

Parish Round Table

Spring 2018



Diocesan Annual Appeal 2017-2018 Prayer

We praise and thank You, Father, for all the gifts You have generously given to us through Your Son, Jesus Christ.

We pray Lord for the strength to serve You humbly in this life, doing good works in Your Name and being today's compassionate image of Your Holy Gospel. Thus, may we sow the seeds of hope for those who are weakened by a world of sadness and discouragement.

United as disciples in the love of Your Son, let us be reminded of our baptismal call to follow our Lord Jesus Christ as generous stewards in service to others as Mary our Holy Mother humbly did by listening to the angel's message.

Mary, our model of hope, sustain us in our faith as the Mother of hope for the community of believers. Encourage and guide us your children as we await the open door of His heavenly Kingdom.

We make our prayer through Christ our Lord.

AGENDA

- A. Opening Prayer
- B. Review of the census software selection process and outcome
- C. Orientation – benefits and challenges. What stays the same, what changes and how you’ll know the difference.
 - a. Diocesan Standard Operating Procedures (SOP) for recording census data
 - i. Full document is found at diolc.org/pims/
- D. Data review – how to prepare your data for transition.
 - a. Staff listings
 - b. Send magazine
- E. Training – what is available online, in your deanery, from the vendor and from curia.
 - a. Transition schedule and change management for census software upgrade
- F. Go-live - what to expect and what to watch out for. Where to find support.
- G. Feedback – help improve the transition process.
- H. Chancery Bulletin feedback and local SPAM checking
- I. Safe Environment forms and procedures
- J. Social Media for your parish
- K. Questions.
- L. Closing Prayer

ParishSOFT Transition to online

Benefits

- Log-in and work from anywhere
- Mobile access to parish membership
- Parishioner access to My Own Church
- Data is always backed up on the cloud
- Single, diocesan-wide database
- Fewer data conflicts, data corruption issues
- Licensing changeover at year-end is gone

Challenges

- New user interfaces to learn
- Some new workflows, screens and steps
- Quality of Internet connection matters
- Activity of other users matters
- Data conversion issues (staff listings)
- Time and Talent is not in new version

What stays the same. What changes.

Stays the same:	Changes:
<ul style="list-style-type: none">• Data – What you have is what you get	<ul style="list-style-type: none">• Data synch and backup are gone
<ul style="list-style-type: none">• Offering data is still private to the parish	<ul style="list-style-type: none">• Batch Posting is streamlined
<ul style="list-style-type: none">• Terminology – field names, modules	<ul style="list-style-type: none">• No Member merge
<ul style="list-style-type: none">• Staff assignments, permissions	<ul style="list-style-type: none">• No Extended Family fields
<ul style="list-style-type: none">• Support	<ul style="list-style-type: none">• Reports

How you can learn about changes

- Compare desktop software to the parish census SOP
- Compare desktop software to online demo <https://sandbox.parishsoftfamilysuite.com>
Username **user1**, Password **Pass12**
- Compare the SOP to **Top ParishSOFT Family Directory Tasks**
- Visit a nearby parish that is already online
- Watch [ParishSOFT videos](#)

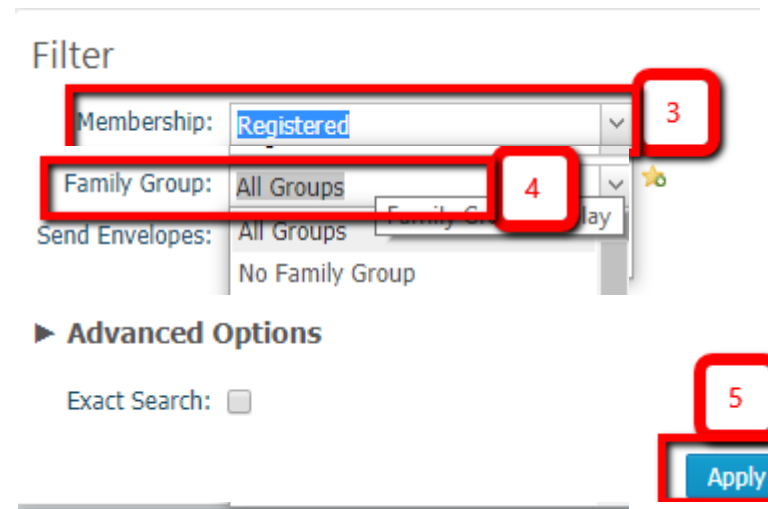
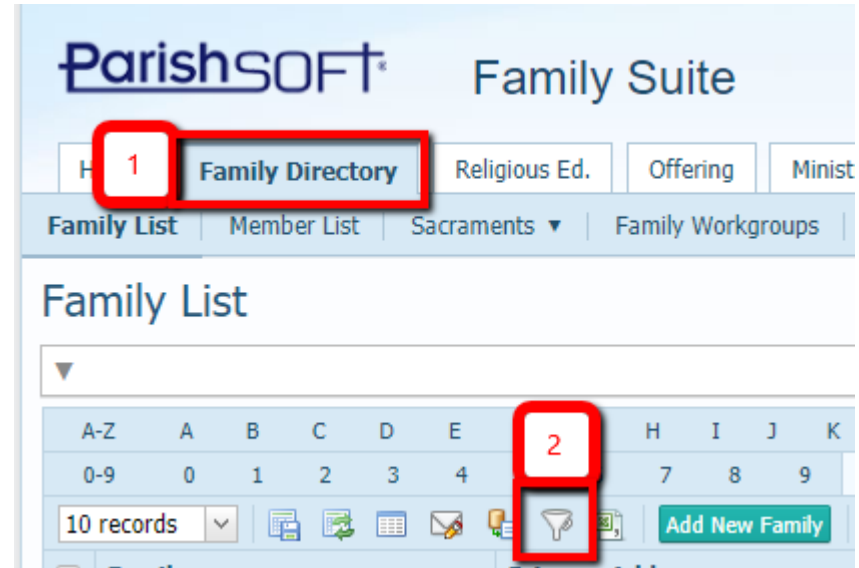
PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Contents

Record Keeping Responsibilities.....	3
Family and Member	3
Offertory Funds, Pledges, Contributions and Batches	3
Sacramental Details.....	3
Administrative Staff, Assignments, Positions and Access Rights.....	3

Prepping for the transition

- Staff listings
- Registration and Family Groups
 - Registered, Active
 - Registered, Inactive
 - Registered, Unknown
 - Registered, Deceased
 - Registered, Moved
 - Registered, ??????
- Data browsing
 - Sacraments
 - Family Workgroups
 - Member Workgroups
- ParishSOFT [Transition checklist](#)



Family List

Good Shephe

▼

A-Z	A	B	C	E	F	G	H	I	J	K	L	M	N	O	P	Q
0-9	0	1	2	3	4	5	6	7	8	9	Filter Criteria: None		Filter Column:			

10 records ▾ [Print] [Export] [Refresh] [Add New Family] [Delete Selected Families]

Select Grid Columns

<input checked="" type="checkbox"/> Family	<input type="checkbox"/> Envelope #	<input type="checkbox"/> Family Email	<input type="checkbox"/> Phone
<input type="checkbox"/> Address	<input type="checkbox"/> City	<input type="checkbox"/> State	<input type="checkbox"/> Postal Code
<input type="checkbox"/> Plus 4	<input checked="" type="checkbox"/> Registered	<input checked="" type="checkbox"/> Family Group	<input type="checkbox"/> Zip Code
<input type="checkbox"/> Registered Org ID	<input type="checkbox"/> Organization Registration	<input type="checkbox"/> Diocesan ID	<input type="checkbox"/> sDiocesanID
<input type="checkbox"/> Family ID	<input type="checkbox"/> FamilyDUID	<input type="checkbox"/> Family Group ID	

Select All | Clear All | Save & Close | Cancel

Family	Registered	Family Group
<input type="checkbox"/> Adamski, Frank and MaryAnn	Yes	Active
<input type="checkbox"/> Ahles, Richard	Yes	Active
<input type="checkbox"/> Aieyo, Luis and Miguela	Yes	Active
<input type="checkbox"/> Alland, Donald and Cynthia	Yes	Active
<input type="checkbox"/> Allen, Jim and Cheryl	Yes	Active
<input type="checkbox"/> Allen, Mary	Yes	Active
<input type="checkbox"/> Allen, Michael and Randi	Yes	Active
<input type="checkbox"/> Allen, Veronica	Yes	Active
<input type="checkbox"/> Allmann, Paul and Linda	Yes	Active

Funds

- ✓ Tie-out counters' tape to bank deposit receipt
- ✓ Tie-out bank receipt to ParishSOFT Batch report
- ✓ Tie-out the ParishSOFT Funds totals to general ledger journal entry in
 - Quick Books
 - Ledgers & Payables

Add Fund


Fund #:	1231.04	1	
Description:	Operation Rice Bowl		
Start Date:	<input type="text"/>		
End Date:	<input type="text"/>		
Diocesan #:	1231.04	3	
External #:	1231.04	2	
Revenue Account:	<input type="text"/>		
Tax Deductible:	<input checked="" type="checkbox"/>	Tuition Fund:	<input type="checkbox"/>
Require Pledge:	<input type="checkbox"/>	Enable Import:	<input type="checkbox"/>

COLLECTIONS AND APPEAL FUNDS

57.	(1231.07) Diocesan Council of Catholic Women.....	_____
62.	(1231.06) Propagation of the Faith — Memberships.....	_____
63.	(1231.02) Propagation of the Faith — Mission Sunday.....	_____
64.	(1231.01) Propagation of the Faith — Mission Co-op.....	_____
67.	(1231.03) Propagation of the Faith — Student Lenten.....	_____
68.	(1231.05) Propagation of the Faith — Fund for Religious.....	_____
69.	(1231.04) Rice Bowl.....	_____
70.	(1231.08) Other.....	_____
71.	TOTAL OF LINES 57 THROUGH 70.....	_____

Loose Cash

- Share Loose Cash, FDUID 63626, at all parishes
 - Post all non-envelope cash contributions
 - Post non-envelope checks less than \$250

 To share the Loose Cash Family into your parish records use [Add New Family](#), [Find Family](#), specify Last Name "Cash", First Name "Loose" (1) and Search (2). From the Find Family results screen select Family "Cash, Loose" with Family DUID 63626 (3) and then Move Selected Family, As Unregistered (4) as shown below. In the shared record set the Family Group to Contributor Only.

Find Family

Selected Organization: All Saints Parish, Stanley

Filter by Organization: All

Last Name*: Cash

First Name: Loose

City:

Search

	Family Name	Registered Organization	Family DUID	Diocesan
<input checked="" type="radio"/>	Cash,Loose		63626	
<input type="radio"/>	Cash,Loose		78856	

Add New Family

Move Selected Family

Cancel

Formal Salutation

[As Unregistered](#)

Informal Salutation

[As Registered](#)

Batch Documentation, Audit Hardcopy

IM 43001							
Quick Entry Posting Batch Report							
Batch Description: 04-15-2018							
Donor	Envelope #	Amount	Fund	Pledge ID	Check #	Memo	Date
Green, William and Patricia	1	\$575.00	Offertory Plate Collections at Mass or Other Servi		6128		4/26/2018
		\$575.00	Offertory Plate Collections at Mass or Other Servi Total				
Gibson, Mel	12	\$310.00	Parish Picnics		5261		4/26/2018
		\$310.00	Parish Picnics Total				
Bates, Josephine	21	\$200.00	Parish Bazaars			cash given to Fr Rust	4/26/2018
		\$200.00	Parish Bazaars Total				
Spudrink, Elmer		\$202.56	Offertory Plate Collections at Mass or Other Servi		542		4/26/2018
		\$202.56	Offertory Plate Collections at Mass or Other Servi Total				
		\$1,287.56	Grand Total				

- Documents the total amount for tie-out to the counter's tape and bank receipt
- Includes Fund subtotals for tie-out to the accounting software
- Includes Donor names, amounts, check #, memos and dates – a subsidiary journal

Diolc.org/PIMS

Parish census software

Standard Operating Procedure

Training, Help and Support services

- 4 in-person ‘train the trainer’ sessions: La Crosse, WI Rapids, Wausau, Eau Claire
- Phone support
- Webinars: as-needed
- Screenshare: as-needed
- Diolc.org/PIMS
 - [Video training](#)
 - [Video Help by Module and Topic](#)
 - [“How-to” articles by Module and Topic](#)
 - ParishSOFT Transition – project updates
- MyParish Group, Administrative Staff and Secretaries

ParishSOFT Transition

Signup for Transition Training. Contact [Nick Lichter](#) for details.

La Crosse	WI Rapids	Wausau	Eau Claire
Diocesan Center Tuesday, May 1 and Wednesday, May 2	Assumption Catholic Schools Tuesday June 5	(site to be determined) Tuesday, July 10	(site to be determined) Tuesday, August 21
<i>La Crosse, Prairie du Chien, Richland Center, Tomah deaneries</i>	<i>WI Rapids, Stevens Point deaneries</i>	<i>Wausau, Marshfield, Thorp deaneries</i>	<i>Chippewa Falls, Eau Claire, Durand, Arcadia deaneries</i>

Schedule Overview

Desktop Transition/Integration Timeline	Business Days to Complete
You submit backup and continue to work in the desktop version.	1
They integrate the data at a staging site for you and the diocese to review.	3
You and the diocese review and report staging site data discrepancies.	5
They resolve the discrepancies and respond.	Variable
You approve the test data for production.	1
You submit a fresh backup and stop working in the desktop database. They schedule your transition which grants access 3 business days later.	3
Total Estimated Integration Time	13

4 Training Sessions by ParishSOFT staff

Sign-up for training

Sign-up your parish for transition

1. May 30-31, Location La Crosse
 Deaneries La Crosse
 Prairie du Chien
 Richland Center
 Tomah
2. July 19-20, Wisconsin Rapids
 - WI Rapids
 - Stevens Point
3. July 30 – Aug 1, Wausau
 - Wausau
 - Marshfield
 - Thorp
4. August 21-22, Eau Claire
 - Chippewa Falls
 - Eau Claire
 - Durand
 - Arcadia

Feedback

Help yourself and help others

- What did you like best about this meeting, like least?
- How can the implementation plan be improved?
- How can our materials be improved?
- What is your biggest concern about the implementation plan?
- What have we missed?