

ParishSOFT Newsletter - Split an Existing Family

1 message

Catholic Diocese of Sioux Falls - Carla Haiar <chair@sfcatholic.org>
Reply-To: Catholic Diocese of Sioux Falls - Carla Haiar <chair@sfcatholic.org>
To: Carla Haiar <chair@sfcatholic.org>

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Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This new sletter w ill be sent periodically to assist in your transition. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

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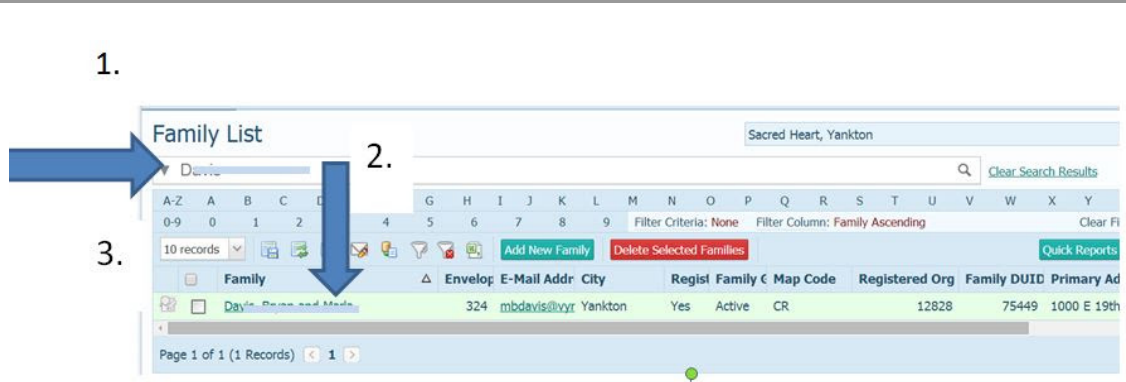
Catholic Diocese of Sioux Falls

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Family Suite

Family Directory - Splitting an Existing Family

When a family is separating into two households or an adult child is leaving his/her family record and registering as an adult in a parish, you need to create a NEW family and import the member record. Steps below will outline the process.



1. On Family Directory, Family List, enter and locate the existing family you wish to split.

2. Note the Family Name and member names.

3. If the family cannot be found in your directory, but you know an adult child exists in the diocesan database, go to Add New Family and pull in his/her Parents' record as UNREGISTERED.

If you are SPLITTING an existing family, keep in mind contributions stay with the existing family - NOT the new family.

The screenshot shows a web interface for editing a family record. At the top, the title is "Mr and Mrs E. [REDACTED] (75149) Env#: 324". Below the title are tabs for "Family Details" and "Member Details (4)". Under "Family Details", there are sub-tabs for "Family Information" and "Notes". The "Family Information" section includes a family photo placeholder with "Change" and "Delete" links, and the following fields: "Church of Registration: Sacred Heart - Yankton, SD 57078", "Details Modified On: Monday, August 12, 2013 5:51 PM", "Family Group: Active", "Registration Status: ", "Registration Date: 6/18/2003", and "Unregistered Date:". Below this is a form for "Last Name", "First Name(s)", "Middle Name", "Informal Name", "Formal Salutation", and "Informal Salutation". To the right is the "Primary Address" section with tabs for "Home", "Mailing", and "Other", and fields for "Country: United States", "Postal Code: 57078 1807", and "Address Line 1: 1000 E 15th St". At the bottom are "Edit Details" and "Close" buttons. A blue arrow labeled "1." points to the "Edit Details" button. Another blue arrow labeled "2." points to the "First Name(s)" and "Formal Mailing Name" fields.

1. Open the existing Family Record and click Edit Details.
2. Remove the name of the family member being removed in the First Name(s) and Formal Mailing Name fields.
Click Save.

1.

1. Click on Member Details tab, locate the record to be export and verify the Status.

Click Close.

When importing a member into a family, the system filters the list by Status.

On Family List, click on the button Add New Family. You will be prompted to enter a Last Name, click Search. Verify that a family record is NOT already existing for

Find Family

Selected Organization: Sacred Heart, Yankton

Filter by Organization: All

Last Name: Da

First Name:

City:

Search

	Family Name	Registered Organization	Family DUID	Dioc:
<input type="radio"/>	Da		87	
<input type="radio"/>	Da		75	
<input type="radio"/>	Da		64	86453
<input type="radio"/>	Da		86	85946
<input type="radio"/>	Da		94	16641
<input type="radio"/>	Da		49	63650
<input type="radio"/>	Da		46	63874
<input type="radio"/>	Da		77	30089
<input type="radio"/>	Da		00	36458
<input type="radio"/>	Da		35	76361

1. of 12 (119 Records) < 1 2 3 ... 6 7 **8** 9 10 11 12 >

Add New Family Move Selected Family ▼ Cancel

1. Click on Add New Family.

Add New Family to Sacred Heart, Yankton

<p>Family Member (one or more required)</p> <p>Prefix: Mr.</p> <p>First Name: Bryan DUPL</p> <p>Nick Name:</p> <p>Last Name: Da</p> <p>Suffix:</p> <p>Type: Head</p> <p>Gender: Male</p> <p>Birth date:</p> <p>E-Mail Address:</p> <p>Add Another</p>	<p>Family Information</p> <p>Family Group: Active</p> <p>Send Magazine: <input type="checkbox"/></p> <p>Registration Status: <input checked="" type="checkbox"/></p> <p>Registration Date: 6/3/2014</p> <p>Auto Fill Family Names</p> <p>Last Name: Da</p> <p>First Name(s): Br</p> <p>Formal Mailing Name: Br</p> <p>Informal Name:</p> <p>Formal Salutation:</p> <p>Informal Salutation:</p> <p>E-Mail Address:</p>	<p>Family Address</p> <p>Address Type: Home</p> <p>Address Line 1: 1</p> <p>Address Line 2:</p> <p>Postal Code: 57078</p> <p>City: Yankton</p> <p>State/Region: South Dakota</p> <p>Country: United States</p>
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Save & New Save & Edit Save & Finish Cancel

Even though you will be importing a Member record, you are required to create one for this new family. Please add DUPL after the First name to distinguish between the two member records. Enter Prefix, First Name, Last Name, **Type as HUSBAND or WIFE (not as shown as Head)**.

Keep Active, Registered, enter Last Name, First Name, Formal Mailing Name.

Enter Address.

Click Save & Edit.

1.

Family Details Member Details

Add Import

Change Delete

Member DUID: 264772
Special Needs:

Gender: Male
Title: Mr.
First Name: Bry...
Nick Name:
Middle Name:
Last Name: Dav...
Suffix:
Maiden Name:
Role: Hee...

Status: Active
Birth Date:
Birth Place:
Age:
Date of Death:
Religion:
Language:
Ethnicity:
Marital Status: Single
Envelope #: 0 Send?

General Religious Ed. Contact Misc.

Contact Information


Email Address:
Home Phone:
Cell Phone:
Work Phone:
Pager:
Fax:


Click on the Member Details tab. You should see the DUPLICATE member record you created when creating the Family.
1. Click Import.

Member Search

Last Name: Status: Active

	Last Name	Title	First Name	Middle Name	Suffix	Birthdate
<input type="radio"/>	D		Brittany			10/26/1990
<input checked="" type="radio"/>	D		Ryan			09/01/1970
<input type="radio"/>	D		Ryan DUPL			
<input type="radio"/>	D		Arla			03/03/1971
<input type="radio"/>	Davis		Nikolaus			01/28/1993

1. 

2. 

Enter the Last Name in the Member Search screen. Verify the Status matches the Member Status of the original member record.

1. Click the button next to the name you wish to import. Disregard the name ending in DUPL, this is the one created when the family was created.
2. Click Accept.
3. Update the Role on this record to Head.

1.

2.

Family Details Member Details (2)

Br, [redacted] an DUPL Add Import

Change Delete

Member DUID: 264777

Special Needs:

Gender: Male

Title:

First Name: Br [redacted]

Nick Name: Br

Middle Name:

Last Name: Da

Suffix:

Maiden Name:

Role: Head

Status: Active

Birth Date: 9/1/1970

Birth Place: Scotland, SD

Age: 43

Date of Death:

Religion: Catholic

Language: English

Ethnicity:

Marital Status: Single

Envelope #: 0 Next Send?

General Religious Ed. Contact

Contact Information

Email Address:

Home Phone: 605 [redacted]

Cell Phone:

Work Phone: 605 [redacted]

Pager:

Fax:

Edit Details Close

As you can see there are two member records (one is a duplicate) for this family.

1. Note Member DUID of each record and email the chancery that you wish to have these member records merged.

Be sure to review the Family Details for both records. Send Mail should be checked a new envelope number assigned to the new family record. Verify that the Formal Mailing Names are correct as this is used for Bishops Bulletin printing.

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Catholic Diocese of Sioux Falls
523 N Duluth Ave
Sioux Falls, SD 57104

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