

From Implementation to Stabilization & Optimization

As we continue our preparations for the implementation of Partners in Gospel Parish Families, we are focusing on Phase 0 and Phase 1 activities:

Phase 0: PREPARE (Now – July 2024) - There are four areas of focus, as we move through Phase 0 – 1) Giving Portal; 2) Apps; 3) Sacrament Logging; and 4) Profile Management:



ParishStaq
Phase Zero: PREPARE
(Now-July 2024)

PARTNERS IN THE GOSPEL

Phase Zero: focuses on the current parish, in preparation for a future parish family. This is a time to assess the state of the parish and to get ready for transition. Phase 0 is for preparation with a focus on the current parish and its people. Stability is key.

- Giving**
\$
Migrate to Parish-Managed-Funds
All Posting in Pushpay Giving Portal
February 2024
- Apps**
LEAD APP for parish leadership
Our Catholic Community App for Parishioners
- Sacraments & Duplicates**
Sacrament Tracking for all Sacraments
Continue to focus on deduping profiles within your parish

- All sites should be working with Matt Feria, our Customer Success Manager, from Pushpay, on creating their own funds and transitioning the Org Funds to the Parish Funds.
- All batch entry should be taking place in the Giving Portal of the ParishStaq Suite.
- The team highly recommends that parish staff members and any trusted volunteers who are in leadership roles download the LEAD App. Please see this help article for how to download: <https://aosparishionerengagement.weebly.com/lead-app.html>
- Parishes will want to work with their community to determine the best time to launch their site on the Our Catholic Community App
- In addition to entering all Sacraments in your official Sacramental Registries, you'll also want to enter all Sacraments in ParishStaq. These will ultimately "roll up" for the Parish Annual Report, starting with the 24-25 report, but this practice should be in place, starting January 2024.

Phase 1: WELCOMING (2024-2025) - There are a couple of key areas of focus as we move into the active implementation of ParishStaq across Parish Families – 1) Determine a Lead ParishStaq Campus Admin for your Parish Family and 2) ParishStaq Onboarding/Offboarding:



Lead ParishStaq Campus Admin



Lead ParishStaq Campus Admin

- The ParishStaq/Technology advisory team in consultation with Pastor can select a Lead ParishStaq Campus Admin and notify the Parishioner Engagement Team by emailing parishstaq.support@seattlearch.org. The team will adjust positions and permissions for parish family staff based on the direction of the pastor and/or the Lead Family Campus ParishStaq Admin.
- Depending on changes made, management of ParishStaq users within a Parish family will be turned over to the Parish Family as soon as reasonably possible.
- Lead ParishStaq Campus Admin should assign permissions early in Phase 1 (starting July 1) to ensure timely completion of work in accordance with Parish Family planned use of ParishStaq.

ParishStaq Onboarding & Offboarding

An essential element of great security for the system is maintaining proper onboarding and offboarding procedures. This applies to all areas of technology for your parish. For ParishStaq, there are two primary areas of permissions and access that must be maintained – 1) Giving Portal and 2) the ChMS Database:

ParishStaq Onboarding Best Practices

| ChMS Database Access | Giving Portal Access |
|---|---|
| Who: Staff and Trusted Volunteers in Group Leadership | Who: Financial Admins and Trusted Batch Posting Volunteers |
| Locate or Create a ChMS Profile for user. Please use the parish business email address for staff members. If staff members are members of another parish or have active personal giving in your parish, you might consider adding a 'staff' persona profile for them. Many have added "(Staff)" or a position name to the end of the last name to easily identify the business profile vs. a personal profile. If you do this, mark these staff profiles as type 'Participant.' | The main Campus Admin submits a support ticket directly to Pushpay requesting either 'Batch Entry' or 'Listing Level' access for their listing(s). For more details on these two levels of access, please see this help article : https://support.pushpay.com/s/article/Pushpay-Administrator-Roles |
| Set proper Admin Permissions on their profile. See this article for details on the admin permission options - https://support.pushpay.com/s/article/How-To-Assign-Remove-Admin-Privileges | The new Giving Portal user receives a Giving Portal activation email that they must accept within 10 days. |
| Send Activation Emails – Actions User Account Management Send Activation Email | |
| The new ChMS user receives an activation email that they must accept within 10 days. | |

ParishStaq Offboarding Best Practices

| ChMS Database Access | Giving Portal Access |
|---|--|
| Who: A Staff Member or Trusted Volunteer leaving their role. | Who: A Financial Admins leaving their role |
| Locate the ChMS Profile for the person leaving their role. | The main Campus Admin submits a support ticket directly to Pushpay requesting that access to the Giving Portal be remove and mark the ticket as HIGH priority. |
| Go to Involvement tab and click on the ... on the Groups tile and check for Groups that the member is a LEADER of and change the leader position to someone else. | |
| On the Actions dropdown, select User Account Management Revoke Access | |
| On the Actions dropdown, select Admin Permissions and remove all Admin Permissions | |
| If this is a Staff Member leaving their role, remove the email address on their profile and mark INACTIVE. | |

Upcoming Training Opportunities

| Date/Zoom link | Topic |
|--|--|
| April 23 @ 1PM Office Hours/ https://us06web.zoom.us/j/84300906628?pwd=Lsu5aXiQErgtSg9eeS0l5f4UyP8kSU.1 | Giving Portal Fund Management for Financial Admins |
| April 30 @ 1PM Office Hours/ https://us06web.zoom.us/j/85302873679?pwd=nW6FLPH3HPNc1yyV1z5N5M6w2aDQ4g.1 | Process Queues & How to Manage Across Campuses |