



ARCHDIOCESE OF SEATTLE

PARISHIONER
ENGAGEMENT

Monthly Support & Check-In

January 11, 2024

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.

AGENDA

- ❖ **Opening Prayer**
- ❖ **Update**
- ❖ **Learning: Reports**
- ❖ **Upcoming Meetings**

Prayer for Reaching a Goal

Dear God, today is a new day--a blank page, a clean slate. Let me start this day without worry or stress, but knowing you are walking with me through all the distractions. Help me to focus on my job goals today; staying disciplined in my actions and my words so that I might achieve a satisfying result from my work.

Open my eyes and my spirit to what you would like me to do and how I can be the most help to my colleagues and to your people who walk through our doors. Today is a new day. This is the day the Lord has made; let us rejoice and be glad in it. Psalm 118:24

UPCOMING MEETINGS

January Tuesdays at 1 pm

There will be special office hours with break-out rooms for those needing help with running their giving statements out of ParishStaq and Fund Management.

February 8 at 10 am – Sacrament logging

ParishStaq Team Monthly Check-in

LEARNING: REPORTS

- ❖ **People Search**
Use cases: mailings; create an event for young adult group
- ❖ **One or two of “pre-potted” reports**

Best Practices

- Pending Profiles
- In Parish De-Duping
- Cross Parish De-Duping
- Custom Report Using People Search
- Group Report Dropdown
- Event Report and Action Dropdown
- System Reports – A Few Good Ones
- Transaction Export – Giving Portal

Best Practices – Pending Profiles

What is a Pending Profile?

A Pending Profile is a Profile that has not been approved yet. Pending Profiles are originally created by a person, via Public Needs sign up or Public Schedule sign up, when logging into the My Church App for the first time, when giving through Pushpay Giving for the first time, or when giving a subsequent gift using information that doesn't match with their existing ChMS profile created from their first gift.

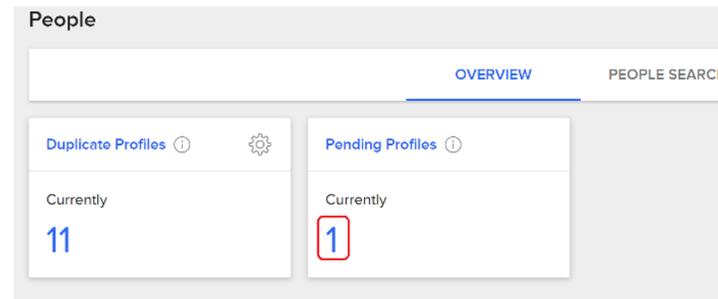
Created via:

- Public Needs Sign Up
- Public Schedule Sign Up
- Logging into the Church App for the first time
- When giving through Pushpay Giving for the first time
- Or, when giving a subsequent gift using information that doesn't match their existing ChMS Profile

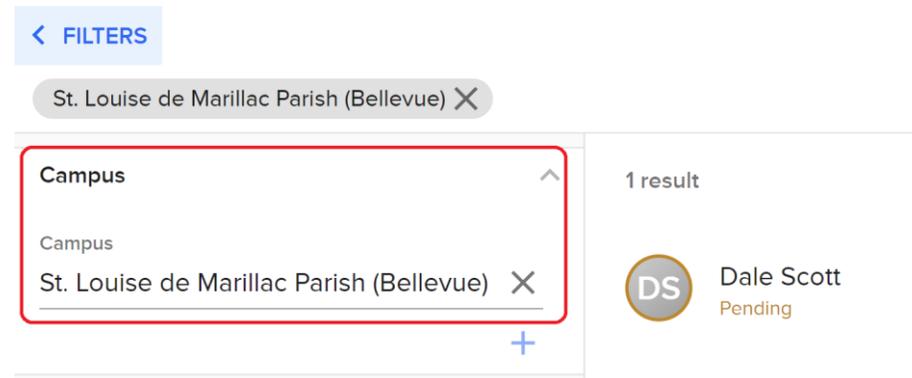
Best Practices – Pending Profiles

Access the Pending Profile Section

- Go to People on the left side menu and then select Overview along the top:

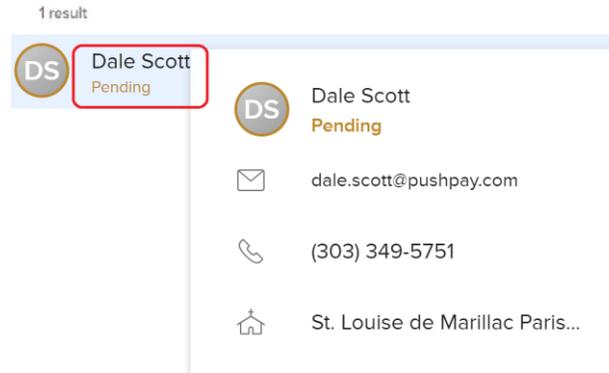


- Click on the number in blue underneath the word 'Currently' and then click on the drop down next to Campus and select your Campus Name:

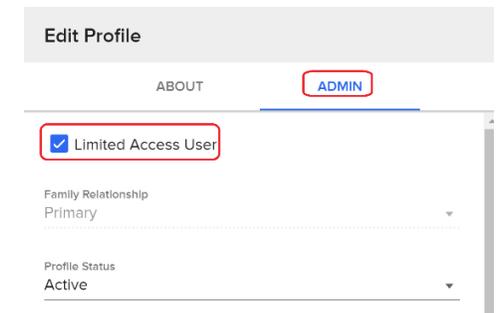


Best Practices – Pending Profiles

- Place your mouse over the name without clicking (hover):



- If there are more than one, you may want to do a screen capture or print the list. This will assist you in merging duplicate profiles later, should this be necessary.
- General Best Practice would be to Approve these one at a time and then then manage the duplicate merge, where needed. Remember there is a periodic duplication check that takes place 'behind the scenes', so these will not show up as potential duplicates right away.
- You will want to view these profiles to assign a Membership Type and a Family Position, when appropriate.
- These profiles will come into the system with Limited Access User setting. If appropriate, uncheck the LAU checkbox:

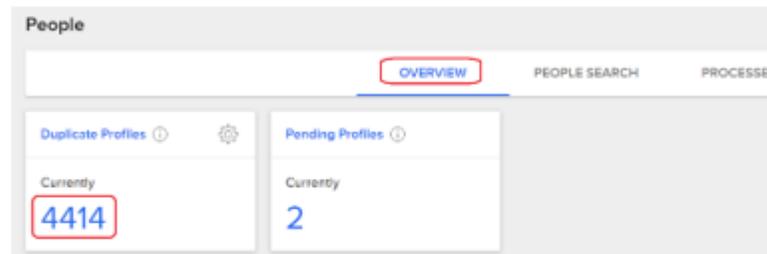


Best Practices – Deduping Within Your Campus

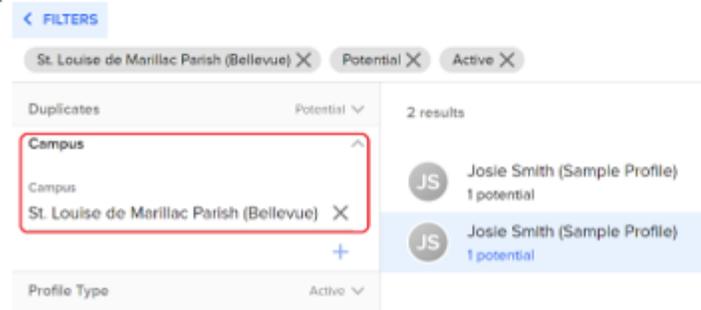
As we continue our migration to ParishStaq, there will be situations where potential duplicate records are created and migrated within your campus. The following steps will help you identify if duplicate profiles are contained within your campus or are cross-campus. Cross-campus duplicates require communication between campus admins on the two (or potentially more) campuses

Step 1: Determine if a Duplicate Profile is Within Your Campus

- Go to People on the left side menu and then select Overview along the top:

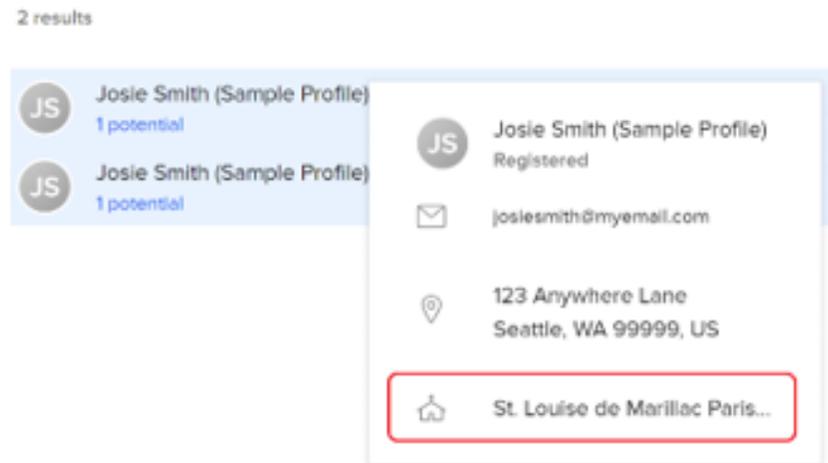


- Click on the number in blue underneath the word 'Currently' and then click on the drop down next to Campus and select your Campus Name:



Best Practices – Deduping Within Your Campus

- Once selected, the profiles that are matched for de-duping will be listed on the right side, like the example profile 'Josie Smith (Sample Profile). Place your mouse over the name without clicking (hover):



You should see that this profile is in your campus, which is 'St. Louise de Marillac Parish (Bellevue), in our example.

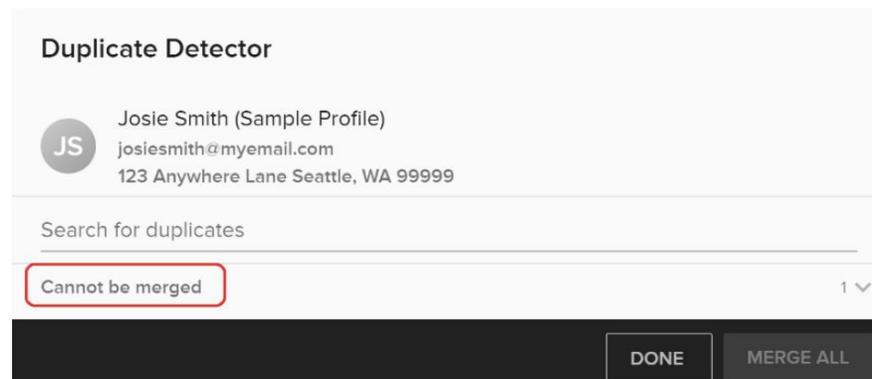
Best Practices – Deduping Within Your Campus

Step 2: Attempt to Merge the Duplicate(s):

- Click where you see '1 Potential' in our example to bring up the profile that is a potential duplicate. This number could be greater than 1, if there are multiple duplicates:



- If the profile shows up with 'Cannot be merged', the duplicated profile resides in a different campus:

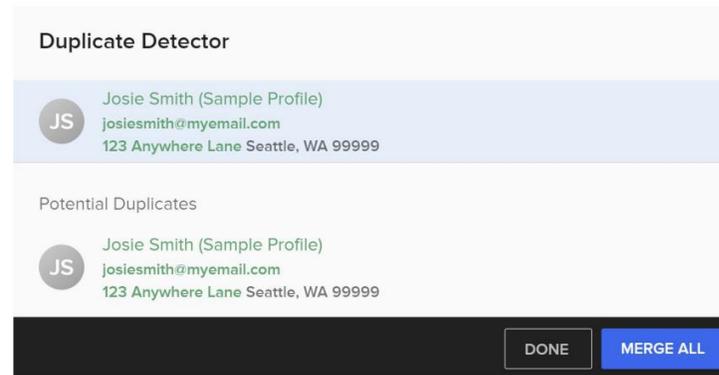


We cover this in next section



Best Practices – Deduping Within Your Campus

- If the profile shows up like the following, then both profiles reside within your campus(es):



Duplicate Detector

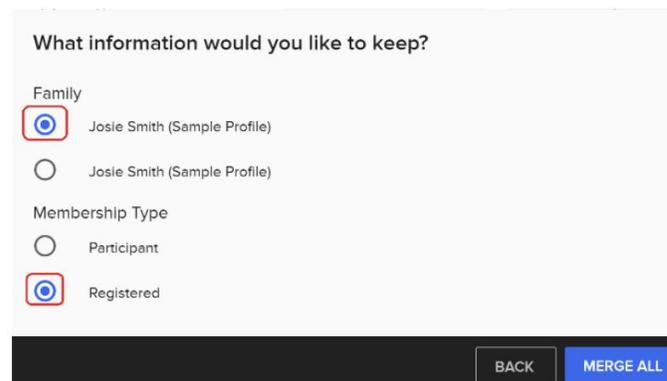
JS Josie Smith (Sample Profile)
josiesmith@myemail.com
123 Anywhere Lane Seattle, WA 99999

Potential Duplicates

JS Josie Smith (Sample Profile)
josiesmith@myemail.com
123 Anywhere Lane Seattle, WA 99999

DONE MERGE ALL

- Click the MERGE ALL button and the program will bring up any fields that have information that does not match between the profiles. Select the value you want to retain from each unmatched field and then click MERGE ALL:



What information would you like to keep?

Family

Josie Smith (Sample Profile)

Josie Smith (Sample Profile)

Membership Type

Participant

Registered

BACK MERGE ALL

Best Practices – Cross Parish De-Duping



<https://archseattle.ccbchurch.com/goto/forms/27/responses/new>

Best Practices – Cross Parish De-Duping

Duplicate Merge Request

This form is for Campus Admins to request a review of a duplicate across campuses

Campus Admin Information
Please enter YOUR information here. If you're logged in, this should auto-populate with your information.

Change Respondent
Someone else... ▼

First Name*	Last Name*
Sally	Smith

Email*

sally@myparish.org

Mobile Phone	Mobile Carrier ▼
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Duplicate Details

Full Name of Duplicate Profile*
Please enter the information from YOUR campus member profile that has a duplicate.

Susie Smith 11 / 60

URL of the Profile on Your Campus*
Example: <https://archseattle.ccbchurch.org/goto/individuals/2>

<https://archseattle.ccbchurch.com/goto/individuals/2> 52 / 60

I would like the following done with this duplicate:*

Review and contact both campus admins for more info ▼

Any notes to assist with this review?

Maggie has been actively participating in our Faith Formation program

Custom Reports Using People Search

A Special Event – Crab Feed for Young Adults

Goal: Send an Email to our Young Adults to Invite Them to a Crab Feed

Young Adult Crab Feed – You're Invited

All You Can Eat Crab Feed Fest for our Young Adults



Saturday, Feb 10th, 2024

6:00pm – 9pm

\$60 Crab and Lasagna

\$20 Lasagna Only

Dinner includes Coleslaw, Garlic/French Bread, Water, Soda, Beer, or Wine

Please RSVP [Crab Feed RSVP](#)

Creating a People Search Filter and Select Fields for Your Report

Select Your Fields for People Search

1 FILTER < 14 COLUMNS

Search name, phone, or email

Enabled columns: CHOOSE COLUMNS

- First / Last (fixed)
- Campus
- Custom Field - Family Formal Sal
- Custom Field - Family Informal Sal
- Custom Field - Family Mailing Name
- Home Street
- Home City
- Home State
- Home Zip
- Mailing Street
- Mailing City
- Mailing State
- Mailing Zip
- Email

Creating a People Search Filter and Select Fields for Your Report

Set Your Filters for Young Adults

CAMPUS SELECTION RESET HIDE

Admin Support ▾

DISPLAY IN RESULTS ⓘ

People matched in the search

Primary contact in their family

Spouse in their family

Children in their family

Others in their family

REFINE BY

Include active profiles

Include inactive profiles

Include deceased individuals

Include unlisted individuals ⓘ

Include "Child Protected" individuals

Apply filters below: CLEAR FILTERS

Match All ▾

Age (In Years) ▾ Is Between ▾ 25 and 35

Membership Type ▾ Is ▾ Registered ▾

Creating a People Search Filter and Select Fields for Your Report

Actions -> Send Mail Merge Message to the Filtered Group

The screenshot shows the ParishStaq interface. On the left, the 'ACTIONS' menu is open, with 'Send A Mail Merge' highlighted. A yellow arrow points from this menu item to a 'Send A Mail Merge' dialog box. The dialog box has two options: 'Create A New Mail Merge' and 'Use An Existing Mail Merge', with the latter selected. Below the options, a search bar contains 'Young Adult Crab Feed - Admin Support Campus'. A yellow arrow points from the dialog box to the right, where a preview of the email is shown. The email preview has a subject line 'Young Adult Crab Feed - You're Invited' and a body with the text 'All You Can Eat Crab Feed Fest for our Young Adults' and a large image of a crab. The interface also shows a progress bar at the top with steps 'Compose', 'Choose recipients', and 'Send'. On the right side, there is an 'Actions' panel with options like 'Send me a test email', 'Delete this mail merge', and 'Share this mail merge'.

Creating a People Search Filter and Select Fields for Your Report

Actions -> Send Mail Merge Message to the Filtered Group

Add Recipients

- From a group
- From a department
- Individually by name
- From a saved search
- From the last search**
- From a position
- Registered for an event
- Helping with a need
- From a process queue

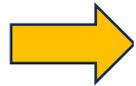
Last search results x
Start typing a name

All people matching the selection (1)

Recipient choices:

- People matched in the search
- Primary contact (of their family)
- Spouse (of their family)
- Children (of their family)
- Other members (of their family)

Cancel **Add Recipients**



Step 1 Compose Step 2 Choose recipients Step 3 Send

SEND "YOUNG ADULT CRAB FEED - ADMIN SUPPORT CAMPUS"

Email Version YES
Subject: Young Adult Crab Feed - You're Invited
 Follow recipient's General Church Communication settings
Send email to 1 recipient

Print Version [Sorting and label options...](#) [Compose print version](#)
 Only for recipients to whom the email will not be sent
Create letters for 0 recipients

Export (CSV) version NO
Export recipient list to use in another program
File will contain 1 recipient

Send

Creating a People Search Filter and Select Fields for Your Report

Actions -> Export List of Attendees

CAMPUS SELECTION RESET HIDE

Admin Support ▾

DISPLAY IN RESULTS ⓘ

- People matched in the search
- Primary contact in their family
- Spouse in their family
- Children in their family
- Others in their family

REFINE BY

- Include active profiles
- Include inactive profiles
- Include deceased individuals
- Include unlisted individuals ⓘ
- Include "Child Protected" individuals

Apply filters below: CLEAR FILTERS

Match All ▾

Age (In Years) ▾ Is Between ▾ 25 and 35

Membership Type ▾ Is ▾ Registered ▾



- ACTIONS ▾ < >
- Edit Profiles
 - Edit Sacraments
 - Export ▾ Export List
 - Add To Group
 - Add To Event
 - Add To Process
 - Send An Email
 - Send A Mail Merge
 - Print Labels
- Export Options

Group Report Dropdown

Using Group Actions Dropdown for Reports

The screenshot shows the ParishStaq interface for a group named "Special Event Samples" with 1 participant and a leader. The main content area is currently blank, displaying a large placeholder icon of three people. A navigation bar at the top includes "INFO", "MESSAGES", "CALENDAR", "FILES", "NEEDS", and "PARTICIPANTS". A dropdown menu is open from the top right corner, listing various report options:

- Group Participants
 - Printable Directory
 - Birthday List
 - Anniversary List
 - Parent List
 - Individuals: Contact Cards
 - Export Individuals
 - Group Contact List
 - Name List
 - List of Families
 - Postal Code Summary
 - Blank Attendance Marking Sheet(s)
 - Roster with Barcodes
- Events & Attendance
 - Event List
 - Basic Event List for a Single Date
 - Events with Resources
 - Event Setup
 - Individual Attendance Summary
 - Individual Attendance Summary (with missed/attended)
 - Individual Attendance Missed in a Row
 - Individual Attendance Detail

Event Report and Action Dropdowns

Using Event Actions Dropdown for Reports

back to calendar

 **Young Adult Crab Feed** Published
Saturday, February 10, 2024 6:00 PM - 9:00 PM | [Special Event Samples](#)

PREVIEW GUEST LIST ATTENDANCE CHECK-IN PUBLISH



Event Actions dropdown menu:

- Attendance Detail
- Guest List
- Event Fact Sheet
- RSVP
- Yes
- Maybe
- Add new event
- Edit this event
- Delete this event
- Duplicate this event
- Send a Mail Merge
- Print Labels

GUEST LIST

Attending	0
Maybe	0
Not attending	0
Unconfirmed	1 >

Reports dropdown menu:

- Basic Event List for a Single Date
- Events with Resources
- Event Setup
- Individual Attendance Summary
- Individual Attendance Summary (with missed/attended)
- Individual Attendance Missed in a Row
- Individual Attendance Detail

System Reports – A Few Good Ones

Events & Attendance

← Collapse Menu

- Home
- People
- Groups
- Events
- Check-In
- Schedules & Plans
- Giving
- Forms
- Communication
- Reports & Metrics**
- Settings

Reports & Metrics

SYSTEM REPORTS

Events & Attendance | Financial | People | Groups | Process

EVENT & RESOURCE

- Event List
- Basic Event List for a Single Date
- Events with Resources
- Event Setup

ATTENDANCE

- Attendance Trend
- Attendance Overview
- Attendance Summary
- Attendance Grouping Summary
- Individual Attendance Detail
- Individual Attendance Summary
- Individual Attendance Summary (with missed/attended)
- Individual Attendance Missed in a Row
- Blank Attendance Marking Sheet(s)
- Roster with Barcodes

Financial

- Events & Attendance
- Financial**
- People
- Groups
- Process



STATEMENTS & PLEDGES

- Giving Statements
- Giving Statement Summary
- Pledge Statements
- Pledge and Giving Detail**
- Pledge and Giving Summary**



TRANSACTIONS

- Transaction Summary
- Transaction Detail**
- Transactions by Amount
- Transactions by Batch or Date Range
- Transactions by Category
- Annual Summary by Categories
- Bank Deposit List
- First/Last Transaction Detail**
- Batch Report Summary



CHART OF ACCOUNTS

- Category Summary by Donor
- Category Summary by Batch or Date Range
- COA Statistics
- COA Category Summary by Month
- Chart of Accounts Detail
- Chart of Accounts List



ONLINE GIFTS

- Repeating Gifts Schedule
- Merchant Settlement Summary
- Merchant Transaction Detail



SPECIAL REPORTS

- Donor Analysis**
- Contribution Amount Statistics**
- Transaction Grouping Trend

People

- Events & Attendance
- Financial
- People**
- Groups
- Process



GENERAL

[Individual Profiles](#)

[Individual Notes](#)

[Printable Directory](#)

[List of Individuals](#)

[List of Families](#)

[Significant Events](#)

[Export Individuals or Change Log](#)



STATS & PRIVILEGES

[Usage Stats](#)

[Leadership Roles](#)

[Member Privileges](#)

[Quick Email Log](#)

Groups

- Events & Attendance
- Financial
- People
- Groups**
- Process



GENERAL

Department Summary

- Group Contact List
- Name List
- Birthday List
- Anniversary List
- Parent List
- Postal Code Summary
- Group Participants
- Export Groups

Process

- Events & Attendance
- Financial
- People
- Groups
- Process



PROCESSES & QUEUES

- Queue Manager Breakdown
- Process Queues Breakdown
- Overdue Breakdown
- Queue Comparison
- Process Queue
- Process Detail
- Process Summary
- Process Manager List
- Queue Manager List

Transaction Export Giving Portal

Using Transaction Export in the Giving Portal

- Finance
 - Transactions
 - Then, Set Filters

The screenshot displays the 'Transactions' page in the Giving Portal. At the top, there are dropdown menus for 'Campus' (Archdiocese of Seat... (+165)) and 'Listing' (Archdiocese of Seat... (+263)). Below these, a 'Transaction Period' dropdown is set to 'Custom' for '03 Jan 2024 - 10 Jan 2024'. A row of filter dropdowns includes 'Transaction Source', 'Payment Method', 'Transaction Status (2)' (highlighted in green), and 'Transaction Amount'. A second row includes 'Service Time', 'Fund', 'Member Type', and 'Transaction or Batch ID'. Under 'Applied filters', two tags are visible: 'Transaction Status: Processing' and 'Transaction Status: Success'. At the bottom, there are 'Apply filters' and 'Clear all' buttons.

Using Transaction Export in the Giving Portal

A screenshot of the 'Transaction Period' filter menu. The menu is open, showing a 'Custom' selection with a date range of '03 Jan 2024 - 10 Jan 2024'. Below this, there is a 'Date range:' section with a 'Custom' dropdown and two date input fields: 'Jan 3, 2024' and 'Jan 10, 2024'. At the bottom of the menu are 'Cancel' and 'Apply' buttons.

A screenshot of the 'Transaction Source' filter menu. The menu is open, showing a list of transaction sources with checkboxes: 'Batch entry', 'Gift Entry', 'Kiosk', 'Mobile', 'Recurring', 'Text giving', and 'Transaction import'. A 'Clear' button is visible at the bottom of the menu.

A screenshot of the 'Payment Method' filter menu. The menu is open, showing a list of payment methods with checkboxes: 'ACH', 'Cash', 'Credit card', 'Non-cash', 'Recorded ACH', 'Recorded check', and 'Recorded credit card'. A 'Clear' button is visible at the bottom of the menu.

Email the Support Team

We are still having trouble receiving all submissions to the parishstaq.support@seattlearch.org

Please Use

support@archdioceseofseattlepes.samanage.com