

Using ParishSOFT Family Directory to answer Census Questions on Annual Report

In the Annual Report for the Bishop there are two questions which can be answered by the Family Directory module of ParishSOFT. The questions are the first and third questions in the first section on page one, under the heading "Statement of General Statistics."

ANNUAL REPORT
ST. AMBROSE FINANCIAL SERVICES, INC.
FOR FISCAL PERIOD 7/1/13- 6/30/14

PARISH _____ LOCATION _____

STATEMENT OF GENERAL STATISTICS

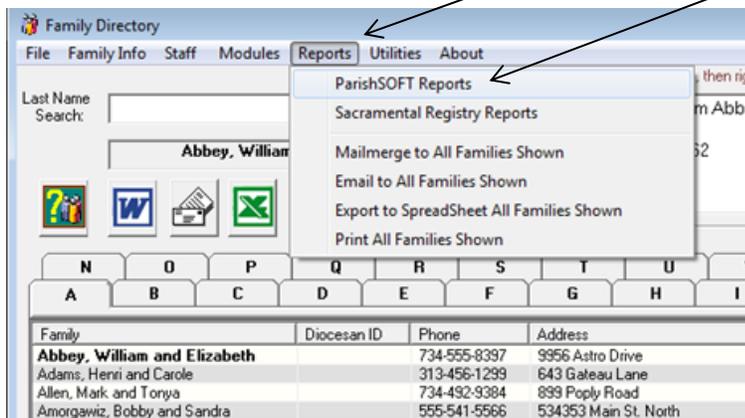
GENERAL

What is the Catholic population of your parish? (Actual) _____
What percent of the people living within the boundaries of your parish are Catholic? (Estimate) _____
How many Catholic households/units in your parish? _____
How many envelope holders contribute \$100.00 or more per year? _____
(This number is considered for the Diocesan Annual Appeal target)
Have you taken a complete census of your parish within the last three years? Yes ____ No ____

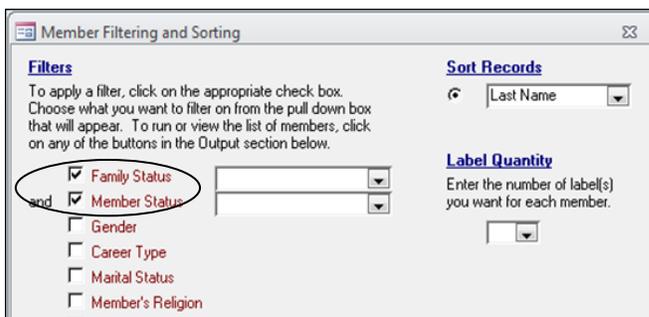
To answer the Annual Report question: What is the Catholic population of your parish?

The Catholic population of your parish is the number of *active members* in your parish from *registered families*.

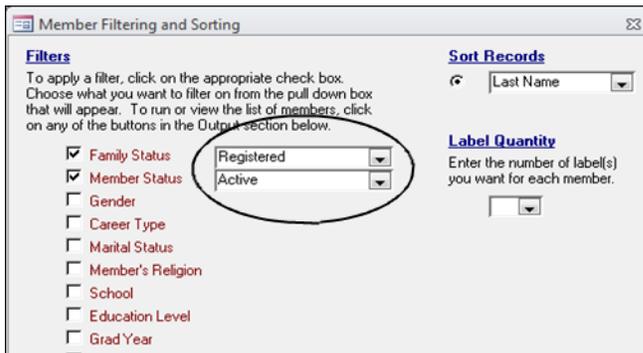
1. In the Family Directory rolodex, click **Reports** menu, > **ParishSOFT Reports**.



2. Click the **Census Menu** button, > Member Filtering and Sorting
 - a. Under *Filters*, click to place checkmarks next to **Family Status** and **Member Status**.



- b. Click the drop-down arrow in the box next to *Family Status* and select **Registered**.
- c. Click the drop-down arrow in the box next to *Member Status* and select **Active**.



- d. Under *Output*, click **Show Results**.
The Catholic population of this demo parish is 289.

Family_envt	Member_en	MemberID	Membershp	FirstName	LastName	Tag_name	Mailing Name	Salutation	Career
0	0	355	1	William	Abbey	William and Eli	Mr and Mrs William Abbey	Mr.	Banker
0	0	354	85	Carole	Adams	Henri and Caro	Henri and Carole Adams	Mrs.	
222	0	545	144	Mark	Allen	Mark and Tony		Mr.	
222	0	548	144	Matthew	Allen	Mark and Tony			
222	0	550	144	Melanie	Allen	Mark and Tony			
222	0	549	144	Meredith	Allen	Mark and Tony			
222	0	547	144	Michael	Allen	Mark and Tony			
222	0	546	144	Tonya	Allen	Mark and Tony		Mrs.	
210	0	440	106	Barbara	Anderson	Matthew and E	Matthew and Barbara Ande	Mrs.	
210	0	463	106	Cedric	Anderson	Matthew and E	Matthew and Barbara Ande		
38	0	113	30	Ethan	Anderson	James and Mar	Mr and Mrs James Andersor		
210	0	527	106	Grace	Anderson	Matthew and E	Matthew and Barbara Ande		
38	0	56	30	James	Anderson	James and Mar	Mr and Mrs James Andersor	Mr.	Build
38	0	112	30	John	Anderson	James and Mar	Mr and Mrs James Andersor		
38	168	61	30	Marcus	Anderson	James and Mar	Mr and Mrs James Andersor		Stude
38	0	57	30	Martha	Anderson	James and Mar	Mr and Mrs James Andersor	Mrs.	Banker
210	0	439	106	Matthew	Anderson	Matthew and E	Matthew and Barbara Ande	Mr.	
19	0	4	3	Nancy	Bailey	Todd and Nanc	Mr and Mrs Todd Bailey	Mrs.	

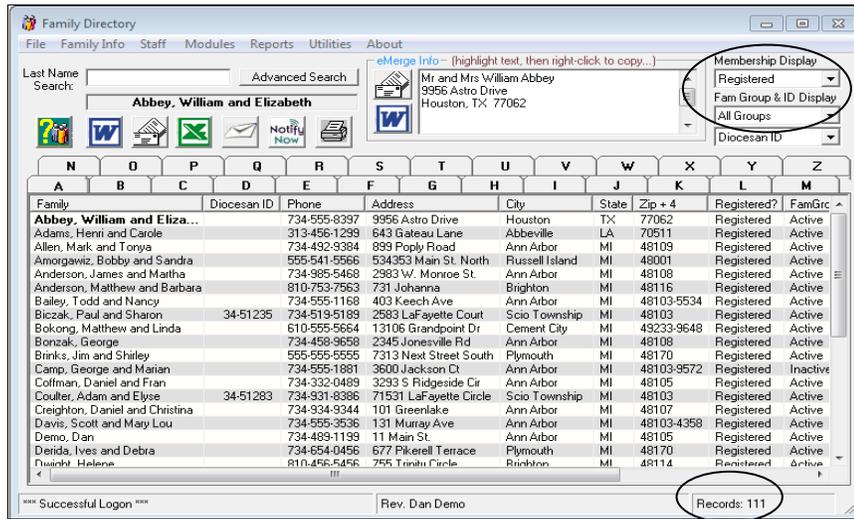
*** Data Integrity Audit Regarding Member Records ***

Obtaining the number of the Catholic population in your parish in the manner described above assumes the data is current and correct. One way to evaluate the integrity of your Catholic population data is to review *Active* member records that are from Unregistered Family records.

The query results may help to reveal records that need updating or correction. There are, however, scenarios where such a combination – an *active member* from an *unregistered family* – is accurate, for example, the case of “Religious Ed Only” for a child whose family is registered at a different parish.

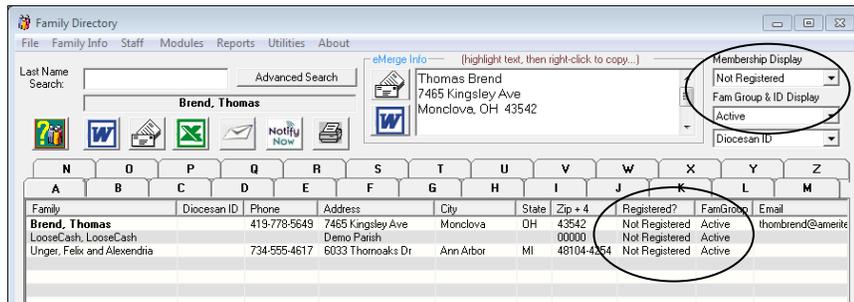
To answer the Annual Report question: How many Catholic households/units are in your parish?

In the Family Directory rolodex, this number is the number of *Registered Families* in your parish from *All Groups* as illustrated below, with the number of households indicated by “Records: 111” at the bottom of the window.



***** Data Integrity Audit Regarding Family Records *****

When we select *Not Registered* and *Active* in our demo, three records are queried. Updates/corrections need to be made to these records either (1) to change the **Membership Display** from *Not Registered* to *Registered*, or (2) to change the **Family Group** to *Inactive* or another group coherent with the *Not Registered* status.



The chart below illustrates which Family Groups should normally be associated with the *Not Registered* and *Registered* status of Family records.

Family Record	Family Group
Registered	Active Assisted Living Center Clergy/Religious Homebound Nursing Home
Not Registered	Contributor Only Religious Ed Only Sacrament Only School Only Deceased Inactive Moved Transferred Visitor