

CATHOLIC DIOCESE OF HOUMA-THIBODAUX

ParishSOFT Standard Operating Procedures (SOP)

Version 3.0
Revised April 2022

Contents

Family Directory 4

 Registering a Family 4

 Adding a New Family 5

 Adding a Business or Organization 6

Family Groups 7

 Definition of Default Family Groups 7

 Member Status Interaction with Family Groups 9

Family Name Standards 11

 Handling Divorce Situations 13

Address Standard 14

 Home Address 14

 Mailing Address 14

 Other Address 14

Change of Address 16

Publications & Privacy Settings 17

 Send Mail 17

 Send Contrib. Env 17

 Publish Phone 17

 Publish Email 17

 MLNA 17

 Publish Address 17

 Publish Photo for Pictorial Directory 17

 Send Magazine 17

 Do Not Call 17

 Do Not Solicit 17

Preferred Communication Method 18

Member Roles 19

 Head – Husband – Wife 19

 Single Adults 19

 Unknown 19

Member Status 20

 Defining Member Status 20

 Active 20

 Inactive 20

 ActOther 20

Deceased..... 20

Member Info 21

 Maiden Name 21

Sacrament 22

 Baptism 22

 Reconciliation..... 23

 First Eucharist and Confirmation 23

 Recording Baptism of Already Adopted Children 23

 Recording Adoptions on a Baptismal Record Already Recorded..... 23

 Legal Rights of Church for Disclosure of Sacraments 24

 Important Information Regarding Certificates 24

 Genealogy Research..... 24

Administration 25

 Staff Management 25

 Notifications..... 26

 Merging Records 27

Family Directory

Revision #: 3.0

Revision Date: April 2022

Registering a Family

Title: Assigning Registration Status to Family

Description: A family may be REGISTERED in only ONE parish but can be Active in many. The following describes how the diocese recommends parishes determine the “Home” parish for a family and where they should be registered.

Details: A **REGISTERED FAMILY** is a family that fills out a registration form at the parish or parish’s website stating they would like to become registered parishioners of the parish. For intended purposes, registered does not necessarily mean active/inactive. Registered refers to the way that we keep track of the number of Catholic families in our diocese. **No family should be registered in multiple parishes!**

! It is the responsibility of the parish to keep an accurate and current list of registered families in their parish.

Revision #: 3.0

Revision Date: April 2022

Family Directory

Adding a New Family





Title: Adding a New Family

Description: This standard procedure outlines the process followed when a parish is attempting to add a new family to their database. When a new family is added into a parish's database, the system performs an automatic look-up (search) in the master diocesan directory to determine if the family is already in our database.

Details: The following information indicates how to add a new family within ParishSOFT Family Suite for recording and reporting purposes.

When adding a family into the Parish database, a search is performed to see if the family appears in another parish's database. If the family is found in the list of search results, it can be imported in. **Only if the family does NOT exist should it be added as new.**

If the family exists and is marked as registered to another parish, please follow this procedure:

1. For a genuine change of parish, send a courtesy email notification to the parish of registration listing reasons the family is leaving parish.
 2. If a courtesy email is not received, it can be assumed the record is being pulled for sacramental record changes.
-  Only the parish of registration is able to modify contact information for the family. A parish may pull a family into their database that is registered at another parish, however they will not be able to modify basic contact and family detail information, until listed as the registered parish of that family.
-  If the family being added is listed but spelled incorrectly, edit the misspelling and edit the family information as necessary to reflect the proper information. Again, if the family is registered at another parish, then the parish of registration should be contacted to decide the proper registration status.
-  Adding a family to your parish is not necessary when they make a one-time contribution, for example, a donation of \$20. However, if it is a large contribution, over the \$250 threshold, they do need to be added due to end-of-year procedures and tax reporting purposes. When a family makes contributions to your parish, but is registered at another parish, you would import the family in and choose: "Not Registered; Contributor Only". As their status.
-  **Important: The family directory is considered a census of the Diocese of Houma-Thibodaux and records all households that register and identify as Catholic within the diocese. A family record is a record of a household. All members of the household should be entered in the family record so that an accurate representation of the household is created and maintained.**

Revision #: 3.0
Revision Date: April 2022

Family Directory

Adding a Business or Organization

Title: Adding a Business or Organization to ParishSOFT Family Suite

Description: In addition to family donors – there are Organizations and Businesses that will be contributors or donors. This procedure covers the recommended way for tracking these entities in your system.

Details: The following information indicates how to create an Organization or Business within ParishSOFT Family Suite for recording and reporting purposes.

Currently, there is no specific designation for an Organization or Business within the program. You must track these entities using the Family Group value of “Organization/Business.”

There are fields such as prefix and role that are required by the program when entering a new record. Follow the guidelines below to add an Organization or Business to your system.

Enter the organization as follows:

- Prefix: Mr
- Last Name: Knights of Columbus
- First Name: . (period)
- Role: Head
- Gender: Male (default)

Enter the address as you would for any record.

- ! Registration Status = Unregistered
- ! Family Group = Organization/ Business
- ! **Do not use auto fill** for the salutations. These fields will be a manual entry. See example:
 - Formal Mailing Name: Knights of Columbus
 - Informal Mailing Name: Knights of Columbus
 - Formal Salutation: Knights of Columbus
 - Informal Salutation: Knights of Columbus

 You may add a member record if you want to track the primary contact person of the organization.

Revision #: 3.0
Revision Date: April 2022

Family Directory

Family Groups

Title: Assigning a Family Group

Description: Family Groups allow for the quick sorting and filtering of various types of family data that resides in your ParishSOFT Family Suite. A family can only be assigned one Family Group. Make sure it is the group that represents the primary engagement with the parish.

Details:

- *Best Practice: every family record must contain a Family Group assignment.
- *Diocese approved Family Groups you will use in ParishSOFT are listed below.
- *Recommended Registration status is listed in parenthesis for each Family Group type

Definition of Default Family Groups

| | |
|---|--|
| <p>Active (Registered)</p> | <p>Active families are those where one or more members are also designated as active; Those families that are actively participating in many activities with the parish. Recommended family status is Registered. However, a family may be active and not registered in your parish.</p> |
| <p>Contributor Only (Unregistered)</p> | <p>Family is contributing but not registered in this parish. Recommended family status is unregistered; they are giving but have never formally registered.</p> |
| <p>Inactive (Registered or Unregistered)</p> | <p>A family is considered inactive when all members are designated with a status of inactive (or whatever criteria the diocese and/or Pastor decide upon). This family group can be used to manage your census data and track those families that have shown no participation in-parish. Think of this group as another opportunity for engagement. Family status can be registered or unregistered depending on the circumstance.</p> |
| <p>Moved (Unregistered)</p> | <p>Family has moved out of the diocese. Family status is unregistered.</p> |
| <p>Religious Ed Only (Unregistered)</p> | <p>The family participates only in the religious education program but is not registered in this parish. Family status is unregistered.</p> |

| | |
|---|--|
| <p>Sacrament Only (Unregistered)</p> | <p>Family is there to receive a sacrament, however is not a registered member of your parish and does not affect your census. (A bride wants to get married at her childhood home parish, or the parents who want to have their baby Baptized in the grandparent’s parish.) Family status is unregistered.</p> |
| <p>School Only (Unregistered)</p> | <p>Student at a school who is not registered in any parish. Family status is unregistered.</p> |
| <p>Staff (Unregistered)</p> | <p>Member of the staff who is not registered in any parish. Family status is unregistered.</p> |
| <p>Organization/ Business (Unregistered)</p> | <p>Any business or organization that supports and/or is affiliated with the parish. Family status is unregistered.</p> |
| <p>Deceased (Unregistered)</p> | <p>When all members of the household have a member status of Deceased. Family status is unregistered.</p> |

- ! **These values are global. If you would like to request an additional value be added, please contact your Arch/Diocesan Administrator.**
- ! **If you are unsure about entering in the status, contact the Diocesan office for guidance by emailing support@htdiocese.org.**

Family Groups

Revision #: 3.0
Revision Date: April 2022

Member Status Interaction with Family Groups

Title: Recording family and member status

Description: This standard procedure outlines the process that should be followed when a parish is adding a new family and must specify the family’s status as well as the member’s status. There are several scenarios that could occur within a parish that must be identified. A proper family status and member status combination will describe an individual’s unique standing within the parish.

Details: The following process should be followed:
The following example scenarios list how a person may be represented in the Parish.

| Parishioner Scenario | Family Registration Status | Currently Registered box <input checked="" type="checkbox"/> | Family Group | Member status |
|--|-----------------------------|--|--------------|--|
| Active/Registered | Registered | Yes | Active | All members – active OR Individual Members may be a combination of Active, ActOther, Inactive, or Deceased |
| Non-Catholic member of Standard Registered family | Registered | Yes | Active | ActOther |
| Standard Inactive family | Not Registered | No | Inactive | Inactive |
| All members of the family are Deceased | Not Registered | No | Deceased | Deceased |
| Non Member | Not Registered | No | Inactive | Inactive |
| Registered in Another Parish Active in Your Parish | Registered at (Parish Name) | No | Active | Active |
| Contributor | Not Registered | No | Contributor | Inactive or Active |

| Parishioner Scenario | Family Registration Status | Currently Registered box <input checked="" type="checkbox"/> | Family Group | Member status |
|---|----------------------------|--|---------------------------|--|
| Organization/Business | Not Registered | No | Organization/ Business | Inactive or Active |
| Staff that is a registered parishioner | Registered | Yes | Staff | Active |
| Staff, unregistered parishioner | Not Registered | No | Staff | Active |
| School only | Not Registered | No | School Only | Family Inactive / Child Active |
| Registered family that has moved out of the diocese | Not Registered | No | Moved | Inactive |
| Sacrament Only Family | Not Registered | No | Sacrament Only | Inactive |
| Religious Ed family that is not registered | Not Registered | No | School Only | Family Inactive / Child or Member Active |

To ensure that the proper family and member status is used, look up the scenario in which the family or person applies in the table above and complete the family, registered, and member status fields in the manner in which it is described in the table.

- ! If you are unsure about entering in the status, contact the diocese office for guidance.
- ! For intended purposes, registered does not necessarily mean active/inactive. Registered refers to the way we keep track of an individual family. **Reminder: No family should be registered in multiple parishes!!**

Family Directory

Revision #: 3.0
Revision Date: April 2022

Family Name Standards

Title: Data Entry standards for family names

Description: Data entry standards should be used to ensure the proper formatting for mailing lists, letters, and emails.






Good data entry practices such as searching for the family record before adding it, using correct spelling of a family’s name and adding member birthdates will all help in preventing the introduction of duplicate entries.

Details: When adding a new family, proper spelling and punctuation should be used at all times. Please use the full legal name.


You must always check to see if the family already has a record in the database. Use proper case when searching the record.

If the family is listed, but spelled incorrectly, go into the Family Details page and correct any misspellings. **It is important for data integrity that you do not add a new record when one already exists.**


The following best practices should be followed:





-  When adding a family that is not present in the database, be sure to capitalize the first letter of the first name as well as the first letter of the last name. Failure to adhere to this will cause unprofessional appearances of the name when sending mail merge letters or other communications to the family.
-  Every family record must have at least ONE member record with the role type of Head, Husband or Wife. These member roles are synonymous.
-  When a head of family has a suffix in their name, such as Jr. or Sr., add a comma following that person’s first name in the “First Name(s)” field. For example, the family of Jacob Smith Sr. and Eula Smith should be listed as “Jacob, Sr. and Eula” in the “First Name(s)” field. In family searches, it would then appear as “Smith, Jacob, Sr. and Eula.” This is to help better find certain heads of family with common names.
-  Upon entering member information, a married couple is to be entered as husband and wife, whereas a single person would be head of household (Head).
-  If the wife chooses to retain her maiden name or combine it with her husband’s surname, enter the member last name for the wife as she wishes it to appear. For example:

| | |
|----------------|------------------------|
| Husband | John Doe |
| Wife | Jane Taylor-Doe |

-  Use of Autofill will create the following naming convention for each field listed below:

| | |
|------------------------------|--|
| Mailing Name | Mr. John Doe and Mrs. Jane Taylor-Doe |
| Informal Mailing Name | John Doe and Jane Taylor-Doe |
| Formal Salutation | Mr. Doe and Mrs. Taylor-Doe |
| Informal Salutation | John and Jane |

-  Deceased family members should **NOT** be included in any fields within the “Family Information” tab.

-  The system requires complete gender, role, and first and last name on each member record.
-  Best practice for autofill purposes is to also complete the title, nickname and suffix fields on the member record.
-  **Do not** use a character such as forward slash (/) to indicate a couple.
-  **Do not** use an ampersand (&) in place of the word “and”.

Standard Member Title

Standard Member Suffix

| | |
|--------------|----------|
| Mr. | Jr. |
| Mrs. | Sr. |
| Miss | I |
| Ms. | II |
| Dr. | III |
| Master | IV |
| Rev. | V |
| Rev. Mr. | CPPS |
| Rev. Msgr. | CSSR |
| Very Rev. | Esq |
| Most Rev. | esq. |
| Fr. | M.D. |
| Deacon | MD |
| Br. | OD |
| Brother | OFM Conv |
| Sister | OSF/S |
| His Eminence | OSFS |
| Excellency | OSF/T |
| Judge | OSU |
| Capt. | PhD |
| Lt. | RSM |
| | SJ |
| | SND |
| | VF |
| | VG |
| | VJ |

Family Directory

Revision #: 3.0

Revision Date: April 2022


Handling Divorce Situations

Title: Data entry standards for divorced couples

Description: This procedure outlines the processes that should be followed when addressing a divorced couple situation.

Details: There will be situations where a couple becomes divorced or separated. In such cases, please be sure to export one of the individuals into their own family record. Furthermore, update the original record's name fields accordingly.

If children are involved, they should only be listed under one family group. The question should be asked of the members which parent is the custodial parent. If joint custodians, the question should be asked which parent's family profile the child or children should stay with.

 There will be situations when you need to maintain contact with both parents after a divorce or separation. Creating a Work Group for divorced parents is the best way to handle this situation. The work group should be created for the parent that does not have the child or children listed in their family group. This will allow for quick identification and communication of information regarding the couple's children.

! If assistance is needed with creating work groups, contact diocese for guidance by emailing support@htdiocese.org.

Address Standard

Revision #: 3.0
Revision Date: April 2022

Title: Data Entry standards for addresses

Description: This procedure outlines the process that should be followed when a user is attempting to add a new address to the family directory. This standard follows ParishSOFT Family Suite and US Postal Service regulations. Data entry standards should be used to ensure the proper formatting of mailing lists, letters and emails.

Details: Definition of Home, Mailing and Other – Function of CASS validation

Home Address

The physical local residence.


Mailing Address

The alternate address to which mail is delivered. This is generally a P.O. Box

Other Address

The away address typically used for seasonal residents or snowbirds. This address provides the ability to enter dates in which this alternate address is valid. Note: the system will automatically change to this address during the period listed.

 **Be certain the Primary Address drop down points to the correct mailing address.**

 Please note that this format follows USPS guidelines.

Yes, Use This Format

1234 S Main St
5648 S 200 W
45 E Palm Rd Rm 456
PO Box 123

Do Not Use This Format

1234 South Main St.
5648 South 200 West
45 E. 9933 Room 456
P.O. Box 123

The following are the most common Street Suffix Abbreviations:

| For | Use | For | Use |
|-----------|------|-------|------|
| Avenue | Ave | Pike | Pike |
| Boulevard | Blvd | Pine | Pine |
| Circle | Cir | Plaza | Plz |

| For | Use | For | Use |
|----------|------|-----------------|----------|
| Court | Ct | Post Office Box | PO Box |
| Drive | Dr | Road | Rd |
| Heights | Hts | Route | Rte |
| Isle | Isle | Shore | Shrs |
| Junction | Jct | Square | Sq |
| Lane | Ln | State Roads | State Rd |
| Mount | Mt | Street | St |
| Park | Park | Terrace | Ter |
| Parkway | Pkwy | Trail | Trl |

Common abbreviations that you can use in apartment/building addresses include:

| For | Use | For | Use |
|-----------|------|------------|------|
| Apartment | Apt | Room | Rm |
| Building | Bldg | Department | Dept |
| Floor | Fl | Unit | Unit |
| Suite | Ste | | |

! No punctuation, symbols, or special characters are to be used in these fields.

Family Directory

Revision #: 3.0

Revision Date: April 2022

Change of Address

Title: Change of address

Description: When a family changes their address for any reason.

Details: The family's previous address **should** be noted and documented in the family notes field along with the date of change and reason for change.

Family Directory

Revision #: 3.0
Revision Date: April 2022

Publications & Privacy Settings

- Title:** Standards for publication and privacy of the family record.
- Description:** Identifying the areas of publication and privacy within family screen
- Details:** These check boxes are used to keep track of families regarding their preferred correspondence and privacy settings.

Send Mail

Check if the family wishes to receive mail. Uncheck if the family does not wish to receive mail.

Send Contrib. Env.

Check if the family wishes to receive contribution envelopes. Uncheck if the family does not wish to receive contribution envelopes.

Publish Phone

Check to allow the phone number to be printed in rosters and directories. Uncheck to conceal the phone number on all roster directories and other printed material.

Publish Email

Check to allow the e-mail address to be printed in rosters and directories. Uncheck to conceal the e-mail address on all roster directories and other printed material.

MLNA

MLNA means "Moved, Left No Address." Check this if the family moved and left no updated address.

Publish Address

Check to allow the address to be printed in rosters and directories. Uncheck to conceal the address on all roster directories and other printed material.

Publish Photo for Pictorial Directory

Check to allow the family photo to be printed in rosters and directories and used in My Own Church. Uncheck to conceal the family photo on all roster directories and in My Own Church.

Send Magazine

Check if the family wishes to receive magazines and bulletins. Uncheck if the family does not wish to receive magazines and bulletins.

Do Not Call

Check if the family does not wish to be called. Uncheck if the family does not mind calls.

Do Not Solicit

Check if the family does not allow solicitation. Uncheck if the family allows solicitation.

! If all members of the family are deceased, make sure all check boxes are unchecked.

Family Directory

Revision #: 3.0

Revision Date: April 2022

Preferred Communication Method

Title: Standards for preferred communication method.

Description: This procedure outlines the proper way to record a family's preferred communication methods.

Details: Preferred communication methods are to be recorded in the **General** section of the **Notes** tab on the family record. Simply type "Preferred Communication Method:" followed by whichever method the family prefers, separated by commas if there are multiple. The primary communication methods recorded by the diocese are:

- Phone
- Text
- Email
- Mail

Family Directory

Revision #: 3.0
Revision Date: April 2022

Member Roles

Title: Assigning member roles within the family

Description: This standard outlines the proper assignment of member roles and relationships within the family record.

Details: Everyone must be given a role in the Member Tab. Incorrect use of Roles can cause inaccurate information on some reports.

Family member roles are based on how they relate to the Head, Husband or Wife in the family record. For instance, if the husband’s mother moves in with them, her role would be Mother because she is the Mother of the husband, **not** Grandmother to the children. There are various roles. See below:

Head – Husband – Wife

Each record must have one of these three primary roles assigned. For consistency, married couples are given the roles **Husband** for the man and **Wife** for the woman. **Head** is only used for non-married persons. A common example would be newly separated or divorced families.

Single Adults

Two single, non-married adults that live together, such as a boyfriend and girlfriend or brother and sister, should be included on the same family record unless otherwise directed by the family.

- ! Remember, the family directory is treated as a literal census that records all households within the diocese. All individuals within a household must be recorded in the family record so you are creating an accurate representation of the household. This includes recording non-married couples, same-sex couples, and adults living together who are not in a relationship such as adult siblings.

If otherwise directed by the family, the adults should have their own separate family records, both with roles of Head. For instance, if the adults within the household prefer to get separate mail from each other yet live at the same address.

Unknown

This role would only be used until you can determine the correct role for this individual. This should NOT be a permanent role.

- ! **If you have a question about Roles, contact the diocese office for guidance by emailing support@hdiocese.org.**

Family Directory

Revision #: 3.0
Revision Date: April 2022

Member Status

Defining Member Status

Title: Selecting the proper member status.

Description: This standard outlines the use of proper member status within the family record. Often families will contain members that are not Catholic or are no longer actively participating in the church.

Details: There are four standard member statuses within the system: Active, Inactive, ActOther, and Deceased.

Active

This member is actively participating in the parish. When using this designation, the religion field should reflect Catholic. (See ActOther for someone active in the parish but declares themselves another religion)

Inactive

This member is not actively participating in the parish. This could be a college student away from home, or some other scenario where the member is no longer participating.

ActOther

This is used for members that are actively participating in the parish but are not Catholic. When using this designation, the religion field should reflect the religion of this member, e.g. John Doe is Catholic, his member status is Active, his religion is Catholic, Jane Doe is Episcopalian, her member status is ActOther and her religion is Episcopalian. This is an opportunity for evangelization and contributes to the parish statistics.

Deceased

This member status is used when a family member dies. When status is used, a date of death should be completed. Member and family records of deceased people should not be removed or deleted from your Family Directory. The records should be maintained for historical tracking purposes.

- Note: The Date of Death field is only editable when the member status has been set to Deceased.

! These Member Status fields cannot be modified.

Family Directory

Revision #: 3.0

Revision Date: April 2022

Member Info

Maiden Name

Title: Tracking maiden name

Description: A maiden name should be included in the record where possible.
This field is used when creating sacramental records and certificates.
It must be present to run certificates for Baptism of associated children.
This assists with genealogical record keeping and to ensure the proper tracking of an individual from birth to death despite a name change.
Example: Due to marriage.

Details: This field should be completed when entering Baptismal records

Family Directory

Revision #: 3.0

Revision Date: April 2022

Sacrament


Title: Recording sacramental data

Description: The electronic ParishSOFT entries **DO NOT** replace the physical Sacramental Register (handwritten book). Parishes are required by universal law to keep a permanent record of baptism.

Keeping electronic sacramental records provides both the parish and diocese with a disaster recovery backup should a catastrophic event occur.

- Data entries must be completed in a timely manner and contain complete information.
- Update the sacraments when updating other information on the member record.

Details: All Sacraments should be **recorded in BOTH** the register book and maintained electronically in ParishSOFT.


 **Anyone, employees or volunteers, with access to sacramental details needs to recognize the seriousness of the confidential nature of this information. Any changes being made to sacramental information must be supported by proper legal documentation. Please reach out to the Diocesan Archive & Historical Research Center located in Thibodaux.**

Baptism


Check completed when a canonical baptism has taken place in your parish. Date is the actual date of baptism. Prep year is just the four-digit year of the baptismal preparation seminar. Parish and celebrant can be populated by searching the menu located to the right of the field box.

Baptismal name should include the full name of the child at baptism (first, middle, last, suffix). Faith of baptism should indicate the faith in which the child was baptized. For the Diocese of Houma-Thibodaux recording purposes, we record Catholic for a canonical baptism.

Sponsors are confirmed Catholics, at least 16 years of age and in good standing with the Church. Each child baptized should have at least one sponsor, according to Canon law.

 Those who qualify as sponsors are: Catholics, who have been confirmed, are at least 16 years old and are leading “a life of harmony with the faith and the role to be undertaken” (Canon 874).

Witnesses are for non-confirmed Catholics and Christian witnesses of other denominations.

 A person who belongs to a non-Catholic ecclesial community may not be a sponsor at the baptism of a Catholic, but may be recorded as a witness together with a Catholic sponsor (Canon 874).

Sponsors/Witnesses **can never be changed** once the child is baptized, unless written permission is obtained from the Bishop.

The hard copy (hand-written) sacramental register is for parishes to document sacraments performed in that parish. For easy cross referencing in ParishSOFT, always complete the Registry volume, record and record number fields.

Registry volume is the year of the record and must be four digits, i.e. 2022.

Record is the assigned number from the series of records and must be a three-digit number, i.e. 001.

Record number is the registry number and record combined, i.e. 2022001. (This provides a unique record number for this sacrament in the parish)

General remarks should only contain information on proxy, marriage notations, annulments or RCIA information. This information is retained and printed on the baptismal register.

General remarks **do not** print on the certificate, but do print on the registers.

Reconciliation

The date of reconciliation **should never** be recorded and a certificate should never be issued with a date of reconciliation. We can never verify if the reconciliation actually took place. For Religious Education and 1st Communion Preparation purposes, you may check off the box, enter the prep year and the parish. Certificates can only state that they completed the preparation for the sacrament.

First Eucharist and Confirmation

The recording of First Eucharist is per parish discretion. However, parishes are required by Canon Law (Canon 895) to record the Sacrament of Confirmations in their parish.

These fields should be recorded to have a completed sacramental historical record. Additional information can be recorded in the general remarks field, per parish discretion, i.e., child was baptized in a different parish out of state or out of diocese and they have been granted eligibility to receive the sacrament of confirmation by a pastor.

Each sacrament contains an individual tab with information to be completed. For example, confirmation requires saint name and sponsor name.

Also, for each sacrament, this is where the register number, record and register volume are recorded. Follow the registry, record and record number requirements previously mentioned above.

Recording Baptism of Already Adopted Children

The Baptism is to be recorded in the usual manner of recording a Baptism. The child is added as a new member record under its adoptive name and the name of the adoptive parents are listed. In the "General Remarks," a notation should be made of the Civil Court which issued the decree of adoption, together with its date and number. Information about the natural parents are not recorded.

Recording Adoptions on a Baptismal Record Already Recorded

When recording an adoption of an already baptized person, the original record history must not be lost. **NEVER DELETE THE EXISTING SACRAMENTAL RECORD** nor delete or change any information in the existing record, rather, build a new member record in that family. The old member record is marked inactive and a note is made in the remarks field referencing the adoption, i.e. "Adopted by Mr. & Mrs. John S. Doe 12/02/2001 – see active record." Parentheses are placed around the last name in the member name field. Parentheses are also placed around the parent's names in the General Tab screen and the last name in the Name at baptism field.

A new member record is created and marked active. The name is recorded using the new surname along with the original date, place, and minister of baptism. The adoptive parents' information is entered in the General Remarks

using the same date and place of birth. The names of the sponsors are not added. No mention of the adoption will be made on the certificate. In the remarks field, a notation is recorded referencing the adoption, i.e. Adopted 12/02/2001- original name was John Samuel Doe – see inactive record.

Recording should stop in the original record and all new information or future sacraments should be recorded in the new (adoptive) record.

Legal Rights of Church for Disclosure of Sacraments

Sacramental history and records are not to be shared with anyone other than the person who received the sacrament, the priest, the guardian (if involving children under 18), or a parish/diocesan representative. If your parish has any questions about documenting sacraments, canonical questions, or the hard copy Sacramental Register, please contact the Diocesan Archives & Historical Research Center located in Thibodaux.

Important Information Regarding Certificates

Unlike other certificates, the certificate of baptism is a canonical document that indicates the person's canonical status in the Church. When completed, it must be verified against the sacramental register and include the full and accurate notations on the reverse side.

Parishes should not delete any sacramental history from individual records in the sacramental register or ParishSOFT without proper legal documentation.

In general, reporting of sacraments takes place by the parish where the sacrament was conferred (an exception is possible for confirmation). The parish must create a record for all sacraments conferred, regardless whether the person is a member of the parish (also see information on adoption).

Baptism certificates should only be printed by the baptizing parish. Each time a certificate is requested, the register (hand written) should be pulled and information in ParishSOFT verified. If corrections are necessary, make them according to the official register (hand written).

Genealogy Research

This should **never** take place in the parish. Anyone requesting genealogy records or conducting such research should be referred to the Diocesan Archives & Historical Research Center in Thibodaux.

Revision #: 3.0

Revision Date: April 2022

Administration

Staff Management

Title: Setting up and maintaining staff records

Description: This standard procedure describes the process that should be followed when a parish is setting up a staff record. This procedure also applies when new staff members join and when a staff member leaves. It is necessary to keep information within the staff directory current to utilize the background check most effectively.

- Best Practice: keep records of all staff and volunteers in your parish

Details: The following process should be followed:

- Add **all** staff members (whether they are parishioners or not) into the family directory.
- The staff member must have a family record present in your family directory. If they are registered at another parish, import the record as unregistered.
- Non-Catholic staff members must have a family record. The family would be **unregistered** and the family group **Staff**.
- The individual is added to the staff list by the system administrator who must then select the access rights for that user. Keep in mind that some staff and volunteers may not need access to all areas of the ParishSOFT Family Suite.

Administration

Revision #: 3.0

Revision Date: April 2022

Notifications

Title: Notifications of record changes by another organization

Description: Notifications are generated to the parish when activity happens on a record to which your parish has a connection.

These notifications include Family Merge and change of parish registration

Details: The system administrator should review the notifications and insure that necessary adjustments to the record are completed.

Adjustments could include removal of such items as sending envelopes, ministry participation, family or member workgroups, and changing family group status.

Revision #: 3.0

Revision Date: April 2022

Merging Records

Title: Standards for merging duplicate records

Description: At this time, all duplicates must be merged at the diocesan level.
The diocese will only merge duplicates in which there is a clear match.

If there is any question regarding the ability to match a record, the diocese will contact the parish involved and possibly the parishioner.

Details: It is the responsibility of the parish to thoroughly research possible duplicate records and notify the diocese so they can be merged.

There are two types of duplicates:

- Internal parish duplicates (duplicates within your own parish data)
- Cross parish duplicates (duplicates between your parish and another parish)

- ! Once records are merged they cannot be undone. Research must be accurate and thorough.
- ! The diocese-preferred method for removal of records is the process of merging so that only one permanent record remains. Duplicate records should NEVER be deleted.
- ! **To submit a merge request, email the necessary Family DUID and/or Member DUID numbers of the duplicate family and/or member records to support@htdiocese.org with “Merge Request” as the subject.**