

From Implementation to Stabilization

As we continue our work with stabilization and optimization of our ParishStaq implementation, we turn our attention to some further cleanup of the migrated data. During data migration, we migrated several fields from PDS into “custom fields” in ParishStaq.

Custom Fields Migrated into ParishStaq:

- Envelope User
- Religion
- Ethnicity
- Language
- Maiden Name
- Second ID
- Family Formal Salutation
- Family Mailing Name
- Family Informal Salutation
- Member Formal Salutation
- Member Informal Salutation
- Member Mailing Name

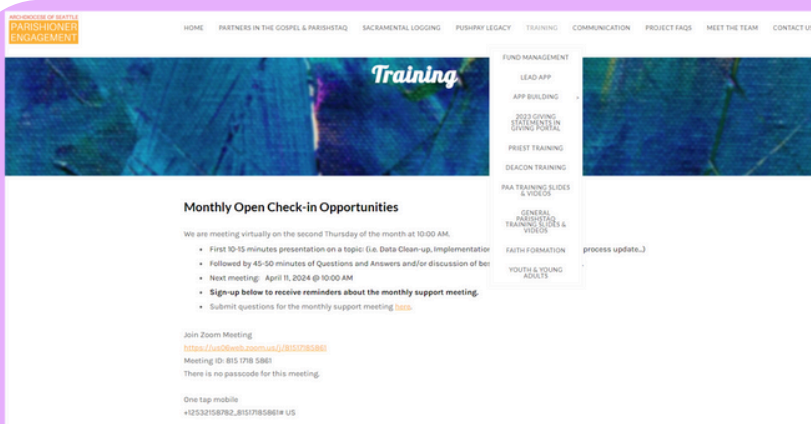
Following the ACA Follow-Up letter timing, we will be moving the majority of these to newly provided PROFILE fields in ParishStaq. The vendor has added these profile fields in response to our requests and in consultation with other Catholic Dioceses. The cleanup process involves our team and the team from Pushpay moving the custom fields values to the newly provided Profile fields. The following defines the mapping from custom to profile and the final removal or retention of the custom field:

Migrated Custom Field	Moved to ParishStaq Profile Field	Remove or Retain Custom Field
Custom Field - Envelope User	Envelope User	Remove
Custom Field - Religion	Religion	Remove
Custom Field - Ethnicity	Ethnicity	Remove
Custom Field - Language	Preferred Language	Remove
Custom Field - Maiden Name	Maiden Name	Remove
Custom Field - Alt Family ID	Diocesan ID	Remove
Custom Field - Family Formal Sal	No longer needed - See Family/Household Mailing Name	Remove
Custom Field - Family Informal Sal	Custom Field will be retained	Retain
Custom Field - Family Mailing Name	Family/Household Mailing Name	Remove
Custom Field - Formal Sal	No longer needed - can be created from Profile Fields	Remove
Custom Field - Informal Sal	No longer needed - can be created from Profile Fields	Remove
Custom Field - Mailing Name	No longer needed - can be created from Profile fields	Remove

Key Notes on Migration:

- When we migrate data between custom fields to profile fields, we will NOT overwrite data in the profile fields (if they are populated) as we'll assume that is the good data.
- We will work closely with NCS Envelope Company to ensure that they are aware when we make the Envelope User checkbox migrations, so that they can be sure to pull the proper envelope files.
- We will update and have available the OSV Envelope extraction instructions prior to migrating the Envelope User data.

Upcoming Training Opportunities

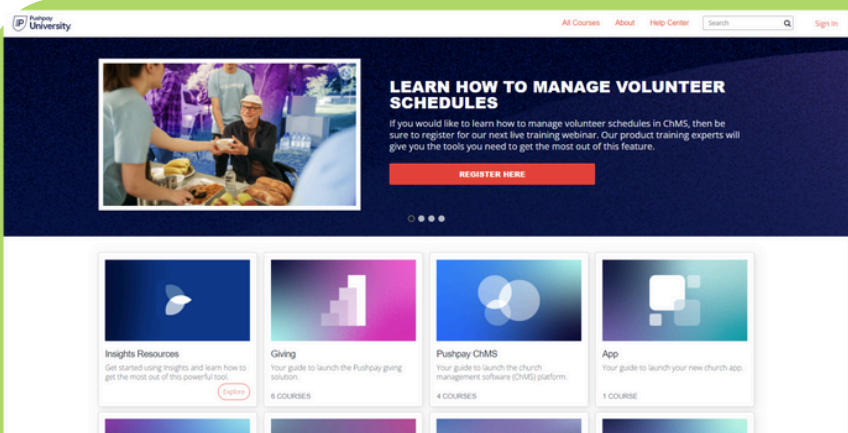


The screenshot shows the 'Training' page on the Parishioner Engagement Weebly site. It features a navigation menu at the top with links for HOME, PARTNERS IN THE GOPEL & PARISHSTAQ, SACRAMENTAL LOGGING, PUSHPAY LEGACY, TRAINING, COMMUNICATION, PROJECT FAQS, MEET THE TEAM, and CONTACT US. The main content area is titled 'Training' and includes a section for 'Monthly Open Check-in Opportunities'. This section states that meetings are held virtually on the second Thursday of the month at 10:00 AM. The agenda includes a 10-15 minute presentation on a topic (e.g., Data Clean-up, Implementation), followed by 45-50 minutes of Questions and Answers and/or discussion of the topic. The next meeting is on April 11, 2024, at 10:00 AM. A sign-up link is provided to receive reminders about the monthly support meeting. Below this, there is a 'Join Zoom Meeting' section with a Zoom link, meeting ID (815 1718 5861), and a note that there is no passcode for this meeting. At the bottom, there is a 'One tap mobile' link with a phone number (+12532108782, 81517185861# US).

Our Parishioner Engagement Weebly Site:
<https://aosparishionerengagement.weebly.com>

Fund Management:
<https://aosparishionerengagement.weebly.com/fundmgmt.html>

Sacramental Logging:
<https://aosparishionerengagement.weebly.com/sacramentallogging.html>



The screenshot shows the Pushpay University website. The main header includes the Pushpay University logo, navigation links for All Courses, About, and Help Center, a search bar, and a Sign In button. The main content area features a large banner for 'LEARN HOW TO MANAGE VOLUNTEER SCHEDULES'. Below the banner, there is a 'REGISTER HERE' button. The page also displays several course cards: 'Insights Resources' (6 COURSES), 'Giving' (6 COURSES), 'Pushpay CHMS' (4 COURSES), and 'App' (1 COURSE). Each card includes a brief description of the course content.

Pushpay University
<https://www.pushpayuniversity.com>

Training Calendar @ Pushpay University
<https://www.pushpayuniversity.com/calendar>

Managing Religious Education Programs @ Pushpay University
<https://www.pushpayuniversity.com/managing-religious-education>

Maximizing the LEAD App @ Pushpay University
<https://www.pushpayuniversity.com/lead-app-workshop>

Upcoming Training Session on ParishStaq:

We will be having our monthly support meeting training session coming up on May 9 @ 10 AM. This session will cover Reports with Matt Feria.

Zoom link : <https://us06web.zoom.us/j/81517185861>