



ARCHDIOCESE OF SEATTLE

PARISHIONER
ENGAGEMENT

Monthly Support & Check-in

February 8, 2024

Prayer for workers in the vineyard

Hebrews 6:10

Oh Lord, we thank You for workers in the church and we acknowledge that at times we may feel underappreciated while we serve the church. But Lord we ask that You will help us to remember that this service is not about serving human masters. Lord, we acknowledge Your Word that declares that You are not unjust and we know that You will not forget the work that workers within the church have done. So, we thank You Father, Amen.

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Sacrament Entry

Sacrament Entry Required in ParishStaq

1. Enter all sacramental information retroactive to January 1, 2024 into the ChMS.
2. Parish Sacrament Registries remain the primary record. This secondary record will roll up to the required Parish Annual Report.

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Sacrament Data Migration Update

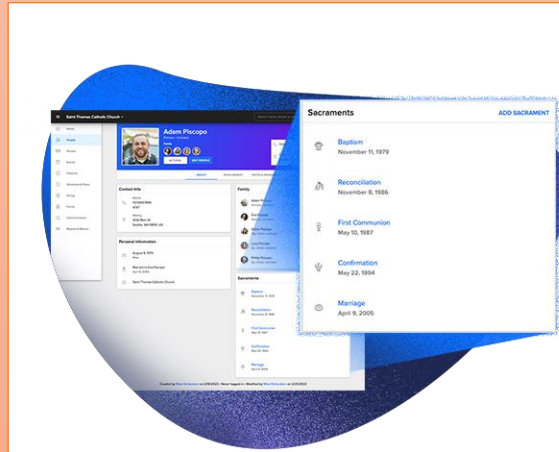
As part of our migration from PDS and other legacy software, we are moving any sacramental data that is present. For a small number of locations, the sacraments have cross-mapped during the migration process. This is due to the sacrament data architecture in PDS that can best be described as “wonky” (a highly technical term).

The export process used on sacraments was identical across all the sites, but in doing an audit, we came across some mapping discrepancies. For sites where there was an issue, we are submitting new sacrament migration data to the Pushpay team. Expect this work to take place during the month of February and should not affect your entry of sacraments into the system. If there is data in the sacrament fields entered manually by a user, our process will not overwrite it.

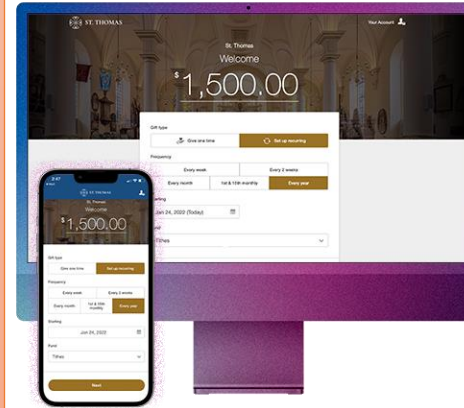


ParishStaq Sacrament Logging 101

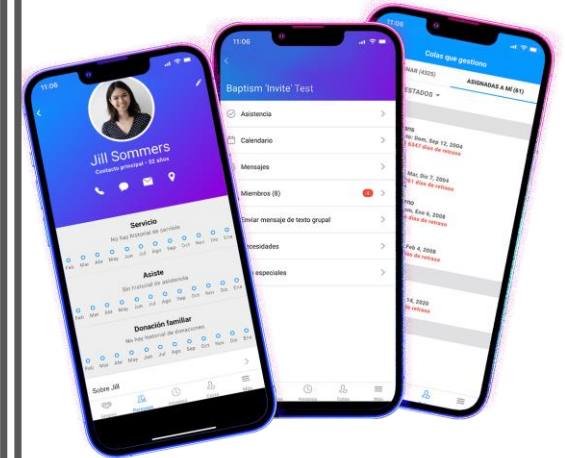
Overview to Sacraments in ParishStaq



ChMS
Church Management System



Giving Portal



Apps: Lead and Parishioner

Suite of e-tools

PRIMARY RULE FOR SACRAMENT LOGGING:

Your Parish Registry is the primary source for sacrament logging.

Sacraments: People Tab

The screenshot displays a user profile for Adam Piscopo in a church management system. The interface includes a navigation sidebar on the left with options like Home, People, Groups, Events, Check-In, Schedules & Plans, Giving, Forms, Communication, and Reports & Metrics. The main content area shows the profile header with a photo, name, and contact information. Below the header are tabs for ABOUT, INVOLVEMENT, and NOTES & MESSAGES. The profile is divided into sections: Contact Info (Mobile: 11234567890, Mailing: 1234 Main St, Seattle, WA 98101, US), Personal Information (Born: August 8, 1979, Married to Eva Piscopo on April 9, 2005), Family (listing Adam, Eva, Addie, Lucy, and Phillip Piscopo), and Sacraments (listing Baptism, Reconciliation, First Communion, Confirmation, and Marriage). The Sacraments section is highlighted with a red border.

Sacrament	Date
Baptism	November 11, 1979
Reconciliation	November 8, 1986
First Communion	May 10, 1987
Confirmation	May 22, 1994
Marriage	April 9, 2005

Do you see what I see?

- Internal Admin-side (for staff and trusted volunteers – permissions to be set by role)
- Administratively toggle on/off:
 - Show basic fields
 - Show fields required for parish register
 - Show fields required for Parish Annual Report

Sacrament Icons in ParishStaq

Baptism



Anointing of the Sick



Confirmation



First Communion



Holy Orders



Deacon



Priest



Bishop

Marriage

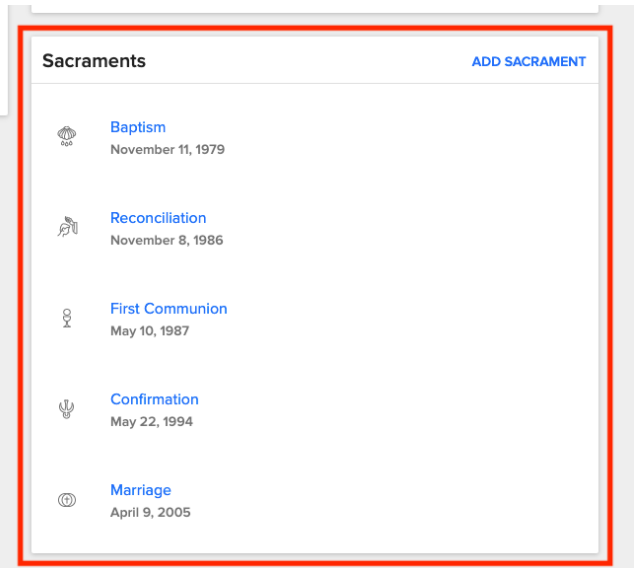
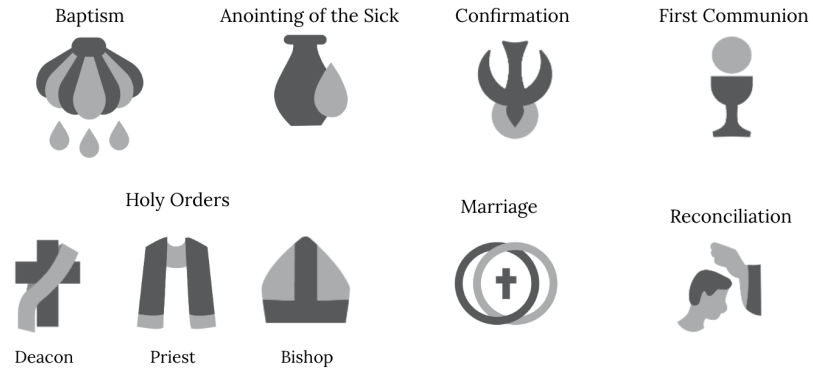


Reconciliation



*** Note: Reconciliation in the system is not a record of reception of the sacrament, it is an optional record of the date the preparation for that sacrament was completed.**

Managing Sacraments



Who can view and edit

Master Admin

Sacrament Information?

User that has *Full*Read and *Full*Write and Print privileges

******Special note to Campus Master Admins, do not assign assignment of permissions to anyone***

What can you do?

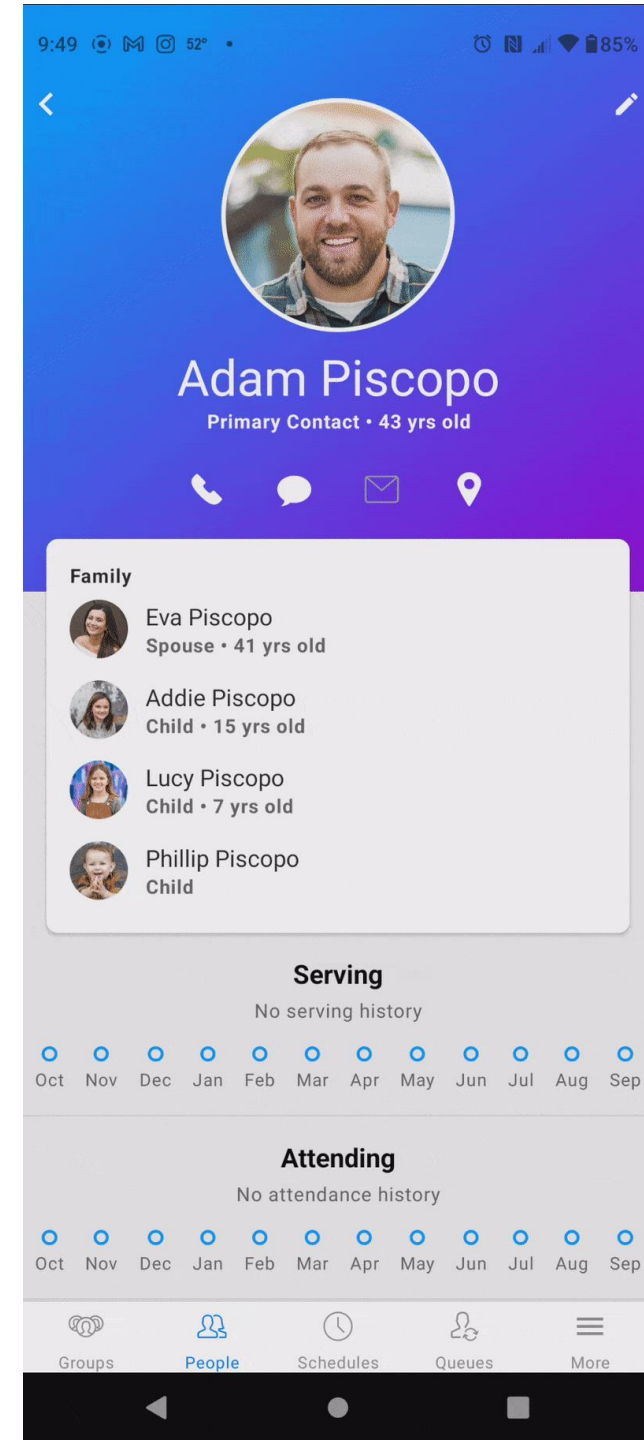
Edit *en masse*, i.e. change information for a list of people, i.e. First Communion, Confirmation

Ability to run reports and move lists of people into ParishStaq groups for further evangelization

Store scanned copies of certificates

Managing Sacraments

You can view sacraments in the Lead app, but you cannot add or edit them there.



Sacramental Preparation Progress

You will be able to note in the system that Sacramental Preparation is in progress.

Sacraments



Baptism

Received Here

August 25, 1989



Reconciliation

Prepared Here

February 25, 2002



First Communion

Received Here

March 25, 2002





ARCHDIOCESE OF SEATTLE

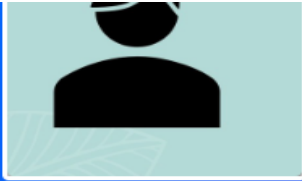
PARISHIONER
ENGAGEMENT

ParishStaq Sacrament Logging 102

Manual Sacrament Entry on a Profile

PES Team RULE FOR SACRAMENT LOGGING:

Your sacrament recipient must have a ChMS profile.



Family



Mrs



Child 2



Child 1

ACTIONS ▾

EDIT PROFILE

test@test.com

907 E 9th Ave
Spokane, WA 99202

ABOUT

INVOLVEMENT

NOTES & MESSAGES

Contact Info



Email
test@test.com



Mailing

Personal Information



Admin Support

Family

ADD FAMILY MEMBER



Test Testing
Primary • Participant



Mrs Testing
Spouse • Participant



Child 2 Testing
Child • Participant



Child 1 Testing
Other

Sacraments

ADD SACRAMENT



Baptism
Received Here
April 30, 1999



First Communion
Received Here
May 1, 2005

Click **ADD SACRAMENT**

**Select the
Sacrament
you want to
add**

ADD SACRAMENT

Reconciliation

Confirmation

Marriage

Holy Orders

Anointing of the Sick

Complete the
pop-out form
with
Sacramental
information
and click
SUBMIT

Add Confirmation

Received Here

Archdiocese of Seattle

Completion Status

Complete with Date

Month: February Day: 2 Year: 2024

In Preparation with Planned Date

Incomplete / Pending

Received as part of OCIA

Profession of Faith

Celebrant

Celebrant Type

Confirmation Saint Name

Sponsor

Register Volume

CANCEL **SUBMIT**



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PARISHIONER
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ParishStaq

Sacrament Logging

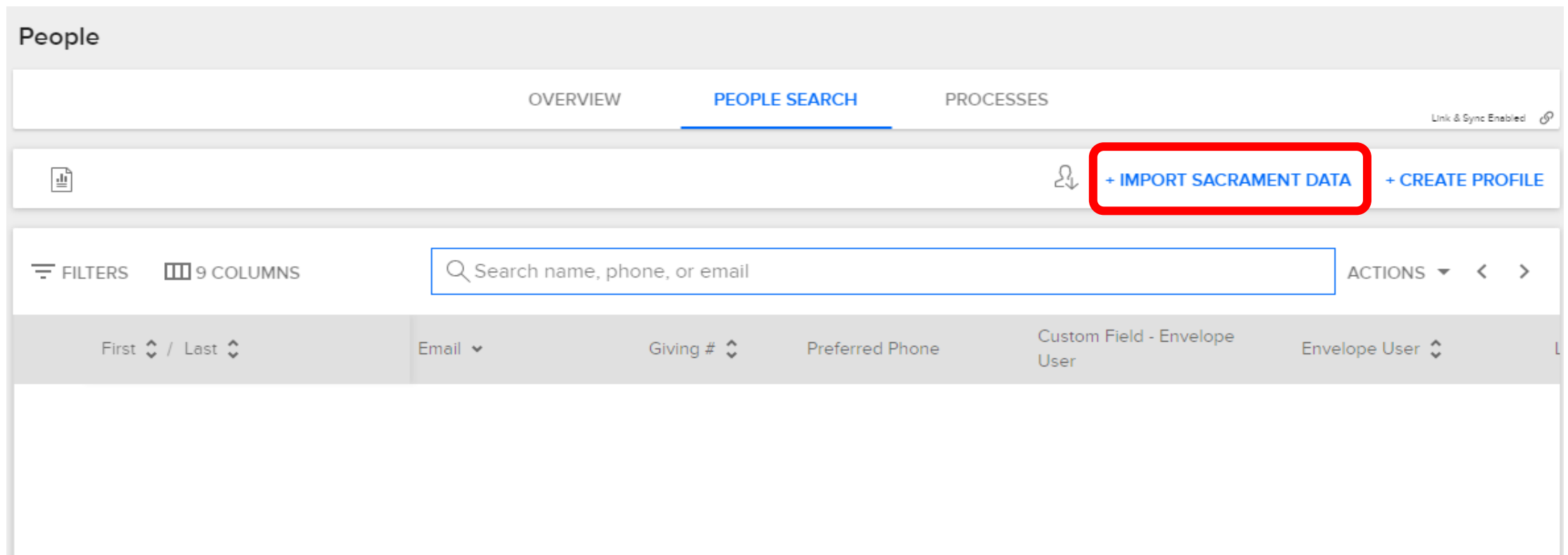
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PES Team RULE FOR SACRAMENT LOGGING:

Your sacrament recipient
must have a ChMS profile.

Import Sacrament Data

Once you have your file ready for import, you can get started with bulk uploading your sacrament data by following the steps below. Go to People and click **Import Sacrament Data**.



The screenshot displays the 'People' management interface. At the top, there are tabs for 'OVERVIEW', 'PEOPLE SEARCH' (which is active), and 'PROCESSES'. A 'Link & Sync Enabled' status is visible in the top right. Below the tabs, there is a toolbar with a document icon on the left and two buttons on the right: '+ IMPORT SACRAMENT DATA' (highlighted with a red box) and '+ CREATE PROFILE'. Below the toolbar, there is a search bar with the placeholder text 'Search name, phone, or email'. To the left of the search bar are 'FILTERS' and '9 COLUMNS'. To the right are 'ACTIONS' and navigation arrows. Below the search bar, there is a header row for columns: 'First / Last', 'Email', 'Giving #', 'Preferred Phone', 'Custom Field - Envelope User', and 'Envelope User'.

Start uploading your data by clicking **Begin**

Note: Bulk Upload is only for existing profiles. You cannot create new profiles using the Bulk Upload feature. To create or update existing profile information, use a .CSV exported from People Search. The .CSV file must have a column with the Individual IDs and the column must be titled "Individual ID." The maximum file size is 100KB.

People > People Search > Import Sacrament Data

Import Sacrament Data

1 Introduction – 2 Upload – 3 Match Fields – 4 Preview

CANCEL

BEGIN

Let's Import Your Sacrament Data!

Use a .CSV exported from People Search to create or update existing profile information. The .CSV file must have a column with the individual IDs and the title 'Individual ID'. The maximum file size is 100 KB.

“Individual ID”

You can manually find the Individual ID of a profile from the URL of a profile

Mr. Test Testing's Individual ID is 534093

https://archseattle.ccbchurch.com/goto/individuals/534093

Admin Support

Test Testing
Primary · Participant

Family

Mrs Child 2 Child 1

ACTIONS EDIT PROFILE

ABOUT

Next, you can either drag and drop your file, or click Browse Files to **Select Spreadsheet** to attach it.

People > People Search > Import Sacrament Data

Import Sacrament Data

Introduction — **2** Upload — 3 Match Fields — 4 Preview

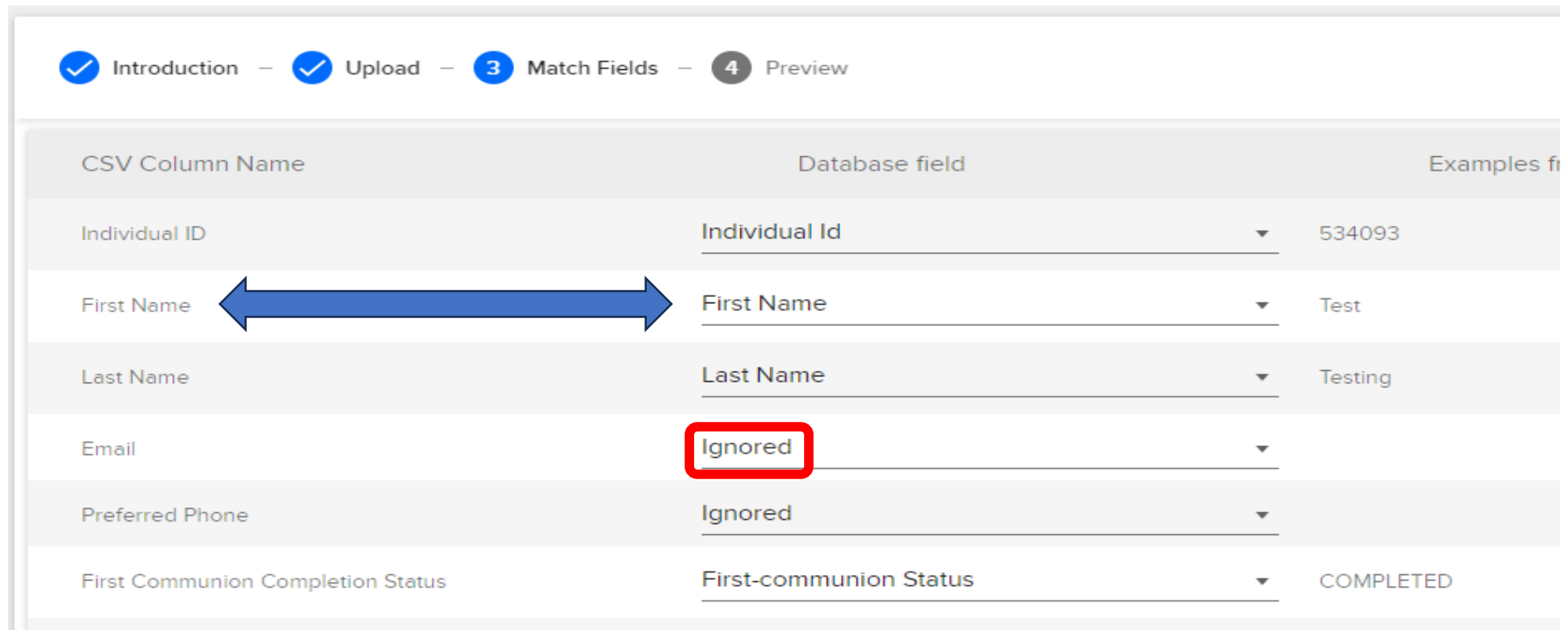
CANCEL UPLOAD

Drag and drop .CSV files here

BROWSE FILES

Match your Column Name

Match up the correct CSV Column Name to the corresponding Database field.



Introduction — Upload — 3 Match Fields — 4 Preview

CSV Column Name	Database field	Examples from CSV
Individual ID	Individual Id	534093
First Name	First Name	Test
Last Name	Last Name	Testing
Email	Ignored	
Preferred Phone	Ignored	
First Communion Completion Status	First-communion Status	COMPLETED

Fix your “Ignored”

Note: If a row states "Ignored," then the information will not map to a new field. Click on the Ignored and select the appropriate field that your CSV Column Name should map to.

PES Team can provide you with Database field lists per sacrament.

The screenshot shows a data mapping interface with three steps: Introduction, Upload, and Match Fields. A table lists CSV Column Names and their corresponding database fields. The last row, 'Frist Communion Date Received', is marked as 'Ignored'. A dropdown menu is open, showing a list of database fields, with 'First-communion Date Performed' selected.

CSV Column Name	Database Field
Individual ID	Confirmation Status
First Name	Conflict Resolution
Last Name	First Name
Email	First-communion Celebrant
Preferred Phone	First-communion Date Performed
First Communion Completion Status	First-communion Diocese Name
Frist Communion Date Received	First-communion Is Ocia
	First-communion Is Performed Here
	First-communion Notes
	First-communion Parish City
	First-communion Parish Country
	First-communion Parish Email
	First-communion Parish Name
	First-communion Parish Phone
	First-communion Parish State
	First-communion Parish Street
	First-communion Parish Street Two
	First-communion Parish Zip
	First-communion Profession Of Faith
	First-communion Register Number
	Ignored

Preview, verify, and Import

Preview, verify, and click **Import** to complete the upload!

Note: A green confirmation will be shown at the top to let you know how many sacraments were updated.

People > People Search > Import Sacrament Data

Import Sacrament Data

Introduction – Upload – Match Fields – 4 Preview

CANCEL

IMPORT

Individual Id	First Name	Last Name	Email	Preferred Phone	First Communion Completion Status	Frist Communi
534093	Test	Testing			COMPLETED	5/1/2005
534094	Mrs	Testing			COMPLETED	5/2/2006
534095	Child 1	Testing			COMPLETED	5/3/1999
534096	Child 2	Testing				



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ParishStaq

Sacrament Logging

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Form to Groups

Group to Bulk Upload

Sacrament Preparation Groups

If you used a form and that has been automated into a group or created a sacramental preparation group, you can run a report and edit the report for bulk upload.

Please email our team to set up a Zoom meeting time with someone from Parish Support to assist you with this process.

- ❖ Email: parishstaq.support@seattlearch.org
- ❖ Email: support@archdioceseofseattlepes.samanage.com

ParishStaq Form



Forms filled out with automation(s)

Groups, Events, Needs



Meeting with family, Classes, Retreats, Volunteer coordination, Rehearsal

Process Queues



You can track documentation, track progress, and assign follow up tasks

Events, Process

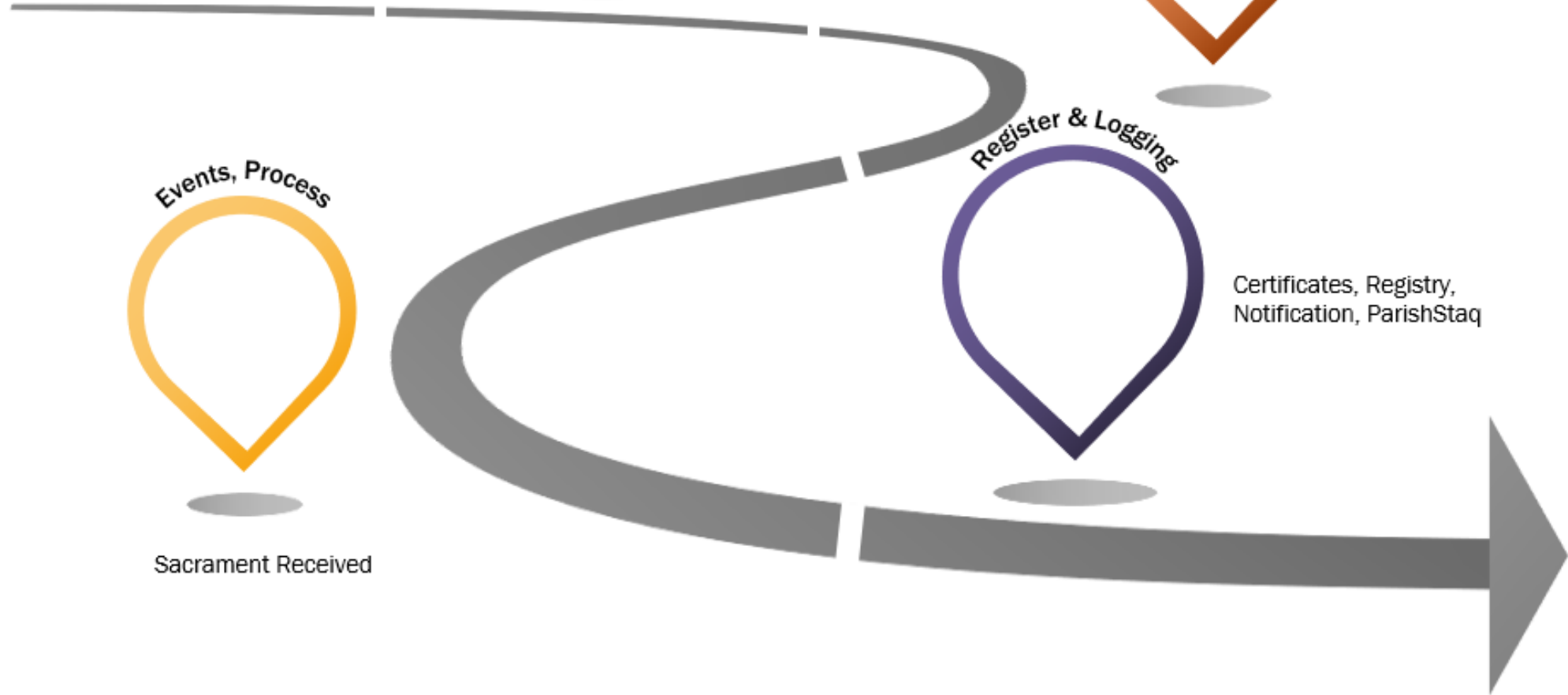


Sacrament Received

Register & Logging



Certificates, Registry, Notification, ParishStaq



ARCHDIOCESE OF SEATTLE

PARISHIONER ENGAGEMENT

The Implementation Team's goal is to execute and support this database transition and software implementation with caution, collaboration, communication, and compassion.

Support:

❖ Implementation and Learning Site

archseattle.org/parishioner-engagement

❖ Email: parishstaq.support@seattlearch.org

❖ Email:

support@archdioceseofseattlepes.samanage.com