

Add A New Family

Htdiocese.org/psegrou or Support.parishsoft.com

Note: When creating a new Family Record it's necessary to conduct a search for the family to see if they already exist in the database. This prevents duplicate Family Records for the Diocese.

1. In the Family Directory, click **Family List** at the top left corner.

2. Select **Add New Family**.

The screenshot shows the ParishSOFT interface for 'Our Lady of Victory Parish'. On the left sidebar, the 'Family List' option is highlighted with an orange box and a hand icon. An orange arrow points from the 'Add New Family' button in the top right of the 'Family List' section to the 'Add New Family' button in the bottom right of the 'Family List' table.

3. In the Find Family window, type the last name (if it is a common last name put in the first name of the head of household too) and click Search.

The screenshot shows the 'Find Family' window. The 'Last Name' field contains 'anderson'. The 'Search' button is highlighted with an orange box. An orange arrow points from the 'Search' button to the 'Add New Family' button in the bottom right of the window.

4. If the family is found, you may select them and add them to your parish. You must determine if they will be added with an **unregistered** association only or if you want to bring them into your parish as a **registered** member.

You can click on the name of the family (blue text) to view the family record to determine if this is the family you want to add.

The screenshot shows the 'Find Family' window with search results. The 'Last Name' field contains 'Anderson'. The search results table shows two entries: 'Anderson, Myron' and 'Anderson, Sandi'. The 'Anderson, Sandi' entry is highlighted with an orange box. An orange arrow points from the 'Add Selected Family' button to the 'Add New Family' button in the bottom right of the window.

5. If the family does not display, click **Add New Family**

The screenshot shows the 'Find Family' window with the message 'No families found'. The 'Add New Family' button is highlighted with an orange box. An orange arrow points from the 'Add New Family' button to the 'Add New Family' button in the bottom right of the window.

6. You may add all of the family members on this very first page by selecting the **Add Another Member** option for each member until you have completed adding all members.

Add all of the information provided to you, including birth date, email, phone, etc.

The screenshot shows the 'Add New Family to Corpus Christi Parish, Ann Arbor' form. The form is divided into three main sections: 'Family Member (one or more required)', 'Family Information', and 'Family Address'. The 'Family Member' section has fields for Prefix, First Name, Nick Name, Last Name, Suffix, Type, Gender, Birth date, E-Mail, and Address. The 'Family Information' section has fields for Family Group, Send Magazine, Registration Status, Registration Date, Diocesan ID, Last Name, First Name(s), Formal Mailing Name, Informal Name, Formal Salutation, Informal Salutation, and E-Mail Address. The 'Family Address' section has fields for Address Type, Address Line 1, Address Line 2, Postal Code, City, State/Region, and Country. An orange arrow points from the 'Add Another Member' button to the 'Add Another Member' button in the bottom right of the form. Another orange arrow points from the 'Auto Fill Family Names' button to the 'Auto Fill' button in the bottom right of the form. A third orange arrow points from the 'SOP pg. 11: First Name(s): Use "and" instead of "&" when adding a couples name. Ex: James and Mary' text to the 'First Name(s)' field. A fourth orange arrow points from the 'Use Auto Fill to populate the salutations' text to the 'Formal Salutation' field.