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.

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

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.

ARCHDIOCESE OF SEATTLE

PARISHIONER ENGAGEMENT

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.

ARCHDIOCESE OF SEATTLE

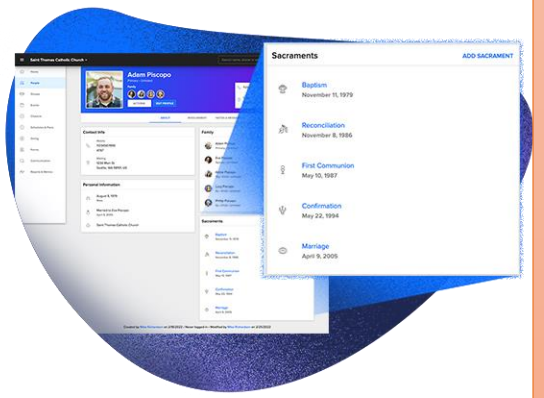
PARISHIONER ENGAGEMENT

ParishStaq Sacrament Logging 101

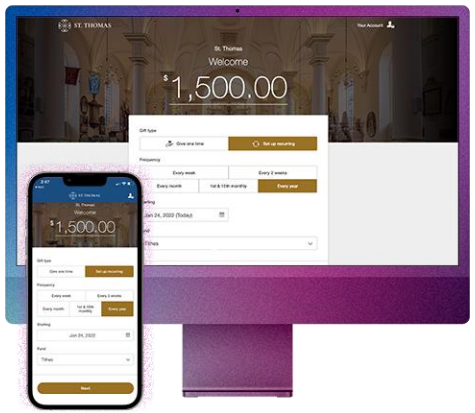
Overview to Sacraments in ParishStaq

Pushpay

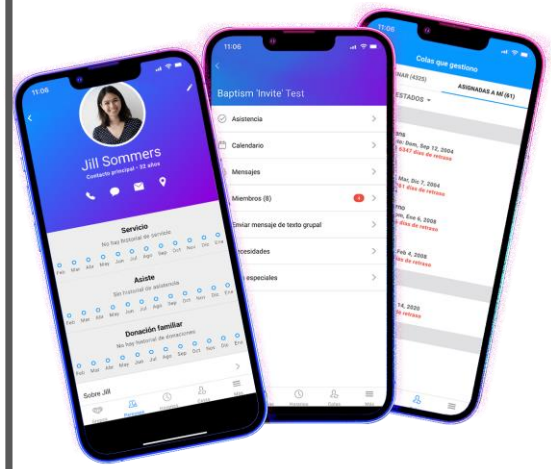
ParishStaq™



ChMS
Church Management System



Giving Portal



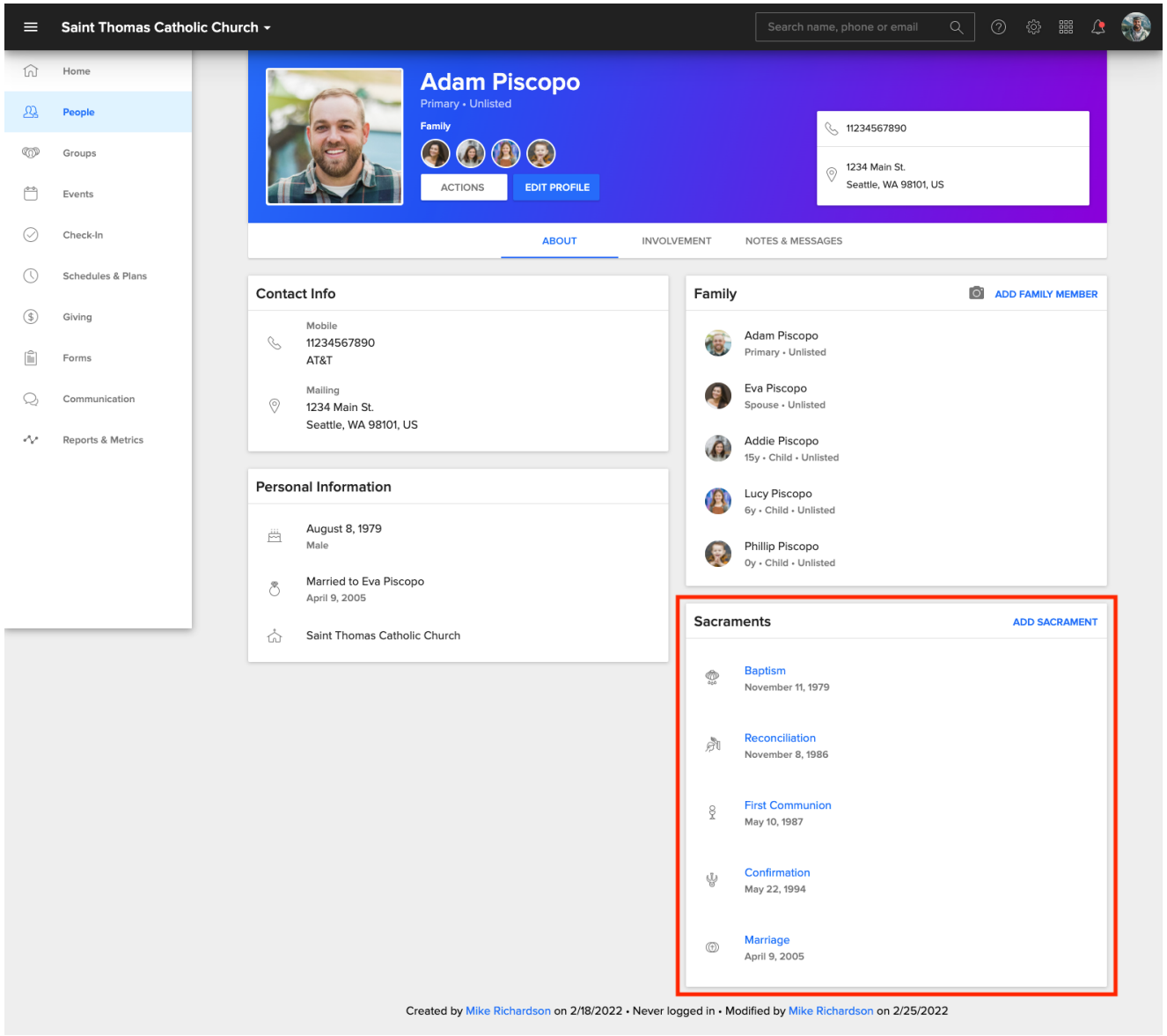
Apps: Lead and Parishioner

Suite of e-tools

PRIMARY RULE FOR SACRAMENT LOGGING:

Your Parish Registry is the primary source for sacrament logging.

Sacraments: People Tab



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

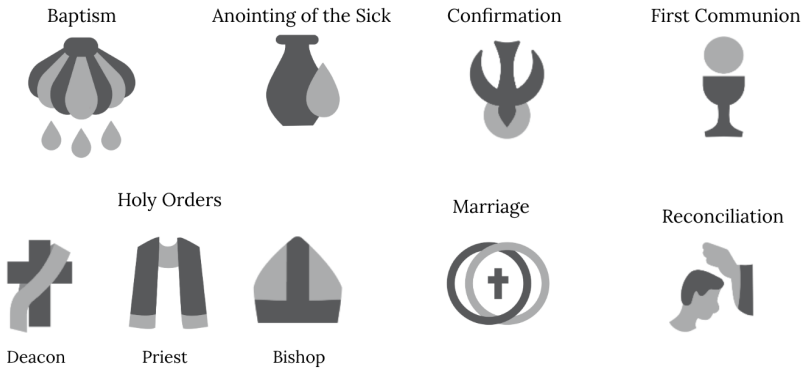
Bishop

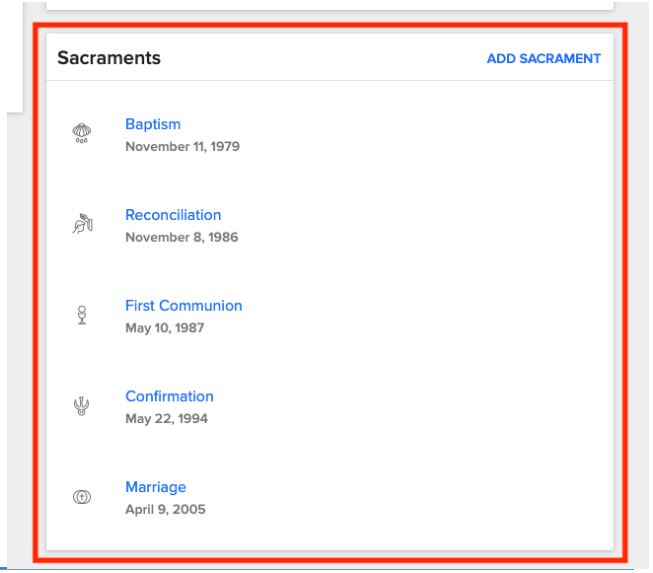
Marriage

Reconciliation

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

Managing Sacraments





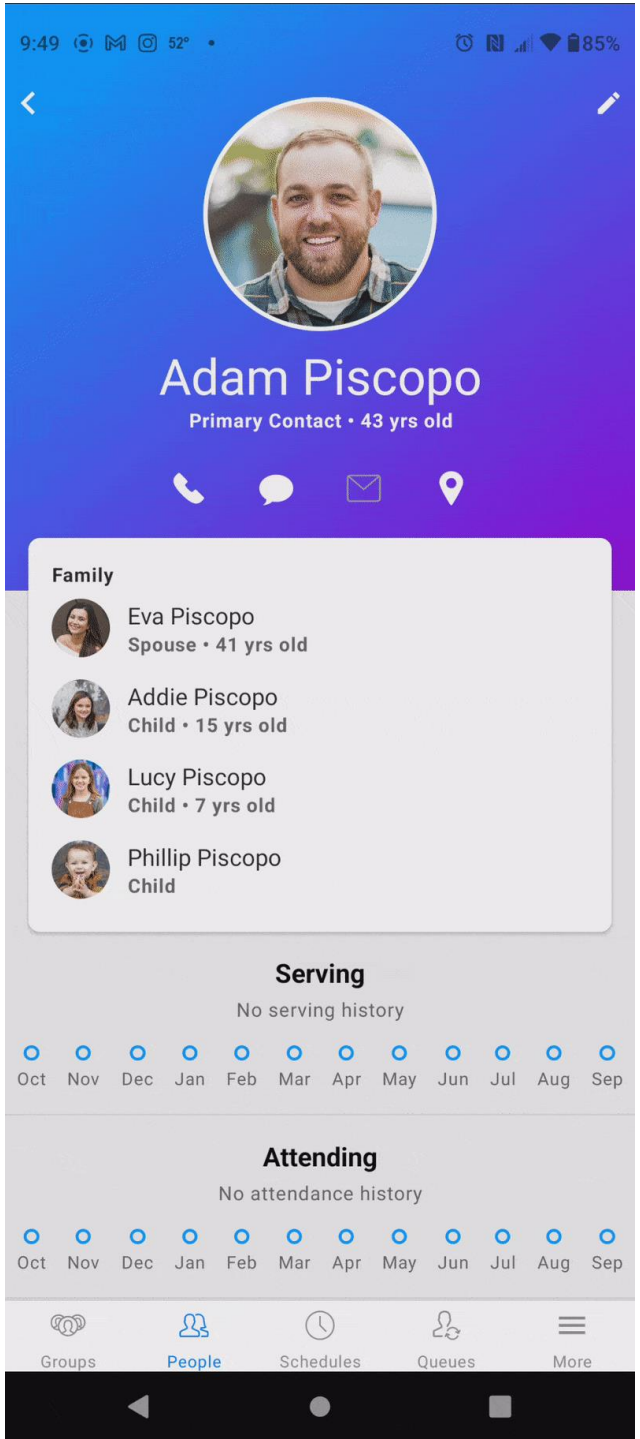
Who can view and edit Sacrament Information?	Master Admin
	User that has *Full* Read and *Full* Write and Print privileges

******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

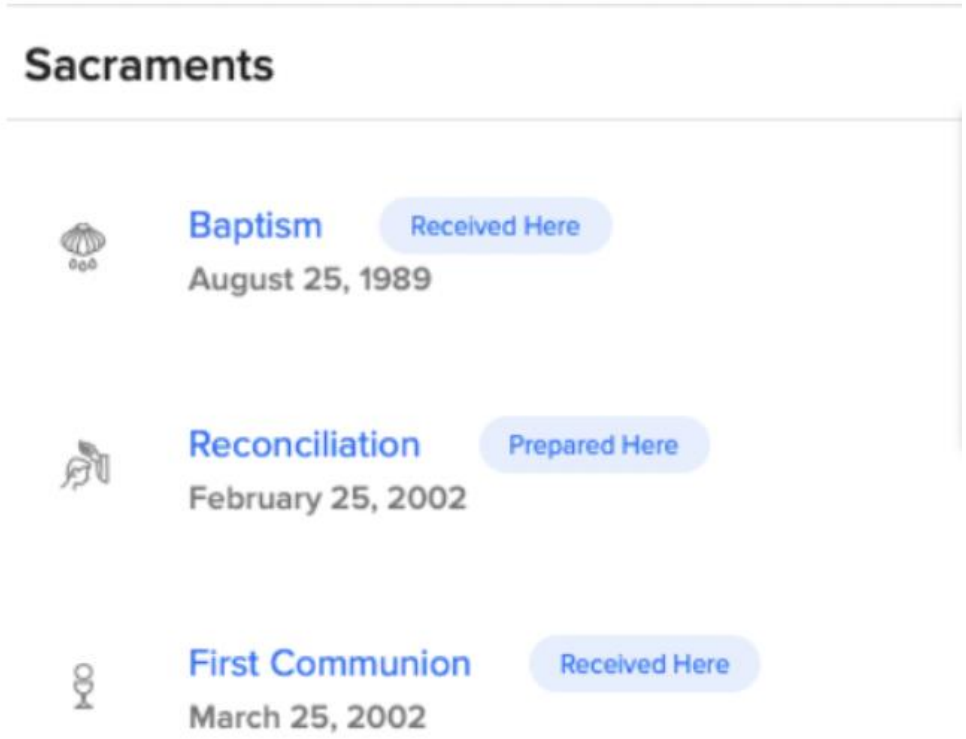
Managing Sacraments

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.



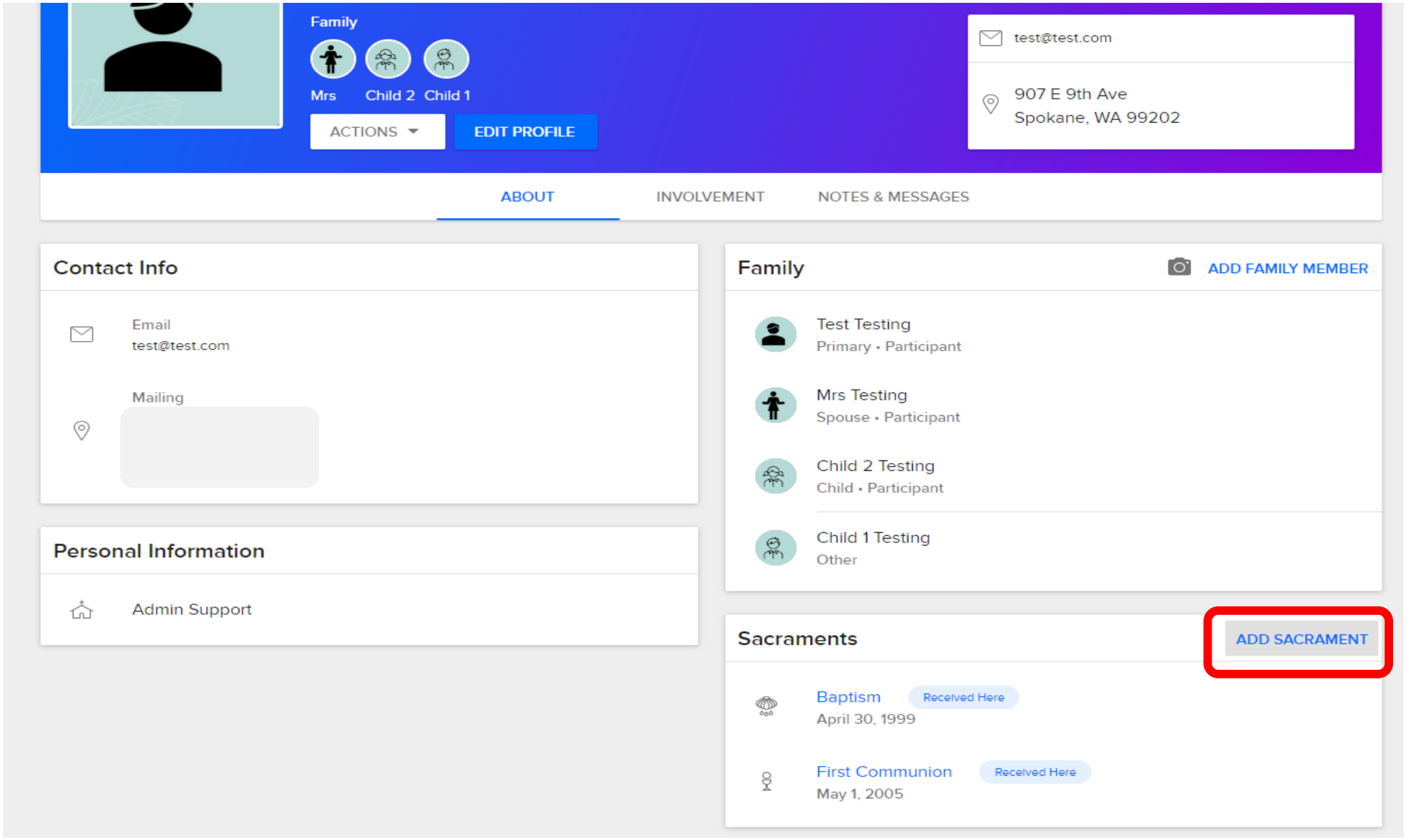
ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

ParishStaq Sacrament Logging 102

Manual Sacrament Entry on a Profile

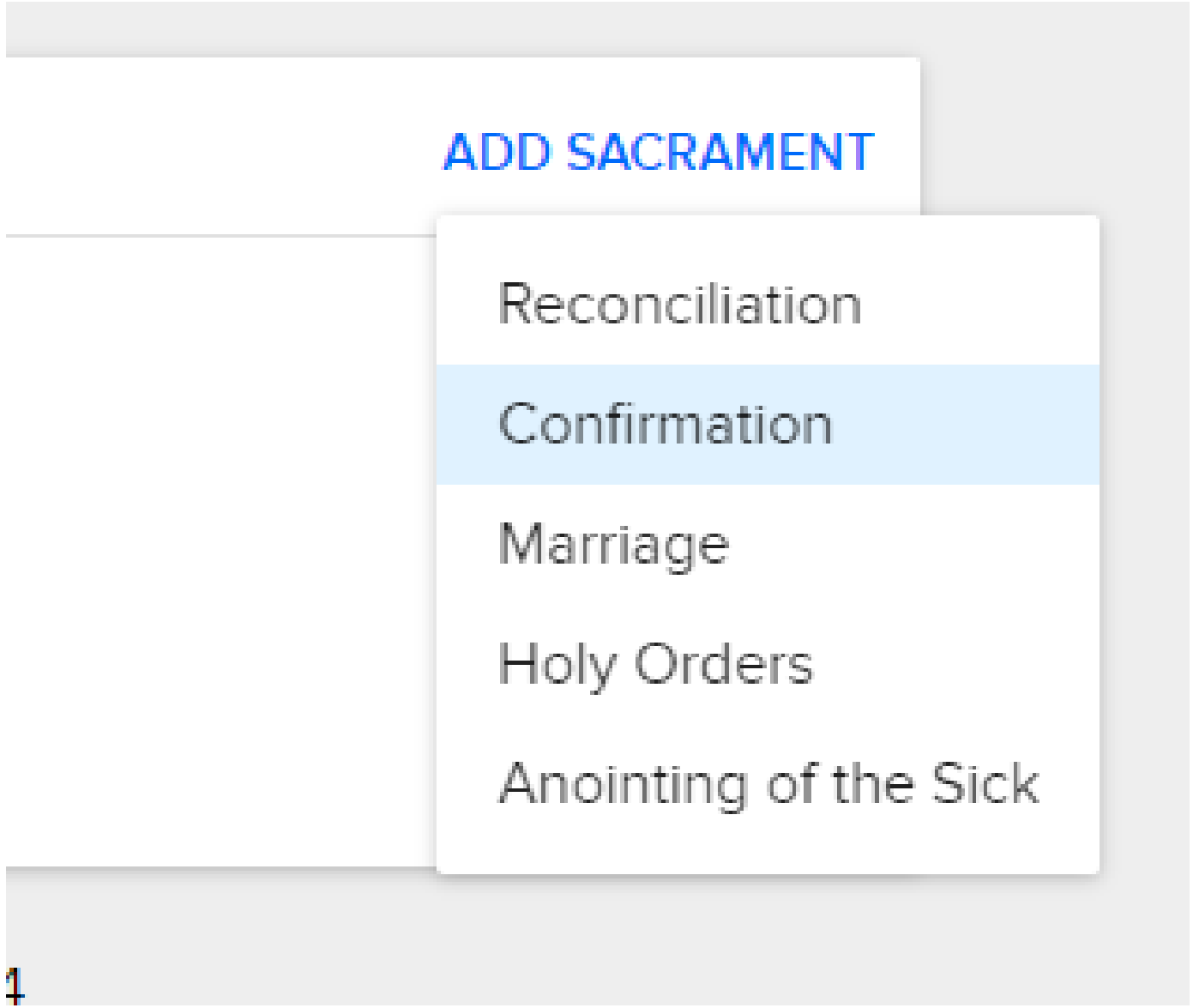
PES Team RULE FOR SACRAMENT LOGGING:

Your sacrament recipient must have a ChMS profile.

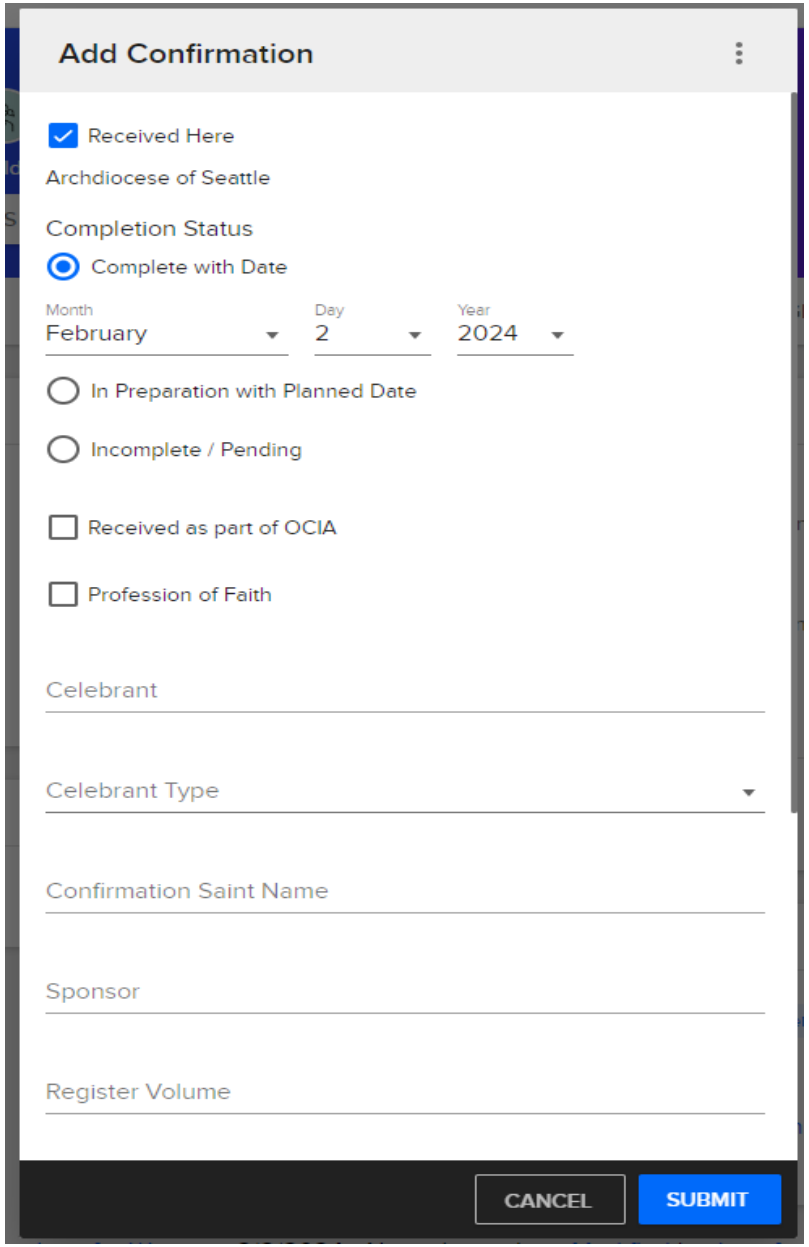


Click ADD SACRAMENT

Select the Sacrament you want to add



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



ARCHDIOCESE OF SEATTLE

PARISHIONER ENGAGEMENT

ParishStaq Sacrament Logging 103

PES Team RULE FOR SACRAMENT LOGGING:

Your sacrament recipient must have a ChMS profile.

Bulk upload of Sacraments

If you are tracking your sacraments in non-ParishStaq systems, you enter information in to an excel (.CSV) format and upload them into the system.

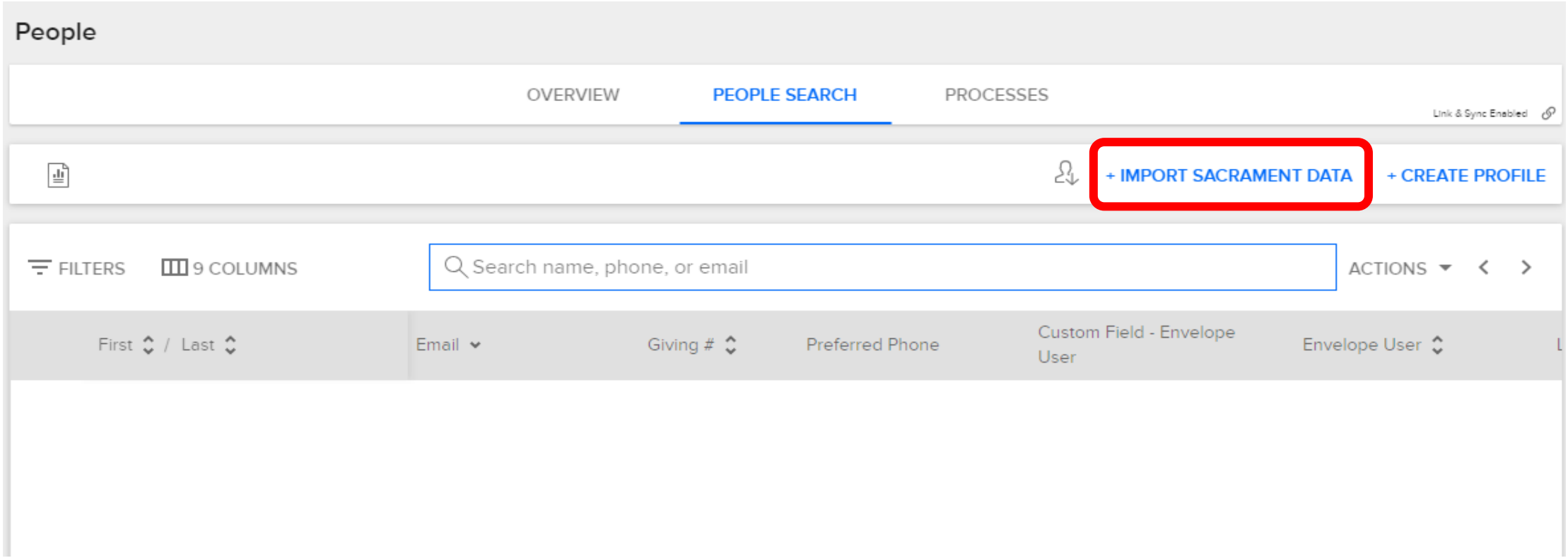
OR

You can run a people report if they are in a Group and edit the export to conform with the (.CSV) for upload.

	A	B	C	D	E	F	G	H	I	J
1	Individual ID	First Name	Last Name	Email	Preferred Phone	First Communion Completion Status	Frist Communion Date Received	First Communion Performed Here	Frist Communion Parish Name	First Communion Parish Address
2	534093	Test	Testing			COMPLETED	5/1/2005	Yes		
3	534094	Mrs	Testing			COMPLETED	5/2/2006	No	St. Flower	1234 5th Ave
4	534095	Child 1	Testing			COMPLETED	5/3/1999	Yes		
5	534096	Child 2	Testing							
6										
7										
8										

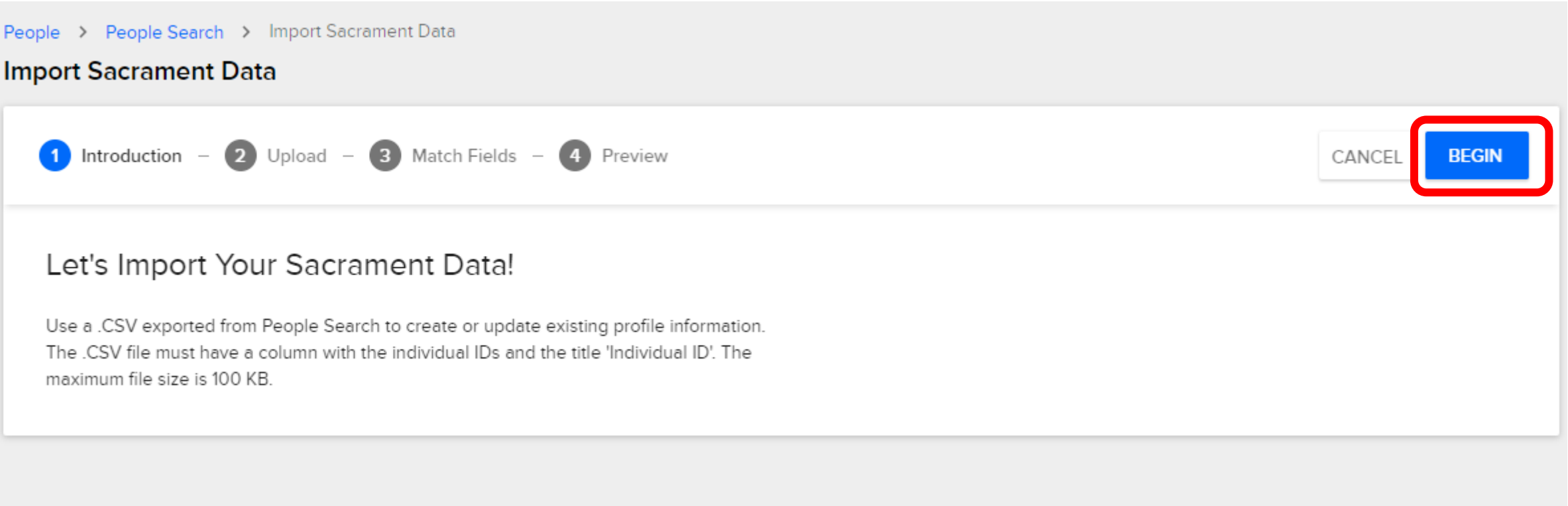
Import Sacrament Data

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**.



Start uploading your data by clicking **Begin**

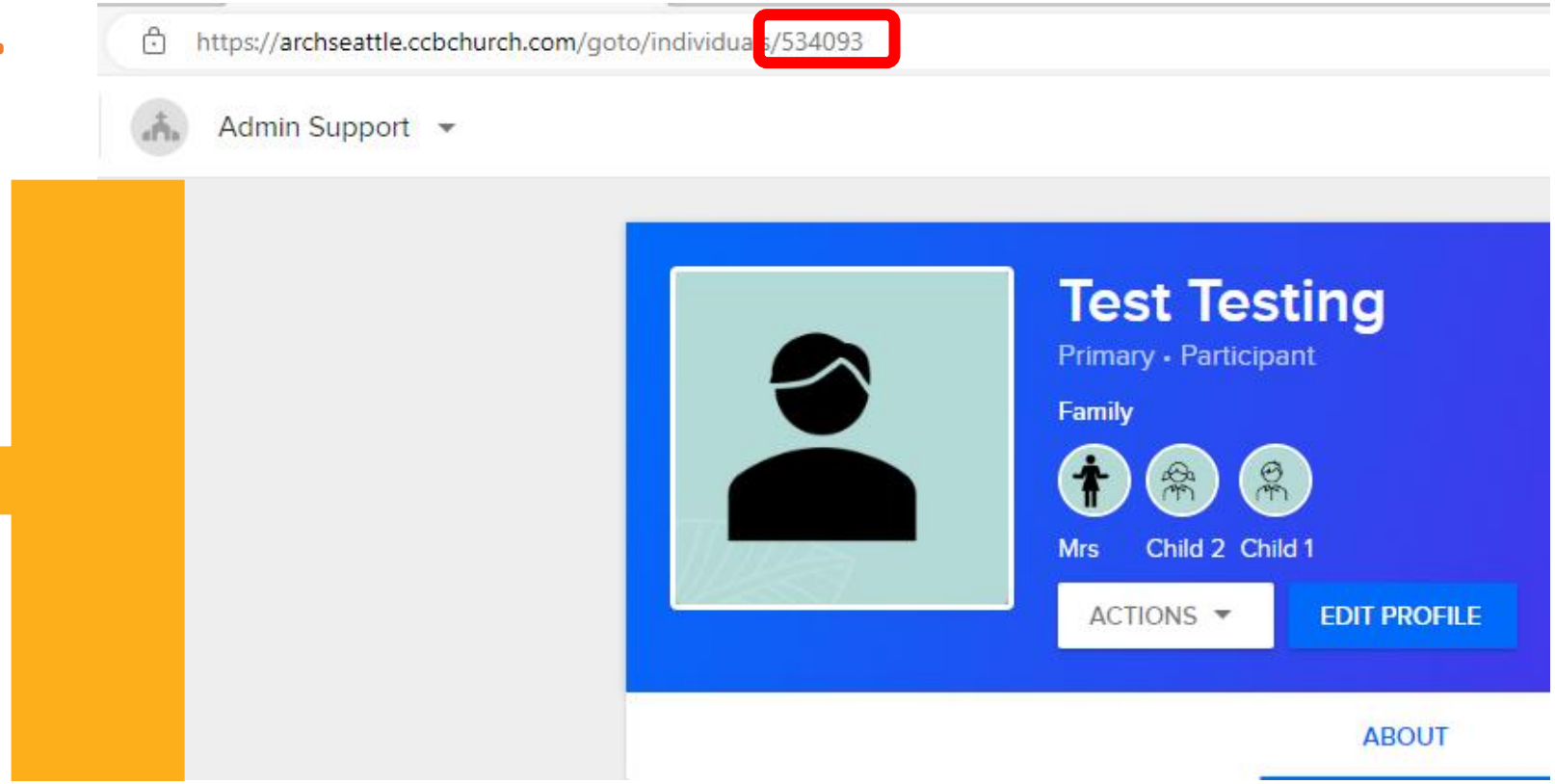
Note: Bulk Upload is only for existing profiles. You cannot create new profiles using the Bulk Upload feature. To create or update existing profile information, use a .CSV exported from People Search. The .CSV file must have a column with the Individual IDs and the column must be titled "Individual ID."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



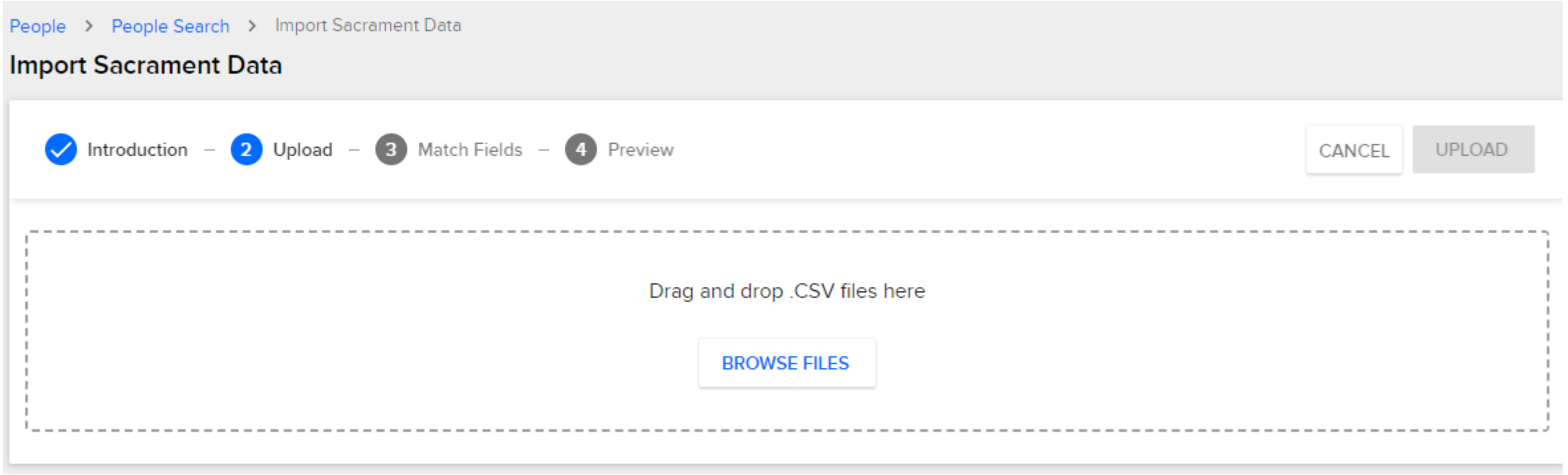
“Individual ID”

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

Mr. Test Testing’s Individual ID is 534093

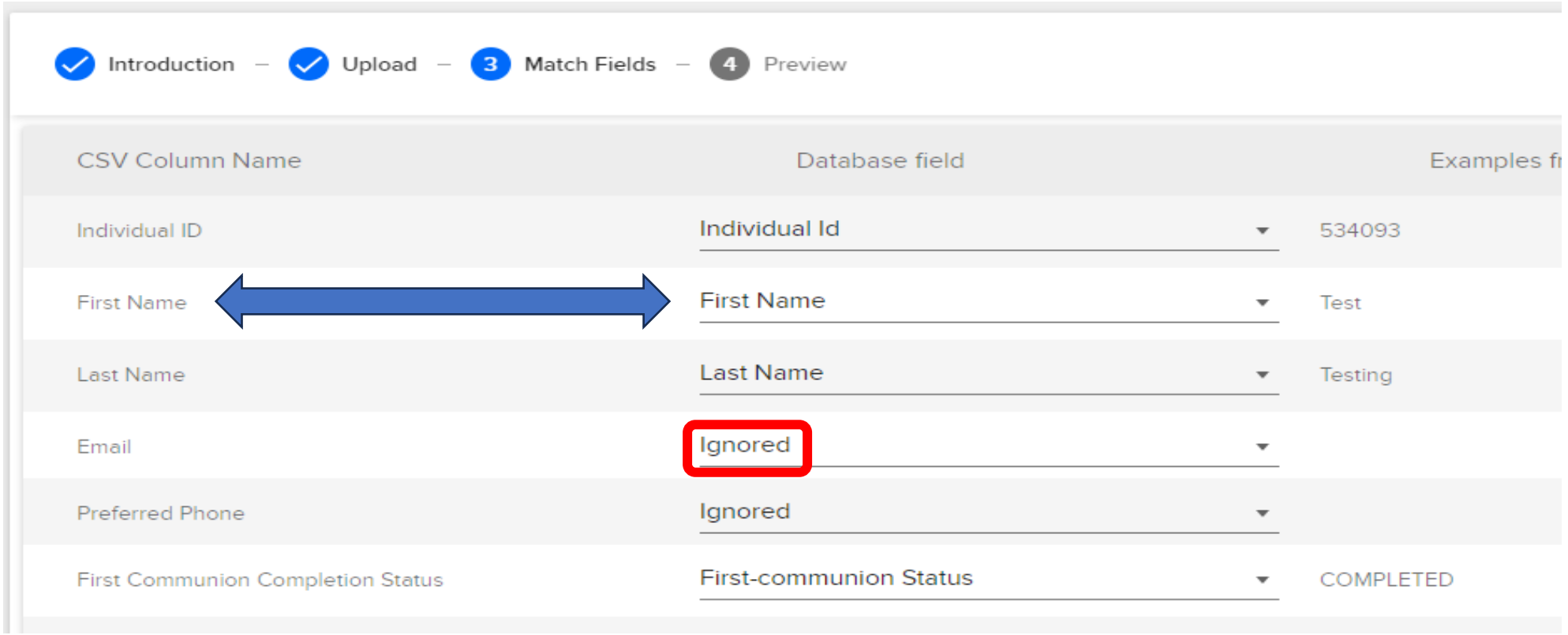


Next, you can either drag and drop your file, or click Browse Files to **Select Spreadsheet** to attach it.



Match your Column Name

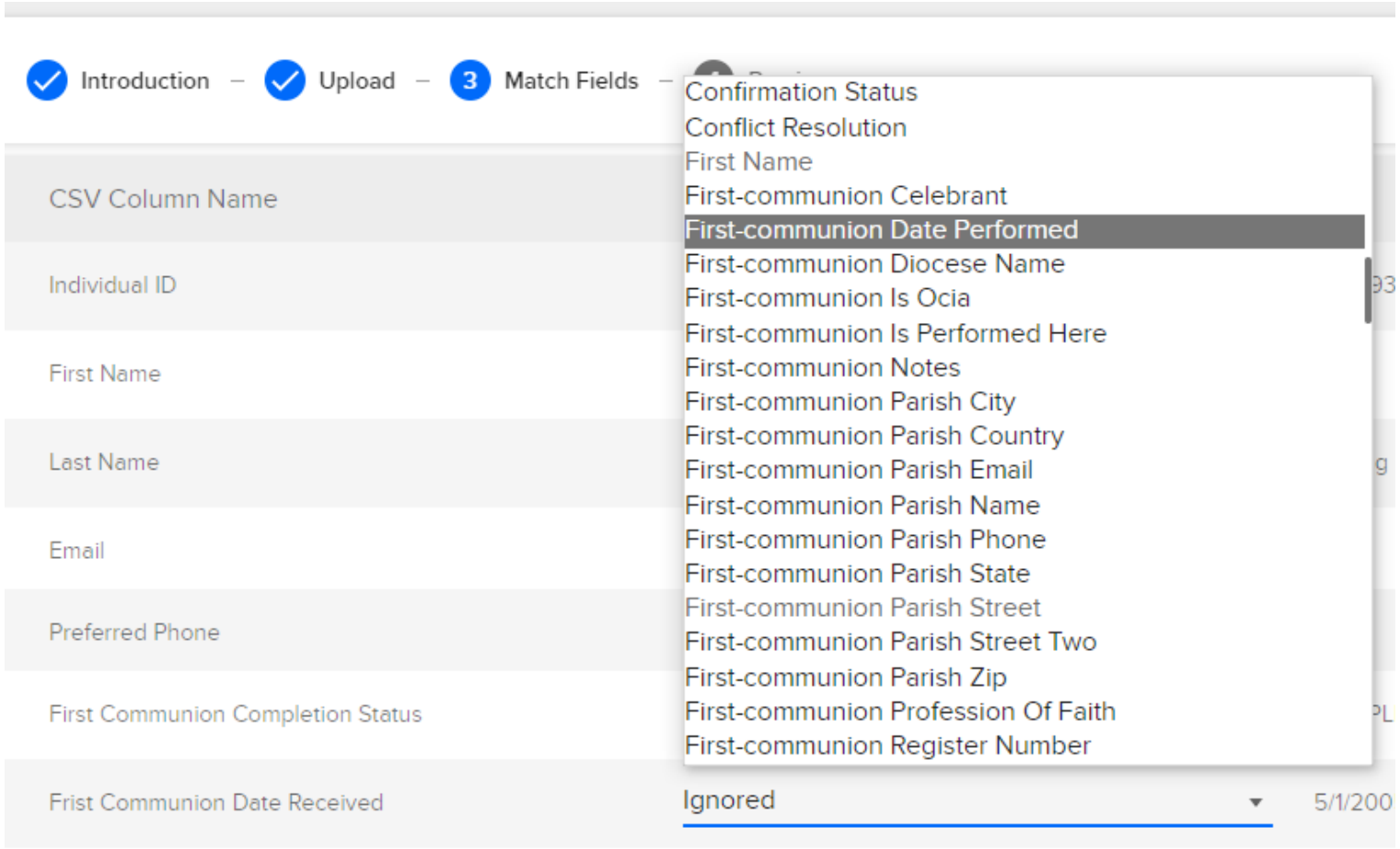
Match up the correct CSV Column Name to the corresponding Database field.



Fix your “Ignored”

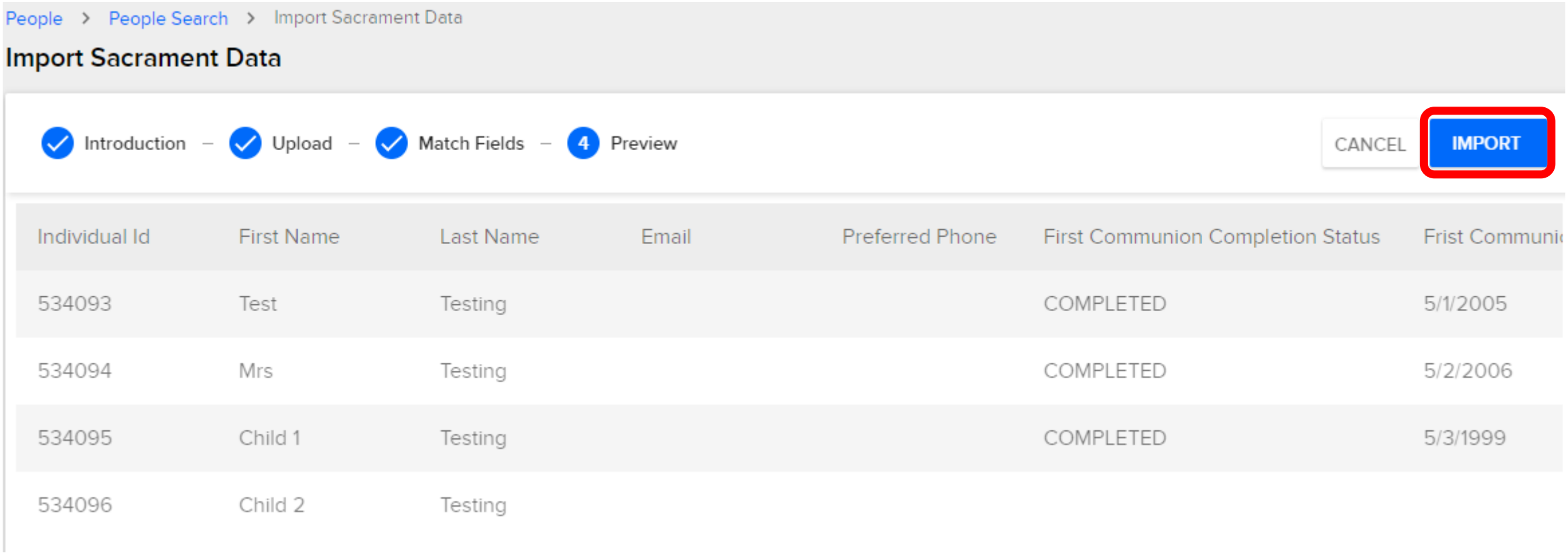
Note: If a row states "Ignored," then the information will not map to a new field. Click on the Ignored and select the appropriate field that your CSV Column Name should map to.

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



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.



ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

ParishStaq
Sacrament Logging
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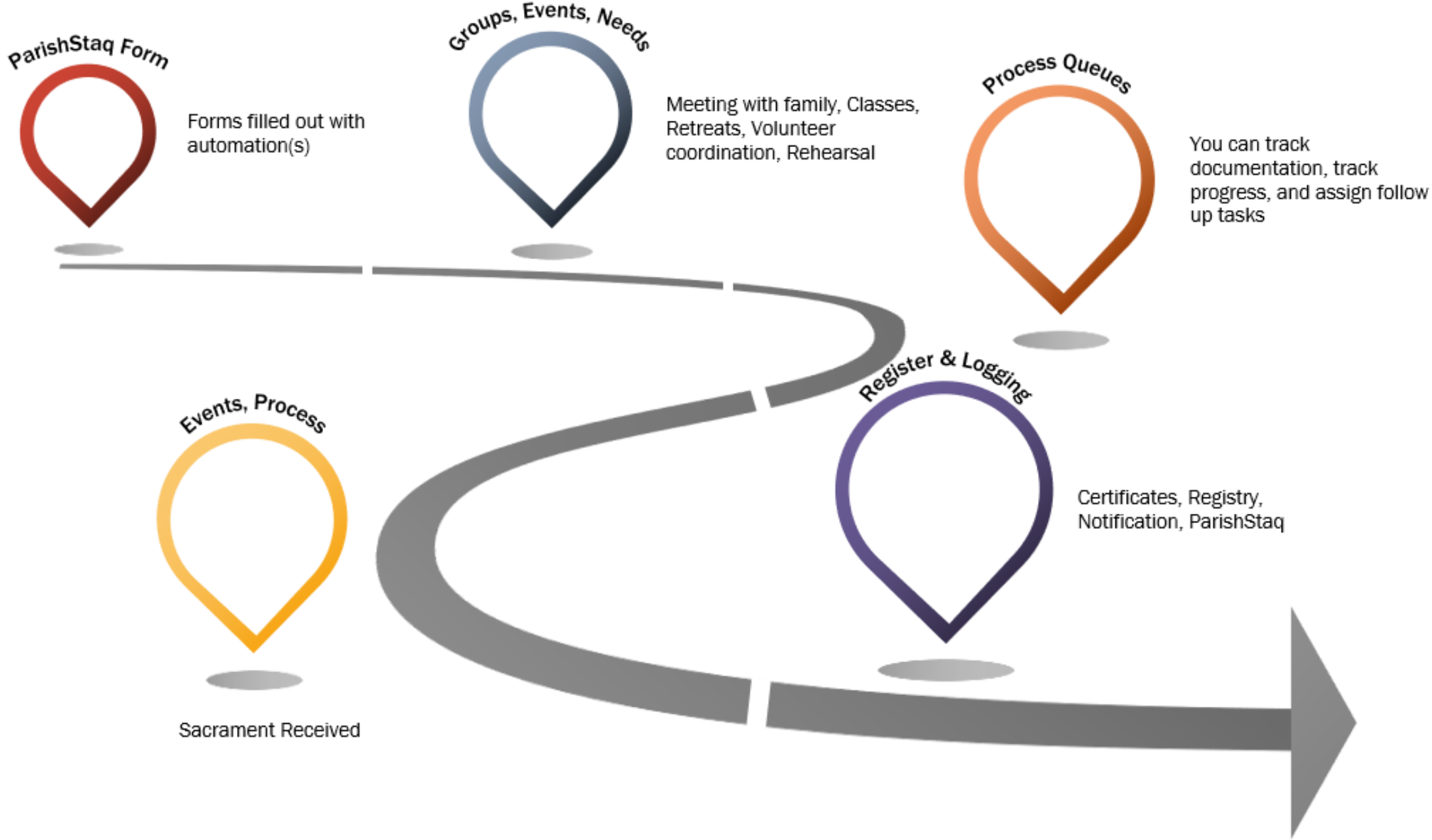
Form to Groups
Group to Bulk Upload

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
Register & Logging
Certificates, Registry, Notification, ParishStaq
Events, Process
Sacrament Received

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