

Entering Sacramental Records into ParishSOFT

Baptism 1st Eucharist Confirmation Marriage Funeral

ParishSOFT Data Entry Questions

Catholic Foundation of South Louisiana

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ParishSOFT Login

https://houma.parishsoftfamilysuite.com/

ParishSOFT eGroup (DHT PS users support page, includes Standard Operating Procedures)

https://www.htdiocese.org/psegroup

ParishSOFT Sandbox (Practice site)

ParishSOFT Sandbox: https://trainingdemo5.parishsoftfamilysuite.com/

User Name: see Birth Month Box

January	User1	July	User7
February	User2	August	User8
March	User3	September	User9
April	User4	October	User10
May	User5	November	User11
June	User6	December	User12

Birth Month User ID Birth Month User ID

Confidentiality

Password: *S@intJo\$3ph*

Nature of Information

Care must be taken to protect people's privacy. Although sacramental registers contain information about public events and other facts readily known to any interested party, they also contain information that is very personal and confidential.

Access to Registers

The sacramental registers belong to the individual parish. They are maintained for the good of the Christian faithful, but they are private documents, not public ones. No one other than the pastor can claim a right to direct access to the registers.

Authorized Personnel

The pastor is always and ultimately responsible for the care and confidentiality of the sacramental registers themselves as well as any reproductions (c. 535 §1). He may designate other persons to make entries in the registers and to prepare certificates. These may be employees or volunteers, but their number should be very small. These designated persons must be well known to the pastor, must be capable of careful work and protecting confidentiality, and must be adequately trained to work with the registers. Their work with the registers is not to exceed their mandate from the pastor (c. 877)

Genealogical Research

Sacramental registers should never be made available to genealogical researchers. Care must be taken not to disclose confidential information. Contact the Diocesan Archives office for guidance on a sacramental record request.

Before (and After) Entering a Sacramental Record

Baptism:

- Search for the Family Record If not found, click "Add New Family"
- Update Information: Name, address, Registration status, family group
- Are all of the family members listed in the record?
 - o If not, add the new family member.
 - Enter all data from registration form
- Go To: Sacraments > Add/Edit Sacrament > Baptism
- Follow instructions: Entering Sacramental Records into ParishSOFT

1st Eucharist or Confirmation:

- Search for the Family Record If not found, click "Add New Family"
- Update Information: Name, address, Registration status, family group
- Are all of the family members listed in the record?
 - If not, add the new family member.
 - Verify all data from Youth Formation registration form
- Go To: Sacraments > Add/Edit Sacrament > 1st Eucharist (or Confirmation)
- Follow instructions: Entering Sacramental Records into ParishSOFT

Marriage:

- Search for both members Records If not found, click "Add New Family"
- Export member to "New Family"
- Keep the Brides Salutation as Ms. and her maiden name as her Last Name (this information will be importing into the sacramental record correctly)
- Many times they will be found in their parent's family record.
- Export/Combine both parties records into one Family Record.
- If they need to be merged together, email the FAMILY DUID numbers to support@htdiocese.org (it will take at leat 24 hours for the records to merge)
- Update: Name, address, Registration status, family group
- Enter data from the Prenup Inquiry Form
- Go To: Sacraments > Add/Edit Sacrament > Marriage
- Follow instructions: Entering Sacramental Records into ParishSOFT
- Then, Go back to the Family Directory and search for the Family's record.
- Click "Auto-Fill" to update their Salutations If everything is entered correctly in the member record it should populate correctly, if not, go to their member records, make corrections they "Auto-Fill" again.

Funeral

- Search for the Family Record If not found, click "Add New Family"
- Update Information: Name, address, Registration status, family group
- Go To: Sacraments > Add/Edit Sacrament > Funeral
 - Follow instructions: Entering Sacramental Records into ParishSOFT
- Then, Go back to the Family Directory and search for the member's record.
- The members record Should have the following fields updated:
 - o Status: Deceased
 - Date of Death
 - If married, click on Sacraments tab, go to details
 - Change Spouse's Marital Status: Widowed
 - Date Ended: Date of Death
 - Save, Close (It will take you back to the Family List screen, OK update)
- Verify the Spouse and overall Family Information
 - Click "Auto-Fill" to update the Salutations
- If all members in the family record are deceased, Mark the Family Group as Deceased and Unregister the record.
- Leave the existing name of the family and address as it was the last address they were living at.
- Remove "Send Contib. Env."
- Review the surviving spouses member record:
 - Marital Status: Widowed (role can remain husband or wife, or change to Head)



The Church parish where the

sacrament is taking place is responsible for entering the

sacrament into ParishSOFT

Entering Sacramental Records

⇒ Search Family Record

Search for the parent's record in Family Directory.

Registered at your Church

- How to filter your family list using the fuzzy search and/or Rolodex features
- (Advanced Search) How to Filter Records

Not Registered at your Church

How to add an unregistered copy of a family record

An unregistered copy of a family record is used when a family is registered at a different church parish or is not interested in being a registered family at the child's church of Baptism. The unregistered copy gives you access to the family's record so you can add the child's baptism.

⇒ Review Family Record

Verify/update the family mailing address and contact information. The Standard Operating Procedure Manual has data entry standard for addresses. Use "Auto Fill" when updating your salutations to ensure that each members record is correct. (Head, Husband or Wife)

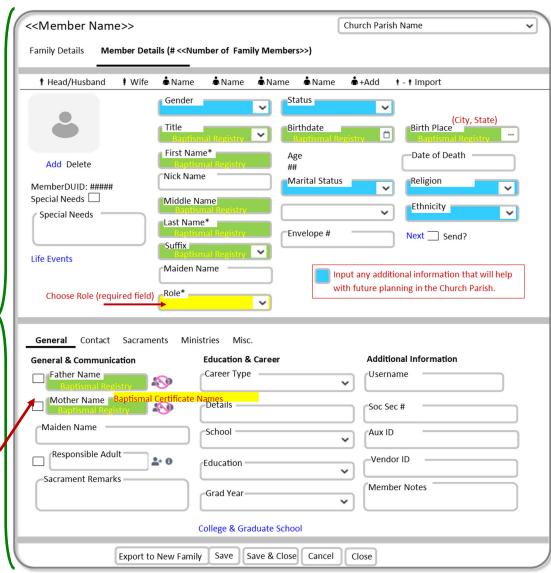
⇒ Add Family Member

Add the child to the family record. (Click +Add tab, take note of the child's Member DUID number.)
How to add
How to add a member to an existing family record

Father Name/Mother Name

Add the parents name as they are listed in the registry.

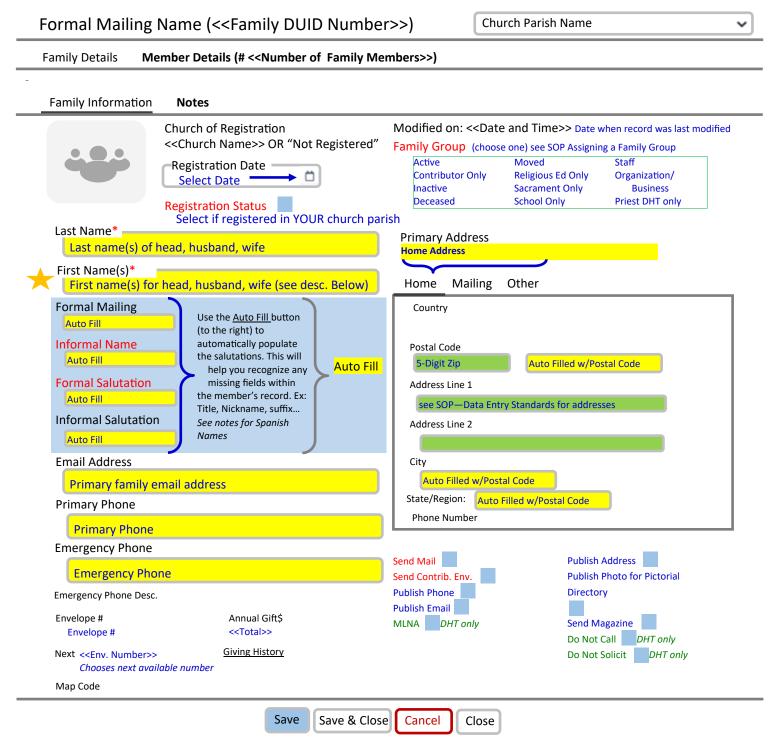
These text boxes are printed on the Baptismal Certificate.



- * If the parents are living at two different addresses, keep their family records separate and add the child with the domicile parent.
- ** The Church parish where the sacrament is taking place is responsible for entering the sacrament into ParishSOFT.



Family Record



Last Names* and First Names* - When you are searching for a family, these are the name fields that are searched. See Searching—Best Practices for more details. (use %)

Red text - Changes made to data in fields with red text only apply to YOUR church IF the family group is not "Registered" in your parish



Member Record

Family Directory

< <member name="">></member>		Church Parish Name
Family Details Member Det	ails (# < <number family="" members="" of=""></number>	>)
† Head/Husband † Wife	å Name å Name	åName å+Add † - † Import
	Baptismal Registry Ba	ndate ptismal Registry (City, State) Baptismal Registry Baptismal Registry
Add Delete MemberDUID: ##### Special Needs	First Name* Raptismal Registry Nick Name Mar Middle Name	Date of Death See page: Funeral Record Religion
Special Needs Things we may need to know. Ex: homebound (Also used with Re. Ed	Raptismal Registry Last Name*	elope # Next _ Send?
Life Events Choose Role (required field	Maiden Name	Input any additional information that will help with future planning in the Church Parish.
General Contact Sacram		ather Name: You cannot update/correct a parents name if it is record. The Family record must be <u>registered</u> at your church.
Father Name Baptismal Registry Mother Name Baptismal Registry	Career Type Details	Additional Information Username Soc Sec #
Maiden Name Do not use	School	Aux ID
Responsible Adult Used w/Rel. Ed Module Sacrament Remarks	Education Cand Vacan	Vendor ID Member Notes
Export to	College & Graduate School New Family Save Save & Close	Cancel Close

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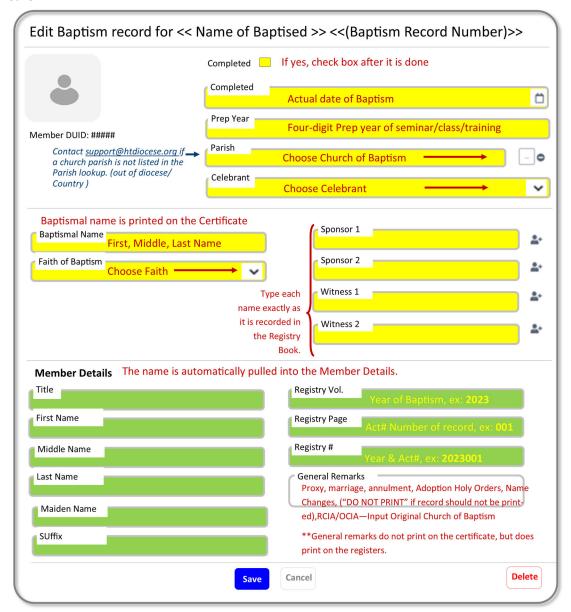
Baptism

⇒ Add the Baptism Record

- Sacraments: How to create a sacramental record
- Go to: Family Directory (left menu), Sacraments (top ribbon), Add/Edit Sacrament (dropdown)
- Choose <u>Baptism</u>, enter the name in the proper fields and search.
- The child's name should not be found when searched. Click the button "Create new Baptism record"

If the child's record is found, click on the pencil icon in front of the name, then click edit details to verify/update the Baptism Record details.

- Find the child's name (verify the Birthdate and Member DUID before selecting the name)
- Enter the Baptism Record. If the Celebrant isn't in the search area, email Support@htdiocese.org and provide the priests complete name.
- Click "Save".



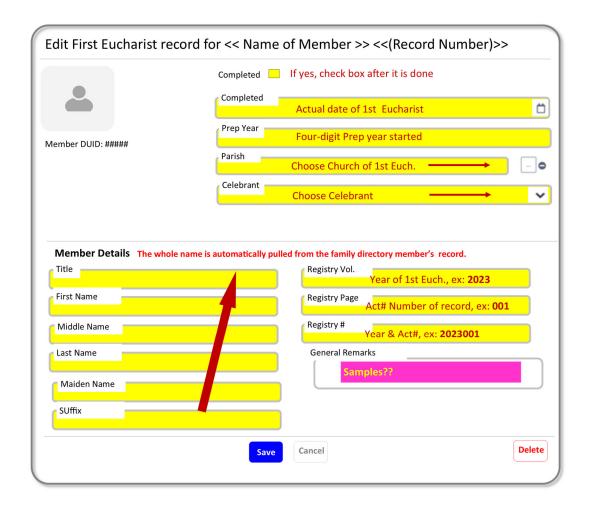
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First Eucharist

⇒ Add the First Eucharist Record

- Sacraments: How to create a sacramental record
- Sacraments: How to add a sacrament record for more than one person at a time (Group Entry)
- Go to: Family Directory (left menu), Sacraments (top ribbon), Add/Edit Sacrament (dropdown)
- Choose First Eucharist, enter the name in the proper fields and search.
- The child's name should not be found when searched. Click the button "Create new First Eucharist record"
- Find the child's name (verify the Birthdate and Member DUID before selecting the name)
- Enter the First Eucharist Record
- Click "Save".

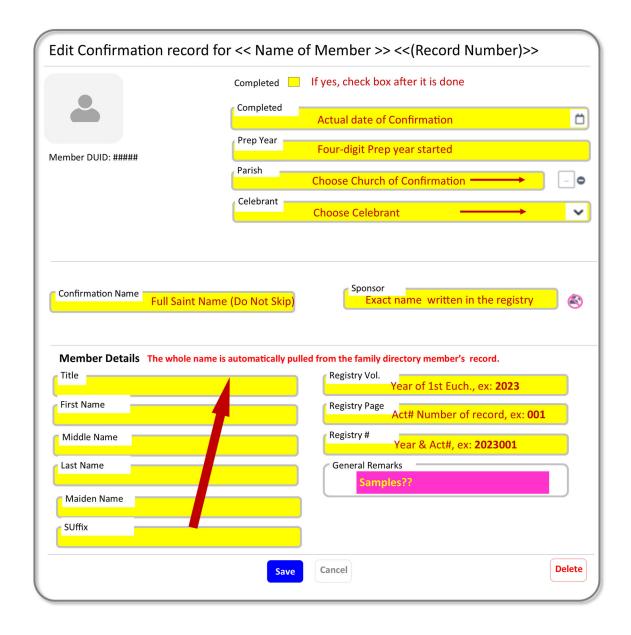




Confirmation

⇒ Add the Confirmation Record

- Sacraments: How to create a sacramental record
- Sacraments: How to add a sacrament record for more than one person at a time (Group Entry)
- Go to: Family Directory (left menu), Sacraments (top ribbon), Add/Edit Sacrament (dropdown)
- Choose Confirmation, enter the name in the proper fields and search.
- The child's name should not be found when searched. Click the button "Create new Confirmation record"
- Find the child's name (verify the Birthdate and Member DUID before selecting the name)
- Enter the Confirmation Record





Marriage

⇒ Add the Marriage Record

- Sacraments: How to create a sacramental record
- Go to: Family Directory (left menu), Sacraments (top ribbon), Add/Edit Sacrament (dropdown)
- Choose Marriage, enter the name in the proper fields and search.
- The member's name should not be found when searched. Click the button "Create new Marriage record"
- Find the member's name (verify the Birthdate and Member DUID before selecting the name)
- Enter the Marriage Record (see next page for Marriage Record Description)
- Click "Save".

Other notes:

⇒ Separation/Divorce (Export one member into a new family)

When the parish has been notified that a couple is separating or divorcing and are living apart, their original family record can be separated into two family records to correctly represent the separated family. This will not null their marriage record. They will remain connected on their marriage record until the marriage is annulled. One member can be exported to a new family (see member record). **Note: Donations will remain with the original family recored and a tax statement would be generated for that individual.

⇒ Annulment (Export one member into a new family)

If the marriage took place in your parish: Search in Add/Edit Sacrament (Marriage), view/edit Sacrament, Edit Details, Marital Status: Annulled, type information in General Remarks, Save.

Add to the General Remarks:

Declaration of invalidity PN:##-### (Date Annulment granted)

Restrictions: (if any)

Note: General Remarks will not print on a Baptismal Certificate, only in the Marriage Registry

Export one of the members into a new record. You can import children to the custodial parent or they can remain with the parents record that was not exported.

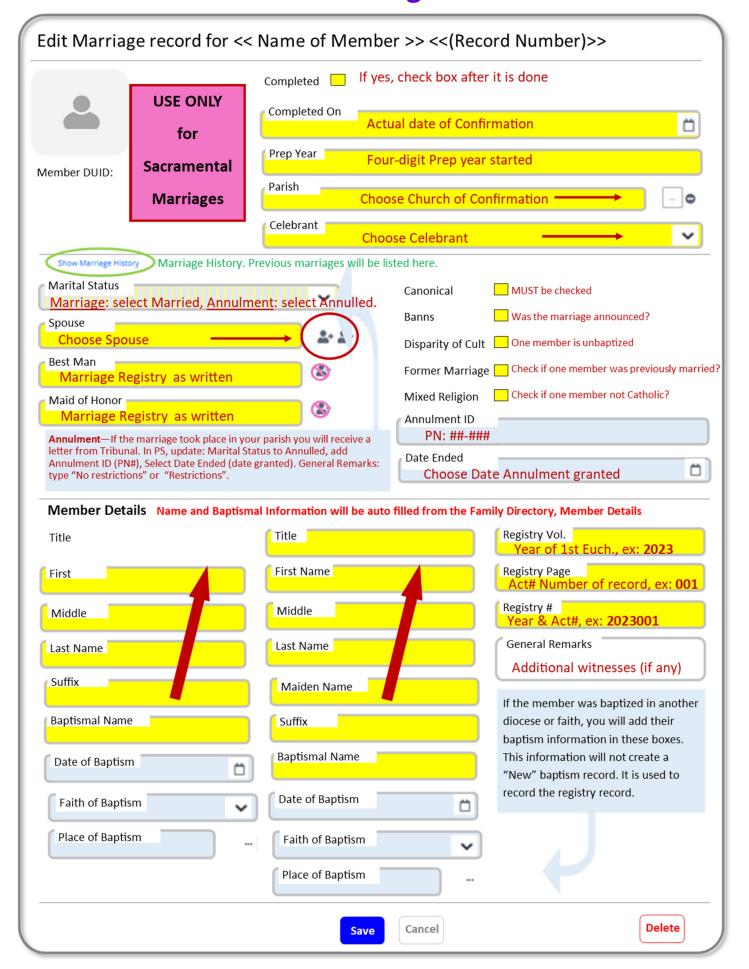
Contact the Diocesan Tribunal Office with questions about missing documentation for an annulment granted in our Diocese.



Veronica Songe Tribunal Specialist/Notary 985-850-3126 vsongehtdiocese.org

Diocese of Houma-Thiboduax

Marriage





Funeral

⇒ Add the Death/Funeral Record

- Sacraments: How to create a sacramental record
- Go to: Family Directory (left menu), Sacraments (top ribbon), Add/Edit Sacrament (dropdown)
- Choose <u>Funeral</u>, enter the name in the proper fields and search.
- The person's name should not be found when searched. Click the button "Create new Funeral record"
- Find the person's name (verify the Birthdate and Member DUID before selecting the name)
- Enter the Funeral Record
- General Remarks: Can also enter cemetery details here. This will print on the registry.
- Click "Save".

Funeral and Cemetery Record



Rite of Committal Burial Only

When there is only a graveside service (no church service), enter the following:

Completed: Date of the <u>Rite of Committal</u>

Parish: Name of the Church Parish recording the burial

Celebrant: Celebrant for the Rite of Committal.

Funeral Title:

Write: "Rite of Committal only" or "Burial only"

Do not create a Funeral Record if the Funeral or Rite of Committal did not happen at your Church parish/cemetery.

Edit Funeral record for << Name of Deceased >> <<(Funeral Record Number)>> Completed					Death	CBISCI Y
Actual date of Funeral Member DUID: ##### Place of funeral must be the recording parish. Celebrant Select Celebrant Select Celebrant Select Celebrant Select Celebrant Cemetery Name Place of Burial Anointed Anointed Anointed Anointed Funeral Title Purchase Date Purchase Date Purchase Date Purchase Cost Cause of Death Deed Issue Date Wigil Place Vigil Place Vigil Celebrant Member Details Legal name at time of death. Title Registry Vol. First Name Registry Page Middle Name Last Name Registry # General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Books's here.	Edit Funeral rec	ord for << N	lame of Dec	eased >> <<(F	Funeral Record Number	r)>>
Actual date of Funeral Member DUID: ##### Place of funeral must be the recording parish. Celebrant Select Celebrant Burial Date on Death Certificate Anointed Anointed Funeral Title Burial Date Burial Type Deed Issue Date Cause of Death Deed Owner Purchase Date Purchase Cost Cause of Death Deed Owner Weigl Celebrant Member Details Legal name at time of death. Title Registry Vol. First Name Middle Name Registry # General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Books's here.			Completed	If yes, check bo	ox after it is done	
Member DUID: ##### Select Church of Funeral			Completed	Actual date o	f <u>Funeral</u>	(
Select Celebrant Hint: press backspace button before searching for celebr Date of Death Date on Death Certificate Anointed Funeral Title Burial Date Cause of Death Cause of Death Cause of Death Cause of Death Deed Issue Date Next of Kin Parent, wife, husband, child Vigil Place Vigil Celebrant Member Details Legal name at time of death. Title First Name Meigistry Page Middle Name Registry # General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Book#'s here.	Member DUID: ####	must be the	Parish	Select Church	of Funeral	_ (
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Date on Death Certificate Anointed Funeral Title Burial Date Burial Type Deed Issue Date Cause of Death Cause of Death Cause of Death Cause of Death Deed Owner Next of Kin Parent, wife, husband, child Vigil Place Vigil Celebrant Member Details Legal name at time of death. Title First Name Registry Vol. Registry # Ceneral Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Book#'s here.			Hint: press ba	ackspace butto	on before searching for (celebra
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Funeral Title Burial Date Burial Type Deed Issue Date Deed Owner Purchase Cost Cause of Death Deed Issue Date Deed Owner Wember Details Legal name at time of death. Title First Name Registry Vol. Registry Page Middle Name Last Name General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Book#'s here.	Date on Death Cert	tificate				
Burial Type Deed Issue Date Deed Owner Deed Owner Wember Details Legal name at time of death. Title First Name Middle Name Registry Page Registry # General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks of twill print on the register. Add Burial Type Cause of Death Deed Issue Date Deed Owner			ППППППППППППППППППППППППППППППППППППППП	Grave Details	Purchase Date Purchas	
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Title Registry Vol. Registry Page Middle Name Registry # General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Book#'s here.	Vigil Celebrant		~			
Registry Page Middle Name Registry # General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Book#'s here.	-	gal name at time o	f death.	Registry Vol		
Middle Name Registry # General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Book#'s here.	nde			Registry voi.		
General Remarks If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Book!"'s here.	First Name			Registry Page		
If the funeral is held elsewhere (such as funeral home), it must be recorded in the general remarks so it will print on the register. Add Burial Registry Book! 's here.	Middle Name			Registry #		
Save Cancel De	Last Name			If the funeral is held el recorded in the genera	sewhere (such as funeral home), it must be all remarks so it will print on the register.	
			Save	Cancel		De-

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Funeral

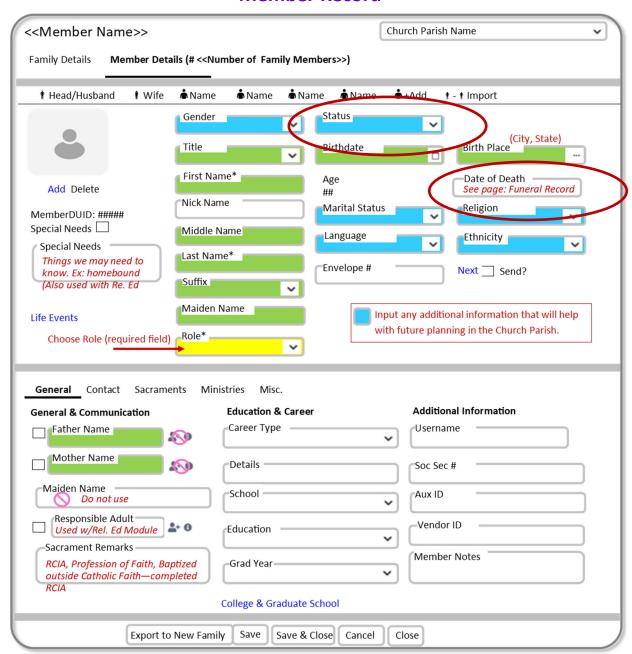
⇒ View the Family Record

Go back to the Family record to verify it has been entered correctly.

Check the following fields in the Members Record

- ♦ Status: Deceased
- ♦ Date of Death: Correct Date

Member Record

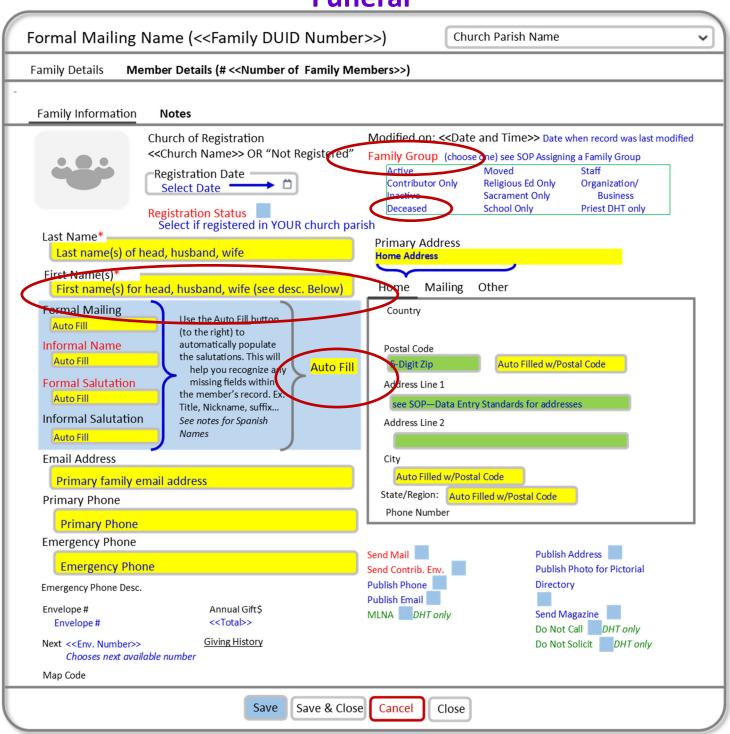




Check and update the following fields in the Family Group:

- ♦ Family Group status (if all members of the family group is deceased—select Deceased)
- First Name(s)* field: do not delete the first name of the Head/Wife/Husband. This field is a description of this family record.
- ♦ **Auto Fill Salutations** to ensure that each members record is correct. (Head, Husband or Wife) . If it does not populate correctly, view the member's record and add/edit their details.

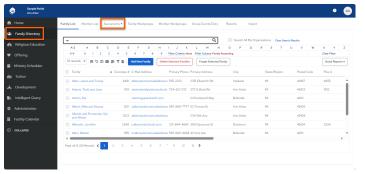
Family Record Funeral



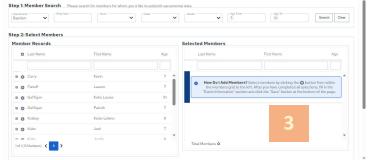


Sacraments: Group Entry

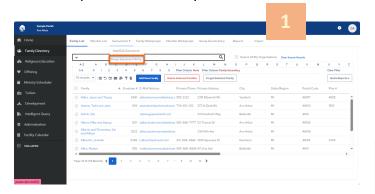
PSFS Family Directory - Sacraments: How to add a sacrament record for more than one person at a time (Group Entry)



3. Select the students you'd like to create the record for by selecting the plus sign next to their name. To select them all you can select the plus sign at the top:



 Going to Family Directory → Sacraments → Group Sacrament Entry:



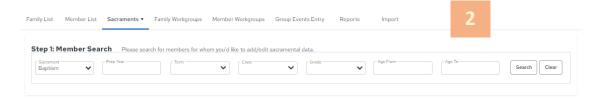
4. Check the boxes next to the information you'd like to add and put in the rect information and click save:



cor-

2. Select the sacrament you'd like to add, then the Term, and then select the class the students are in for whom you'd like to create a sacrament record. Then select search:

A Confirmation Sacrament record will be created for everyone in that was in that class.





Best Practices for searching

New Families – ParishSOFT requires you to "SEARCH DATABASE" First. (Only Parish of Registration can modify the record)

Searching: If the family is coming from a different church parish, you may have to add an "unregistered" copy of their record. (Add them as "Registered" only if they are officially registering at your church parish)

A Family can be REGISTERED in only ONE parish, but active in many!

Find Family Selected Organization: Annunziata Parish, Houma Filter by Organization: All Last Name: First Name: Use %, ex: %Name% City: Search Cancel

Data Entry:

- All USPS standards must be followed Be sure to check punctuation of streets and use appropriate abbreviations
- 3 Tabs for Addresses Home, Mailing, other *Primary* could be set to 'Home' or 'Mailing' but 'Other' will automatically replace both as *primary* when reports are used - if date fields are populated with legitimate dates
- For purposes of both diocesan and parish mailing lists the address marked as *Primary* is the most critical tab for accuracy
- Be sure Mailing Name and Formal Salutation are correctly populated – Use Autofill.

First Name: Use % on each side of the first name field being searched. This will search all names in this field string. If % is not used, it will only search the first name listed. Example: in First Name Field box: % Beth%

Example: Search for Beth Boudreaux (using advanced search instructions)

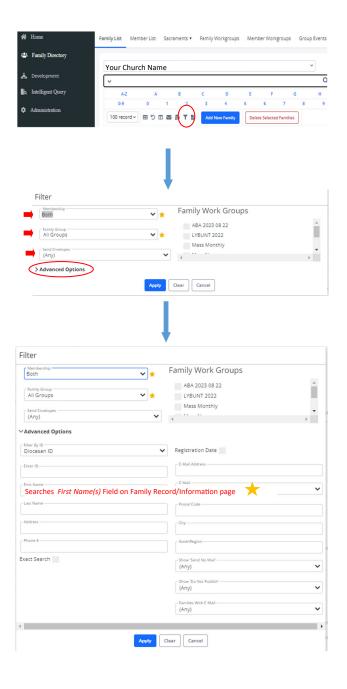
First Name Beth %Beth%
Last Name Boudreaux Boudreaux
of finds 1 37

If the child's mother and/or father's record is with their parent's family group, it may be difficult to find their record. It is helpful to have their parents names and their mailing address. Use "Add New Family" to search for the parents name and you'll be able to see the mailing address to choose the correct family. Use % when searching the first name field for a refined search.

The child's parent's Church of Baptism will also have their parents names.

Marriage Record

The marriage record should be entered from only one of the two members.



PS Org ID	Location	MainPhone	
681	Annunziata, Houma	(985) 876-2971	
	Chapel of the Blessed Sacrament	(985) 575-3551	
15963	Christ the Redeemer, Thibodaux	(985) 447-2013	
15975	Community of St. Anthony, Gheens	(985) 537-6002	
20935	Diocese of Houma-Thibodaux, Schriever	(985) 868-7720	
15984	Holy Cross, Morgan City	(985) 384-3551	
15978	Holy Family, Grand Caillou	(985) 563-2325	
686	Holy Savior, Lockport	(985) 532-3533	
688	Maria Immacolata, Houma	(985) 876-3313	
	Ministry of Healing	(985) 232-2229	
15972	Our Lady of Prompt Succor, Chackbay	(985) 633-2903	
15977	Our Lady of Prompt Succor, Golden Meadow	(985) 475-5428	
15979	Our Lady of the Isle, Grand Isle	(985) 438-4164	
15958	Our Lady of the Most Holy Rosary, Houma	(985) 876-7652	
15981	Our Lady of the Rosary, Larose	(985) 693-3433	
689	Sacred Heart, Cut Off	(985) 632-3858	
15982	Sacred Heart, Montegut	(985) 594-5856	
15983	Sacred Heart, Morgan City	(985) 385-0770	
15968	St. Andrew, Amelia	(985) 631-2333	
15970	St. Ann, Bourg	(985) 594-3548	
687	St. Anthony of Padua, Bayou Black	(985) 872-0922	
15959	St. Bernadette Soubirous, Houma	(985) 879-1506	
15988	St. Bridget, Schriever	(985) 446-6801	
15985	St. Charles Borromeo, Pointe Aux Chenes	(985) 594-6801	
15962	St. Charles Borromeo, St. Charles Community	(985) 446-6663	
684	St. Eloi, Theriot	(985) 872-2946	
680	St. Francis de Sales Cathedral, Houma	(985) 876-6904	
15964	St. Genevieve, Thibodaux	(985) 446-5571	
15960	St. Gregory Barbarigo, Houma	(985) 876-2047	
15986	St. Hilary, Mathews	(985) 537-6002	
21926	St. James Mission, Kraemer	(985) 633-9431	
15965	St. John the Evangelist, Thibodaux	(985) 447-3995	
682	St. Joseph Co-Cathedral, Thibodaux	(985) 446-1387	
15973	St. Joseph, Colliene	(985) 594-5859	
15974	St. Joseph, Galliano	(985) 242-4099	
15980	St. Lawrence Chaseboule	(985) 633-9431	
15971	St. Lawrence, Chacahoula	(985) 448-2165	
15961	St. Louis, Bayou Blue St. Lucy, Houma	(985) 876-3449	
15066		(985) 879-2632	
15966	St. Luke, Thibodaux	(985) 446-0487	
15987	St. Mary's Nativity, Raceland	(985) 537-3204	
21925	St. Rosalie Mission, Stephensville	(985) 384-3551	
15967	St. Thomas Aquinas, Thibodaux	(985) 446-6201	
15969	Thanh Gia, Amelia	(985) 631-3194	