Catholic Diocese of Sioux Falls

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ParishSOFT Newsletter - Split an Existing Family

1 message

Catholic Diocese of Sioux Falls - Carla Haiar <chaiar@sfcatholic.org> Tue, Jun 3, 2014 at 11:27 AM
Reply-To: Catholic Diocese of Sioux Falls - Carla Haiar <chaiar@sfcatholic.org>
To: Carla Haiar <chaiar@sfcatholic.org>

Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This newsletter will 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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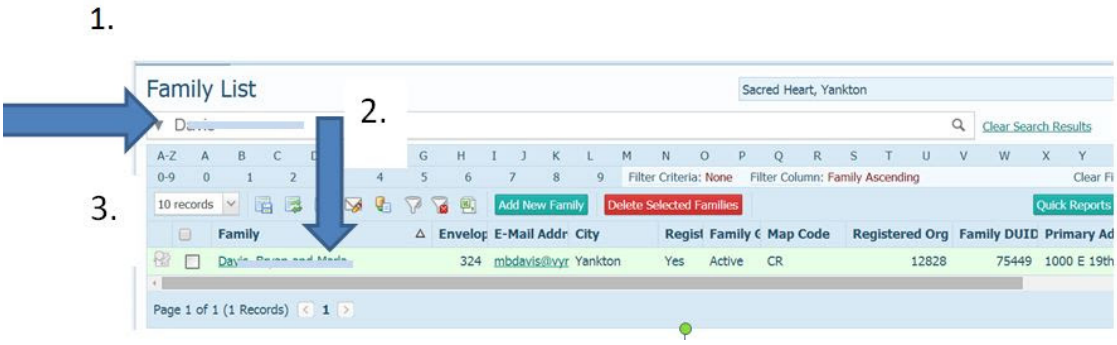
Catholic Diocese of Sioux Falls

ConnectNow POWERED BY PARISHSOFT Family Suite

Family Directory - Splitting an Existing Family

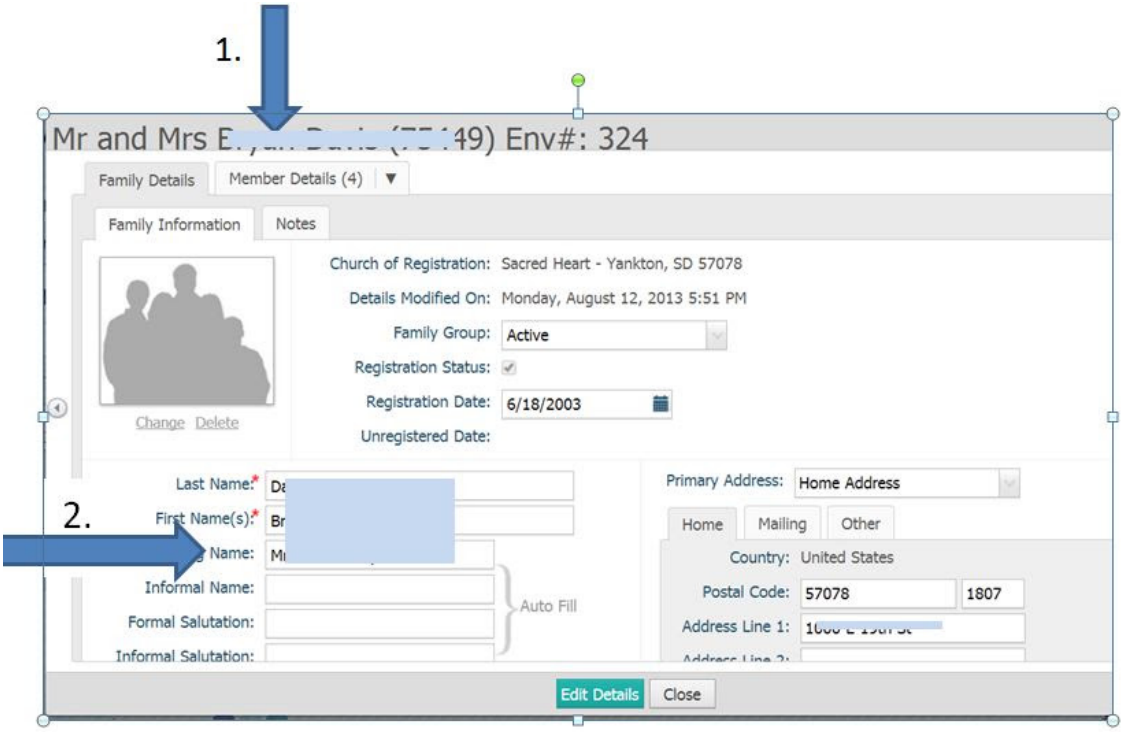
When a family is separating into two households or an adult child is leaving his/her family record and registering as an adult in a parish, you need to create a NEW family and import the member record. Steps below will outline the process.



1. On Family Directory, Family List, enter and locate the existing family you wish to split.
2. Note the Family Name and member names.

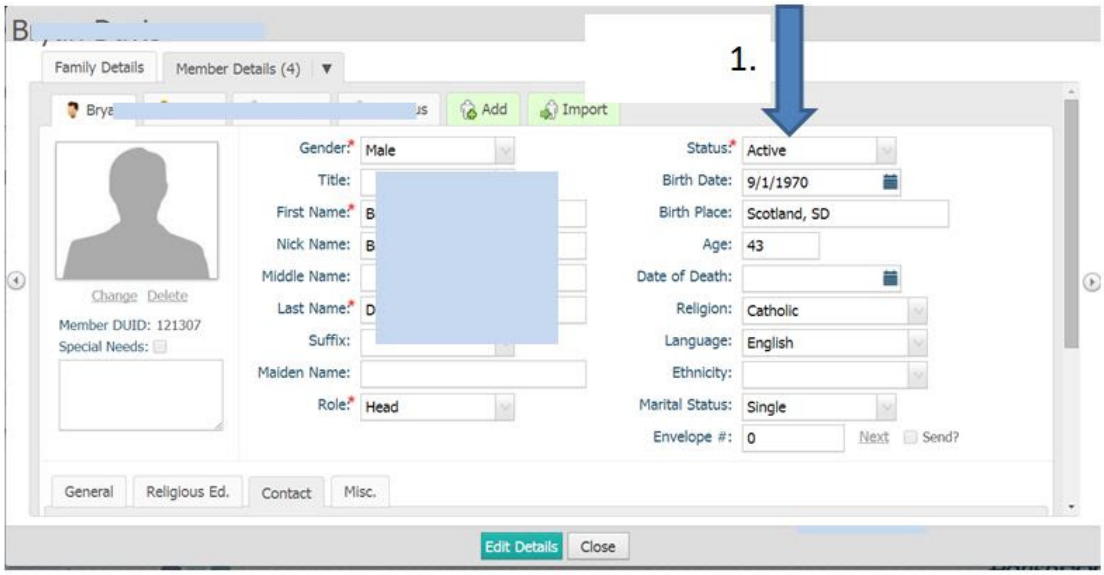
If the family cannot be found in your directory, but you know an adult child exists in the diocesan database, go to Add New Family and pull in his/her Parents' record as UNREGISTERED.

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



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.

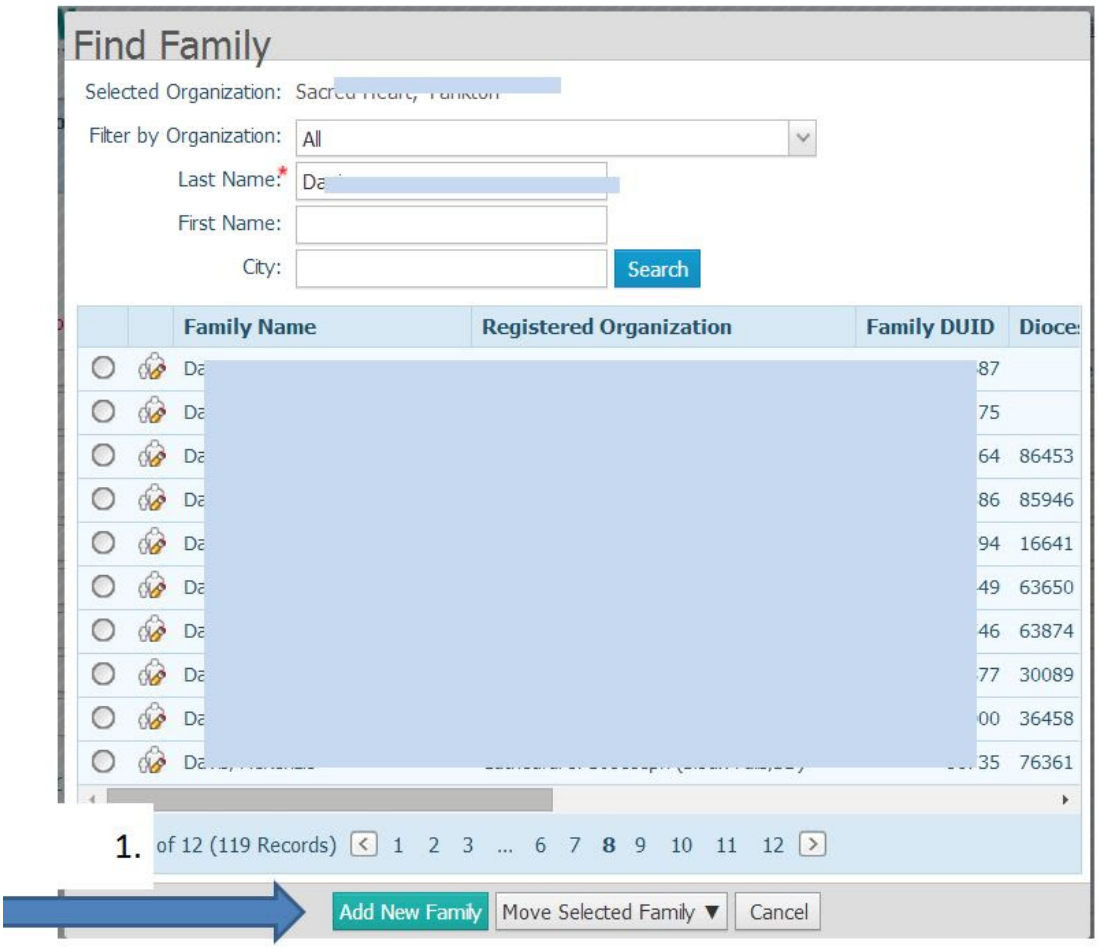


1. Click on Member Details tab, locate the record to be export and verify the Status.

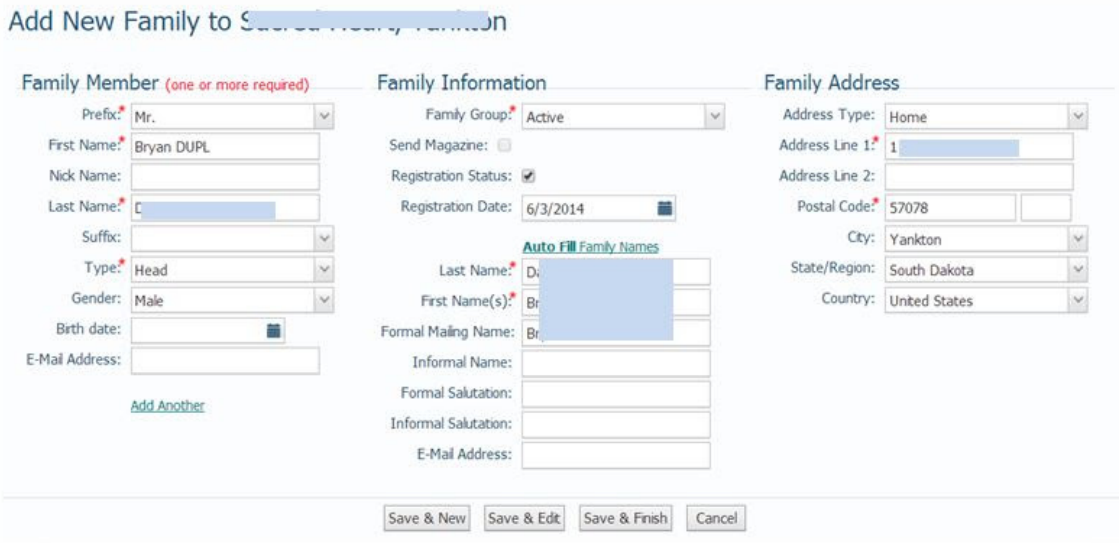
Click Close.

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 w ill be prompted to enter a Last Name, click Search. Verify that a family record is NOT already exisitng for



1. Click on Add New Family.

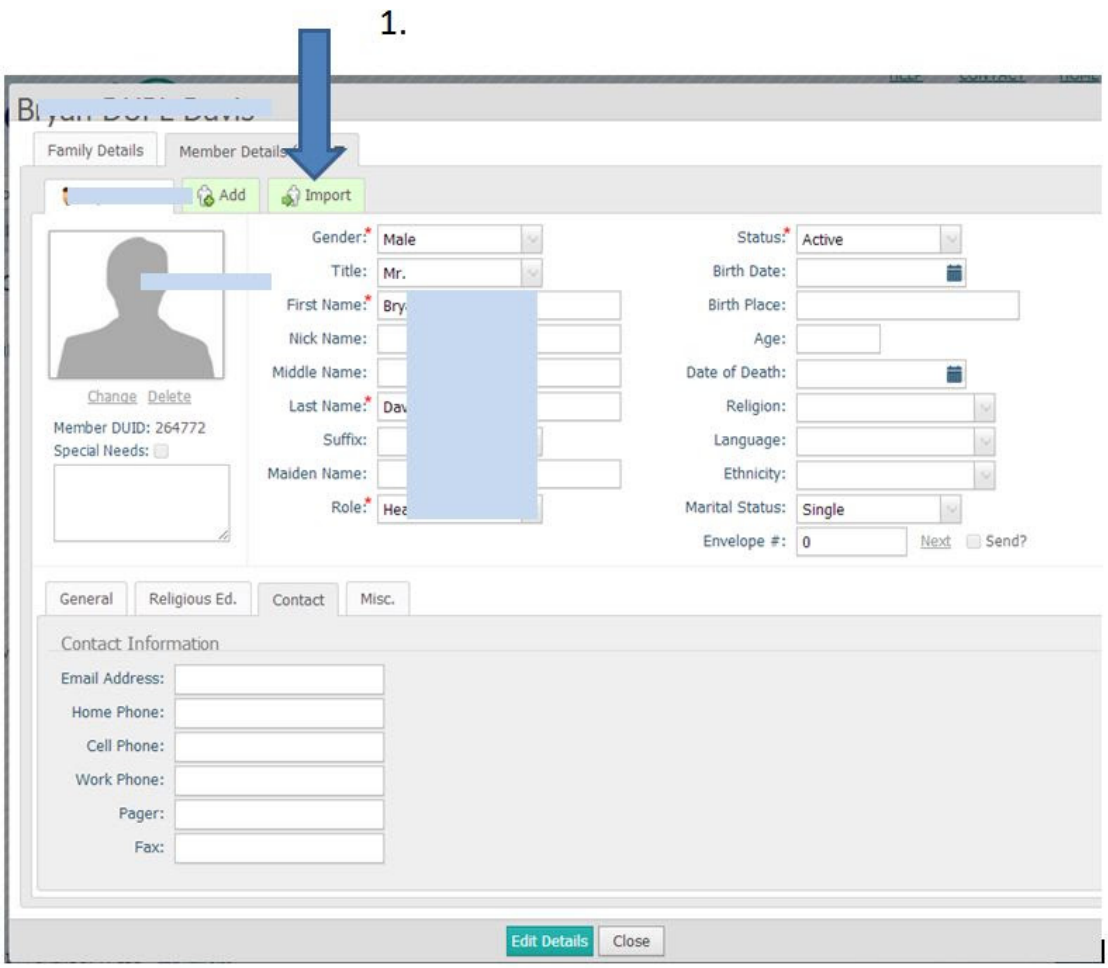


Even though you will be importing a Member record, you are required to create one for this new family. Please add DUPL after the First name to distinguish between the two member records. Enter Prefix, First Name, Last Name, ***Type as HUSBAND or WIFE (not as shown as Head)***.

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

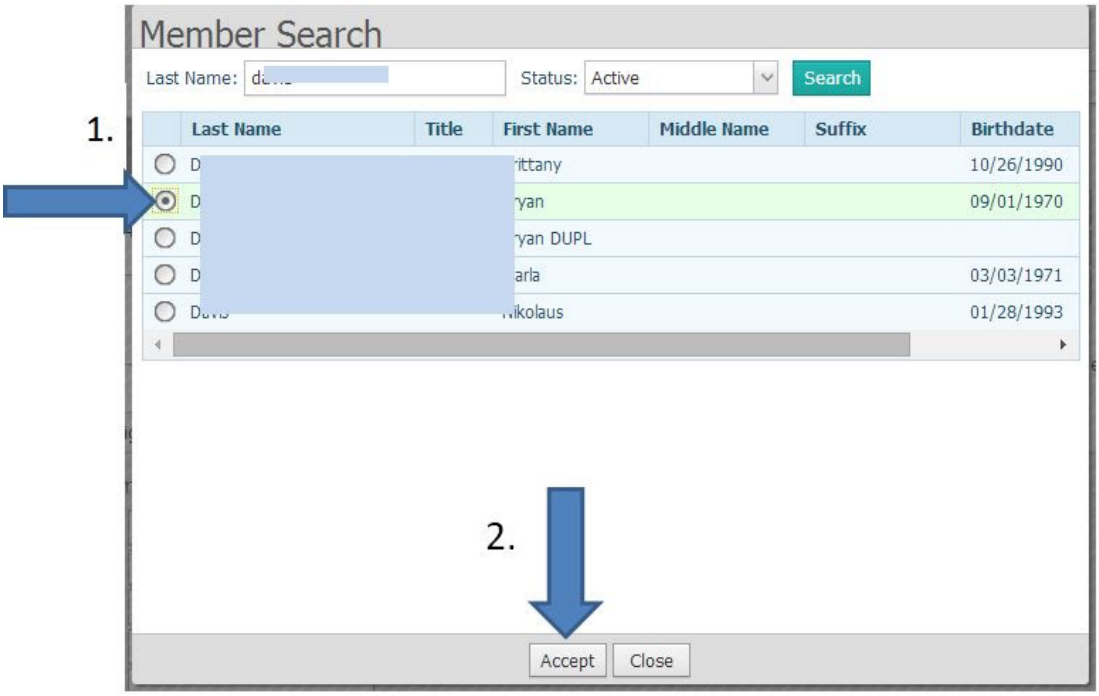
Enter Address.

Click Save & Edit.



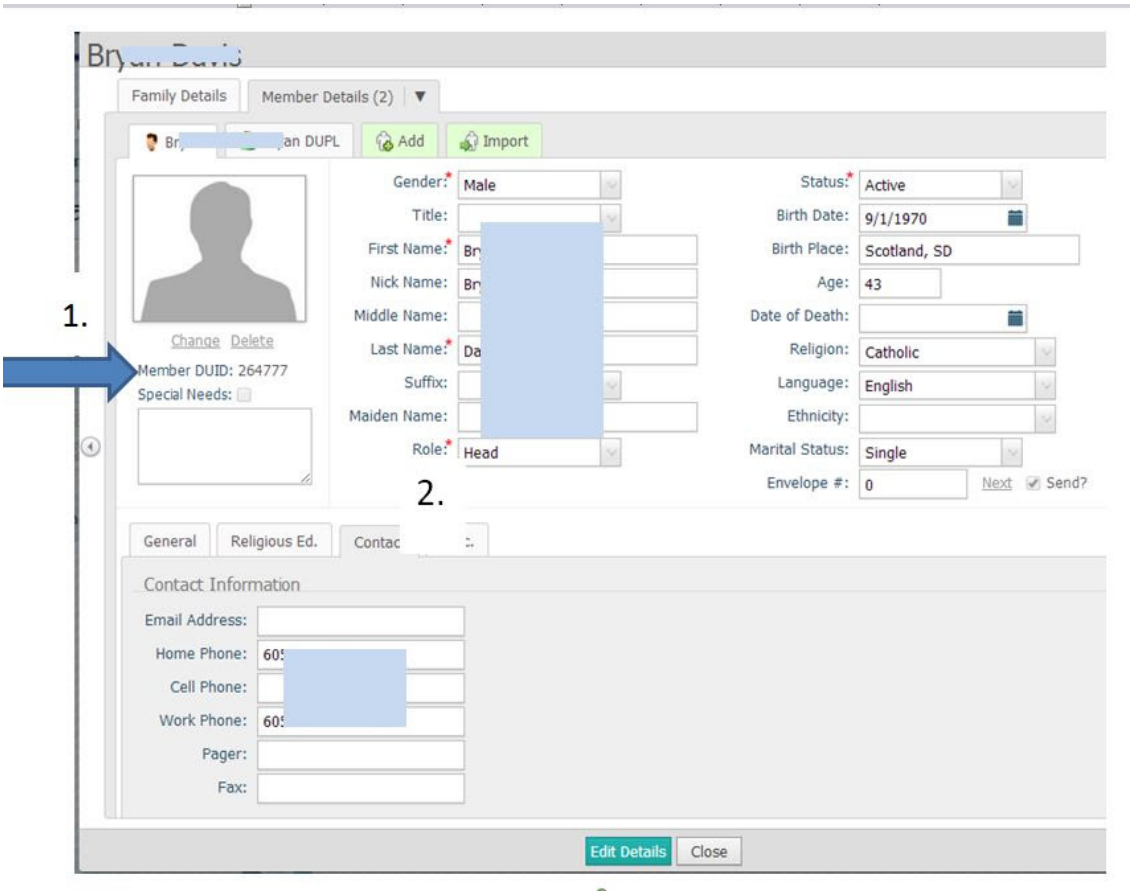
Click on the Member Details tab. You should see the DUPLICATE member record you created w hen creating the Family.

1. Click Import.



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 w ish to import. Disregard the name ending in DUPL, this is the one created w hen the family w as created.
2. Click Accept.
3. Update the Role on this record to Head.



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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