PDS Registration
Best Practices
for
Parish Data System (PDS) - Church Office

Archdiocese of Seattle
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Left blank for future updates.
Importance of Complete and Accurate Registration Information

How many times have you been asked a question about the members of your parish that you were unable to answer? The question may be simple or complicated.

Who uses envelopes? Who does EFT? On-line givers?
How many families left our parish in the last 6 months?
How many households that are registered gave less than $50.00 last year?
What is the language preference of most of our members?
Does anyone in the parish have construction experience? Who can help with the gardens of the parish?

All of this information, and much more, is readily available to you if you collect complete data from your parishioners and enter it accurately. The two easiest ways to do this is by using the drop-down selections on entry screens and the use of keywords (on the next page). This will keep your information consistent and allow for reporting on all aspects of data collected. When you aren’t using the drop-down selections, errors can be made and consistency will be lost. Determine what kind of information you want to know about your parishioners and collect as much of it as possible.

Refer to the following document to learn how to get the most for your parish from your PDS – Office database system.
Keywords

WHAT ARE KEYWORDS?
Keywords are descriptors or adjectives that describe the family or the member. A phrase may also be used as a “keyword”. Keywords should be defined by your system administrator and entered into the drop-down list from which the PDS user will select. You must not simply type a keyword each time but always select the desired word or phrase from the dropdown list.

WHY DO WE USE KEYWORDS?
Keywords are used to provide information about a family or individual for reporting purposes. Keywords and phrases need to be entered identically each time so that reports can be built that will gather information related to those on which the keyword has been identified. If you type the word or phrase and do not type it exactly as previously entered, it makes it impossible to report on that information.

FAMILY KEYWORDS
Examples of keywords that might be used at the family level might be, “no envelopes”, “school family”, “Spanish speaking”, “additional tax form needed”, “non-registered family”, “moved out of state”, “no English” etc.

MEMBER KEYWORDS
Examples of member keywords might be, “speaks French”, “Religious Ed student”, “confirmation candidate”, “special needs”, “school student”, “convert” etc.

MINISTRY KEYWORDS
Examples of ministry keywords, “Eucharistic Minister”, “Knight of Columbus”, “usher”, “lector”, “altar linens”, “coffee hour”, “money counter”, “adoration” etc.

TALENT KEYWORDS

REPORTING
Using specific keywords allows for reporting based on those keywords. You may wish to run a report that tells you all of the men in the parish that are Knights of Columbus. For a special event maybe you need flower arranging talents or decorating or cooking talents. How convenient it would be to be able to find all the “public speakers” or maybe “grant-writers” that you have registered. Just remember that in order to report on keywords you must select them from the drop-down and not just type them. If they are typed, it is very easy to have a variance in the way that the words or phrases are entered thus making this type of reporting impossible.
Collecting and Recording Hispanic names:

We are aware that some of our Spanish speaking families record their names a little differently than we might normally expect and parishes struggle with how to enter them. You may notice that the standard first, middle, last name format that we commonly use in this country is not always used by these families. With some great feedback from our consultant and parishes, we have come up with suggestions for you to help you decipher how the names given could be put in the database.

You may also want to consider asking for Apellidos (Last names) and Primer Nombres (first Names) on the Spanish registration form. This will help in determining how to enter in your database.

For both Men and Women – if they give 2 last names and 2 first names:

First Names: Jose Diego  Last Names: Gonzalez Martinez
It’s interpreted as:
First Name: Jose Diego
Father’s Last Name: Gonzalez
Mother’s Last Name: Martinez
For database purposes, it’s suggested to use First (Jose), (Diego) could be entered in the first name line with (Jose) or you can put (Diego) in the middle name field. Enter the Father’s Last Name (Gonzales) with the Mother’s last name (Martinez) in the same field. Do not hyphenate the name unless your parishioner writes it that way. Encourage full names as above at the time of registration. This help with the use of partial names, such as only one last name, that create confusion and duplicate records.

If Jose is married, his wife may fill her names in as Maria Teresa Gonzalez Sanchez
First Name: Maria
Middle Name: Teresa
Husband’s Father’s Last Name: Gonzales
Maria’s Father’s Last Name: Sanchez
For database purposes, it’s suggested to use First (Maria), (Teresa) could be entered in the first name line with (Maria) or you can put (Teresa) in the second name field. Enter the Husband’s Father’s Last Name (Gonzales) followed by (Sanchez). Do not hyphenate the name unless your parishioner writes it that way. Encourage full names as above at the time of registration. This help with the use of partial names, such as only one last name, that create confusion and duplicate records.
Parish Registration Guidelines

The following are guidelines to assist you with parish registration to ensure the accuracy between the data at the parish and the Archdiocese of Seattle.

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PDS PARISH REGISTRATION INSTRUCTIONS CAN BE FOUND AT
http://www.seattlearchdiocese.org/resources

COLLECTING INFORMATION

Have Paper Registration Forms available:
- At the Parish Office
- In the Narthex
- At a staffed ‘welcome’ table
  - Before/After Mass in a visible location
  - At all parish events

ONLINE REGISTRATION FORM

Options for an Online Registration Form:
- FormStack – the link to the form for use on your parish website will be provided by the Annual Appeal Office – the completed form will be emailed automatically to the parish and the Annual Catholic Appeal office.
- Parish Data Systems (PDS) – contact Bryan Gummersall 206-255-5074 for assistance
- Our Sunday Visitor (OSV) has a built-in form for those who have an OSV website - contact Michelle Ostrowski at 800-348-2886 x6986 for questions.

WHAT TO COLLECT

Part 1 – Demographics (Online and paper form)
- Names of all family members
- Address
- Phone(s)
- Email(s) for all members
- Religion
- Birthdate
- Ethnicity

Important to remember: Ask for information only if you are going to use it imminently - too many fields to fill out and a user may not complete it – especially if you are asking for dates of events.

Part 2 – Additional info
- May include but not limited to: sacraments received, volunteer desires, interest in ministries, talents to contribute, special needs, stewardship pledge, language skills etc. Gather this information in person or by a phone call initiated by a key person or a welcome minister as an integral part of inclusion in parish life.
DATA CONSISTENCY
Choose from pre-determined selection fields to allow for more accuracy and consistency in reporting, mailings, labels, etc.

- If using titles (Mr., Mrs., etc.), enter a title for each adult, not just head of household
- A registration is not complete if it reads “The Holmes Family”, it must contain first names for the adults as well as their last names if they are different.

How to get the Online Registration data into the parish database system:

- Enter manually
- PDS has an import feature if you have multiple registrations to enter – Contact Bryan Gummersall at 206-255-5074

Paper registrations

- Enter manually
  - This will be sent to the ACA office when you send in your periodic updates – see communicating with the Archdiocese on the next page

DEFINITIONS of ACTIVE and INACTIVE:

**ACTIVE parishioners:**

- **ALL** persons in your parish registration database.

**INACTIVE parishioners:**

The parish is informed in writing, in person, or by phone:

- Parishioner is no longer a member and requests to be removed
- Parishioner has moved or will be moving out of the parish or archdiocese
- Parishioner is deceased

Mailings you have sent the parishioner:

- Are returned from the post office without a forwarding address or a new address out of the parish boundaries, archdiocese or state

**Note:** Inactivating a parishioner should not be determined by whether or not an individual contributes monetarily to the parish or is not actively involved in a parish ministry. The only time you should inactivate someone is if the person has notified the parish they no longer wish to belong.

Keep in mind there are possible reasons a person may be on your list but not actively giving talent and treasure to the parish.

- Not able to physically attend Mass (shut-in, disabled, etc.)
- Snow-birds
• Loss of job/financial difficulties
• Seriously ill
• Giving cash in the collection basket and not wanting to be identified

COMMUNICATING WITH THE ARCHDIOCESE

1. Keep the Archdiocese updated with Additions, Changes, Moved, Deceased
   • PDS has built a report you can run and send to the ACA office – the “Extraction for Archdiocese” report is located on the Parish Resources Link - or call or email the ACA office database specialist at parishupdates@seattlearch.org or 206-748-7999 to request it.
   • If you don’t have PDS – email parishupdates@seattlearch.org to request the Microsoft Excel Headers
   • If completed through the FormStack form, the diocese will receive a copy automatically. The Annual Catholic Appeal office will send you the ACA 2nd ID to enter in your system.
   • If you would like your entire parish list compared to the ACA database, please contact the database specialist for instructions – or, she can remotely access your computer (while you are there) and she can pull the data file for you.

2. When you are informed of a Deceased Parishioner
   Send info to the ACA office as soon as possible (email or call). The Annual Appeal and the NW Catholic magazine mailings come from one database. We want to ensure the surviving spouse, if any, is updated so as to be as sensitive as possible. Or, to stop any mailings if there is no surviving spouse on record.

   COMPLETE PDS PARISH REGISTRATION INSTRUCTIONS CAN BE FOUND AT http://www.seattlearchdiocese.org/resources

   THANK YOU for all that you do – call if you need assistance or have questions!
   Database Specialist – Nancy Kitterman – parishupdates@seattlearch.org or 206-748-7999
When registering a person or family in PDS, the following are the **Best Practices** to keep your data consistent and to allow for the maximum usage of the information entered.

**FAMILY SCREEN** – The family screen is the entry point for information related to the entire family, even if there is only one individual in the family. This would include address, home phone, home email, remarks and **family** keywords. (See section on keywords in this document.) Member specific information is entered for each individual on the **members** screen.

When entering the family you will have the opportunity to enter 1 or 2 persons as member 1 and member 2. These are to be adult members of the household and would generally reflect spouses. **DO NOT** enter children as member 1 or member 2 when setting up the family record. They will be entered after the family registration screen has been completed and the adult members have been set up.

**MEMBER SCREEN** – All information on the member screen relates directly to the individual. This includes, relationship, birthdate, gender etc. as well as remarks and keywords. A member screen will be created for each family member including the person set up as head of household.
Example 1 - Single Individual

Family Screen # 1

1. **Select:** Families

2. **Select:** Add Family

3. **Last Name:** Enter on first line the last name of member #1 only.
4. **First name:** Enter on the second line. **Do not combine both first and last names on the same line.** (You will later see it displayed that way, but do not enter it that way.) Member 1 may be male or female.
5. **Title:** Select from the drop-down box if your parish uses titles.
6. **Suffix:** Select from the drop-down box if needed.
7. **Gender:** Select from the drop-down box.
8. **Name, Mailing Name, Formal Salutation, Informal Salutation:** This data will populate automatically.

**Select Apply/OK to advance to the next screen**

Family Screen #1
This is the first screen that is presented when you select Families. It contains only names, titles and gender.
Example 1 – Single Individual– cont.

Family Screen # 2

This is the second screen that is presented when you select Families. It contains addresses, phone numbers, family keywords and family remarks.

1. **ID/Envelope**: Let the computer pick the ID #, no special numbering is needed as you will use keywords to identify special accounts.
2. **2nd ID**: Annual Catholic Appeal #. It will be provided by the ACA office after receipt of completed registration.
3. **Family Name**: Auto-filled with value entered on previous screen.
4. **Registration Date**: Enter a date (required)
5. **Envelope Use**: Mark if you will be supplying this family with envelopes. (You will notice in our example that this family will be giving online so we used a Family Keyword to indicate that and did not mark the Envelope User box.)
6. **Synchronize w/Dio**: Not used.
7. **Status**: Select from drop down.
8. **Street Address:, City/State:, ZIP/Postal**: Enter complete address.
9. **Phone Number**: Include the area code.
10. **Send No Mail**: If requested by parishioner mark this box.
11. **Description**: Cell1, Work1 for member 1 and Cell2, Work2 for member 2. Follow this convention to reduce confusion.
12. **Emails**: Enter Email1 for member 1 and Email2 for member 2.
13. **Remarks**: Enter general notes about this family. Use this area only if you can’t use a Family Keyword. Remember not to use this field for data on which you wish to report.
14. **Family Keywords**: Enter keywords related to the entire family, not those that are member specific. You will notice that the information contained in the keywords is about the family in general.
15. Select Save to continue
Members screen

1. Select Members

This is the Member Screen # 1 it is the first screen that is presented when you select Members. It contains marital status, member keywords and remarks as well as some additional fields.

3. **Family**: Auto-filled with family name and **ID** number.
4. **Name**: Auto-filled with member #1 name.
5. **MemId/Env**: Enter if in your parish.
6. **Relationship**: Select from drop-down list, relationship of member to member #1.
7. **Grade/Degree**: Select from drop-down list if used.
8. **Marital Status**: Select from drop down list
9. **Birth Date**: Enter date of birth (required)
10. **Language**: Select from drop-down list if collecting this information.
11. **Ethnicity**: Select from drop-down list if collecting this information.
12. **Remarks**: Enter remarks specific to member only.
13. **Keywords**: Enter any keywords specific to the member.

Select Save to continue to next screen
Example 1 – Single Individual—cont.

Ministries/Talents Screen

1. **Ministries/Talents:** Select from menu on left side of screen.

2. **Family:** Auto-filled with the family name their ID number.

3. **Name:** Auto-filled with member #1.

4. **MemId/Env:** Auto-filled if entered on member screen.

5. **Ministry:** Select from drop down list – add all ministeries in which the member is currently involved as well as those in which they are interested. (Add additional lines as needed.)

6. **Status:** Select from drop down list.

7. **Start Date:** Enter start date if desired.

8. **End Date:** Enter end date if desired.

9. **Talent:** Select from drop-down list.

10. **Status:** Select from drop down list.

11. **Start Date:** Enter start date if desired.

12. **End Date:** Enter end date if desired.

13. **Save:** Select to continue to next screen or if registration is complete.
Example 2 - Two Adults/ Same Last Name

Family Screen #1

1. **Select:** Families

   ![Dashboard with Families tab highlighted](image)

2. **Select:** Add Family

   ![Add Family, Save, Cancel, Family tasks](image)

3. **Last Name:** Enter on first line the last name of member #1 only.
4. **First name:** Enter on the second line. **Do not combine both first and last names on the same line.** (You will later see it displayed that way, **but do not enter it that way.**) Member 1 may be male or female.
5. **Title:** Select from the drop-down box if your parish uses titles.
6. **Suffix:** Select from the drop-down box if needed.
7. **Gender:** Select from the drop-down box.

![Family Name window](image)
Example 2 - Two Adults/Same Last Name – cont.

Family Screen #1 cont.

Information for the Spouse

8. **Last Name**: Enter the Last name of member #2,
9. **First Name**: Enter First name of member #2.
10. **Title**: Select from drop down if using. If you do not choose to use titles, you will want to pay close attention to the *Mailing Name* and *Formal Salutation* lines as you will need to modify these lines to include Member #2’s name.
11. **Gender**: Select from drop down list.
12. **Name, Mailing Name, Formal Salutation, Informal Salutation**: This data will populate automatically.
13. **Apply/OK**:

Mailing Name/Formal Salutation after edited to include member #2.

**The asterisks denote the item has been changed by the user and will no longer be automatically updated.**
Example 2 - Two adults/same last name, cont.

1. **ID/Envelope**: Let the computer pick the ID #, no special numbering is needed as you will use keywords to identify special accounts.

2. **2nd ID**: Annual Catholic Appeal #. It will be provided by the ACA office after receipt of completed registration.

3. **Family Name**: Auto-filled with value entered on previous screen.

4. **Registration Date**: Enter a date (required)

5. **Envelope Use**: Mark if you will be supplying this family with envelopes. (You will notice in our example that this family will be giving online so we used a Family Keyword to indicate that and did not mark the Envelope User box.)

6. **Synchronize w/Dio**: Not used.

7. **Street Address, City/State, ZIP/Postal**: Enter complete address.

8. **Phone Number**: Include the area code.

9. **Send No Mail**: If requested by parishioner mark this box.

10. **Description**: Cell1, Work1 for member 1 and Cell2, Work2 for member 2. Follow this convention to reduce confusion.

11. **Emails**: Enter Email1 for member 1 and Email2 for member 2.

12. **Remarks**: Enter general notes about this family. Use this area only if you can’t use a Family Keyword. Remember not to use this field for data on which you wish to report.

13. **Family Keywords**: Enter keywords related to the entire family, not those that are member specific.

   You will notice that the information contained in the keywords is about the family in general.

14. **Save**: Select to continue
Example 2 - Two adults/same last name, cont.

Members Screen for Member #1

1. Select Members

2. **Family:** Auto-filled with family name and **ID** number.

3. **Name:** Auto-filled with member #1 name.

4. **MemId/Env:** Enter if in your parish.

5. **Relationship:** Select from drop-down list, relationship of member to member #1.

6. **Grade/Degree:** Select from drop-down list if used.

7. **Marital Status:** Select from drop down list.

8. **Birth Date:** Enter date of birth (required)

9. **Language:** Select from drop-down list if collecting this information.

10. **Ethnicity:** Select from drop-down list if collecting this information.

11. **Remarks:** Enter remarks specific to member only.

12. **Keywords:** Enter any keywords specific to the member.

13. **Save:** Select to continue...

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Example 2- Two adults/same last name, cont.

Ministries/Talents Screen for member #1

1. **Ministries/Talents**: Select from menu on left side of screen.

2. **Family**: Auto-filled with the family name their **ID** number.

3. **Name**: Auto-filled with member #1.

4. **MemId/Env**: Auto-filled if entered on member screen.

5. **Ministry**: Select from drop down list – add all ministeries in which the member is currently involved as well as those in which they are interested. (Add additional lines as needed.)

6. **Status**: Select from drop down list.

7. **Start Date**: Enter start date if desired.

8. **End Date**: Enter end date if desired.

9. **Talent**: Select from drop-down list.

10. **Status**: Select from drop down list.

11. **Start Date**: Enter start date if desired.

12. **End Date**: Enter end date if desired.

13. **Save**: Select to continue to next screen or if registration is complete.
Example 2- Two adults/same last name, cont.

Member Screen for Spouse or member #2

1. **Search By:** Enter part of the last name to search for family. When family is selected it will auto-fill the ID/Envelope number and the family name on the member screen.

2. **Members:** Using the drop down Members tab, select member 2. The members are listed in the order added, i.e. Head of Household, Spouse, children.

3. **Family:** Auto-filled with family name and **ID** number.
4. **Name:** Auto-filled with member #1 name.
5. **MemId/Env:** Enter if in your parish.
6. **Relationship:** Select from drop-down list, relationship of member to member #1.
7. **Grade/Degree:** Select from drop-down list if used.
8. **Marital Status:** Select from drop down list
9. **Birth Date:** Enter date of birth (required)
10. **Language:** Select from drop-down list if collecting this information.
11. **Ethnicity:** Select from drop-down list if collecting this information.
12. **Remarks:** Enter remarks specific to member only.
13. **Keywords:** Enter any keywords specific to the member.
14. **Save:** Select save to complete this screen.
Example 2- Two adults/same last name, cont.

Ministries/Talents Screen for member #1

1. **Ministries/Talents**: Select from menu on left side of screen.

   ![Ministries/Talents Screen](image)

2. **Family**: Auto-filled with the family name and their ID number. (Use search if needed to get correct family.)

3. **Name**: Select correct family member using drop down list.

4. **MemId/Env**: Auto-filled if entered on member screen.

5. **Ministry**: Select from drop down list – add all ministries in which the member is currently involved as well as those in which they are interested. (Add additional lines as needed.)

6. **Status**: Select from drop down list.

7. **Start Date**: Enter start date if desired.

8. **End Date**: Enter end date if desired.

9. **Talent**: Select from drop down list.

10. **Status**: Select from drop down list.

11. **Start Date**: Enter start date if desired.

12. **End Date**: Enter end date if desired.

13. **Save**: Select to continue to next screen or if registration is complete.

![Save Button](image)
Example 3 - Two adults/different last name

Family Screen #1

1. **Select:** Families

![Dashboard with Families selected]

2. **Select:** Add Family

![Add Family dialog box]

3. **Last Name:** Enter on first line the last name of member #1 only.

4. **First name:** Enter on the second line. **Do not combine both first and last names on the same line.** (You will later see it displayed that way, but do not enter it that way.) Member 1 may be male or female.

5. **Title:** Select from the drop-down box if your parish uses titles.

6. **Suffix:** Select from the drop-down box if needed.

7. **Gender:** Select from the drop-down box

![Example family screen with selected fields]
Family Screen #1 cont.

Information for the Spouse
8. **Last Name**: Enter the Last name of member #2,
9. **First Name**: Enter First name of member #2.
10. **Title**: Select from drop down if using. When adding two persons with different last names, the names will be entered for you with an ampersand (&) in between. **Mailing Name** and **Formal Salutation** lines may be modified if desired.
11. **Gender**: Select from drop down list.
12. **Name, Mailing Name, Formal Salutation, Informal Salutation**: This data will populate automatically.
13. **Apply/OK**: 

![Family Screen #1 cont.](image)
15. ID/Envelope: Let the computer pick the ID #, no special numbering is needed as you will use keywords to identify special accounts.

16. 2nd ID: Annual Catholic Appeal #. It will be provided by the ACA office after receipt of completed registration.

17. Family Name: Auto-filled with value entered on previous screen.

18. Registration Date: Enter a date (required)

19. Envelope Use: Mark if you will be supplying this family with envelopes. (You will notice in our example that this family will be giving online so we used a Family Keyword to indicate that and did not mark the Envelope User box.)

20. Synchronize w/Dio: Not used.

21. Street Address, City/State, ZIP/Postal: Enter complete address.

22. Phone Number: Include the area code.

23. Send No Mail: If requested by parishioner mark this box.

24. Description: Cell1, Work1 for member 1 and Cell2, Work2 for member 2. Follow this convention to reduce confusion.

25. Emails: Enter Email1 for member 1 and Email2 for member 2.

26. Remarks: Enter general notes about this family. Use this area only if you can’t use a Family Keyword. Remember not to use this field for data on which you wish to report.

27. Family Keywords: Enter keywords related to the entire family, not those that are member specific. You will notice that the information contained in the keywords is about the family in general.

28. Save: Select to continue
Example 3 - Two adults/Different last name-cont.

Members screen #1

1. Select Members

![Dashboard, Families, Members, Contributions]

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family</td>
<td>Auto-filled with family name and ID number.</td>
</tr>
<tr>
<td>Name</td>
<td>Auto-filled with member #1 name.</td>
</tr>
<tr>
<td>MemId/Env</td>
<td>Enter if in your parish.</td>
</tr>
<tr>
<td>Relationship</td>
<td>Select from drop-down list, relationship of member to member #1.</td>
</tr>
<tr>
<td>Grade/Degree</td>
<td>Select from drop-down list if used.</td>
</tr>
<tr>
<td>Marital Status</td>
<td>Select from drop down list</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Enter date of birth (required)</td>
</tr>
<tr>
<td>Language</td>
<td>Select from drop-down list if collecting this information.</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Select from drop-down list if collecting this information.</td>
</tr>
<tr>
<td>Remarks</td>
<td>Enter remarks specific to member only.</td>
</tr>
<tr>
<td>Keywords</td>
<td>Enter any keywords specific to the member.</td>
</tr>
<tr>
<td>Save</td>
<td>Select to continue.</td>
</tr>
</tbody>
</table>

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Example 3 - Two adults/Different last name - cont.

Ministries/Talents Screen for member #1

1. **Ministries/Talents**: Select from menu on left side of screen.

2. **Family**: Auto-filled with the family name their ID number. (Use search if needed to get correct family.)

3. **Name**: Select correct family member using drop down list.

4. **MemId/Env**: Auto-filled if entered on member screen.

5. **Ministry**: Select from drop down list – add all ministeries in which the member is currently involved as well as those in which they are interested. (Add additional lines as needed.)

6. **Status**: Select from drop down list.

7. **Start Date**: Enter start date if desired.

8. **End Date**: Enter end date if desired.

9. **Talent**: Select from drop-down list.

10. **Status**: Select from drop down list.

11. **Start Date**: Enter start date if desired.

12. **End Date**: Enter end date if desired.

13. **Save**: Select to continue to next screen or if registration is complete.
Example 3 - Two adults/Different last name – cont.

Member Screen for Spouse or member #2

1. **Search By:** Enter part of the last name to search for family. When family is selected it will auto-fill the ID/Envelope number and the family name on the member screen.

2. **Members:** Using the drop down Members tab, select member 2. The members are listed in the order added, i.e. Head of Household, Spouse, children.

15. **Family:** Auto-filled with family name and ID number.
16. **Name:** Auto-filled with member #1 name.
17. **MemId/Env:** Enter if in your parish.
18. **Relationship:** Select from drop-down list, relationship of member to member #1.
19. **Grade/Degree:** Select from drop-down list if used.
20. **Marital Status:** Select from drop down list
21. **Birth Date:** Enter date of birth (required)
22. **Language:** Select from drop-down list if collecting this information.
23. **Ethnicity:** Select from drop-down list if collecting this information.
24. **Remarks:** Enter remarks specific to member only.
25. **Keywords:** Enter any keywords specific to the member.
26. **Save:** Select save to complete this screen.
Example 3 - Two adults/Different last name – cont.

Ministries/Talents Screen for member #2

1. **Ministries/Talents**: Select from menu on left side of screen.

2. **Family**: Auto-filled with the family name their ID number. (Use search if needed to get correct family.)

3. **Name**: Select correct family member using drop down list.

4. **MemId/Env**: Auto-filled if entered on member screen.

5. **Ministry**: Select from drop down list – add all ministeries in which the member is currently involved as well as those in which they are interested. (Add additional lines as needed.)

6. **Status**: Select from drop down list.

7. **Start Date**: Enter start date if desired.

8. **End Date**: Enter end date if desired.

9. **Talent**: Select from drop-down list.

10. **Status**: Select from drop down list.

11. **Start Date**: Enter start date if desired.

12. **End Date**: Enter end date if desired.

13. **Save**: Select to continue to next screen or if registration is complete.
Example 4 - Adding Children/Additional Family Members

1. Select the **Families** button, then press the **Search by** button and search by **family name**.

   ![Screenshot of Families search](image1)

2. Select the family name and press enter.

   ![Screenshot of family search](image2)

3. Select the **Members** button and then the **Add Member** button.

   ![Screenshot of Members search](image3)

The Confirm Family screen will pop-up.

![Confirm Family screen](image4)

4. **Add to this Family**: Select to add the family member.

![Add member to family](image5)
Example 4 - Adding Children/Additional Family Members cont.

Member Name Screen

5. **Last Name**: Auto-filled based on your search criteria.
6. **First Name**: Enter first name or name of additional family member.
7. **Middle Name/Initial**: Enter middle initial (excellent information to positive identification).
8. **Maiden Name**: Enter maiden name if known.
9. **Title**: Enter title if your parish uses them.

After entering the basic information on the member select Apply/OK to continue on with the next screen.
Example 4 - Adding Children/Additional Family Members cont.

**Member Screen**

1. **Family**: Auto-filled with family name and **ID** number.
2. **Name**: Select member from drop down, if not displayed.
3. **MemID/Env**: Enter if using member envelopes or separate member IDs.
4. **Relationship**: Select from drop down if used.
5. **Grade/Degree**: Select from drop down if used.
6. **Marital Status**: Select from drop down list.
7. **Birth Date**: Enter date of birth (required).
8. **Language**: Select from drop down list.
9. **Ethnicity**: Select from drop down list.
10. **Remarks**: Related specially to the member, not the family.
11. **Keywords**: Related specially to the member, not the family.

12. **Save**: Select save when information is complete.
Example 4 - Adding Children/Additional Family Members cont.

Ministries/Talents Screen

1. **Ministries/Talents**: Select from menu on left side of screen.

14. **Family**: Auto-filled with the family name their *ID* number. (Use search if needed to get correct family.)

15. **Name**: Select correct family member using drop down list.

16. **MemId/Env**: Auto-filled if entered on member screen.

17. **Ministry**: Select from drop down list – add all ministries in which the member is currently involved as well as those in which they are interested. (Add additional lines as needed.)

18. **Status**: Select from drop down list.

19. **Start Date**: Enter start date if desired.

20. **End Date**: Enter end date if desired.

21. **Talent**: Select from drop-down list.

22. **Status**: Select from drop down list.

23. **Start Date**: Enter start date if desired.

24. **End Date**: Enter end date if desired.

25. **Save**: Select to continue to next screen or if registration is complete.
What to do when a family leaves the parish

1. Select Families from the top menu. Use Search by and search by family last name.

2. **Left Parish:** Entry point on the Families screen. Enter the appropriate date.

3. A pop-up box will ask you, “Do you wish to make this family inactive?” Answer Yes. *Inactive box* will automatically be checked.
What to do when Member #1 Dies

Marking Member #1 Deceased

1. **Families:** Select to begin.

2. **Search by:** Select the family name and press enter.

3. **Members:** Select the member who has passed away.

4. Enter a date into the **Deceased** field. (If date is unknown enter current date.)
What to do when Member #1 Dies-cont.

Marking Member #1 Deceased cont.

Mark Member Deceased Screen.

Decease Member Section
1. **Change Type from Head of Household to:** Check this box when the Head of Household or member #1 is deceased.
2. Select **Other** from the drop down list.
3. **Add Entry of Deceased to Sacraments List:** If the funeral is at your parish, you may want to check this box to continue with adding the service information.

![Deceased Member Screen](image)

Survivor Section
4. **Change Name:** Check that the name is the surviving member. Make any necessary modifications to **Mailing Name, Formal Salutation, Informal Salutation** (This section relates to the member not the family).
5. **Change Type from Spouse to:** Select from drop down box, **Head of Household**.
6. **Relationship:** Select from drop down if using at your parish.
7. **Change Marital Status to:** Select from drop down box, **Widowed**.

![Survivor Screen](image)
What to do when Member #1 Dies-cont.

Marking Member #1 Deceased cont.

Family Name Section
8. **Change Family Status to:** Select appropriate status from drop down list if using status in your parish.
9. **Change Family Name:** Select the drop down box.

```
Family Name: Robertson, William(Sara)

- [ ] Change Family Status to: [ ]
- [ ] Change Family Name: [ ]

Mailing Name: William Robertson
 Formal Salutation: William Robertson
 Informal Salutation: William & Sara
```

**Family Name Screen**
10. **Last Name:** Remove deceased last name and replace with survivor’s last name, if different.
11. **First Name:** Remove deceased first name and replace with survivor’s first name.
12. **Spouse Last Name:** Delete spouse last name.
13. **Spouse First Name:** Delete spouse first name.
14. **Recalculate:** Is used if the **Name** or **Mailing address** or **Salutations** were modified. They will display *** (three asterisks) to indicate a modified name. Use the **Recalculate** button to resolve customizations that were made.
15. **Apply/OK:** Select to complete this screen
16. **Save:** Select on Mark Member Deceased Screen
What to do when Member #1 Dies - cont.

Marking Member #1 Deceased cont.

Members screen as it appears after the member #1 has been marked as deceased.

Notice that the Name is now shown in **Red**.
The **Deceased Box** is checked.
The **Type** is no longer Head of Household but is now **Other**.
The **Deceased Date** is displayed shown.

Continue on to Memorial Section (page 44) – this is optional.
What to do when Member #2/Spouse Dies

Marking Member #2/Spouse Deceased

1. **Families:** Select to begin.

2. **Search by:** Select the family name and press enter.

3. **Members:** Select the member who has passed away.

4. Enter a date into the **Deceased** field. (If date is unknown enter current date.)
What to do when Member #2/Spouse Dies-cont.

Marking Member #2/Spouse Deceased cont.

Mark Member Deceased Screen.

Deceased Member Section

1. **Change Type from Head of Household to:** If Member #2 is designated as Head of Household in your parish, be sure to click this box. This value should always be other for the deceased member.
2. Select Other from the drop down list.
3. **Add Entry of Deceased to Sacraments List:** If the funeral is at your parish, you may want to check this box to continue with adding the service information.

Survivor Section

4. **Change Name:** Check that the name is the surviving member. Make any necessary modifications to Mailing Name, Formal Salutation, Informal Salutation (This section relates to the member not the family).
5. **Change Type from Spouse to:** Select from drop down box, Head of Household.
6. **Relationship:** Select from drop down if using at your parish.
7. **Change Marital Status to:** Select from drop down box, Widowed.
What to do when Member #2/Spouse Dies-cont.

Marking Member #1 Deceased cont.

Family Name Section

8. **Change Family Status to:** Select appropriate status from drop down list if using status in your parish.
9. **Change Family Name:** Select the drop down box.

![Family Name Screen](image)

Family Name Screen

17. **Last Name:** Remove deceased last name and replace with survivor’s last name, if different.
18. **First Name:** Remove deceased first name and replace with survivor’s first name.
19. **Spouse Last Name:** Delete spouse last name.
20. **Spouse First Name:** Delete spouse first name.
21. **Recalculate:** Is used if the Name or Mailing address or Salutations were modified. They will display *** (three asterisks) to indicate a modified name. Use the Recalculate button to resolve customizations that were made.
22. **Apply/OK:** Select to complete this screen
23. **Save:** Select on Mark Member Deceased Screen
What to do when Member #2/Spouse Dies-cont.

Marking Member #2 Deceased cont.

Members screen as it appears after the member #2 has been marked as deceased.

Notice that the Name is now shown in Red. The **Deceased Box** is checked. The **Type** is no longer Head of Household but is now **Other**. The **Deceased Date** is displayed shown.

Continue on to Memorial Section (next page) – this is optional.
Recording Memorial Information - Optional

Optional Entry

1. **Memorial Information**: Select Yes, if you want to record information regarding the funeral/memorial service and the place of internment. Select No if not recording funeral/memorial information or not tracking donations given in the name of the deceased.

2. **Deceased Date**: Enter the Date of Death
3. **Funeral Date**: Enter the Date of the Funeral or Memorial Service.
4. **Performed by**: Select the Celebrant from the drop down list.
5. **Place of Funeral**: Select Location of Funeral or Memorial Service from the drop-down list.
6. **Cemetery**: Enter the place of final rest.
7. **Plot**: Enter the Location of the Cemetery Plot or Mausoleum, if known.
8. **Notes**: Enter a note or notes if desired.
9. **Primary**: Enter Next of Kin, check drop down list for immediate family.
10. **Relationship**: Select appropriate value from drop down list.
11. **Street Address**: Add the address for Next of Kin. (This is extremely important if not an immediate family member).
12. **City/State**: Select from drop down list.
13. **Zip**: Select the correct Zip Code.
14. **Phone**: Enter a contact phone for the Next of Kin.
15. **Add Secondary Next of Kin**: If you wish to record another “Next of Kin” selection of the button will save the first entry and clear the Next of Kin section for secondary entry.
Memorial Donations Entry - Optional

Optional Entry

1. **Memorial Fund**: Select the appropriate predefined fund from the drop down selection.
2. **Activity Name**: Select the applicable activity from the drop down selection.
3. **Donor Family**: Using drop down box, select the donor family.
4. **ID/Envelope**: This will populate automatically if the donor is in your database.
5. **Street Address**: Auto-fills if donor is in database. Enter address if donor is not in your parish database. (This is needed for acknowledge cards.)
6. **City/State**: As above.
7. **Zip**: As above.
8. **Date of Donation**: Enter the date the donation was received in the parish.
9. **Donation Amount**: Enter the amount of the donation.
10. **Check**: Enter the check for reference if applicable.
11. **Add Donor**: Select the add donor button to save the entry and clear the screen to process additional donations. You will notice that the gifts appear on the bottom half of the screen.
12. **Next**: When finished adding your donations for this person select the next button. (Note: you can return to this donation page later and enter further gifts if received.)
Thank You for Memorial Gift Letters – Optional

Optional Entry

1. **Print Thank You.** You may initiate the printing of Thank You letters to the donors simply by checking this box.

2. **Print Letters:** Will take you directly to your reporting section that allows printing of letters and reports.

After the letters have been printed the box titled **Thank You Printed** will change to **YES**.
Optional Entry

1. **Print Thank You.** You may initiate the printing of Thank You letters to the donors simply by checking this box.

2. **Print Letters:** Will take you directly to your reporting section that allows printing of letters and reports.

This letter informs those listed as Next of Kin about the donations received as a memorial for the deceased. After the letters have been printed the box titled **Thank You Printed** will change to **YES**.

![Next of Kin Letter](image-url)
Optional Entry

1. **Print Summary of Posted Information**: Print report if desired.

2. **Export Batch Totals**: If you want to export your gift information to either PDS Ledger or QuickBooks select the appropriate checkboxes and enter the correct path.