

PARISH GUIDE

Welcome & Registration — How It Works

From a new family's first visit to a trustworthy household census — in plain language.

A simple, step-by-step guide for parishioners and parish staff · Powered by Nave

At a glance

Welcome & Registration is how new parishioners join your parish and how the office keeps an accurate record of every household. A newcomer has **two front doors**; behind both is **one workspace** — Census & Households. Together they make sure nobody who reaches out is ever lost, and the household list you rely on stays current.

 **New here?** →  **Register your household** →  **New parishioners** →  **On the census**

Two ways in, by design. The **recommended** path is to **create a free account and register your household** — that gives the family a home base they can update anytime. For visitors not ready for an account, a quieter **"leave your info"** form sends the basics to the parish, who follow up personally. Either way, the parish ends up with the family on record.

The three pieces

Two are for parishioners (the public Welcome page and the portal household card); one is for staff — **Census & Households**, which now holds the follow-up queue as its first tab.

Welcome page

The public front door — create an account & register, or leave your info for a callback. No sign-in needed for the callback form.

My household (portal)

A signed-in parishioner registers their family and keeps it current. Submitted for staff review.

Census & Households

Everything the office works: new parishioners, everyone on the census, and the households they belong to. Pastor & staff only.

Everyone is a record — with or without a login

A spouse who never signs in and a child in faith formation are **real records** in the census, exactly like the person who filled in the form. An account is simply a way to sign in; it is not what makes someone a parishioner.

What makes someone a parishioner is being in a registered household. That means a sponsor or godparent from another parish, or a staff member who worships elsewhere, can be on file without ever being counted as one of your families.

Census & Households has three tabs

New parishioners

Families still being welcomed — with a call log and one-click ministry connect — plus anyone who signed in but isn't on the census yet. This is where the old Welcome Queue lives now.

Existing parishioners

The census one person at a time: who they are, which family, and how to reach them. Useful for "how old is this child?" questions.

Registered households

The families themselves — rosters, the annual refresh, and transfers. Add or edit anyone in the family here.

Everything is multilingual. The Welcome page and portal are shown in each visitor's own language (English / Spanish / more), so a new family

is guided in the language they read.

Part A • For parishioners

How a new family joins the parish, and how anyone keeps their household details current. The recommended path takes about a minute; the callback form needs nothing but your name.

USE CASE 1 • CREATE AN ACCOUNT & REGISTER YOUR HOUSEHOLD

Who: A new parishioner or family. **Goal:** Put your household on record and get a home base you can manage.

1. On the parish website, open **Welcome** and tap **Get started** → (under "New here?"). Create your free account.
2. You land in **My Parish** (the member portal). Find the **My household** card and tap **Register household**.
3. Add your family — household name, the people in it, and your contact details — then submit. Your household is saved as **pending review** by the parish office.
4. Once staff approve it, the status turns to **approved**. You can reopen the card anytime to keep your family's details up to date.

Result: Your family is on the parish's records, and you have an account for RSVPs, giving, following ministries, and service hours.

USE CASE 2 • PREFER A CALLBACK? LEAVE YOUR INFO

Who: A visitor not ready to create an account. **Goal:** Let the parish reach out and register you personally.

1. On the **Welcome** page, open "**Prefer we just reach out? Leave your info instead** →".
2. Fill in your **name** (required) and, if you like, your **phone**, **email**, and **mailing address** for a welcome packet.
3. Optionally tap the **ministries** you'd love to be part of, so the parish can connect you.
4. Tap **Send my info**.

Result: Your details go straight to the parish's **New parishioners** list, and the welcome team follows up personally — no account required.

USE CASE 3 • KEEP YOUR HOUSEHOLD CURRENT

ANYTIME

Who: Any signed-in parishioner. **Goal:** Update your family's roster or contact details when life changes.

1. Sign in and open **My Parish** → the **My household** card.
2. Add or remove household members, fix your address or phone, and tap **Save household**.
3. If the parish asks for an **annual refresh**, this is the same place you confirm your details are still right.

Result: The parish's records stay accurate because the people who know best — your family — keep them current.

Part B • For parish staff

One screen with three tabs: **Admin** → **Census & Households**. Follow up on newcomers under **New parishioners**, look people up under **Existing parishioners**, and maintain the families under **Registered households**. Visible to **pastor and staff only**.

USE CASE 4 • WORK THE NEW PARISHIONERS TAB

Who: Parish staff (welcome access). **Goal:** Make sure every newcomer gets a personal follow-up.

1. Open **Admin** → **Census & Households** → **New parishioners**. Every family still being welcomed appears as a card, whether they registered themselves or left their details for a callback.
2. After you call or email them, tap **Log contact**, add a short **note** (what you discussed, when to try again), and save. Each attempt is kept, so anyone can see the history — and logging the first one is what moves the family from **New** to **Contacted**.
3. Below the cards, the same tab lists **people who signed in but aren't on the census yet**. Give them a household in one click. Staff appear in their own group — some staff are parishioners too, and for the ones who worship elsewhere you can answer **Not a parishioner** once and they stop appearing.

Result: A single worklist of everyone on their way in — every outreach logged, nobody sitting on a screen you forgot to check.

USE CASE 5 • MARK REGISTERED & CONNECT THEM TO MINISTRIES

Who: Parish staff (welcome access). **Goal:** Finish onboarding a family and hand them to the right ministries.

1. When a newcomer is fully registered, set their card to **Registered**. That also confirms their details, so they won't immediately show up as due for the annual refresh.
2. If they checked any **ministry interests**, Nave opens a **join request** for each matching ministry and alerts those leaders automatically — you'll see a confirmation of how many connections were made.
3. If a family can't be reached after repeated tries, mark them **Unreachable** so the active queue stays meaningful.

Result: The newcomer is onboarded and already introduced to the ministries they care about — without a single extra email from you.

Who: Pastor / parish staff (census access). **Goal:** Keep a household master list you can trust.

1. Open **Admin** → **Census & Households** → **Registered households**. A summary bar shows **people on file**, total **households**, how many are **not registered** yet, and how many are **refresh due**.
2. Open a family to see **the people in it**. Add anyone — a spouse, a child, a grandparent living with them — with their date of birth and relationship. They become records you can look up, whether or not they ever sign in.
3. Where someone has a Nave account, link it so their record and their login are the same person. Renaming is safe: the record keeps its links.
4. Removing someone from a household doesn't erase them — they stay on file as a person with no household, so nothing recorded about them is lost.
5. Add a household yourself with **Add new** (you can link a member's account as the primary contact), and mark a family that has left as **moved** to keep the active count honest.
6. Work through the **refresh due** list each year to confirm details are still current.

Result: One reliable household directory — updated by parishioners, approved by staff — instead of a spreadsheet nobody trusts.

Quick reference

Where do new families start?	The parish website → Welcome . Recommended: Get started to create an account and register a household. Or open the "leave your info" form for a personal callback.
Do I need an account to register?	The recommended path uses a free account (your home base). The "leave your info" form needs no account — just a name.
What happens after I register my household?	It's saved as pending review . A staff member approves it, and it turns approved . You can update it anytime.
Where do "leave your info" submissions go?	To Admin → Census & Households → New parishioners as a follow-up card, starting at status New . The family is on the census from that moment — nothing has to be re-typed later.
What are the follow-up statuses?	New, Contacted, Registered, and Unreachable . Contacted isn't set by hand — logging a contact is what marks it.
Does everyone in a family need an account?	No. A spouse or child who never signs in is still a full record on the census. An account is only a way to sign in.
What makes someone a parishioner?	Being in a registered household. That's why a sponsor from another parish, or a staff member who worships elsewhere, can be on file without being counted as one of your families.
What does "Registered" do besides change the status?	If the family listed ministry interests, Nave opens a join request for each match and alerts those ministry leaders.
Who can see the Census?	Pastor and parish staff only . It's the master list of households, rosters, the annual refresh, and transfers.
What does "refresh due" mean?	Households flagged for the parish's periodic (typically annual) check that their details are still current.
What languages?	The whole Welcome flow and portal are multilingual (English / Spanish / more), shown in each visitor's own language.

The big idea: Welcoming a family and keeping good records is one connected flow, not a clipboard at the door. A newcomer registers themselves (or asks for a call); staff follow up from a shared queue where nothing is lost; and the household census stays trustworthy because parishioners keep their own families current and staff simply approve. Warm for newcomers, light for the office.