

ParishSOFT Family Suite

Standard Operating Procedures



Finance Office / Parish Support

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ARCHDIOCESE OF ATLANTA
Standard Operating Procedures – ParishSOFT Family Suite

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Family Directory

Revision #:2018-4
Revision Date: 2018-04-16

Registering a Family

Title: Assigning Registration Status to Family

Description: 0 A family may be REGISTERED in only ONE parish but can be Active in many. The following describes how the Diocese recommends parishes determine the “Home” parish for a family where they should be registered.

Details: Registration is initiated by completion of parish registration form by the new member or family.



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Family Directory

Adding a Business or Organization

Title: Adding a Business or Organization to ParishSOFT Family Suite

Description: In addition to family donors – there are Organizations and Businesses that will be contributors or donors. This procedure covers the recommended way for tracking these entities in your system.

Details: The following information indicates how to create an Organization or Business within ParishSOFT Family Suite for recording and reporting purposes.

Currently, there is no specific designation for an Organization or Business within the program. You must track these entities using a Family Group of Organization/Business.

There are fields such as prefix and role that are required by the program when entering a new record. Follow the guidelines below to add an Organization or Business to your system.

Enter the organization as follows:

- Prefix: Mr
- Last Name: Knights of Columbus
- First Name: . (period)
- Role: Head
- Gender: Male (default)
-

Enter the address as you would for any record.

! Registration Status = Unregistered

! Family Group = Organization/ Business

! **Do not use auto fill** for the salutations. This will be a manual entry

- Formal Mailing Name: Knights of Columbus
- Informal Mailing Name: Knights of Columbus
- Formal Salutation: Knights of Columbus
- Informal Salutation: Knights of Columbus

 You may add a member record if you want to track the primary contact person of the organization.



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Revision Date: 2018-04-16

Family Directory

Family Groups

Title: Assigning a Family Group

Description: Family Groups allow for the quick sorting and filtering of various types of family data that resides in your ParishSOFT Family Suite. A family can only be assigned one Family Group. Make sure it is the group that represents the primary engagement with the parish.

*Best Practice: every family record must contain a Family Group assignment.

Details: *Recommended Registration status is listed in parenthesis for each Family Group type

Definition of Default Family Groups

Active (Registered)	Active families are those where one or more members are also designated as active; Those families that are actively participating in many activities with the parish. Recommended family status is Registered.
Contributor Only (Unregistered)	Family is contributing but not registered in this parish. Recommended family status is unregistered; they are giving but have never formally registered.
Moved (Unregistered)	Family has moved out of the diocese. Family status is unregistered.
Inactive (Unregistered)	A family is considered inactive when all members are designated with a status of inactive. This family group can be used to manage your census data and track those families that have shown no participation in parish. Think of this group as another opportunity for engagement. Family status should be unregistered.



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<p>Religious Ed Only (Unregistered)</p>	<p>The family participates only in the religious education program but is not registered in this parish. Recommended family status is unregistered.</p>
<p>Sacrament Only (Unregistered)</p>	<p>Family is there to receive a sacrament, however is not a registered member of your parish and does not affect your census. (A bride wants to get married at her childhood home parish, or the parents who want to have their baby Baptized in the grandparent’s parish.) Family status is unregistered.</p>
<p>Staff (Unregistered)</p>	<p>Member of the staff who is not registered in any parish. Family status is unregistered.</p>
<p>Visitor (Unregistered)</p>	<p>Usually reserved for out-of-town or first-time visitors.</p>
<p>Deceased (Unregistered)</p>	<p>When all members of the household have a member status of Deceased. Family status is unregistered.</p>

! These values are global.



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Member Status Interaction with Family Groups

Parishioner Scenario	Family Registration Status	Currently Registered box <input checked="" type="checkbox"/>	Family Group	Member status
Active/Registered	Registered	Yes	Active	All members – active OR Individual Members may be a combination of Active, ActOther, Inactive or Deceased
Non-Catholic member of Standard Registered family	Registered	Yes	Active	ActOther
Standard Inactive family	Not Registered	No	Inactive	Inactive
<u>All members</u> of the family are Deceased	Not Registered	No	Deceased	Deceased
Non Member	Not Registered	No	Inactive	Inactive
Registered in Another Parish Active in Your Parish	Registered at (Parish Name)	No	Active	Active
Contributor	Not Registered	No	Contributor	Inactive or Active
Organization /Business	Not Registered	No	Organization/ Business	Inactive/Active
Visitor	Not Registered		Visitor	Inactive/Active



Family Directory

Revision #:2018-4
Revision Date: 2018-09-11

Family Name Standards

Title: Data Entry standards for family names

Description: Data entry standards should be used to ensure the proper formatting for mailing lists, letters, and emails.

Good data entry practices such as searching for the family record before adding it, using correct spelling of a family’s name and adding member birthdates will all help in preventing the introduction of duplicate entries.

Details: When adding a new family, proper spelling and punctuation should be used at all times. Please use the full legal name.

You must always check to see if the family already had a record in the database. Use proper case when searching the record.

If the family is listed, but spelled incorrectly, go into the Family Details page and correct any misspellings. It is important for data integrity that you do not add a new record.

The following best practices should be followed:

-  When adding a family that is not present in the database, be sure to capitalize the first letter of each first name as well as the first letter of the last name or names. Failure to adhere will cause unprofessional appearances of the name when sending mail merge letters or other communications to the family.
-  Every family record must have a member record with the role type of Head, Husband or Wife. These member roles are synonymous.
-  Upon entering member information, a married couple is to be entered as husband and wife, whereas a single person would be head of household.
-  If the wife chooses to retain her maiden name along with her husband’s surname, enter the member last name for the wife as she wishes it to appear. For example:

Husband	John Doe
Wife	Jane Dixon Doe

-  Use of Autofill will create the following naming convention for each field listed below:



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Mailing Name	Mr. John Doe and Mrs. Jane Dixon Doe
Informal Mailing Name	John Doe and Jane Dixon Doe
Formal Salutation	Mr. Doe and Mrs. Dixon Doe
Informal Salutation	John and Jane

- The system requires complete gender, role, and first and last name on each member record.
- Best practice for autofill purposes is to also complete the title, nickname and suffix fields on the member record.
- Do not use a character such as forward slash (/) to indicate a couple.
- Do not use an ampersand (&) in place of the word “and”.
- Most last names do not legally contain a hyphen. The ParishSOFT system accepts two last names separated by a space. The convention of two last names is very common with the Latino community.

Standard Member Title

Standard Member Suffix

Mr.	Jr.
Mrs.	Sr.
Miss	II
Ms.	III
Dr.	IV
Sr.	V
Rev.	CSSR
Rev. Mr.	M.D.
Rev. Msgr.	OFM Conv
Very Rev.	PhD
Br.	esq.
Capt.	OSF/S
Most Rev.	OSF/T
	OSFS
	OSU
	RSM
	SJ, etc.



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Revision #:2018-4

Revision Date: 2018-04-18

Family Directory

Unmarried couples living in same household

Title: Data entry standards for unmarried couples living in the same household

Description: This procedure outlines the process that should be followed when a parish is adding a new family and must specify the family's status as well as the member's status. There are several scenarios that could occur within a parish that must be identified. A proper family status and member status combination will describe an individual's unique standing within the parish.

Details: Here are some scenarios your parish may wish to consider setting standards for

- Same sex couples
- Unmarried couples
- Adults living together who are not in a relationship such as adult siblings

The Archdiocese recognizes the Pastor as having the ultimate say in sensitive, pastoral matters about households.

Archdiocesan Best Practices recommend that unmarried couples be listed as two separate households. Our recommendation goes along with IRS tax filing guidelines, i.e., two adults who are not married cannot file their taxes together, unless one is the legal dependant of another.



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Family Directory

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Revision Date: 2018-04-18

Handling Divorce Situations

Title: Data entry standards for divorced couples

Description: This procedure outlines the processes that should be followed when addressing a divorced couple situation.

- Details:**
- The marriage, shown on the sacramental tab of the adult members' records should be end-dated. You may not know the actual date – using the date you were notified is acceptable.
 - The previously married adults each need to have their own household record. Their role should change to “Head” of their household. Do NOT delete the adult who is no longer in residence at the family home.
 - Remember to check the mailing names for each household to reflect the current status.
 - Children's records should never be duplicated – assign them to the household which corresponds with their legal residence (much as it would for school or a driver's license).
 - If one adult moves out of the parish and you do not have a current address, you may use the last known address and mark the household as unregistered/inactive.
 - Our database is member-centric and as such, children with divorced parents will still show the link to both parents (as is required for sacramental certificates).
 - Your pastor may need to be consulted for complicated situations.



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Address Standard

Revision #:2018-4
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Title: Data Entry standards for addresses

Description: This procedure outlines the process that should be followed when a user is attempting to add a new address to the family directory. This standard follows ParishSOFT Family Suite and US Postal Service regulations. Data entry standards should be used to ensure the proper formatting of mailing lists, letters and emails.

Details: Definition of Home, Mailing and Other – Function of CASS validation

Home Address

The physical local residence.

Mailing Address

The alternate address to which mail is delivered. This is generally a P.O. Box

Other Address

The away address typically used for seasonal residents or snowbirds. This address provides the ability to enter dates in which this alternate address is valid. Note: the system will automatically change to this address during the period listed.



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Change of Address

Title: Change of address

Description: When a family moves, or changes their address.

Details: Previous address should be noted in family notes field along with date of change, reason for change and the initials of person making change.



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Revision Date: 2018-04-16

Publications & Privacy Settings

Title: Standards for publication and privacy of the family record.

Description: Identifying the areas of publication and privacy within family screen

Details: There are several selections within the family screen that require attention.

Send Magazine-

When “Send Magazine” is checked, and the family is Active/Registered, this family will receive the Georgia Bulletin newspaper sent to their mailing address.

Send Mail,

If left unchecked, it will stop all mail from being sent at any level. This field can be unchecked if all members of the family are deceased.

Publish Address,

When checked will allow the address to be printed in rosters and directories left unchecked the address will be concealed on all roster directories and other printed material.

Publish Phone,

When checked will allow the phone number to be printed in rosters and directories. Left unchecked, the address will be concealed on all roster directories and other printed material.

Publish Email,

When checked will allow the e-mail address to be printed in rosters and directories. Left unchecked the email-address will be concealed on all roster directories and other printed material.

Publish Photo for Pictorial Directory

When checked will allow the family photo to be printed in rosters and directories and used in My Own Church, if left unchecked the address will be concealed on all roster directories and other printed material.



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Map Codes

Title: Map Codes

Description: The system provides an area in which to detail family location. This field is commonly used to make note of neighborhoods by name. Standardization of the names of neighborhoods associated with each parish will make this field more valuable to the parish (e.g., Polo Fields Golf and Country Club is not the same as Polo Fields or Polo.)

Details: Utilization of this field will support evangelization efforts, ministry and strategic planning efforts.



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Member Roles

Title: Assigning member roles within the family

Description: Family member roles are based on how they relate to the Head, Husband or Wife in the family record. For instance, if the husband’s mother moves in with them, her role would be Mother because she is the Mother of the husband, **not** Grandmother to the children. This would only be appropriate in situations where the “Mother” was a dependent of the family. Most times it would be more appropriate for her to have her own household even though they reside at the same address.

Details: If you have questions about roles, please contact the Finance Office/Parish Support at the Archdiocese. Susan Shirley, sshirley@archatl.com .

Head – Husband – Wife

Each record must have one of these three primary roles assigned. Head would be single adult.

Single Adults

Two single adults that live together, such as brother and sister, should have separate family records, both with roles of Head.

Unknown

This role would only be used until you can determine the correct role for this individual. This should NOT be a permanent role.



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Member Status

Defining member status

Title: Selecting the proper member status.

Description: This standard outlines the use of proper member status within the family record. Often families will contain members that are not Catholic or are no longer actively participating in the church.

Details: There are four standard member statuses within the system: Active, Inactive, ActOther, and Deceased.

Active

This member is actively participating in the parish. When using this designation the religion field should reflect Catholic. Any parish staff members who require access to the ParishSOFT database must be listed as Active when creating/editing their user profiles.

Inactive

This member is not actively participating in the parish. This could be a college student away from home, or some other scenario where the member is no longer participating.

ActOther

This is used for members that are actively participating in the parish but are not Catholic. When using this designation the religion field should reflect the religion of this member, e.g. John Doe is Catholic, his member status is Active, his religion is Catholic, Jane Doe is Episcopalian, her member status is ActOther and her religion is Episcopalian. This is an opportunity for evangelization and contributes to the parish statistics.

Deceased

This member status is used when a family member dies. When status is used a date of death should be completed. Member and family records of deceased people should not be removed or deleted from your Family Directory. The records should be maintained for historical tracking purposes.

- Note: The Date of Death field is only editable when the member status has been set to Deceased.

! These Member Status fields cannot be modified.



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Member Info

Maiden Name

Title: Tracking maiden name

Description: A maiden name should be included in the record where possible.
This field is used when creating sacramental records and certificates.
It must be present to run certificates for Baptism of associated children.
This assists with genealogical record keeping and to ensure the proper tracking of an individual from birth to death despite a name change due to marriage.

Details: This field should be completed when entering Baptismal records.



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Sacrament

Title: Recording sacramental data

Description: The electronic ParishSOFT entries **DO NOT** replace the physical Sacramental Register. Data entries must be *completed in a timely manner* and contain complete information.

Keeping electronic sacramental records provides both the parish and diocese with a disaster recovery backup should a catastrophic event occur.

- Update the sacraments when updating other information on the member record.

Details: All Sacraments should be **recorded in BOTH** the register book and maintained electronically. Full procedural details on sacramental records may be obtained from the Office of Archives at the Archdiocese of Atlanta.



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Offertory

Revision #:2018-4

Revision Date: 2018-04-16

Batch Standards

Title: Naming standards for batch creation

Description: Batch naming standards allow for sorting and filtering of offertory batches based on parish standards.

Details: Recommended batch naming conventions:

four digit year-two digit month-two digit day Mass time type of collection

- 2018-04-01 900am main – this is easily interpreted to be the 9:00 am Main Offertory collection on Sunday April 1, 2018
- 2018-04-01 900am St Vincent de Paul – this is easily interpreted to be the 9:00 am Second Collection on Sunday April 1, 2018 for St. Vincent de Paul
- 2018-04-01 Misc – this is easily interpreted to be the miscellaneous deposits which were counted and tabulated by the parish count team along with the other collections on April 1, 2018.

Placing the year at the beginning of the batch name allows for alpha/numeric sorting that will keep batches in sequential order.



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Posting Standards

Title: Posting standards

Description: Proper count procedures enable the person responsible for posting to quickly create and post a balanced batch. The Archdiocese of Atlanta has fully detailed count team procedures located at:
<https://archatl.com/offices/finance/policies-best-practices-procedures/>

Details: All parish offertory income is entered into ParishSOFT.
All batches must be closed in a timely manner.
Posting date should be set to the date on which the donation was received.
If a check is received from someone registered at another parish within the diocese, import the family from that parish as unregistered. If they are not registered anywhere in the diocese add the family to your database as an unregistered contributor.
When the batch balance is zero a batch detail report should be run to verify that all details are correctly recorded. The batch should be closed in a timely manner.



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Offertory

Revision #:2018-4

Revision Date: 2018-09-11

Posting Corrections

Title: Making corrections after batch is closed

Description: Correction batches are used to record audited transactions to closed batches.
A correction batch is used when items are returned from the bank such as NSF checks or adjustments that are required to parishioner giving.

Details: Correction batches must be done as a detailed posting entry.

-  Correction batch for NSF check should include a posting date that is the same as the original donation – this will prevent a negative contribution from showing on the year-end statements.
-  Best practice is to note NSF in the memo field for the transaction.
-  Correction batch for incorrectly posted item located in a closed batch. (i.e., wrong fund, wrong donor, wrong amount)
-  Best practice to date correction batch on the date of the original posting.



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Offertory

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Reporting

Title: Batch and offertory reporting

Description: Archdiocesan Best Practices require frequent reconciliation between ParishSOFT Family Suite and ParishSOFT Accounting – to validate that all contributions are accurately recorded in both programs. The reconciliation requires the weekly and monthly printing of reports and sharing those reports with all involved parish or accounting personnel.

Details: Required offering reports:

- Batch Detail Report for each posted batch
- Parish Contribution Summary – run weekly and monthly
- Monthly Contribution Summary should be reconciled against Deposit Register from ParishSOFT Accounting.
- Contact Susan Shirley sshirley@archatl.com for full instructions on fund reconciliation.



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Administration

Staff Management

Title: Setting up and maintaining staff records

Description: This standard procedure describes the process that should be followed when a parish is setting up a staff record. This procedure also applies when new staff members join and when a staff member leaves. It is necessary to keep information within the staff directory current to keep parish data secure.

Details: The following process should be followed:

- Add **all** staff members (whether they are parishioners or not) into the family directory.
- The staff member must have a family record present in your family directory. If they are registered at another parish, import the record as unregistered.
- Non-Catholic staff members must have a family record. The family would be **unregistered** and the family group **Staff**. The staff member record must be Active.
- After the individual is added to the staff list, the system administrator must then select the access rights for that user. Keep in mind that some staff and volunteers may not need access to the ParishSOFT Family Suite.
- The Archdiocesan standard for username creation is First Initial Last Name and parish POL – (e.g., SShirley21066).



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Administration

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Lookup Tables

Title: Look up tables are a combination of “global” and local tables. Lookup tables can be managed centrally at the diocesan level and/or locally at the parish. These are used to provide consistency in information tracking and ease of reporting.

Description: Staff members with Administrative access rights may edit the lookup tables as required by the parish. Common additions to the tables may be local schools, special or visiting presiders. Additions/modifications may also be made to the Religious Education/Leader Roles to meet the needs of your varying volunteer roles.

Details: As needed by the parish.



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Fund Creation

Title: Creating funds in the ParishSOFT Family Suite Offering

Description: At this time each parish may manage their own Offering Fund names and numbering schema.

Details: Special attention must be paid to designating each fund based on tax status – deductible or non-deductible. Fund details also determine whether online giving contributions may be posted automatically to the fund. To allow for auto import of online giving, each fund receiving contributions must be marked “Enable Import”.

Funds may not be deleted but may be renamed to allow for alphabetical orientation (e.g., Capital Campaign 2015 – 2017 will show up alphabetically next to Capital Campaign 2018 – 2020 – you may rename Capital Campaign 2015 – 2017 to zzzCapital Campaign 2015-2017 – this renaming pushes this fund to the bottom of the list and can prevent confusion when posting).

In ParishSOFT Fund Permissions are assigned separately from Access Rights. The Fund Permissions are assigned, by staff member, in the Offertory/Funds module.



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Administration

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Module Settings

Title: Module settings and configuration of tabs

Description: ParishSOFT Family Suite allows for the customization of certain modules and tabs. Parishes may change the name of the Religious Education module to meet their current needs.

Details:



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Administration

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Notifications

Title: Notifications of record changes by another organization

Description: Notifications are generated to the parish when activity happens on a record to which your parish has a connection.

These notifications include Family Merge and change of parish registration

Details: The system administrator should review the notifications and insure that necessary adjustments to the record are completed.

Adjustments could include removal of such items as send envelopes, ministry participation, family or member workgroups, and changing family group status or change of address.



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Revision #:2018-4
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Merging Records

Title: Standards for merging duplicate records

Description: At this time all duplicates must be merged at the diocesan level. The diocese will only merge duplicates in which there is a clear match. The data match includes:

- Name
- Address
- Birthdate

If there is any question regarding the ability to match a record the diocese will contact the parish involved.

Details: It is the responsibility of the parish to thoroughly research possible duplicate records and notify the diocese so they can be merged.

Duplicate records will be merged using their Family DUID as the search criteria. To merge families, please send the Family DUID of the primary family, followed by the Family DUID of the duplicate family via email to Susan Shirley, sshirley@archatl.com. Merges will happen overnight and must be checked for accuracy the following day. Special attention should be paid to Member roles and Family mailing names.

! Once records are merged they cannot be undone. Research must be accurate and thorough.