

## GabrielSoft Parish Operating Policy Standard for Diocese of Green Bay

All Parishes should be using GabrielSoft for the following documentation for Parish Families.

### Pillar 1

#### 1. Review families census information

- Ensure correct name, address, email, phone.
  - Update Mailing address in Mailing tab when address is updated on maintenance screen.
  - Make a global note with date and initials & Parish abbreviation (ie 3/2/23 py-StPer)
- Review Family Status as appropriate to their relationship with your church.
  - If you change the family status – it will only affect their status with your church
  - If you change the family status, and the family has no other churches, it may affect the member statuses.
    - i.e. Making a family Inactive could make the members inactive.
    - Making a family deceased when there are still active members, will make the living member inactive.
- Ensure Registration status is updated for the church the family chooses to be registered with.
  - If the family is active, at your church, then they should be registered.
  - If you find a family active at more than one church, then check with the other church to see which church should have the registered button checked.
  - Only Active families should be Registered families.
  - If a family or individuals in a family state they want to “belong” to both churches, then the two churches should work out who gets the registered button, and the other church could use one of the seldom used family types (such as outreach, visitor, prospective) and then make sure that for mailings they choose Active and Visitors.
- Ensure the correct members at the address are listed.
  - Review Misc Tab for birthdate, gender, marital status.
  - Monitor families for young adults to be moved to a separate single family.
    - Check that the young adults are not already part of another family (i.e. thru marriage).
      - ☐ Use member search and search by first name & birthdate start/Birthdate end.
    - If the young adult is already in another family, then use “add to existing family” and move the young adult.
      - ☐ If the new family is not in your church, simply Add the Family to your churches as inactive and then do the move into that family.
- Member status is updated by the parish of registration.
  - Check the churches tab for parish relationships before altering a member status.
- Update Mailing address in Mailing tab when address is updated on maintenance screen.
  - Once the new address is entered in the family maintenance screen, open the Mailing address tab, uncheck the “☒ Mailing Address” box at the left, Hit save. Refresh or open the family record again to see the update.
- Review families for duplicates (the diocese can provide a report) and request to merge duplicates.
  - When you search for a family, if you use keyword search (typing portions of the name), you may find a family listed more than once.
  - Add the Church Name, Church City and Church ID columns to your Explorer. Clear the filter for Church ID (to see all parishes) and then search again for a family.
  - It also helps to enter part of the family name (and TAB), then enter part of either spouse’s first name (and TAB) to reveal more families to look for similarities.
  - Some parishes put first name in male then female order, and some put female then male order.