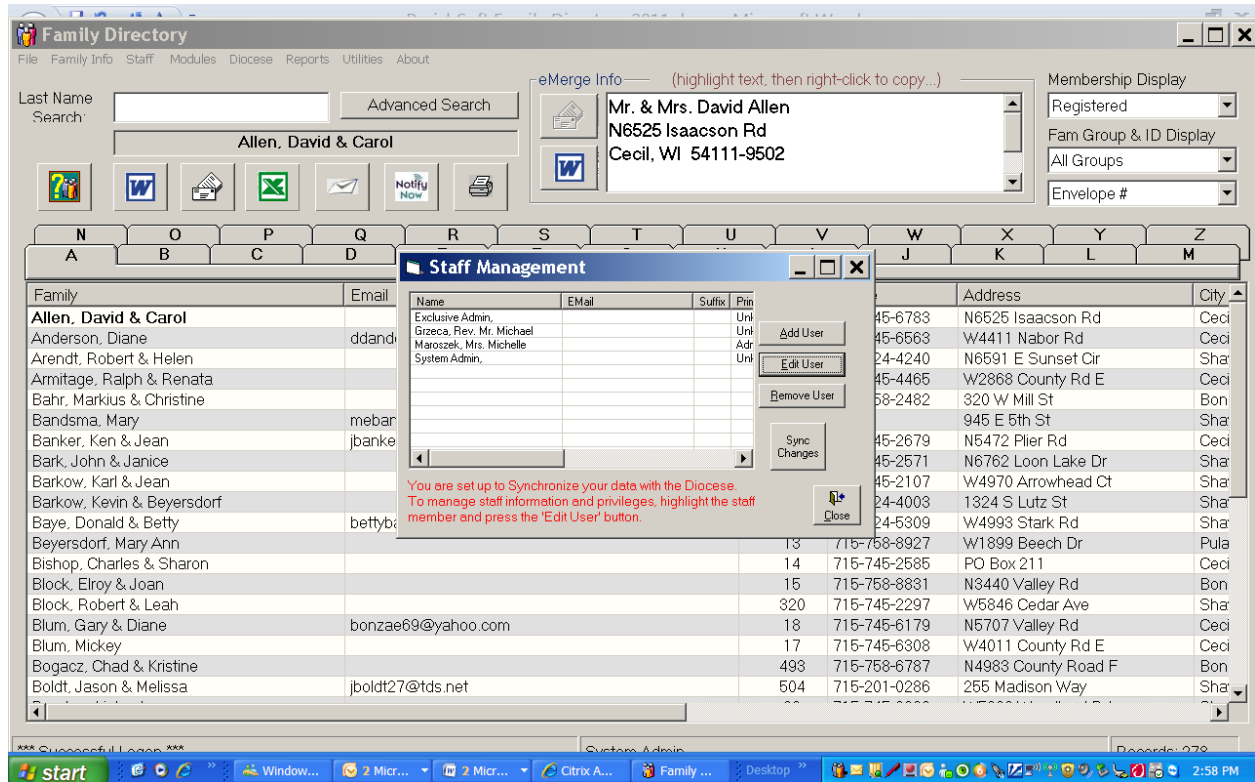
NEWCAS ParishSoft Family Directory

Pu



- vi. Once Access Rights have been granted click on the Positions tab.
- vii. Place a check next to each position that the person will be filling for the parish.
- viii. Highlight the Primary position and use the Order button on the right to move that position to the top.
 1. It is a good idea to unclick Unknown once it is no longer on the top of the list.
- ix. Once all positions have been checked and ordered, click on the Update button.
- x. Then when the update is completed click on the Close button when it becomes available.

NEWCAS ParishSoft Family Directory



- xi. Before closing the Staff Management window click on the Sync Changes button.
- xii. Once the Synchronization is completed click on the Close button.

NEWCAS ParishSoft Family Directory

- d. To reset a ParishSoft user's password (only for ParishSoft logins) use the Reset Password button on the Assignments Tab
 - i. in cases where staff may have forgotten their passwords
 - ii. or to force staff to reset passwords.

[illegible]

- Catholic Diocese of Green Bay

NEWCAS ParishSoft Family Directory

26. To drill down into the Family Information details of a family and member records,
 - a. click on the family name from the Family Listing and then double (left) click
 - b. or click on the Family Info Menu and select Family Details.
27. The Names and Salutations section of the window need to be reviewed (upper-left quarter of the window).
 - a. The format used for each field needs to be consistently applied.
 - b. The Last Name and First Name(s) fields are used to coordinate information with the **Bishop's Appeal list and the AIM Diocese database.**
 - i. These names **MUST** be their formal (given or baptismal) names.
 1. Other fields are available for nicknames.
 - c. The Mailing Name is generally used to generate family mailings.
 - i. Follow the example used here and eliminate punctuation
 - ii. **Use the "&" instead of the word "and".**
 - iii. These are USPS recommendations.
 - d. The Informal Name, Formal Salutation and Informal Salutation may be selected for use in mass mailings and other correspondence.
 - i. **These salutations are used with "Dear...."**

NEWCAS ParishSoft Family Directory

The screenshot displays the ParishSoft Family Directory application. The main window is titled 'Family Directory' and contains a menu bar (File, Family Info, Staff, Modules, Reports, Utilities, About) and a search bar. A 'Family Information' dialog box is open, showing details for Family ID 4. The 'Families' tab is active. The form includes fields for Last Name (Camp), First Name(s) (George & Marian), Mailing Name (Mr & Mrs George S Camp), Informal Name (George Camp), Formal Salutation (Mr & Mrs Camp), and Informal Salutation (George & Marian). There are three address types: Home (8400 Jackson Rd, Ann Arbor, MI 48103, 734-555-1881), Mailing, and Other. The Home address is selected as the primary. Other fields include Primary Phone (734-555-1881), Emerg. Ph., Desc., Family Group (Inactive), Membership Date (01-01-1999), Parish of Registration (Demo Parish -- Ann Arbor, MI 4810), and checkboxes for 'Do not Send Mail' and 'Currently Registered Family'. A 'Notes' section is also present. The background shows a list of families and a search bar.

28. ParishSoft tracks up to three unique addresses.

- Home – Street Number, Street Name, City, State, Zip and Phone.
- Mailing – Post Office Box, City, State, Zip and Phone.
- Other – May be used for vacation homes, school addresses, etc.
 - To and From dates can be entered for the Other Address so that it can be activated and de-activated before mailings are generated.
- At the discretion of the parish, any of the three addresses may be selected as “Primary”** at any time.
 - Primary addresses will be used by default for any mailing (Religious Education, Contributions, etc.)
- If a family prefers not to receive mailings from the parish (EX: nursing home patients) check the Do Not Send Mail box.
- As a short cut you can enter only the Zip Code and the City and State will populate automatically.

29. Family Phone numbers and emergency contact phone numbers are also tracked by ParishSoft.

- Use the Description field to identify the name of the emergency contact.

NEWCAS ParishSoft Family Directory

Family Directory

File Family Info Staff Modules Reports Utilities About

Last Name Search: []

eMerge Info (highlight text, then right-click to copy...)

Membership Display

Registered

Group & ID Display

Active

Diocesan ID

Y Z

L M

Family

Camp, George and

Fear, Teresa

Kane, James and Pat

Smith, Michael and B

Family ID: 4

Last Name: Camp

First Name(s): George & Marian

Mailing Name: Mr & Mrs George S Camp

Informal Name: George Camp

Formal Salutation: Mr & Mrs Camp

Informal Salutation: George & Marian

Primary Address: Home

Do not Send Mail

Home Mailing Other

Address From: To:

City: Ann Arbor State: MI

Zip: 48103 Area Code: 734

Phone: 734-555-1881

Emerg. Ph: Desc:

Email:

Family Photo

Find Photo

Enlarge

Remove

Notes

Pastoral Workgroups Headshots Log File Edit Family

Notes

Send Contrib. Env. Diocesan ID Annual Gift \$

Env. # 26

Next Avail. Envelope # Skipped Envelopes Giving History

Map Code:

Last Updated: 12-12-2000

Family Group: Inactive

Membership Date: 01-01-1999

Parish of Reg: Ann Arbor, MI 4810

Successful Logon Rev. Dan Demo Records: 4

30. The Family Group indicates the **family's relationship to the parish.**
 - a. Select from one of the options available from the drop-down list.
 - i. Do not add any additional Groups.
31. The Currently Registered Check Box is used to indicate what parish has been chosen as the "primary" parish for the family.
32. The Membership Date indicates the date that the family became "Registered" with the parish.
33. The name of the Parish of Registration (your parish) needs to be selected from the list found under the ellipsis button (button with [...]).

NEWCAS ParishSoft Family Directory

The screenshot shows the ParishSoft Family Directory application. The main window is titled 'Family Directory' and contains a menu bar (File, Family Info, Staff, Modules, Reports, Utilities, About) and a toolbar. A search bar is at the top left. The 'Family Information' window is open, displaying details for Family ID 4. The 'Notes' section is active, showing a list of notes with columns for MemberName and Description. The 'Extended Family' section is also visible, showing a list of family members with columns for MemberName and Description. The 'Family' list on the left includes 'Camp, George and Fear, Teresa', 'Kane, James and Patricia', and 'Smith, Michael and Barbara'.

34. The Notes section helps parishes track information regarding the family.
 - a. General notes should begin with a date.
 - i. Year, Month, Day
 - b. Then the initials of the person making the entry should be entered on the line.
 - c. These should be followed by the note to be recorded in the **family's file**.
35. Pastoral Notes are available only to pastoral staff members.
36. Workgroups are lists of family-based groups that the family belongs to (EX: Retirees, Nursing Home, Scrip).
37. Health Info Notes are available to help parishes track confidential health information that will help the parish minister to the family.
 - a. These notes are also limited to pastoral staff members.
38. The Extended Family is the place where ParishSoft tracks family member relationships for other than immediate family members.
 - a. See example listed above.
 - b. Extended Family Members must first be listed in ParishSoft.



NEWCAS ParishSoft Family Directory

Family Directory

File Family Info Staff Modules Reports Utilities About

eMerge Info (highlight text, then right-click to copy...)

Last Name Search: []

Membership Display: Registered

Group & ID Display: []

Family ID: 4

Last Name: Camp

First Name(s): George & Marian

Mailing Name: Mr & Mrs George S Camp

Informal Name: George Camp

Formal Salutation: Mr & Mrs Camp

Informal Salutation: George & Marian

Primary Address: Home

City: Ann Arbor State: MI

Zip: 48103 Area Code: 734

Primary Phone: 734-555-1881

Family Group: Active

Membership Date: 01-01-1999

Parish of Registration: Demo Parish -- Ann Arbor, MI 4810

Notes: Patricia Kane Sister to Marian ...

Family Photo: [Find Photo] [Enlarge] [Remove]

Send Contrib. Env. []

Diocesan ID: []

Annual Gift \$: 0

Env. #: 26

Next Avail Envelope #: []

Skipped Envelopes: []

Giving History: []

Map Code: []

Last Updated: 12-12-2000

Update Close Cancel

Successful Logon Rev. Dan Demo Records: 4

45. Do NOT click on the red "X" to close a ParishSoft window.
46. DO click on the Update button to save changes.
47. The Close button will not automatically save changes made to the family record.
 - a. It will give a prompt to remind the user that changes were not saved.
48. The Cancel button will delete any changes made to this window during this session.

NEWCAS ParishSoft Family Directory

The screenshot displays the NEWCAS ParishSoft Family Directory application. The main window, titled "Family Directory", has a menu bar with "File", "Family Info", "Staff", "Modules", "Reports", "Utilities", and "About". A search bar at the top left is labeled "Last Name Search:". A list of families is visible on the left, including "Camp, George and", "Fear, Teresa", "Kane, James and Pat", and "Smith, Michael and B". A "Family Information" window is open, showing details for "Family: (ID 4) Mr. Mrs George S Camp on 8400 Jackson Rd ---- Phone #: 734-555-1881". The window has tabs for "Families" and "Members". The "Members" tab is active, showing details for "George". The "Status" is "Active", "Gender" is "M", "Age" is "63", and "BirthDate" is "06-08-1947". The "Role" is "Husband", and the "Name" is "George S. Camp". The "Email Address" is "gcamp@gmail.com". The "Member ID" is "5", and the "Goes By" is "Red". The "General Info" tab is selected, showing "Contact Information" with "Home Phone", "Work Phone", "Cell Phone", "Pager", and "Fax" fields. The "First Language" is "English", and a "Photo" is displayed. The "Education and Career" section shows "Accountant" as the "Career Type", "ABC Tax Service" as the "Details", "1965" as the "Grad Year", "Michigan State" as the "School", and "Bachelors" as the "Education". The "Additional Info and Notes" section shows "SocSec Num: Do-NO-T use" and "Aux ID:". The bottom status bar shows "Successful Logon", "Rev. Dan Demo", and "Records: 4".

49. Click on the member tab to access information on the individual members of the family.
50. Select a Status from the drop-down window.
51. Select a Role from the drop-down window.
 - a. Husbands and wives are assumed to be members.
 - b. In a blended family where the husband is not catholic, the WIFE should be listed as Head-of-Household.
52. Information on the **Member's** General Tab should be completed as the information becomes available.
53. Use the Drop-Down and Look-Up lists. Select the best-choice options for each field.
 - a. Use the Details field to provide employer specific information if needed.

NEWCAS ParishSoft Family Directory

Family Directory

File Family Info Staff Modules Reports Utilities About

Last Name Search: Advanced Search

eMerge Info (highlight text, then right-click to copy...)

Mr and Mrs George S Camp
3600 Jackson Ct

Membership Display
Registered

Fam Group & ID Display

Family Information

Families Members

Family: (ID 4) Mr Mrs George S Camp on 8400 Jackson Rd ---- Phone #: 734-555-1881

George Marian

Status: Active Gender: M Age: 63 BirthDate: 06-08-1947

Role Name (Title, First, Middle, Last, Suffix) Email Address

Husband Mr. George Robert Camp gcamp@gmail.com

Member ID: 5 Goes By: Red Special Needs?

General Info Sacraments Time and Talent Student Record Offering

Sacraments of Initiation Date: Edit/View Sacramental Details

☒ Baptism 7/25/1948

☐ Reconciliation

☐ First Communion

☐ Confirmation

☐ RCIA Process

Manage Celebrant List

General Notes

Update Close Cancel

Successful Logon Rev. Dan Demo Records: 4

54. The Member's Sacraments tab provides both a summary of Sacramental information and the ability to track details.
55. Record, edit and view Sacramental details by clicking on the Edit/View Sacramental Details button.
 - a. Changes should not be made to this window.
56. The Diocese manages the Celebrant List. Please do NOT enter celebrants.
 - a. If you do not find the celebrant on the list please contact the Diocese to have the celebrant added.

NEWCAS ParishSoft Family Directory

The screenshot displays the 'Family Directory' application window. A 'Sacramental Details' dialog box is open for 'Mr. George Robert Camp' (Member ID: 5, Member DUID: -5). The dialog has tabs for 'Baptism', 'Reconciliation', 'First Eucharist', and 'Confirmation'. The 'Baptism' tab is active, showing fields for 'Baptismal Name' (George Camp), 'Faith of Baptism' (Catholic), 'Sponsors' (Mr. James Kane, Mrs. Patricia Kane), and 'Witnesses' (Mr. Detrick Wozniak, Mrs. Judy Van Tilberg). There are also fields for 'Registry Volume', 'Registry Page', and 'Registry Number'. A 'General Remarks' text area is at the bottom right. On the left side of the dialog, there are sections for 'Baptism' (Completed), 'Reconciliation Prep.' (Completed), 'First Eucharist' (Completed), and 'Confirmation' (Completed), each with fields for Date, Prep Year, Parish, and Celebrant. The background shows a family list with 'Camp, George and Mary' selected. The Windows taskbar at the bottom shows the time as 8:51 PM.

57. Sacramental Details

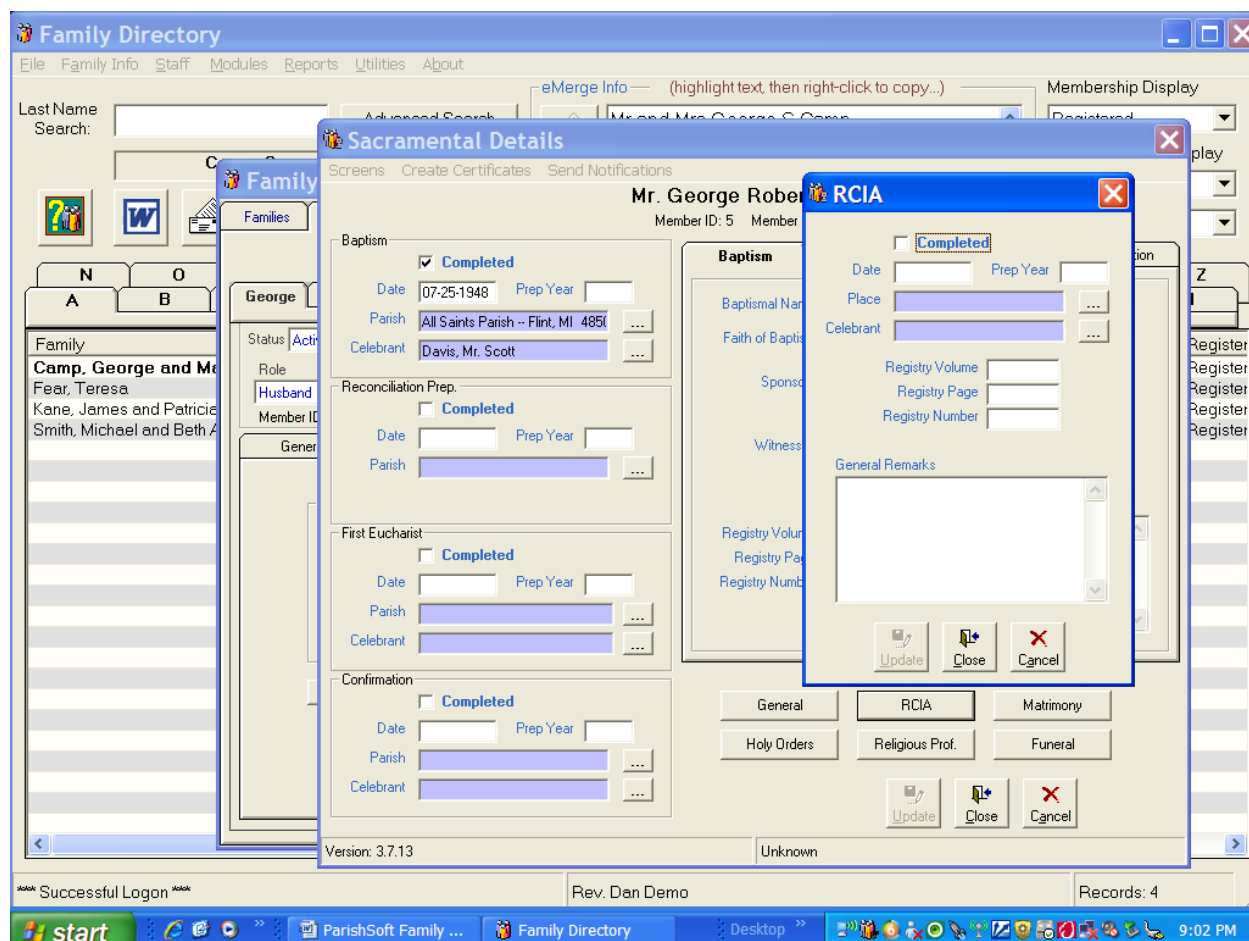
- a. Complete the information on the left navigation pane,
 - i. Then complete the additional details for each sacrament.
 1. Sponsors and Witnesses need to be in the parish database before they can be added to the Sacramental Details.
 2. This information needs to be accurate and coordinated with the written sacramental records.
 - a. Cross reference to the written registry volumes.
 - b. This information is used to print out Baptismal Certificates and to provide an efficient means to transfer information when families move.
 - c. Additional details can be recorded in the General Remarks section.

NEWCAS ParishSoft Family Directory

The screenshot displays the NEWCAS ParishSoft Family Directory application. The main window has a menu bar (File, Family Info, Staff, Modules, Reports, Utilities, About) and a toolbar. A search bar is at the top left. The left pane shows a list of families, with 'Camp, George and Mary' selected. The right pane shows the details for Mr. George Robert Camp (Member ID: 5, Member DUID: -5). A 'Sacramental Details' window is open, showing tabs for Baptism, Reconciliation Prep., First Eucharist, and Confirmation. The 'General Member Info' window is also open, displaying fields for Birth Date (06-08-1947), Age (63), Gender (M), Birth Place (Travis AFB, CA 94535), Father (Capt. Jacob Camp), Mother (Dr. Candance Camp), and Mother's Maiden name. The 'Update' button is highlighted in the 'General Member Info' window.

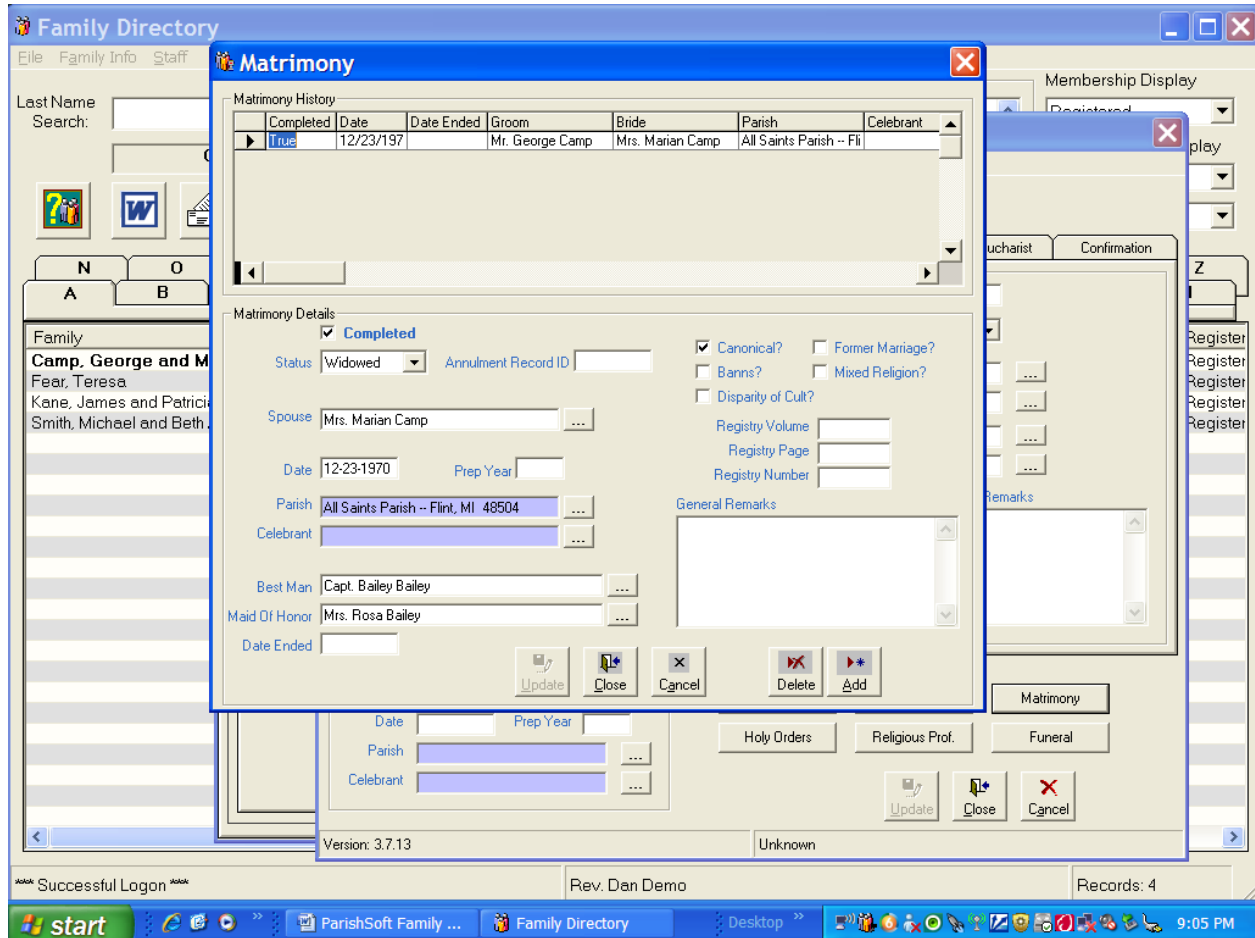
58. The General Button accesses details regarding birth information for a parish member.
- Please complete this information as it becomes available.
 - Once information is entered into the window, be sure to click on the "Update" button.

NEWCAS ParishSoft Family Directory



59. The RCIA button is where records regarding the RCIA confirmations are maintained.

NEWCAS ParishSoft Family Directory



60. When the parish records matrimony information, the process moves the woman from her family to the man's family.

- a. **If a man is a part of his parent's family, he** first needs to be moved to his own family record before the marriage is recorded.
 - i. Start by going to the Family Info Menu button and create a new family for the man (his address, phone number, etc).
 - ii. **Then import the man's member record from his parent's family into his new family record.**
 1. Click on the Add button at the bottom of the window to record marriage information. This will make relevant fields available to be edited.
 2. Select the information from existing parish records.
 - a. **Utilize the [...] ellipsis button to complete these records.**
 3. When all information is recorded click in the Completed box, then
 4. Click on the Update Button and then the Close button.

NEWCAS ParishSoft Family Directory

The screenshot displays the NEWCAS ParishSoft Family Directory application. The main window shows a search for "Mr and Mrs George S Camp" and a list of family members. A "Sacramental Details" window is open for "Mr. George Robert Camp" (Member ID: 5, Member DUID: -5). Within this window, the "Holy Orders" sub-window is active, showing the "Diaconate" tab. The "Completed" checkbox is checked. Fields for Date, Place, and Celebrant are present, along with checkboxes for Permanent Diaconate, Spousal Consent, and Diaconal Documents. A Classification dropdown menu is set to "Deacon". The Role dropdown menu is set to "Deacon". A Dismissal Letter checkbox is also visible. The Registry Volume, Registry Page, and Registry Number fields are empty. The General Remarks field is also empty. The window includes "Close" and "Cancel" buttons. The bottom status bar shows "Version: 3.7.13", "Rev. Dan Demo", and "Records: 4".

Family Directory

File Family Info Staff Modules Reports Utilities About

Last Name Search: Advanced Search Mr and Mrs George S Camp

Membership Display Registered

Group & ID Display

an ID

Mr. George Robert Camp

Member ID: 5 Member DUID: -5

Baptism

Reconciliation

First Eucharist

Confirmation

Marriage

Funeral

Holy Orders

Religious Prof.

Funeral

Update Close Cancel

Version: 3.7.13

Rev. Dan Demo

Records: 4

Successful Logon

start

ParishSoft Family ...

Family Directory

Desktop

9:13 PM

61. Holy Orders information should be recorded in the window found under the Holy Orders button.
62. Complete information under each tab as appropriate.

NEWCAS ParishSoft Family Directory

The screenshot displays the NEWCAS ParishSoft Family Directory software. The main window has a menu bar with options: File, Family Info, Staff, Modules, Reports, Utilities, and About. Below the menu bar is a search bar with the text 'Mr and Mrs George S Camp'. A 'Sacramental Details' window is open, showing the details for 'Mr. George Robert Camp' (Member ID: 5, Member DUID: -5). The window has tabs for Baptism, Reconciliation Prep., First Eucharist, and Confirmation, all of which are marked as 'Completed'. A 'Religious Profession' window is also open, showing fields for Date, Place, Celebrant, Relig. Order, and Released from Solemn Vows, with a 'Completed' checkbox. The interface includes a menu bar, a search bar, and a list of family members on the left.

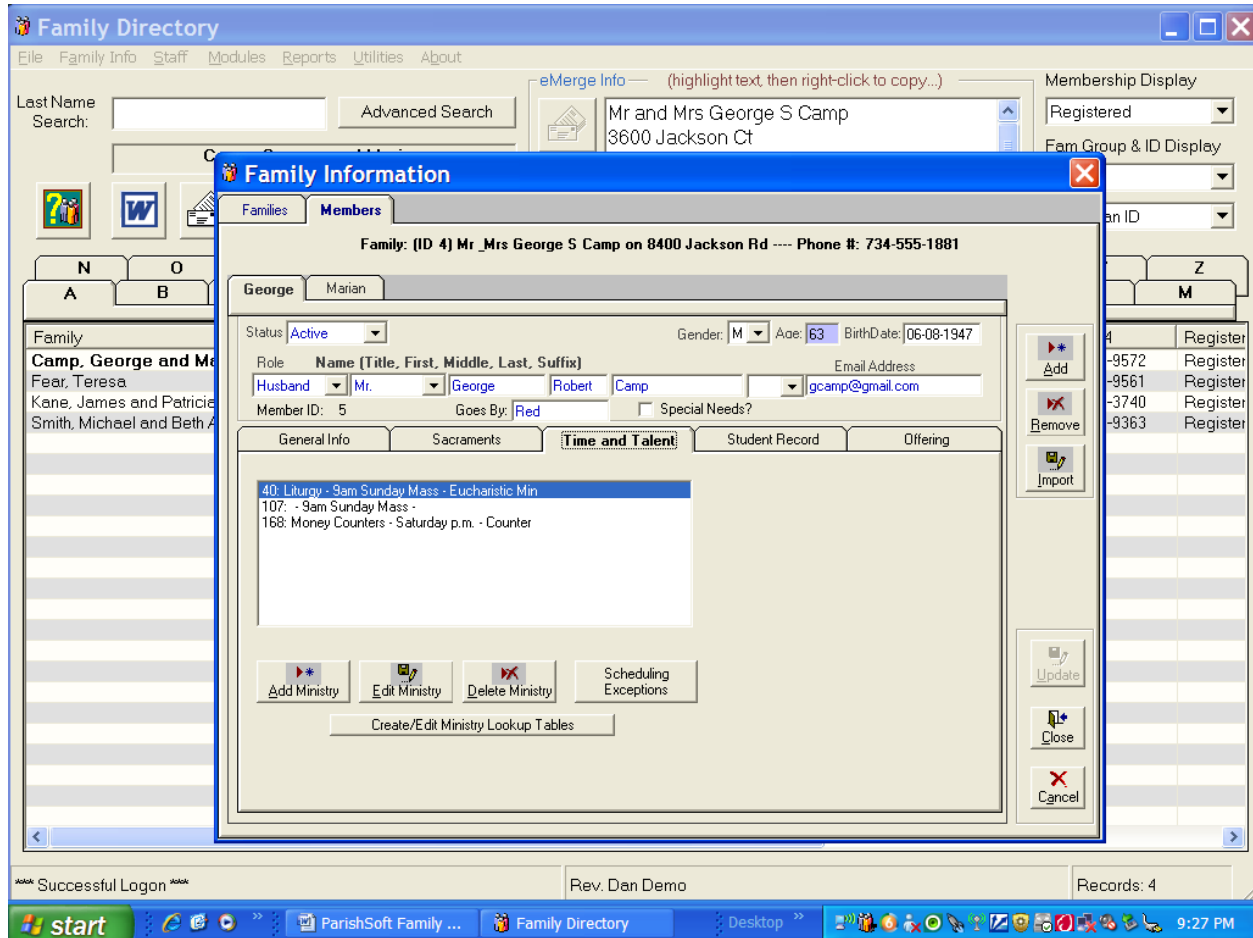
63. Information on Religious Orders is recorded under the Religious Prof. button.
 - a. Check the completed box when appropriate.

NEWCAS ParishSoft Family Directory

The screenshot displays the NEWCAS ParishSoft Family Directory application. The main window is titled 'Family Directory' and shows a search for 'Mr and Mrs George S Camp'. A 'Sacramental Details' window is open for 'Mr. George Robert Camp', showing tabs for Baptism, Reconciliation, First Eucharist, and Confirmation. A 'Funeral' window is also open, displaying fields for Date of Death, Funeral Date, Burial Date, Next of Kin, Vigil Place, Vigil Celebrant, Funeral Pl., Funeral Celebrant, Registry Volume, Registry Page, Registry Number, Cemetery Name, Grave Location, Grave Purchase Date & Cost, Cause of Death, Deed Issue Date, Deed Owner, and General Remarks. The interface includes a menu bar, a search bar, and a list of family members on the left.

64. Funeral information should be recorded on this window.
 - a. Record information as it becomes available.
 - b. Note the space to record the Deed Owner for the Lot.
 - i. Under General Remarks please enter the Last Rights received by the member.
 - ii. Date and initial each entry.

NEWCAS ParishSoft Family Directory



65. The Time and Talent Tab provides a summary of all of the Liturgical Scheduling that applies to a parish member.
- While most scheduling is done through the Time and Talent module, individual records can be updated and maintained utilizing these shortcuts.
 - Details on how the Time and Talent module functions will be covered in a different training session.

NEWCAS ParishSoft Family Directory

Family Directory

File Family Info Staff Modules Reports Utilities About

Last Name Search: Advanced Search

eMerge Info (highlight text, then right-click to copy...)

Mr and Mrs George S Camp
3600 Jackson Ct

Membership Display: Registered

Fam Group & ID Display:

Family Information

Families Members

Family: (ID 4) Mr Mrs George S Camp on 8400 Jackson Rd ---- Phone #: 734-555-1881

George Marian

Status: Active Gender: M Age: 63 BirthDate: 06-08-1947

Role: Husband Name (Title, First, Middle, Last, Suffix): Mr. George Robert Camp Email Address: gcamp@gmail.com

Member ID: 5 Goes By: Red Special Needs? ☐

General Info Sacraments Time and Talent **Student Record** Offering

Student Record

Year Grade-Session-Class Desc. Catechists

2004 AD - Wednesday - Gospel of John Van Tillberg, Arlene
Kane, Patricia

Knowledge: B+ Attitude: Good Grade Pt:

☐ Promote? Attendance: 20 out of 23

Add Class Edit Class Delete Class

Sac. Prep Year Milestones

Baptism ☐
Reconciliation ☐
First Communion ☐
Confirmation ☐
RCIA ☐

Edit Prep Year information in Sacramental Details

Update Close Cancel

Successful Logon Rev. Dan Demo Records: 4

66. Individual Student Record summaries are available on the Student Record tab.
 - a. Although individual records can be edited through this window, most Religious Education classes and activities are assigned through the Religious Education Module.

NEWCAS ParishSoft Family Directory

Family Directory

File Family Info Staff Modules Reports Utilities About

Last Name Search: Advanced Search

eMerge Info (highlight text, then right-click to copy...)

Mr and Mrs George S Camp
3600 Jackson Ct

Membership Display: Registered

Fam Group & ID Display:

Family Information

Families Members

Family: (ID 4) Mr_Mrs George S Camp on 8400 Jackson Rd ---- Phone #: 734-555-1881

George Marian

Status: Active Gender: M Age: 63 BirthDate: 06-08-1947

Role: Husband Name (Title, First, Middle, Last, Suffix): Mr. George Robert Camp Email Address: gcamp@gmail.com

Member ID: 5 Goes By: Red Special Needs? ☐

General Info Sacraments Time and Talent Student Record Offering

Member Envelope

☒ Send Contribution Envelopes

Envelope #: 0

Next Avail Envelope # Skipped Envelopes Giving History

Update Close Cancel

Successful Logon Rev. Dan Demo Records: 4

start ParishSoft Family ... Family Directory Desktop 9:33 PM

67. If the parish has individual member giving (EX: Youth Envelopes) this is where summary member giving information can be accessed (with the correct security rights).

NEWCAS ParishSoft Family Directory

Family Directory

File Family Info Staff Modules Reports Utilities About

Last Name Search: Advanced Search

eMerge Info (highlight text, then right-click to copy...)

Mr and Mrs George S Camp
3600 Jackson Ct

Membership Display: Registered

Fam Group & ID Display:

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Families Members

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Status: Active Gender: M Age: 63 BirthDate: 06-08-1947

Role: Husband Name (Title, First, Middle, Last, Suffix): Mr. George Robert Camp Email Address: gcamp@gmail.com

Member ID: 5 Goes By: Red Special Needs? ☐

General Info Sacraments Time and Talent Student Record Offering

Contact Information

Home Phone: 734-555-1881 Work Phone: 920-123-4567 Cell Phone: 920-606-1234 Pager: Fax:

Email this Member: ☐ UserName: Change User Password

First Language: English

Photo:

Vendor Integration ID:

Education and Career

Career Type: Accountant Details: ABC Tax Service Manage Lookups

Grad Year: 1965 Grade: -- School: Michigan State Education: Bachelors

Additional Info and Notes

SocSec Num: DoI-NO-TI-use Aux ID:

Successful Logon Rev. Dan Demo Records: 4

68. To add new members to a family, click on the Add button.
 - a. This will create a new tab in the Family Detail Members tab.
 - b. Enter information regarding new family members.
69. The Import button will move members from one family to another.
 - a. This button is used primarily when parishes are editing their converted records.
70. When a husband and wife are both deceased, the family will be unregistered and inactivated.
 - a. Their records are never to be deleted.