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**.

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File Famil	y Info Staff	Modules	Reports	Utiliti	es Al	out	/		
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Last Name Search:	Sac	Sacramental Registry Reports					m Abbe		
	A	bbey, William	Mai	Imerge	to All	Families S	hown		52
			Ema	il to A	ll Fami	ies Showr	n		
23					Export to SpreadSheet All Families Shown				
			Print All Families Shown						
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A	B	C	D	E	i Y	F	6	н	Ύι
Family			Diocesar	ID	Phone	3	Address	_	
Abbey, William and Elizabeth				734		734-555-8397 9956 Astro Drive		Drive	
Adams, Henri and Carole				313-456-1299		56-1299	643 Gateau Lane		
Allen, Mark	Allen, Mark and Tonya				734-4	92-9384	899 Poply F	load	
Amorganuiz			555.5	41.5566	524353 Ma	in St. North			

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

📧 Member Filtering and Sorting	23
Member Filtering and Sorting Filters To apply a filter, click on the appropriate check box. Choose what you want to filter on from the pull down box that will appear. To run or view the list of members, click on any of the buttons in the Output section below. Family Status Gender Gareer Type Marital Status Member's Religion	Enter the number of label(s) you want for each member.

- 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.

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	1	0	1	1	William	Abbey	William and Eli	Mr and Mrs William Abbey	Mr.	Banke
	0		355	85	Carole	Adams	Henri and Caro	Henri and Carole Adams	Mrs.	
	0		354	85	Henri	Adams	Henri and Caro	Henri and Carole Adams	Mr.	
	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.	Banke
	210	0	439	106	Matthew	Anderson	Matthew and E	Matthew and Barbara Ande	Mr.	
	19	0	4	3	Nancy	Bailey	Todd and Nand	Mr and Mrs Todd Bailey	Mrs.	-
Re	cord: 1 of 28	9 ▶) ⊨ 🕅	No Filter Search							

*** 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 <u>Unregistered</u> 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.

Family Directory										×
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ABC	T D T	E	FÍGĬ	н	Ϊ	J	Ĭκ	ĹĹĬ	м	Ĩ
Family	Diocesan ID	Phone	Address	City		State	Zip + 4	Registered?	FamGrc	1
Abbey, William and Eliza		734-555-8397	9956 Astro Drive	Hou	uston	TX	77062	Registered	Active	
Adams, Henri and Carole		313-456-1299	643 Gateau Lane	Abb	eville	LA	70511	Registered	Active	
Allen, Mark and Tonva		734-492-9384	899 Poply Road	Ann	Arbor	MI	48109	Registered	Active	
Amorgawiz, Bobby and Sandra		555-541-5566	534353 Main St. N	rth Rus	sell Island	MI	48001	Registered	Active	
Anderson, James and Martha		734-985-5468	2983 W. Monroe S	. Ann	Arbor	MI	48108	Registered	Active	la
Anderson, Matthew and Barbara		810-753-7563	53 731 Johanna Brighto		hton	MI	48116	Registered	Active	
Bailey, Todd and Nancy		734-555-1168	403 Keech Ave	Ann	Arbor	MI	48103-5534	Registered	Active	
Biczak, Paul and Sharon	34-51235	734-519-5189	3 2583 LaFayette Court Sc		o Township	MI	48103	Registered	Active	
Bokong, Matthew and Linda		610-555-5664	13106 Grandpoint [r Cen	nent City	MI	49233-9648	Registered	Active	
Bonzak, George		734-458-9658	3-9658 2345 Jonesville Rd Ann Arbor MI			MI	48108	Registered	Active	
Brinks, Jim and Shirley		555-555-5555	7313 Next Street S	outh Plyr	nouth	MI	48170	Registered	Active	
Camp, George and Marian		734-555-1881	3600 Jackson Ct	Ann	Arbor	MI	48103-9572	Registered	Inactive	
Coffman, Daniel and Fran		734-332-0489	3293 S Ridgeside (ir Ann	Arbor	MI	48105	Registered	Active	
Coulter, Adam and Elyse	34-51283	734-931-8386	71531 LaFayette C	rcle Sci	o Township	MI	48103	Registered	Active	
Creighton, Daniel and Christina 734-934		734-934-9344	101 Greenlake	Ann	Arbor	MI	48107	Registered	Active	
Davis, Scott and Mary Lou 734-55		734-555-3536	131 Murray Ave	Ann	Arbor	MI	48103-4358	Registered	Active	
Demo, Dan		734-489-1199	11 Main St.	Ann	Arbor	MI	48105	Registered	Active	
Derida, Ives and Debra		734-654-0456	677 Pikerell Terrac	e Plyr	nouth	MI	48170	Registered	Active	
Dwight Helene		810-456-5456	755 Tripitu Circle	Brid	hton	м	48114	Registered	Active	ľ
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* Successful Logon ***			Rev. Dan Demo				C B	ecords: 111 /		

*** 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.

🎁 Family Dir	rectory							
File Family	Info Staff Mo	odules Repo	orts Utilities	About				
Last Name Advanced Search Advanced Search Brend, Thomas				arch	Henge Into (highlight text, then right-click to copy) Membership Display Thomas Brend 7465 Kingsley Ave Fan Group & DL 43542			
			8			-	Diocesan ID -	
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A Family	B	P C Diocesan ID	Q F D E Phone	R S F Address	T U G H	V I State Zip + 4	J K Registered?	L M
A Family Brend, Th	B omas	P C Diocesan ID	Q F D E Phone 419-778-5649	R S F Address 7465 Kingsley Ave	T U G H City Monclova	V I State Zip + 4 OH 43542	W X J K Registered? Not Registered	Y Z L M FamGroup Email Active thombrend@amerite
A Family Brend, Th LooseCash,	B B Iomas LooseCash	P C Diocesan ID	Q F D E Phone 419-778-5649	R S F Address 7465 Kingsley Ave Demo Parish	T U G H City Monclova	V State Zip + 4 OH 43542 00000	W X J K Registered? Not Registered Not Registered	FamGrobe Email Active thombrend@amerite
A Family Brend, Th LooseCash, Unger, Felix	B B LooseCash and Alexendria	P C Diocesan ID	Q F D E Phone 419-778-5649 734-555-4617	R S F Address 7465 Kingsley Ave Demo Parish 6033 Thornoaks Dr	T U G H City Monclova Ann Arbor	V State Zip + 4 OH 43542 00000 MI 48104-42	W X J K Registered? Not Registered Not Registered 54 Not Registered	E Y Z L M FamGroon Email Active Active Active

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