

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

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Record Keeping Responsibilities

Family and Member

Record all Family census data in the database. Record Member data for each person in the Family, including Members inactive, deceased or not registered. Record data for each Family as accurately as possible. Birthdates are especially important for creating a demographic profile. Comprehensive Member information is valuable for understanding Family dynamics and parish demographics.

Offertory Funds, Pledges, Contributions and Batches

Record parish offertory Contributions accurately for each Family, Member, or company. These records provide data for Contribution tax reports at year end.

Sacramental Details

The parish Sacramental Registers, hardcopy books of handwritten records, are the official record and the only canonically valid record for sacraments. Electronic records are not official and serve as supplementary reference to the Sacramental Registers.

Record each Sacrament received, Completed On date, Parish administered and Celebrant. Record also the Sacramental Record Registry Volume, Page, and Number to assist parish staff in cross-referencing from electronic records to the official, hardcopy records.

Administrative Staff, Assignments, Positions and Access Rights

Record administrative staff contact data, their assigned positions, their hire and release dates and appropriate access rights.

Reports

Report Family and Member census data, parish statistics, contributions and more. Use various filter criteria related to names, ages, groupings and affiliations to list, export and print in worksheets, or in specially formatted reports and templates.

! Delete Family, Delete Member (Do not use the Delete method)

Delete Family and Delete Member are methods available in ParishSOFT. However, for the Diocese of La Crosse, these methods are never recommended. The software does not actually Delete records. Instead, Delete method records become reassigned from the parish Organization to the Diocese of La Crosse Organization. Since it is never appropriate for the Diocese of La Crosse to have parishioner records, the Delete method is not preferred. The action to take with unwanted Family records is to simply set the Family as [unregistered](#) with an [Inactive Family Group](#). Each Member of the Family should also be set to [Inactive](#).

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Duplicate Family Records

Whenever duplicate Family records are found, it is appropriate to [Merge Family](#) records. Each parish has access to Merge duplicate Family records within their own listings. For duplicate records involving more than one parish please notify the diocesan offices.

Duplicate Member Records

When Duplicate Member records reside within the same parish census database, the records can be merged by the parish. For duplicate member records involving more than one parish please notify the diocesan offices.

If you wish to remove a Family record from the Active rolls in your parish the preferred method is to simply set the Family as [unregistered](#) with an [Inactive Family Group](#).

Merge Family or Member Records

Merge Family and Member Records is the method for removing duplicate records from the parish rolls. The Merge method outlined below is a simple Merge involving only one parish, two Families each having a single Member. For more a more complex Merge see documentation for [Merge Family](#) online, or notify the diocesan offices.

Merge Family or Member requires that you have the Family Diocesan Unique Identification (FDUID) or the Member Diocesan Unique Identification (MDUID) for both the Permanent Family or Member that will persist as well as the Duplicate Family FDUID or MDUID for the duplicate, unwanted or unneeded Family/Member record to be eliminated. FDUID can be found at the top of the Family record screen, in parentheses, to right of the Family name (1). The MDUID can be found on the Member tab under the icon for a Member photograph.

The screenshot shows the 'Family Details' screen for a family named 'Loose Cash'. The family ID '(78856)' and the label 'FDUID' are highlighted with red boxes. The screen displays the following information:

- Family Information tab selected
- Church of Registration: (blank)
- Details Modified On: Monday, October 12, 2015 6:48
- Family Group: Inactive (dropdown menu)
- Registration Status:
- Registration Date: 6/25/2008 (calendar icon)
- Unregistered Date: 2/17/2010
- Last Name: Cash
- First Name(s): Loose
- Formal Mailing Name: Loose Cash

To Merge, navigate to Administration (1), Merge (2) Merge Records from the dropdown box (3) and select either Merge Family Records or Member Records to configure the following steps (4). The selected Merge Records screen appears. Enter the Permanent DUID for the record that will persist (5). In Duplicate DUID field (6) enter the record DUID that will be eliminated. Click Search (7). The screen displays the found records (8). Click the What to Do dropdown box (9) and choose an appropriate Merge (10). Click the Submit to Queue to complete the Merge (11).

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Home | Census | Diocesan Development | IQ | **Administration** | Merge

Lookups | System Setup | Organizations | Manage Staff | Module Settings | Utilities | Merge | Notifications | Reports

Merge Records

Merge Type Families Members

Please identify the families you would like to merge.

Family DUID Search

Permanent Family DUID: 63626 | Duplicate Family DUID: 108064 | Additional Duplicate Family DUID: []

[Search] [Clear] [Add]

Choose to add or merge each member of the duplicate family

Permanent Family Members (63626)	Member DUID	Suffix	Birth Date
Loose Cash	160205		

Duplicate Family Members (108064)	Member DUID	Suffix	Birth Date
Loose Cash	266835		

What to Do: Merge with Loose Cash (160205)

[Submit to Queue] [Cancel]

Add New Family

Add New Family (2) can be found on the Family Directory screen (1). Selecting Add New Family (2) will bring up the Find Family dialog box. Add New Family, [Find Family](#) and [Move Selected Family](#) work together to record census data for an individual Family across multiple parishes. Avoid duplicate Family records by using each method appropriately.

ParishSoft Family Suite

Home | **Family Directory** | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Reports

Family List | Holy Trinity, Grosse Pointe

10 records | [Add New Family] | Delete Selected Families | Quick Reports

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Aaland, Thomas	1234		555-1111	2516 Aldringham Rd	Ypsilanti
<input type="checkbox"/> Aasen, Kathv			555-2221	- No Address-Text On File -	Ann Arbor

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Find Family

Find Family screen searches Last Name (red star designates required field) at other parishes. Search using 3-5 letters, capitalizing the first letter. Fewer letters yield more potential matches.

Find Family

Selected Organization: Holy Trinity, Grosse Pointe



Filter by Organization: All

Last Name* Searc

First Name:

City: Search

Cancel

-  To find a Family record within the parish, within the Family List, use [Filter Family List](#). Filter does not search other parishes and it does not allow [Move Selected Family](#), but it uses more search criteria including phone number, address, family group and registration status.
-  Whenever duplicate or unneeded Family records are found, it may be appropriate to [Merge Family](#) records. Each parish has access to Merge duplicate Family records within their own listings. For duplicates involving more than one parish please notify the diocesan offices. Typically, duplicate Family records, or duplicate Member records, are merged. Multi-parish records are merged at the diocesan level.

Registration Status

Registration Status is at the discretion of the pastor and of the family. Registration Status designates Family census enrollment at one, and only one, parish. A Family may not hold Registration Status in more than one parish. However, a Family can be recorded without Registration Status (box is unchecked) at multiple other parishes.

Each Family having Registration Status within the parish is counted as a Catholic household/unit for purposes of the Bishop's Annual Report. An unregistered Family is not counted, even if they are active and contributing.

Who should be registered, guidelines for Registration

Registration is appropriate for a Family that meets any of the following criteria.

- A Catholic Family that resides within the geographic boundaries of the parish, the domicile.
- A Catholic Family active in parish life, attending Mass or receiving the sacraments.
- A Family who serves the parish community through volunteering, service or ministries.
- A Family, including non-Catholics, who has requested registration.

To set Registrations Status navigate to Family Details (1), locate the Registration Status checkbox (2) and verify the source Church of Registration (3).

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Mr. Beetle Spudola and Elvina Spudola-Spudster (538677)

! Changing the Church of Registration (3) shares the Family record at the source parish for additional recordkeeping at the target parish. If the Family has no previous record shared at the target parish a popup dialog box, Church of Registration, may appear prompting to Move Selected Family (4).

Mr. Beetle Spudola and Elvina Spudola-Spudster (538677)

! Do not use Delete Selected Families. The Delete Selected Families button does not delete the Family record but instead shifts the Family association away from the parish Organization to the Diocese of La Crosse Organization (20945). Likewise, any other parishes which may associations with the Family remain intact. To end a parish

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affiliation with a Family it is best practise [unregister](#) the Family and set the Family Group to [Inactive](#), or to [Deceased](#) as may be most appropriate.

The screenshot shows the ParishSOFT Family Suite interface. At the top, there are navigation tabs: Home, Family Directory (selected), Religious Ed., Offering, Ministry Scheduler, Tuition, IQ, and Administration. Below these are more specific options: Family List, Member List, Sacraments, Family Workgroups, Member Workgroups, and Reports. The main heading is 'Family List' with a dropdown for 'Good Shepherd Parish, Tc'. A search filter is set to 'spud'. Below the search, there are columns for A-Z and 0-9. The current filter criteria is 'none' and the filter column is 'Family Ascending'. There are 10 records displayed. A red box highlights the 'Delete Selected Families' button. The table below shows three family records:

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address
<input type="checkbox"/> Spudola, Beetle				123 Hickory lane
<input type="checkbox"/> Spudrink, Elmer				345 Itchy St
<input type="checkbox"/> Spudroy, Bernard and LuEllen				456

Move Selected Family





Move Selected Family, as noted above (5), shares Family records, including Member records, from the source parish to the target parish. Some fields are not shared, but are displayed separately at each parish. This allows both source and target parishes to differentiate certain data fields appropriate to Family participation at each parish. See [Family Groups](#) to review important differences. Use Move Selected Family to create a shared Family records for these purposes:

When to use Move Selected Family

- Member from another parish contributes (Family Group – Unregistered, Contributor Only)
- Member from another parish attends Religious Education (Family Group – Unregistered, Religious Ed Only)
- Member from another parish receives sacraments (Family Group – Unregistered, Sacrament Only)
- Member from another parish attends school (Family Group – Unregistered, School Only)

Shared data		Fields
	Family Details	Last, First and Formal names. Email, Phone and Addressing. Health Info, Logfile and Dio Notes Registration Date (retains source parish date unless changed by target parish)
	Member Details	Photo, Name, Contact, Birth Date & Place, Religion, Language, Ethnicity General (except Member Notes), Sacraments Religious Education (except Student Notes) Misc. (except Member Workgroups)

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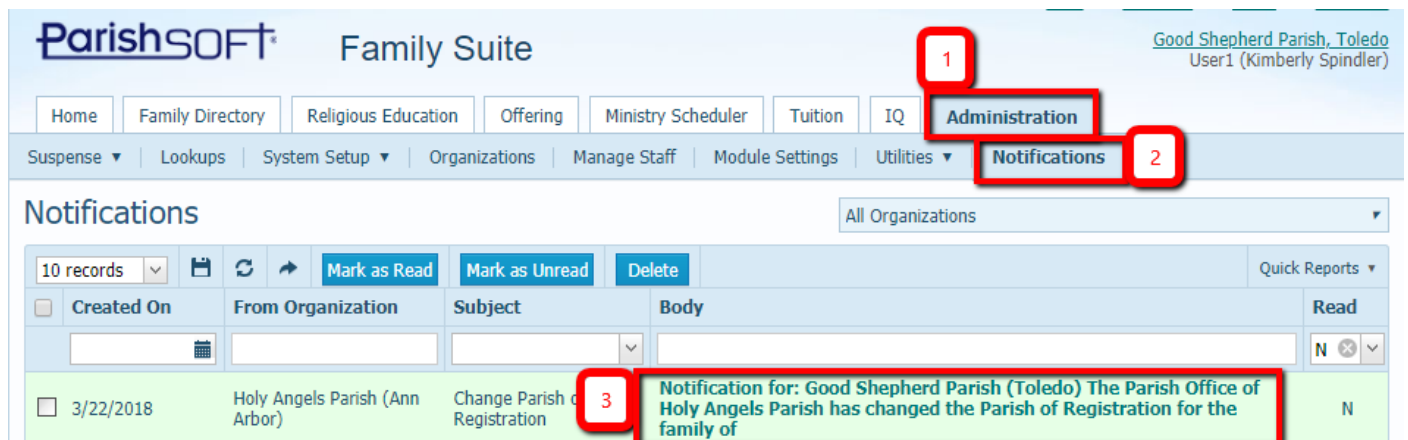
Data not shared	Family Details	<p> Family Contribution history from source parish</p> <p> Family Workgroups at source parish</p> <p>Family Group Registration Status Informal Name, Formal Salutation Envelope # Send Mail, Send Contrib. Env. General and Pastoral Notes</p>
	Member Details	<p> Member Contribution history from source parish</p> <p> Member Workgroups at source parish</p> <p>Status Envelope # Student Notes</p>

As **Unregistered** shares Family census and sacramental data from the Registration parish to the target parish. The newly shared record will display Registration Status as unchecked at the target parish. See [Family Groups, Not registered](#) for criteria on when to use As Unregistered.

! Family Group for the shared Family will default to source parish values at the target parish. These values are often inappropriate for shared records. Recommended best practice is to update these fields to values appropriate for the target parish.

As **Registered** shares Family records and updates Registration Status to checked at the target parish. It overrides Registration Status at the source parish, automatically, leaving it unchecked. See [Family Groups, Not registered](#) for criteria on when to use As Registered.

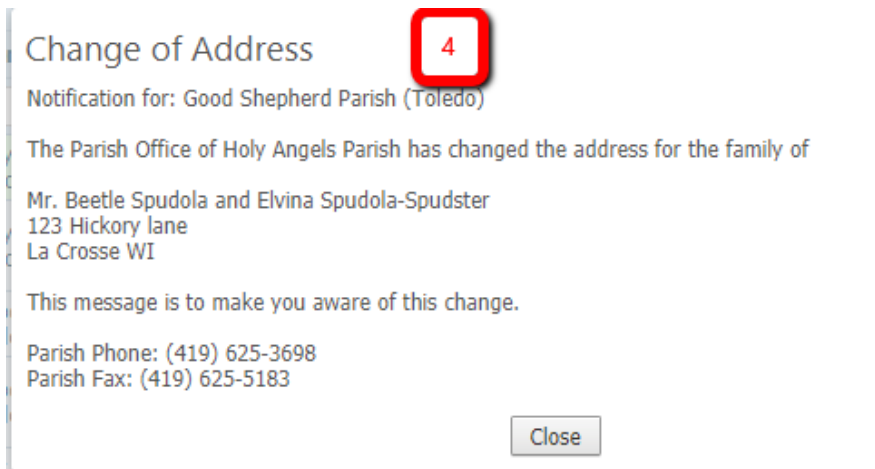
! As Registered will send a Notification to inform the source parish that the Family has been unregistered. To see Notification navigate to Administration (1)/Notifications (2) review the listing of Notifications (3) and double-click the entry to read the detailed Notification (4).



The screenshot shows the ParishSOFT Family Suite interface. The top navigation bar includes 'Administration' (1) and 'Notifications' (2). The 'Notifications' section displays a list of notifications. One notification is highlighted with a red box (3), showing the following details:

Created On	From Organization	Subject	Body	Read
3/22/2018	Holy Angels Parish (Ann Arbor)	Change Parish of Registration	Notification for: Good Shepherd Parish (Toledo) The Parish Office of Holy Angels Parish has changed the Parish of Registration for the family of	N

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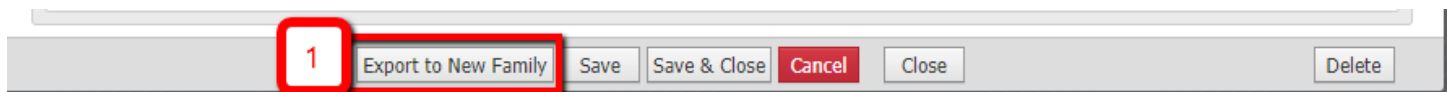
- ! Registration Date and Family Group fields default to source parish values. Recommended best practice is to update these fields to values appropriate for the target parish.

Export to New Family

Export to New Family is used to create a new Family and Member record when a child matures to adult age 22. By default Members age 21 or less are reported as children, and from age 22 or greater as adults.

- ! Before exporting an adult child, search your census database to make sure the person does not already have a separate Family record within your parish census. It could even contain a spouse and/or children. If a Family record exists, you should [merge the two Member records](#) rather than Exporting the adult child Member record to a new Family record. The existing Member number would be the Master and the Member number in the parents' record would be the duplicate. Sacramental information travels with the Member merge.

From Family Directory choose either Family List or Member List. Search for the Family of origin and then choose the Member Details tab for the specific Member who will be exported into a new Family. Click the Edit Details button at page bottom. The Export to New Family button appears at page bottom (1). Click it.



A popup message "Would you like to use the existing family's address as the address for the new family?" Select Yes or No. The [Add New Family](#) screen appears, populated with data for the new Family record and its corresponding, previously populated Member record.

- ! Last Name, Email Address, Family Group and other fields in the new Family record will be populated with corresponding values from the origin Family. Some values, such as Last Name, Email Address and Family Group may not be appropriate for the new Family. Edit inappropriate values as needed.

Export to New Family removes the Member record from the origin Family while retaining all Member data including Sacraments. The transaction:

- o Generates a new Family record and new Family DUID.

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- Registers the new Family record at the recording parish.
- Documents the export transaction in Family Notes tab on both the new and the origin Family record.
- Notifies the origin Family parish of registration about the Member export.

! Other parishes associated with the Origin family do not receive notification.

Choose Save, or Save & Close, to complete the Export to New Family.

Entering Names for Family and Member

Family Formal Mailing Name, Member First Name and Last Name are most important. These are used for a number of purposes at both the parish and diocesan listings.

! System Auto Fill automatically adds Title (Prefix) to Formal Mailing Name. Please remove these Titles. Highlight the Title in the Formal Mailing Name field (1). Right-click or press Ctrl+X to remove the Title (2).

? *IQ query SOP-Family Formal Mailing Name format check (QUID 675)* This query Verifies that the Family Mailing Name is properly formed. It looks for "&" as well as a number of invalid leading characters such as hyphens, slashes and asterisks which prevent names searches from working correctly.



First Name(s) should be entered in proper case as may be appropriate to the name. Do not use uppercase for all letters.

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Correct name lettering:

Last Name:*	McFarland-DeAntoine
First Name(s):*	D'Shaun

Respect personal preferences. When registering, it is important for the Formal Mailing Name to include the first name of both husband and wife.

- ! For consistency, the male name is always entered first – John and Susan
 - Even if one spouse is not Catholic, enter both spouses as an individual Family Member. Unless specifically requested to be removed from mailings, both spouses' first names should appear in the First Name(s) and the Formal Mailing Name fields.
- ! Use Suffix to differentiate same names within a Family: John Smith, Sr; John Smith, Jr; John Smith, III
- ! Do not encode the names with special characters. These indicators prevent Names from listing alphabetically and they hinder Name searches.
 - Do not use hyphens, or forward slashes, to indicate a couple
 - Do not place a Z, or *, in front of the Name to designate 'Spanish', or 'Not Catholic'
- ! Do not use an ampersand (&) in place of the word 'and'
- ! Do not use spaces in Names beginning with Mc, Mac etc.
 - Use: McDonald, MacDonald
 - Not: Mc Donald, Mac Donald.
- ! Do not use spaces in hyphenated names.
 - Use: Mary Owens-Jones
 - Not: Mary Owens – Jones
- ! Do not include the spouse Maiden Name, for example Mary (BoPeep) Jones. Use the Maiden Name field on the Member Details screen to record Maiden Name.

Address Standard

Address Standards ensure the proper formatting of mailing lists and letters. Accurate addressing saves money, time and builds trust. This standard follows US Postal Service regulations.

Complete [US Postal Service address guidelines](#) can be found online as well as definitions for [CASS](#) (Coding Accuracy Support System, US Postal Service address validation) and [NCOA](#) (National Change of Address listing). There are also free address checking online. Please use these tools to enter accurate addresses.

- [USPS.COM](#)
- [Experian](#)
- [SmartyStreets](#)

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The post office standard address is necessary for bulk mailings. The system's address checking function which will attempt to perfect any new street addresses entered into the system. Please use both upper and lower case when entering addresses. A standardized USPS address:

- fully spells the street proper name
- abbreviates street suffix per USPS standards (most common listed below)
- uses no punctuation marks in the address line. No periods after St, Dr or other. No comma before Apt number.

Typical Address:

2965 Anywhere Lane, Apt. B
Middleton, WI 53562

USPS Standardized Address:

2965 Anywhere Ln Apt B
Middleton, WI 53562-1456

The following are the most common Street Suffix Abbreviations:

For	Use	For	Use
Avenue	Ave	Pike	Pike
Boulevard	Blvd	Pine	Pine
Circle	Cir	Plaza	Plz
Court	Ct	Post Office Box	PO Box
Drive	Dr	Road	Rd
Heights	Hts	Route	Rte
Isle	Isle	Shore	Shrs
Junction	Jct	Square	Sq
Lane	Ln	State Roads	State Rd
Mount	Mt	Street	St
Park	Park	Terrace	Ter
Parkway	Pkwy	Trail	Trl

The following are the suggested County, State & Local Highway abbreviations suggested by USPS:

(Note: this is where the State, County or Highway is the primary address designation)

Examples in Use	Standard to Use
County Hwy 60	County Highway 60
CTH 60	County Highway 60
County Rd 41	County Road 41
CR 41	County Road 41
Hwy 14	Highway 14
Highway 14 bypass	Highway 14 Byp
I-10	Interstate 10
Interstate Hwy 680	Interstate 680
Rd 5A	Road 5A
Rte 88	Route 88
State Hwy 60	State Highway 60

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SR MM	State Route MM
US Hwy 44	US Highway 44

Primary Address

- ! The Primary Address field is only available on the Family record screen. It is not available on the Add New Family screen. To access Primary Address, and to enter more than one address (ie. Home, Mailing, Other) for a Family Save the Add New Family record and then reopen the Family record from the Family List.

The Primary Address dropdown box default value is Home (1). This will route all mail to the Home address. A Home address is required and should be entered/listed in the tabbed section below the dropdown (2).

Primary Address: Home Address

Home Mailing Other

Country: United States

Postal Code: 55362

Address Line 1: 123 Fake St

Address Line 2:

City: Monticello

State/Region: Minnesota

Phone Number:

- Home Address (required)
The physical, street address. This is the default mailing address unless Mailing, or Other are specified.
- Mailing Address
An alternate address to which mail is delivered. This is generally a P.O. Box
- Other Address
The secondary, away address typically used for seasonal residents or snowbirds (1). During the specified Valid From date window mail is routed to this alternate address (2).

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The screenshot shows a web form for entering an address. At the top, there is a dropdown menu labeled 'Primary Address:' with 'Other Address' selected. Below this are three tabs: 'Home', 'Mailing', and 'Other'. The 'Other' tab is selected. A 'Valid From:' field is set to '01-12 to 15-03 (mm-dd)'. Below these are fields for 'Country' (United States), 'Postal Code' (32814), 'Address Line 1' (123 Fake St), 'Address Line 2' (empty), 'City' (Orlando), 'State/Region' (Florida), and 'Phone Number' (empty). Red callouts are placed as follows: '3' is next to the 'Primary Address:' dropdown; '1' is above the 'Other' tab; and '2' is above the 'Valid From:' field.

- ! The system triggers a mail routing change to this secondary address automatically, without prompting, year after year. That’s why there is no year entry! It is best practice to review these addresses periodically to insure they remain accurate and are triggered at the correct dates.
- ! The Primary Address field will indicate Other during the timeframe when the Other address is in use (3).
- ! The Primary Address field can be set to Mailing or Other even if those address tabs are blank, causing an invalid condition. No mail will be routed.
- ? *IQ query SOP-Primary Address w NULL, or Unknown (QUID 681)* This query tests for Primary Addresses that have NULL, Unknown or blank fields. Specifically, the query tests Address1, City, State, and Postal Code fields in the Primary Address for NULL, Unknown, or blank fields.

Adding a Business or Organization

Organizations and Businesses are active in the parish. These commercial and social entities may provide ministries, services, advertise, or they may be contributors. Since the census software has no separate designation for companies they must be recorded as a Family.

Required data fields such as Prefix (which becomes the Title field on the Member Details screen) and Type must be given placeholder values for ParishSoft to accept entry. Here are guidelines and default data field values to use when adding an Organization or Businesses.

Required data fields:

- Prefix: please use “Mr.”
- First Name: please use “.” (period)
- Last Name: example “Knights of Columbus”
- Type: please use “Head”
- Gender: please use “(blank)”, or “Unknown”

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Family Member *(one or more required)*

Prefix:* ▼

First Name:*


Nick Name:

Last Name:*

Suffix: ▼

Type:* ▼

Gender: ▼

Birth date: 

E-Mail Address:

[Add Another Member](#)

Enter the address(s) as you would for a Family record.

 Registration Status = Unregistered

 Family Group = Active

! Do not use **Auto Fill Family Names** for the Mailing or Salutation fields. These should be manually entered.

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

Add a Member record to list the primary contact person for the organization.

? *IQ query SOP-Business of Organization (QUID 674)* This query tests Member records for fields that correspond to a Business or Organization. It searches for First Name ".", Type "Head", Gender (blank) or "unknown".

Family Groups (required):

Family Groups allow for quick sorting and filtering of Family records. Each Family must be assigned to a Family Group. Select whichever Family Group best represents the Family's primary engagement with the parish. Note that a Family may be shared across multiple parishes, and may therefore be assigned to different Family Groups.

! There is no error checking function in the software to prevent invalid Family Group selection.

? *IQ query SOP-Family Groups and registration, Invalid test (QUID 682)* This query tests for Families with invalid, or incompatible Registration and Family Group. It tests for the following, valid, Family Groups:

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<u>Family Group ID</u>	<u>Family Group Name</u>
2	Active
3	Inactive
5	School only
6	Religious Ed only
7	Moved
8	Contributor only
9	Sacrament only
246	Deceased
1649	Staff only

Family Groups, Registered

For Registered families there are only 2 valid Family Groups, Active or Inactive

Active (Registered, or Not registered)	Family where Member(s) are active, participating in the parish and the Family is Registered.
Inactive (Registered, or Not registered)	Family where Member(s) are inactive and the Family is Registered.

Family Groups, Not registered

For families that are not registered the following Family Groups are valid.

Active (Registered, or Not registered)	Family where Member(s) are Active, participating in the parish and the Family is no longer Registered, or may be Registered at another parish.
Inactive (Registered, or Not registered)	Family where Member(s) are Inactive and the Family is no longer Registered, or may be Registered at another parish.
Contributor Only (Not registered)	Family is contributing and no longer registered in this parish, or may be Registered at another parish.
Moved (Not registered)	Family has Moved out of the parish and is no longer Registered, or may be Registered at another parish.
Religious Ed Only (Not registered)	Family where a Member participates in the religious education program and yet is Not Registered in this parish, or may be Registered at another parish.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Sacrament Only (Not registered)	Family where a Member receives a Sacrament(s) and yet is no longer Registered, or may be Registered at another parish. (A bride wants to get married at her parent’s parish, or an infant is baptized in the grandparent’s parish.
School Only (Not registered)	Family where a member attends school and yet is not Registered, or may be Registered at another parish.
Staff Only (Not registered)	Family where Member Staff Positions and Assignments record administrative contact information. These Staff Only records are not Registered. (For staff who are also parishioners, a separate family entry records personal contact information and census data.)
Deceased (Not registered)	Family where all are dead, Member Status are Deceased , and therefore no longer Registered.

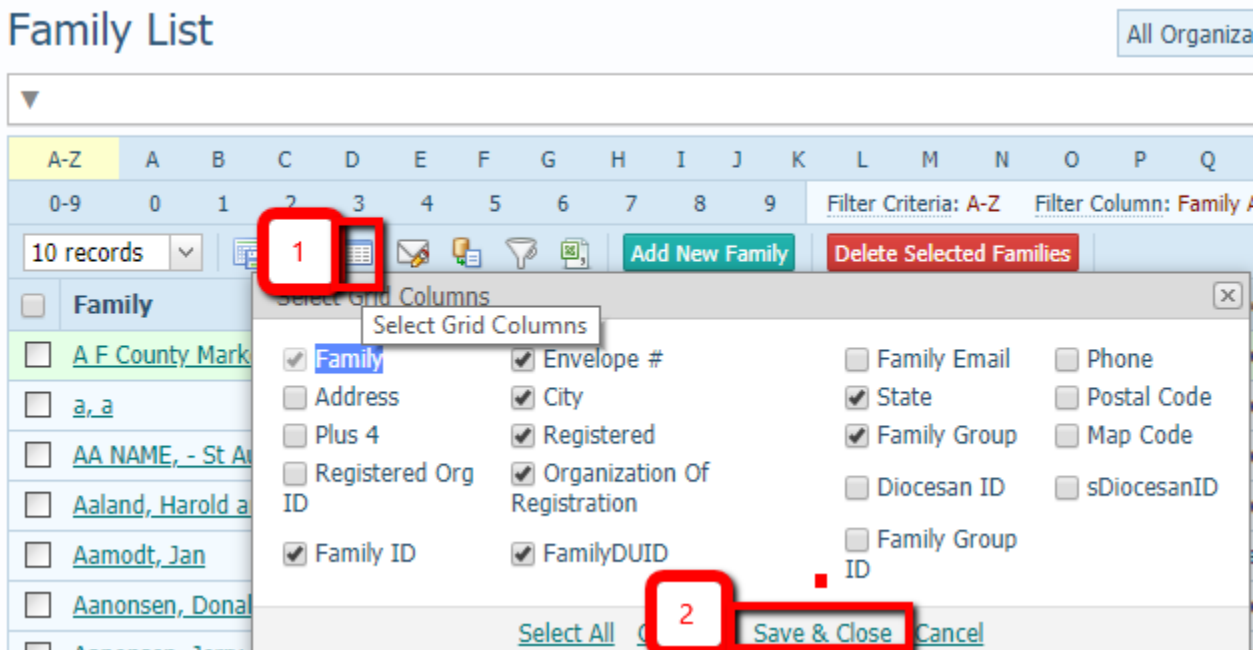
- ! Family Group values are global throughout the diocese. Do not create new Family Group values. Use Workgroups when Family Group doesn’t adequately manage Family records. To request an additional Family Group value, contact your Diocesan Administrator.
- ! Family Group should not be left blank. Use [Filter Family List](#) with search/filter choice No Family Group to identify any Family not assigned to a Family Group.

Filter Family List

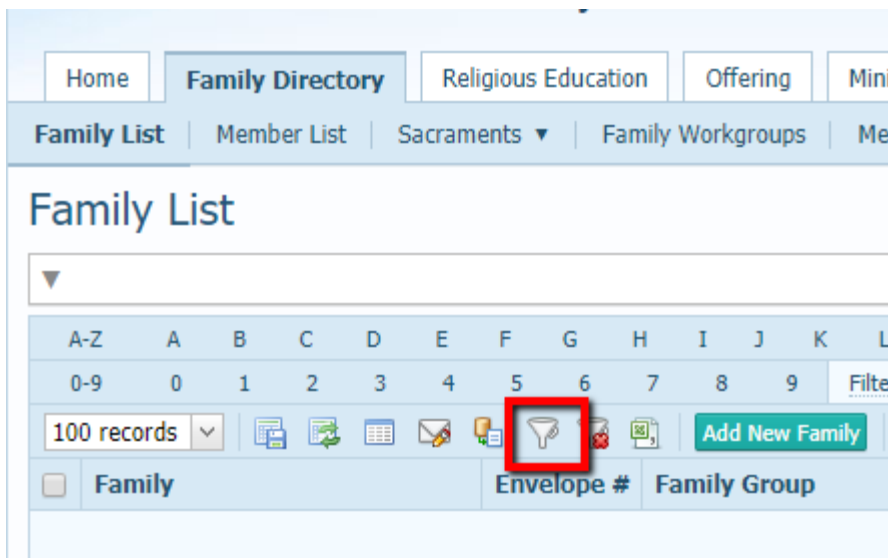
Filter searches for and selects Family records for listing according to user-defined criteria.


- 1.) To format the column listing first choose which columns to display. On the Family List screen click on the spreadsheet icon (1) to display the Select Grid Columns dialog box. Mark the checkboxes for those fields you want displayed in the list. Then select Save & Close (2) at the bottom of the dialog box.

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- 2.) To arrange columns, click and hold any column while moving it to the right or left. Unclick to anchor the column in its new position. A simple click will sort the column.
- 3.) Click the funnel icon to display the Filter dialog box.





- 4.) Set appropriate search criteria to display search and filter selections. Criteria can include any combination of the following fields.
 -  Click on the Advanced Criteria arrow to see all available search fields.
 - Membership status – [Registered](#) status or Registered Date range
 - Family Group
 - Family Work Groups
 - ID numbers – Family ID, Diocesan ID, Envelope #

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- Names – First Name or Last Name
 - Address – Mailing, E-Mail Address, Postal Code, City State
 - Phone #
 - Publishing preferences Send No Mail, Do Not Publish
-  Family Filter default values for membership and Family Group control Family List on the initial screen display. Set default values by clicking the star icon (1) at right of the respective field.

Filter

Membership:  **1**

Family Group:  Save the selected member status as the default

Send Envelopes:

Family Work Groups

- Dynamic Workflow Groups
- Family Member Groups
- Snowbirds

▼ Advanced Options

Filter By ID:

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Registration Date:

E-Mail Address:

E-Mail:

Postal Code:

City:

State\Region:

Show 'Send No Mail' Families:

Show 'Do Not Publish' Families:

Show Families With E-Mail:

Exact Search:

The example below shows a search for any Family Not Registered and Contributor Only.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Filter

Membership: ★

Family Group: ★

Send Envelopes: All Groups
No Family Group

▼ **Advanced C**

Filter By ID:

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Family Work Groups

- Dynamic workflow Groups
- Eucharistic Minister
- Family Workflow Groups
- Finance Council

Registration Date:

E-Mail Address:

E-Mail:

Postal Code:

City:

State\Region:


Show 'Send No Mail' Families:

Show 'Do Not Publish' Families:

Show Families With F-Mail:

The Family List Filter results, as displayed, Not Registered, Contributor Only Family Group.

Family List																										
All Organizations																										
Clear Search Results																										
A-Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
0-9	0	1	2	3	4	Contributor Only Family Group		None		Filter Column: Family Group Ascending		Selected Families		Not registered		Clear Filter										
100 records																										
Family	Envelope #	Family Group	City	State/Region	Registered	Registered Org																				
<input type="checkbox"/>		Zeimetz, Lodovico and Monina	Ann Arbor	MI	No																					
<input type="checkbox"/>		Schmeiser, Irene	Ann Arbor	MI	No																					
<input type="checkbox"/>		Matis, Joel and Susan	Ann Arbor	MI	No																					
<input type="checkbox"/>		Warren, Cathy	Ann Arbor	MI	No																					
<input type="checkbox"/>		Imm, Alice	Ann Arbor	MI	No																					

 [Member List Search, Filters](#) offers additional search capabilities and methods related to Member records.

Family Name Standards

Family Name Standards ensure proper formatting of mailing lists by applying consistent rules for names and spelling.

Always search for the Family record using [Add New Family/Find Family](#) before creating a new entry. When entering a new record is required, take care to spell the Family's name accurately and include Member Birth Dates to help prevent duplicate records.

When entering a new Family record

- record the full legal name using Prefix (Title), First Name, Middle Name, Last Name and Suffix fields.
- capitalize the first letter of each First Name

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- capitalize the first letter of the Last Name
 - enter the Husband, or man's name, first (ex. John and Susan)
 - do not use the ampersand sign (&) in place of the word 'and'
 - do not use special leading characters such as hyphens, slashes, asterisks. They prevent names searches from working properly.
 - include any non-Catholic spouse as a Member, and note mailing preference
 - the Status of a non-Catholic spouse should be ActOther, not Active
 - Prefix on the [Add New Family](#) screen is required. These values are displayed in the Title field on the Member screen. Title is not required.
 - use Suffix values as may be appropriate
- ! Auto Fill applies Prefix (Title) values in the Formal Mailing Name. Diocesan best practice is to remove the Title values (Mr. and Mrs.) from the Formal Mailing Name.


Family, Member and Staff E-Mail Addresses

This is the e-mail address for the Family. The e-merge utility will use the address in this field to e-mail a family, or a group of families. It is important to include e-mail addresses for both Family records and Member records. Using e-mail as your first choice of communication assists in lowering postage costs and keeping additional information updated. People often retain an e-mail address when they move.



Up to 5 email addresses can be recorded per Family record by putting a semicolon, no spaces, between email addresses.
Ex. email1@address.com;email2@address.com;email3@address.com

Here is an example of the correct email format.

jdoe@yourparish.com

 Note: Parish named email domains are free from Google. See Google Apps for non-profits
<https://www.google.com/nonprofits/products/>

Most people have multiple e-mail addresses; therefore, when adding a new Family or Member ask

-  Which e-mail to use for individual Member communications?
-  Which e-mail to use for Family communications?

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Add New Family to Good Shepherd Parish, Toledo

The screenshot shows two main sections: 'Family Member' and 'Family Information'. In the 'Family Member' section, the 'E-Mail Address' field is highlighted with a red box, and a red arrow points to it from a red box labeled 'Member email'. In the 'Family Information' section, the 'E-Mail Address' field is also highlighted with a red box, and a red arrow points to it from a red box labeled 'Family email'. Other fields include Prefix (Father), First Name, Nick Name, Last Name (spunt), Suffix, Type (Head), Gender (Male), Birth date, Family Group (Active), Send Magazine (checked), Registration Status (checked), Registration Date (3/22/2018), Diocesan ID, and an 'Auto Fill Family Names' section with Last Name, First Name(s), Formal Mailing Name, Informal Name, Formal Salutation, and Informal Salutation fields.

- ! When a Member also serves as Administration Staff, the Member record shares Email Address with the Assignment Email Address record. Changes made to Email Address in either screen, Member or Assignment, changes the record for both. To allow use of multiple Email Addresses, one for Member and a second for Staff Assignment, recommended best practice is to create a separate Staff record. This means a separate, additional Family and Member record must be created. The separate Staff record should be designated as Not registered, Active, with a Staff Only Family Group. This allows separate email addressing and control.
- ! Spaces are not allowed in email addresses. Be sure to eliminate any spaces, including leading and trailing spaces. Inadvertent spaces, especially leading spaces, make email addresses difficult to sort and use.

The screenshot shows the 'Assignments' tab selected. The 'Email Address' field is highlighted with a red box and contains the text 'memberemail.here'. A red arrow points from a red box labeled 'Assignments' to the 'Email Address' field. Other fields include Username, SS Num, Email Username, Email Password (masked with asterisks), and Outgoing Mail Server. A 'Reset Password' button is visible at the bottom.

- ! Does the Family approve Email Address listing in directories and reports?

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Send Mail: <input checked="" type="checkbox"/>	Publish Address: <input checked="" type="checkbox"/>
Send Contrib. Env.: <input type="checkbox"/>	Publish Photo for Pictorial Directory: <input type="checkbox"/>
Publish Phone: <input type="checkbox"/>	Send Magazine: <input type="checkbox"/>
Publish Email: <input checked="" type="checkbox"/>	Do Not Call: <input type="checkbox"/>
MLNA: <input type="checkbox"/>	Do Not Solicit: <input type="checkbox"/>

Family, Member and Staff Phone Numbers

Family Details screen has fields for Primary Phone, Emergency Phone, mailing address Phone Numbers. The Member Details screen has fields for Home Phone, Cell Phone and Work Phone, as well as Page and Fax. The Family Primary Phone, as well as adult Member Home Phone and Cell Phone are used to route the Bishop's Advent phone calls. Phone number formatting is important.

- Proper format is 999-999-9999
- Always include the area code
- Always use two hyphens, and only hyphens.
- Do not use parentheses (), or periods ., or spaces, to separate numbers
- Do not include country code, long distance, or dial out prefixes
- Do not include suffixes, or extension numbers
- Do not include extra digits, or notes

Primary Phone:	<input type="text" value="715-555-2222"/>
Emergency Phone:	<input type="text" value="715-555-3333"/>

? *IQ query SOP-Family, Member and Staff Phone Numbers (QUID 673)* This query tests the phone number format. It reports any phone numbers that do not meet SOP standards.

Member List Search, Filters

Member List Search works in conjunction with Member List Filters, and the search/filter icon. These each work in a similar manner as those found in [Filter Family List](#).

1. Member List Search dropdown (1) allows users to select which field(s) to search/filter by checkbox (2). It uses a 'fuzzy' search algorithm returning results such as "Goldsmith", and "Abler-Smith" for search criteria entered (3), in this case Smith.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

ParishSOFT® Family Suite

Home | Family Directory | Offering | Ministry Scheduler | IQ | Administration

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups

Member List

▼ Smith (3)

(1) Member DUID (2) Member DUID

Other criteria include: Family DUID, Family LastName, Registered, Address, City, State/Region, Postal Code, Plus 4, Member Type, Member Status, Gender, Age, Envelope #, Member Email, Home Phone, Mobile Phone, Work Phone, Registered Org ID, Organization of Registration, Family Group.

Select All | Clear All | Close

Search for Staff Member DUID to locate the Staff Family record.

! Member List Search is fuzzy across multiple fields including at least Member First, Member Last and perhaps others.

2. Letter/number selection (3) searches the first character of any selected column in conjunction with any other specified search criteria (1).

Before using Letter/number filter click on any column heading (3) to select it as the Filter Column.

ParishSOFT® Family Suite

Home | Family Directory | Offering | Ministry Scheduler | IQ | Administration

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Reports

Member List

All Organizations

callahan (1) Search Results

A-Z | 0-9 | Filter Criteria: W | Filter Column: Member First Ascending | Clear Filter

50 records | Delete Selected Members | Quick Reports

Member Last	Member First (2)	Family DUID	Regi	Organization of Registration	Family Grou	Member Status	Membe
Callahan	William	226847	92632	No	Staff Only	Inactive	Head

3. Member Filter (1) allows the most discrete specification of record search/filter.

! Clear Search Results (2) and Clear Filter (3) to remove search/filters previously specified.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

The screenshot shows the ParishSOFT Family Suite interface. At the top, there are navigation links: HELP - CONTACT - HOME - SIGN OUT. Below that, the user is identified as St Joseph the Workman Cathedral, La Crosse, nlichter (Nick Lichter). The main navigation bar includes Home, Family Directory, Offering, Ministry Scheduler, IQ, and Administration. The secondary navigation bar includes Family List, Member List, Sacraments, Family Workgroups, Member Workgroups, and Reports. The Member List page is active, showing a search bar with 'callahan' and a dropdown for 'All Organizations'. A search filter is applied, showing 'Filter Criteria: W' and 'Filter Column: Member First Ascending'. A table of members is displayed with columns: Member Last, Member First, Member ID, Family DUI, Regis, Organization of Registration, Family Group, Member Status, and Member Role. A red box labeled '1' highlights a star icon in the Member ID column. Another red box labeled '2' highlights the 'All Organizations' dropdown. A third red box labeled '3' highlights the 'Clear Filter' button.

Member Last	Member First	Member ID	Family DUI	Regis	Organization of Registration	Family Group	Member Status	Member Role
Callahan	William	226847	92632	No		Staff Only	Inactive	Head

Member Filter default values for Membership Status, Family Group and Member Status control Member List on the initial screen display. Set default values by clicking the star icon (1) at right of the respective field.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Filter

Please enter and or select the criteria for searching. Only entered and selected values will be applied to by the filter. NOTE, clear any values from the 'Search' box, or change the 'Quick filter' dropdowns if you do not want these additional constraints.

Membership Status:	<input type="text" value="Both"/>	<input type="checkbox"/>	Member Envelopes:	<input type="text" value="(Any)"/>
Family Group:	<input type="text" value="Both"/>	<input type="checkbox"/>	Maiden Name:	<input type="text"/>
Member Status:	<input type="text" value="Registered"/>	<input type="checkbox"/>	Full Name:	<input type="text"/>
Member Type:	<input type="text" value="(Any)"/>	<input type="checkbox"/>	Family Last Name:	<input type="text"/>
First Language:	<input type="text" value="(Any)"/>	<input type="checkbox"/>	Address:	<input type="text"/>
Ethnicity:	<input type="text" value="(Any)"/>	<input type="checkbox"/>	City:	<input type="text"/>
Gender:	<input type="text" value="(Any)"/>	<input type="checkbox"/>	State:	<input type="text"/>
Member Strength:	<input type="text" value="(Any)"/>	<input type="checkbox"/>	Full Postal Code:	<input type="text"/>
Member Work Groups	<input type="text"/>	<input type="checkbox"/>	Home Phone Number:	<input type="text"/>
		<input type="checkbox"/>	Mobile Phone:	<input type="text"/>
		<input type="checkbox"/>	Work Phone:	<input type="text"/>
		<input type="checkbox"/>	Member E-Mail Address:	<input type="text"/>



Save the selected membership status as the default

▼ Advanced Options

Career Type:	<input type="text" value="(Any)"/>	Show 'Send No Mail' Members:	<input type="text" value="(Any)"/>
Marital Status:	<input type="text" value="(Any)"/>	Show 'Do Not Publish' Members:	<input type="text" value="(Any)"/>
Religion:	<input type="text" value="(Any)"/>	Show Members With E-Mail:	<input type="text" value="(Any)"/>
School:	<input type="text" value="(Any)"/>	Age Range:	<input type="checkbox"/>
Education Level:	<input type="text" value="(Any)"/>	Birth Month:	<input type="text" value="All"/>
Grad Year:	<input type="text" value="(Any)"/>		
Wedding Anniversary:	<input type="text"/>		
Wedding Month:	<input type="text"/>		

Exact Search:


Member Record and Role (required field):

Create a Member record for each person in the Family to accurately represent relationships. Include non-Catholic spouses as well as other family Members who may not participate in the parish. Use Role, Religion and Status fields to outline relationships within the Family and the parish. Birth Date is also important data. Many reports use the Birth Date to group records by Member age.


Navigate from Family Directory to either Family List, or Member List. Click on the listed Family and/or Member to access the Member Details screen.


PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES





 When a Member wishes to use a different surname than the designated Head, or Husband of Family record then enter the Member Last Name as they wish it to appear on lists, reports and mailings. For example:

- Husband (on Family record), Last Name: Doe
- Wife, wishes to use Last Name Dixon-Doe. Enter (on Member record) Last Name: Dixon-Doe

 There are many naming fields on both the Family Details tab and the Members tab. Likewise there are multiple email, address and phone fields. Not all of these field values are available on reports. Experiment with the demo software to gain a full understanding of how these tabs, fields and reports interact.

 Best practice for Autofill purposes is to also complete the Title, Nick Name and Suffix fields on the Member record.

 The Autofill feature on the Family tab uses values across both tabs, drawing name values from Members designated as Husband and Wife.


 The system requires Gender, First Name and Last Name on each Member record. It does not error check Gender and Role values, ie. it allows Gender Male with Role Wife.


 Unknown is intended as a temporary Gender. Unknown is not a valid Gender.

Role: Husband, Wife, or Head (required values)

Role is a required Member data field. It helps define Member relationships within the Family. Each Family record must have at least one Member assigned to a primary, referential Role as Head, Husband, or Wife. Other Member records derive from that primary Family Role. Roles are used by the software for linking Family and Member records in reports such as the baptismal certificate, address labels and others.

- For married couples
 - Select Husband for the man
 - Select Wife for the woman
- Two or more single persons living together, such as brothers and sisters
 - Use separate Family records for each. Designate each Member as Head Role in each Family.
- For a single Member Family
 - Select Head

 *SOP-Member Role (Type), single Member Family (QUID 683)* This query tests that Member Role (listed as Member Type in IQ) of Families having a single Member (Member Count = 1) should be Head.

 The software will always recognize Head, or Husband in precedence over Wife for naming and listing. If the Family or parish wish to designate a woman as lead, use Head for her Role.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- ! If the Husband's Religion is not Catholic, select Head for woman's role so that she will take precedence for naming and listing in the Family record.

On the Members Details screen (1) choose Edit Details (2), then click the dropdown arrow to the right of the Roles field (3). Role values will load and display as you scroll down using the slider bar at the left (4). You may also simply begin typing the appropriate Role and the dropdown listing will index to the available Roles.

The screenshot shows the 'Member Details' screen for a member named Thomas Aaland. The 'Member Details (3)' tab is selected and highlighted with a red box and the number '1'. The 'Edit Details' button is highlighted with a red box and the number '2'. The 'Role' dropdown menu is open, showing 'Husband' selected and highlighted with a red box and the number '3'. The dropdown list includes 'Husband', 'Legal Guardian', 'Mother', and 'Son'. The form fields show: Gender: Male, Title: Mr., First Name: Thomas, Nick Name: Thomas, Middle Name: S., Last Name: Aaland, Suffix: (empty), Maiden Name: (empty). Contact information includes: Email Address: taaland@gmail.com, Home Phone: 715-555-1234, Cell Phone: 715-555-0000. MemberDUID is 929792. Special Needs is unchecked.

Other Family Member Roles are based on the person's relationship to the Husband or Head. For instance, if a Husband's mother joins the family her Role becomes Mother, not Grandmother.

- Daughter and Son are used for children, as well as for Stepdaughter and Stepson.
- At least one Member must be Head or Husband. Available Roles are:
 - Adult
 - Daughter
 - Father
 - Foster Daughter

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- Foster Son
- Granddaughter
- Grandfather
- Grandmother
- Grandson
- **Head**
- **Husband**
- Mother
- Son
- Unknown
- Wife - **Do not use Wife to designate a Family lead, use Head.**

Role: Unknown

! Unknown value is intended as a temporary Role. Unknown is not a valid Role.

Member Status (required field): Active, ActOther, Deceased, Inactive, Unknown

Member Status helps define a person's role within the parish. There are four Status values, Active, Inactive, ActOther, and Deceased. These values cannot be changed or modified. Most commonly a Member is Active, or Inactive.

! Logically, there should be at least one Active Member in each Family recorded as an Active Family Group. However, the software does not error check Member and Family records for consistency. Check to ensure Family Group and Member Status are consistent.

? *IQ query SOP-Member Status, no valid Member in Active Family (QUID 669)* This query tests for Families, registered, Active Family Group, having no valid Active, or ActOther Members, or no Members at all and therefore are invalid records.

! Review Family and Member records for consistent treatment of Family Group and Member Status.

Active

Active Members participate in the parish and belong to the Catholic faith. When an Active Status (1) is selected the Religion (2) field value should always be Catholic.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Family Details | Member Details (1) | Good Shepherd Parish, Toledo

Changes made to data in fields with red text only apply to Good Shepherd Parish

Beetle | Add | Import

1 Status: Active

Birth Date: | Birth Place: | Age: | Date of Death: |

2 Religion: Catholic

Language: Catholic | Non Catholic - In Househ | None

Ethnicity: | Marital Status: None

Gender: Male | Title: Mr. | First Name: Beetle | Nick Name: | Middle Name: | Last Name: Spudola | Suffix: | Maiden Name: | Role: Head

MemberDUID 1057339 | Special Needs

Inactive

Inactive Members are not actively participating in the parish. An example is a college student away from home.

ActOther

ActOther are Members actively participating in the parish but not Catholic. When ActOther Status is selected the Religion field should record a value other than Catholic.

Religion

Religion (2 above) records the faith tradition for each Family Member. Values listed are prevalent mainline Religions, as well as a number of generic choices defined below.

- Nondenominational – Person of Christian faith in an unaffiliated community
- None – Person not professing faith, or person not in a faith community
- Other – Person of a faith, or in a faith community not otherwise specified in the list
- Unknown – Person for whom their faith, or affiliations are not known.

! Unknown is intended as a temporary Religion. Unknown is not a valid Religion.

Deceased

Deceased Member Status records a death.

Steps for recording a Member death.

- ✎ When the last Member of a Family has died the Family record should be assigned to the [Deceased Family Group](#). Deceased Member and Deceased Family records should be retained as valid. Do not delete them. Do not delete Address fields.

Deceased Member record updates	
Record Member Status as Deceased (1)	
Record Date of Death (2)	
Record Funeral (Sacrament)	
Remove Member from Member Workgroups	

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

If Member was single, or was the last surviving Member of a Family	
Change Family Group to Deceased and uncheck Registration	
Uncheck Send Mail, Send Contrib. Env. and Etc.	
Delete Envelope # so it can be reassigned	
Remove Family from Family Workgroups	
If Member was married	Surviving Member and Family records
	Review Family participation in Family Workgroups
Change Marital Status of Deceased to Single (3)	Change Married Status of spouse to Widowed (3)
	Change Role for lead Member to Head
	Change Family Details naming, salutations and email as appropriate

! Envelope # assignment does not affect Contribution records. Contributions are assigned per FDUID (Family Diocesan Unique ID) or per MDUID (Member Unique ID). Envelope # may be reassigned as needed.

Date of Death

Date of Death (2) becomes available when the Member Status has been set to Deceased.


The screenshot shows a form with the following fields and annotations:

- 1**: A red box around the 'Status:' dropdown menu, which is currently set to 'Deceased'.
- 2**: A red box around the 'Date of Death:' field, which contains the date '3/21/2018'.
- 3**: A red box around the 'Marital Status:' dropdown menu, which is currently set to 'Single'.

Marital Status

If the Deceased Member was married the Marital Status and Role for the surviving spouse will need to be changed. For the surviving spouse change the Marital Status to Widowed. The surviving spouse [Role](#) should be changed to Head to reflect their new role.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

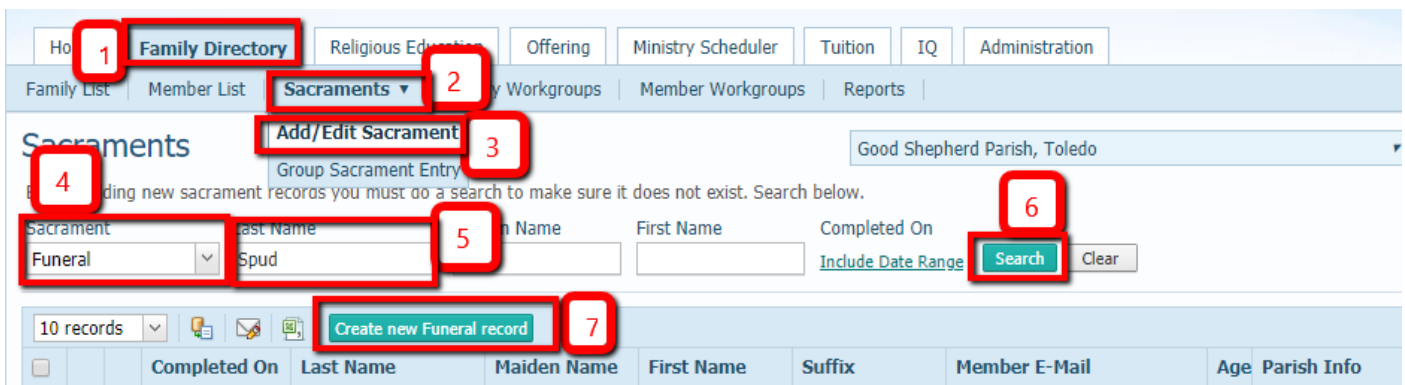
 In the Confirmation message below 'no designated head of household' refers to Role. Set Role for at least one surviving Member of the Family as Head, Husband or Wife. For example, a Deceased Husband implies that one of the surviving Family Members should be designated Head, or Wife.

Confirmation

By changing the status of this member to deceased, there is **no designated head of household**. Do you want to save this change?

[Funeral \(Sacrament\)](#)

Funeral record entry is found by navigating from Family Directory/Sacraments/Add/Edit Sacrament/Funeral (1-4) as shown below. Enter the first few letters of the Last Name (5), select Search (6), then Create new Funeral record (7).



The screenshot shows the software interface with the following elements highlighted:

- 1. Family Directory (Navigation menu)
- 2. Sacraments (Dropdown menu)
- 3. Add/Edit Sacrament (Action button)
- 4. Funeral (Dropdown menu)
- 5. Last Name field (Input field)
- 6. Search (Action button)
- 7. Create new Funeral record (Action button)

The Annual Report Statement of Spiritual Statistics requests information on deaths as follows:

DEATHS Number of deaths in your parish _____ Number of burials _____ Number of cremations _____

Date of Death (1) and Burial Type (2) record data for completing the statement's requested information.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Create Funeral record for Elmer Spudrink

Member DUID: 1057351

Completed:

Completed On: Wed Mar 28 2018

Parish: Good Shepherd Parish, Toledo

Celebrant: Fr. Angel M. Ruiz

1 Date of Death: 3/21/2018

2 Burial Type: Cremated

Funeral Title:

Burial Date:

Next of Kin:

Vigil Place: Interred, Entombed, Cremated

Vigil Celebrant:

Cemetery Name:

Grave Details: Section, Block, Lot, Grave

Purchase Date, Purchase Cost

Cause of Death:

Deed Issue Date:

Deed Owner:

Burial Type (2) has a drop down that includes Interred, Entombed, or Cremated.

- Interred - buried in the ground or placed in a mausoleum/tomb. Generally speaking, the term is used for burial in the ground.
- Entombed - should be used when a person is placed in a mausoleum or tomb.
- Cremation – should be used to record actual cremation. Cremated remains may also be interred or entombed.

Import (moving) Family Members

Import is a modified Add Member record method found on the Member Details screen. Import moves Member record data including Gender, Title, naming values, Role, Status, Birthdate and etc. from the source Family to the Target family. It also moves related records for Sacraments, Contact and Workgroup assignments. Import moves all of the Member record data in a single pass, transferring field values, unchanged, to the target Family record. It leaves no Member data in the source Family record.

When to use Member Details Import

There are several situations when a Member, or several Members, may need to be imported from one Family into another.

- ! Attempting to Import the last, or only remaining Member from the source Family will generate a warning message. The Merge utility referenced is only available at diocesan offices. Contact diocesan staff in the Communications office to Merge a Family having only one Member. Do not add an additional Member to the source Family as the message suggests. This is not an acceptable workaround method.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

parishsoftfamilysuite.com says

The selected member cannot be merged at this time. The import member feature does not allow the last member of a family to be imported into another family. Duplicate checker can be used to merge the two families together, or an additional member can be added to the source family.

OK

- **When couples marry** their Member records should be imported into a new Family record.
 - ✎ Change the target Family record fields for naming, addressing, phone and preferences as needed.
 - ✎ Change the Import Member's Last Name, Maiden Name and Role values as needed.
 - ! The software allows Member Import with Head Role, which may conflict with an existing Family Head, or Husband Role. Review Role values of all Family Members following Import.
 - ✎ Add Sacraments, Marriage data as needed.
 - ! It is not possible to Import the last remaining, or only Member of a Family. When either, or both Members of a marriage are an only Family Member, their Member records should be merged to form the new Family record. It is not possible for parish staff to merge Member records. Contact the Sister Donna Krzmarzick dkrzmarzick@diolc.org to merge Member records.
- **When married couples become divorced, or permanently separated**, the original Family record should be split into two records, one record holding an original Member record and a second, new Family holding an imported Member record.
 - ! Change both source and target Family record fields for naming, addressing, phone and preferences as needed.
 - ! Change the Import Member's Last Name and Role values as needed.
 - ! Change Sacraments, Marriage data as needed.
- **In a Family record, when children from a divorced couple experience a custody change** their Member records should be imported into the Family record of the custodial parent. In the case of joint custody, children Member records should be imported to whichever Family record may be agreed by their parents.

Import process

Navigate to the target Family record (1), then select the Member Details tab (2) and find Import (3) at the far right of listed Members.

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Family Details Member Details (2) Holy Angels Parish, Sandusky

Beetle Elroy Add Import

Member Search

Name: Status: Active Search

Last Name	Title	First Name	Middle Name	Suffix	Birthdate
<input type="radio"/> Aaland	Mr.	Andrew			
<input type="radio"/> Baker	Mrs.	Amy	L.		10/10/1963

MemberDUID 105

- Type the Member Last Name for the person to Import in the Member Search field (4). Click on the Search (5) button.
 - Navigate to the Member record you wish to Import, select their name and click Accept at the bottom of the Member Search screen.
 - The Member record now appears within the target Family record. Select Import at the bottom of the screen.
- ! The Family record Logfile does not log Import actions, which means it should be done manually. When making a Member Import also make Family Details (1) Notes (2) General (3) on the source Family record: “Daughter Elvina married Beetle Spudola on 3/13/2018”. Make a Family Details Notes in the target Family record describing the relationship with the source Family: “Elvina is the daughter to Elroy Spudster. She married Beetle on 3/13/2018.”

Family Details Member Details (2)

Family Information Notes

General

Daughter Elvina married Beetle Spudola on 3/13/2018

Publications & Privacy Settings

These settings are found on the Family Details screen in the lower right quadrant.

- ✎ MLNA is abbreviation for Moved Left No Forwarding Address. Do not use this checkbox. Use [Family Group Moved](#).

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Send Mail: <input type="checkbox"/>	Publish Address: <input checked="" type="checkbox"/>
Send Contrib. Env.: <input type="checkbox"/>	Publish Photo for Pictorial Directory: <input type="checkbox"/>
Publish Phone: <input checked="" type="checkbox"/>	Send Magazine: <input checked="" type="checkbox"/>
Publish Email: <input checked="" type="checkbox"/>	Do Not Call: <input type="checkbox"/>
MLNA: <input type="checkbox"/>	Do Not Solicit: <input type="checkbox"/>

Send Magazine should be checked. This field routes 8 issues per year of Catholic Life, the diocesan magazine, to the [Primary Address](#) for the Family. There are no Catholic Life subscriptions fees for the Family or the parish.

Offering Funds, Pledges, Contributions and Batches

Funds, Pledges, Contributions and Batches are methods that work together for recording and routing Offering monies pledged and contributed, as well as fees paid to the parish by a Family or Member. The census software serves as a subsidiary ledger for recording Family and Member Offering transactions. At year end these transactions should be reported back to the Family, or Member, on a Contribution Statement.

Offering money must be:

1. Counted and deposited in a bank by persons other than those recording receipts in the census software, or those who disburse cash or write checks.
2. Recorded in the census software for each Family and Member, at least weekly, as [Posting](#) to [Funds](#) using [Batches](#) and Batch Management.
 - o Both the amounts counted, and the deposit slip from the bank must reconcile with the amount recorded in the census software Batch.
3. Recorded in the general ledger software as receipts to Funds having the same account numbering as those in the census software.
 - o Fund receipts in the census software must reconcile to Fund account receipts in the general ledger software.

Offering monies to record in the census software include:

- Envelope Contributions
- Building fund and other special account Contributions
- Special collections of Diocesan and national nature such as those listed in [Funds](#) below.
- Monies collected for the Diocesan Annual Appeal (DAA) should be sent directly to the Stewardship and Development Offices. DAA cash receipts should be deposited naming the contributing Family. A check for the collected amount should be sent to the Stewardship and Development Offices.
- Checks and cash from non-parishioners or from parishioners without envelopes
 - o For checks, or cash donations of \$250 or more in a calendar year from a specific Family, or Member, a Posting to that specific Family is required so that a year-end tax statement can be reported. (See [Add New Family](#) to create a new Family record.)
 - o For check or cash donations of less than \$250 per calendar year it is not necessary to create a new Family record or attach [Postings](#) to an existing Family record. Amounts less than \$250 may be Posted to a generic entity, the non-registered Family named Loose Cash.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- ! Best practice suggests that all check donations be recorded. It may not be possible to know beforehand whether the \$250 per calendar threshold may be met.
- o All monies, including plate collection of cash and loose change, must be recorded to either a specific Family, or to the Loose Cash Family.

Loose Cash

Loose Cash is a fictional Family used to consolidate cash Contributions for Posting. Best practice uses a common Loose Cash family across the diocese. 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

As Unregistered

As Registered

Funds

Funds in the census software correspond to revenue accounts in the parish accounting software. Only the pastor, or the person responsible for recording parish finances (bookkeeper) is authorized to Add a Fund, or Edit Fund information. Each census Fund must be unique and should reference a specific account number in the parish chart of accounts. Fund Description and account assignment will follow parish chart of accounts conventions, including those shown below.

- ! Fund # will only accept numbers or dashes "-". Replace the periods below with dashes, as example 1431-01 Parish Bazaars.

1401 Adult Envelope Receipts

1402 Youth and Children Envelope Receipts

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- 1403 Offertory Plate Collections at Mass or Other Services
- 1404 Parish Other Church Support or Income
- 1411 Parish Special Collections for Building Projects and Renovations
- 2411 School Special Collections for Building Projects and Renovations
- 1412 Parish Special Contributions for Loan Retirement
- 2412 School Special Contributions for Loan Retirement
- 1431.01 Parish Bazaars
- 1431.02 Parish Picnics
- 1431.03 Parish Scrip
- 1431.04 Parish Bingo
- 1431.05 Parish Bazaar Other
- 2431.01 School Bazaars
- 2431.02 School Picnics
- 2431.03 School Scrip
- 2431.04 School Bazaar Other
- 1432 Societies -- Men and Women
- 1434 Parish Bequests and Memorials
- 1437 Income from Other Parish/School
- 2434 School Bequests and Memorials
- 1467.02 Gifts for Fund for Works of Charity
- 1467.03 Other Receipts

These account numbers and descriptions are the same as those reported in the Annual Report in section IV RECEIPTS, as shown below.

IV. RECEIPTS

16.	(401) Adult Envelope Receipts (Include Christmas, Easter & Holy days)	_____
	(This number is considered for the Diocesan Annual Appeal target)	
17.	(402) Youth and Children Envelope Receipts.....	_____
18.	(403) Offertory Plate Collections at Mass or Other Services.....	_____
19.	(404) Other Church Support or Income (describe)	_____
22.	(411) Special Collections for Building Projects and Renovations.....	_____
	(This amount is deductible for quota determination <u>only</u> if the project is approved by the Diocesan Bishop, the funds are invested with St. Ambrose Financial Services, Inc. and the total cost of the project exceeded \$5,000.00. Copies of all Improvement Authorization Request Forms must be attached)	
23.	(412) Special Contributions for Loan Retirement	_____
24.	(431) Bazaars, Picnics, Scrip, etc. (NET)	_____
25.	(432) Societies — Men and Women	_____
27.	(434) Bequests and Memorials	_____
30.	(437) Income from Other Parish/School	_____
32.	TOTAL OF LINES 16 THROUGH 30	_____



- Diocesan accounts
- 1231 Restricted Funds
 - 1231.07 Diocesan Council of Catholic Women
 - 1231.06 Propagation of the Faith – Memberships
 - 1231.02 Propagation of the Faith – Mission Sunday
 - 1231.01 Propagation of the Faith – Mission Coop
 - 1231.03 Propagation of the Faith – Student Lenten
 - 1231.05 Retirement Fund for Religious
 - 1231.04 Operation Rice Bowl
 - 1231.08 Other

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

1231.09 CCHD – Collection

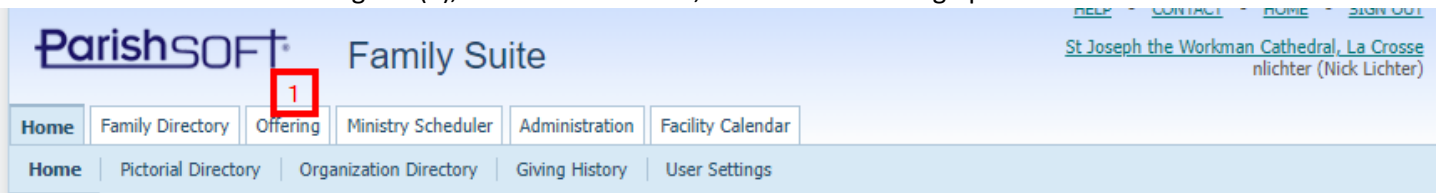
These diocesan accounts are the same as those reported in the Annual Report section IV RECEIPTS, COLLECTIONS AND APPEALS, as shown below.

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) Retirement Fund for Religious.....	_____
69. (1231.04) Rice Bowl.....	_____
70. (1231.08) Other.....	_____
71. TOTAL OF LINES 57 THROUGH 70.....	_____

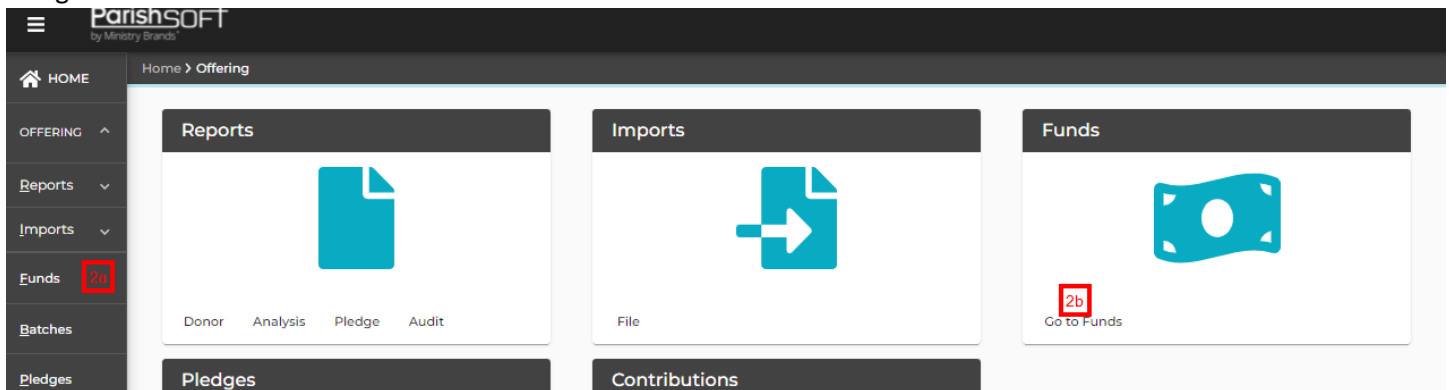
-  Additional sub-accounts, and corresponding Funds, not otherwise previously reserved by the diocese can be added at parish discretion. As example, 1467-04 Other Receipts, Lawn Care Donation.
-  Report these Fund account fiscal year totals for the Annual Report.

Fund Permissions

Fund Permissions work in conjunction with Administration Staff Access Rights. Similarly, Fund Permissions must be assigned before a Staff Member can do work Posting Contributions, Pledges or running Offering reports. To set Fund Permissions select the Offering tab (1), a new browser tab, ParishSOFT Offering opens.

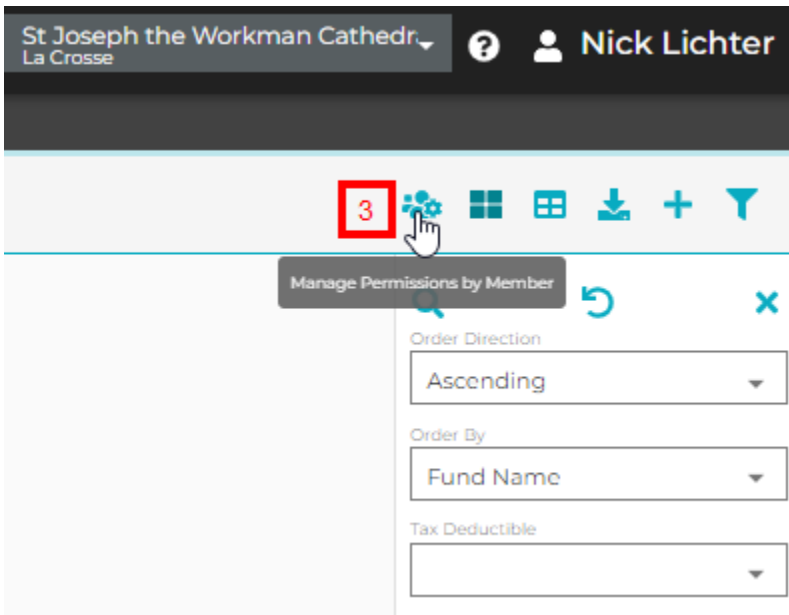


There are two navigation options available, the left sidebar menu Funds (2a) or the Funds tile (2b). Choose either navigation method.

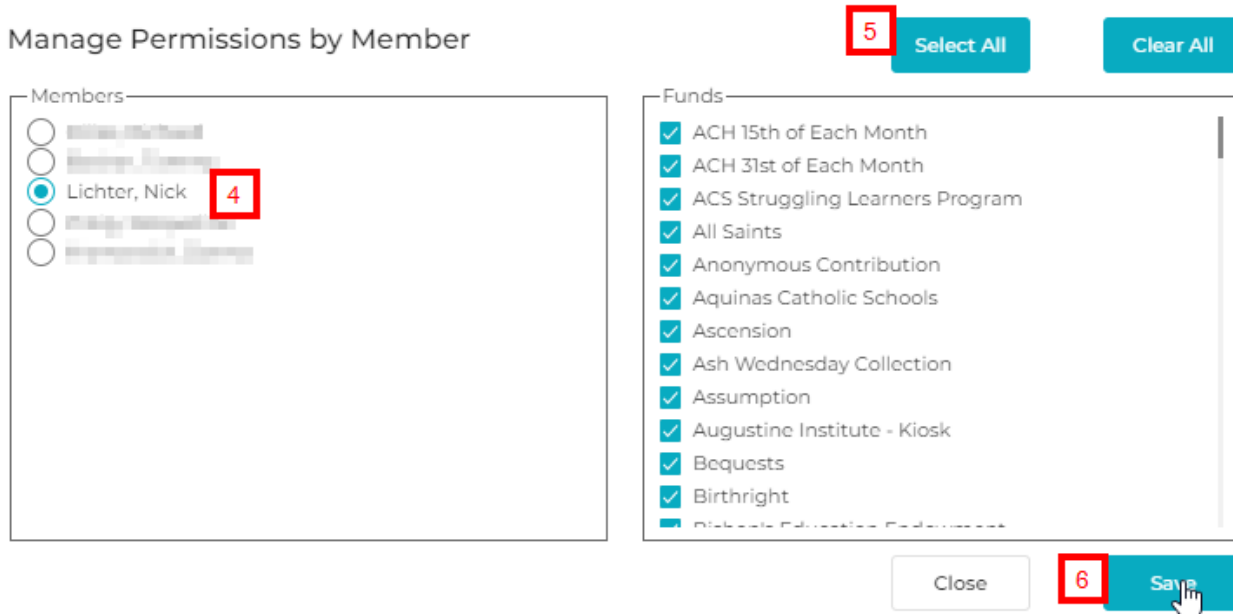


[Fund Permissions](#) are available from the Manage Permissions by Member icon found in the top right are of the Fund screen (3). Click the icon.

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The Manage Permissions by Member screen appears. Choose the appropriate Member (staff member) on the left side of the screen panel (4), and select appropriate Funds, or Select All (5) on the right side. Click Save (6) when selections are complete.



! [ParishSOFT Module](#) Offering [Access Rights](#) must be assigned to a Staff Member before Fund Permissions become available to select.

Account Number (required) and External ID fields in Funds

Account Number (1) and External ID (2) fields specify references to general ledger account numbers. Account Number (1) is for use by parishes with ParishSOFT Accounting software. External ID (2) is for associating to third-party software,

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

such as online giving. Diocesan ID) is not used. The checkbox for tax-deductible gifts is at bottom (3). The save icon is found in the top right of the screen. For parishes using ParishSOFT Accounting, Account Number should specify the Chart of Accounts shortcut number. Shown below is the proper Fund setup for Propagation of Faith - Mission Sunday parish. Note that the Account Number 241005 corresponds to Chart of Account general ledger account Propagation of Faith - Mission Sunday.

Mission Sunday -- Propagation of the Faith

Fund	Permissions
------	-------------

Fund ID
3189

Organization
[Dropdown]

Name *
Mission Sunday -- Propagation of the Faith

Account Number * **1**
241005

External ID **2**
241005

Diocesan ID
241005

Fund is Active

Fund Dates

Start Date
MM/DD/YYYY [Calendar icon]


End Date
MM/DD/YYYY [Calendar icon]

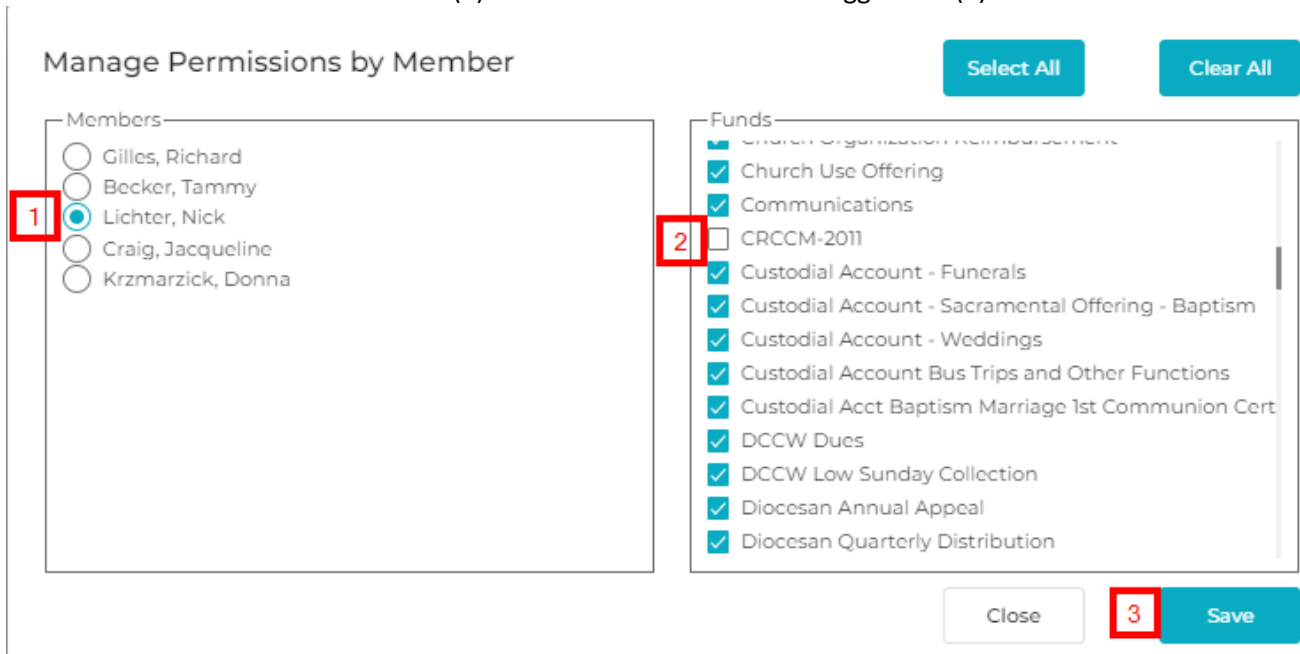
Add Pledge End Date

This fund requires pledges

3 This fund receives tax-deductible gifts

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

 Funds cannot be merged and may only be deleted if they have no Batches, Pledges or Contributions. However, Funds can be made unavailable for viewing or Posting by toggling off [Fund Permissions](#). In the example below Permissions for User Nick Lichter (1) and Fund CRCCM-2011 are toggled off (2). Click Save when finished (3).



Manage Permissions by Member

Select All Clear All

Members

- Gilles, Richard
- Becker, Tammy
- Lichter, Nick
- Craig, Jacqueline
- Krzmarzick, Donna

Funds

- Church Organization Reimbursements
- Church Use Offering
- Communications
- CRCCM-2011
- Custodial Account - Funerals
- Custodial Account - Sacramental Offering - Baptism
- Custodial Account - Weddings
- Custodial Account Bus Trips and Other Functions
- Custodial Acct Baptism Marriage 1st Communion Cert
- DCCW Dues
- DCCW Low Sunday Collection
- Diocesan Annual Appeal
- Diocesan Quarterly Distribution

Close Save

Tax Deductible:

Tax Deductible Funds become available for reporting on Statements. Only Tax Deductible Funds are available. To set Tax Deductible status navigate to the appropriate Fund reference this ParishSOFT Support article, [How to change the tax-deductible status of a fund going forward](#).

Pledges

Pledges are a promise of a Contribution, or several contributions, over a period of time. Using Pledges complicates the setup of Funds, and requires another layer of Contribution management. Setup and handling of Pledges is not documented here. For guidance on setup and Management of Pledges contact the Finance office.

Batches

Batches and Batch Management are a secure method for recording Contributions Posting by Envelope Number, Family Name or Member Name. All Contributions must be entered via Batches. Batch Posting of Contributions require that the total Contribution Amount be specified before Postings are entered. Only authorized Staff have Access Rights to Add/Edit or Close Batches. Batch Contribution Posting provides control and safeguards to prevent fraud. Each Batch provides an audit trail, recording Staff Add/Edit and Close Batch activities. After Close Batch has been done, a Batch is no longer available to Open or Edit.

Add New Batch

Add New Batch is found by navigating from Offering (1), Batches (2) and then Add Batch (3) which brings up Batch Details Screen. See the ParishSOFT Support reference article [How to add a new batch](#)

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Best practice [Batch Description](#) uses consistent timeframes and naming.



Batch descriptions may only contain numbers, letters and dashes.

1. Batch recurrent, weekly, Fund receipts (ie. Adult Envelope, Offertory Plate, etc.) using Sunday's date (1).
2. Batch Contributions from each Mass separately (not shown).
3. Batch other, special collection, or holy day Fund receipts as named Batches (2).

Batch id	Name	Fund	Status	Created Date	Closed Date
279455	ID: 279455 - 2021-11-28 Offertory	Offertory - Plate Collection	Open	12/03/2021	
279454	ID: 279454 - 2021-11-28 Student	Student Envelopes	Open	12/03/2021	
279442	ID: 279442 - 2021-11-28 Adult	Adult Envelopes	Open	12/03/2021	
278710	ID: 278710 - 2021-11-07 ALL SOULS	Stipend Account	Closed	11/18/2021	11/29/2021
278539	ID: 278539 - 2021-11-16 WORKS OF CHARITY	Adult Envelopes	Closed	11/16/2021	11/16/2021
278521	ID: 278521 - 2021-11-04 All Soul's Day	Stipend Account	Closed	11/15/2021	11/15/2021
278519	ID: 278519 - 2021/11/14 Works of Charity	Mission COOP	Closed	11/15/2021	11/15/2021
278516	ID: 278516 - 2021-11-14 MISSION	Mission COOP	Closed	11/15/2021	11/29/2021
278515	ID: 278515 - 2021-11-14 All Saints	Holy Day	Closed	11/15/2021	11/29/2021

- Batches may be setup to receive Contribution Postings, Pledge Postings or both.
- When a returned check, or Posting error, is found after Close Batch best practice is to create a new Batch, also known as an [adjustment Batch](#), using the Add Batch method. An adjustment Batch provides an audit record for correcting returned checks and Posting errors.
- Closed Batch(es) can be re-opened and modified by ParishSOFT Support in extraordinary circumstances. Permission to re-open requires approval from the curia Finance office.

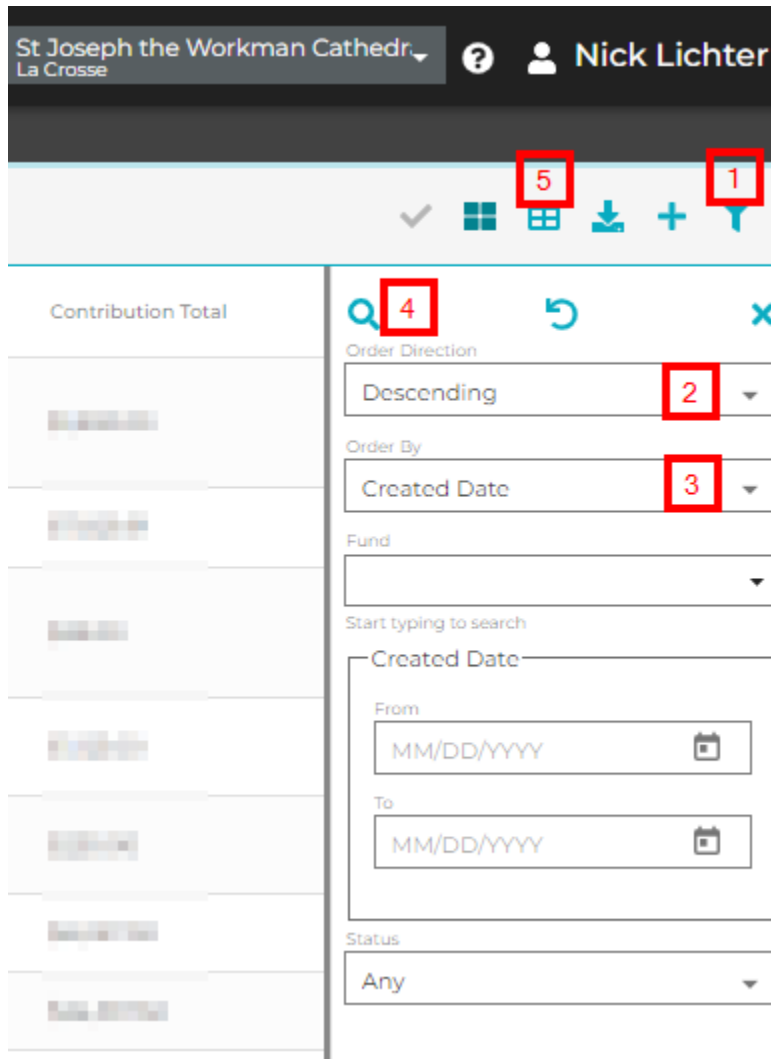
Batch Description

Batch Description displays in conjunction with the Batch ID as Name (3), shown in the column heading of the Batches listing screen above.



To reference a chronological list of recent Batches, use the Batch Filter Data (1). Set the Order Direction to Descending (2), Order By to Created Date (3), choose Search (4) and then Grid View (5) to obtain a recent listing of Batches.

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The screenshot displays the Parish Census Software interface. At the top, the header shows "St Joseph the Workman Cathedr, La Crosse" and the user "Nick Lichter". Below the header is a toolbar with icons for checkmark, grid, grid with filter, download, plus, and filter. The main area is split into two panels. The left panel shows a table titled "Contribution Total" with several rows of data. The right panel is a filter sidebar with a search icon (4), a refresh icon, and a close icon. It contains dropdown menus for "Order Direction" (set to "Descending", 2), "Order By" (set to "Created Date", 3), "Fund", and "Status" (set to "Any"). Below these are date range filters for "Created Date" with "From" and "To" fields, each with a calendar icon.

Contribution Amount, Batch Progress Amount and Batch Amount

- ! Amount, as a field label, is used variously in several different screens to denote similar, but different, concepts. Amount can be an individual Contribution Amount (1), the target value for the Batch, that is the Batch Amount (2), or Posting progress toward the target Batch Amount value, the accumulated Contributions Amount (3).

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! Please review the Cash Receipts/Money Counting section of [Financial Control Guidelines](#) for money counting policy before posting Contributions.

Batch Amount is the target balance of a Batch. In the Batches screen the Contribution Total column corresponds to the Batch Amount.

Batch Id	Name	Fund	Status	Created Date	Closed Date	Pledge Count	Pledge Total	Contribution Count	Contribution Total
275172	Offertory - Sunday Mass	Offertory - Sunday Mass	Review	09/15/2021		--	\$0.00	--	\$1,250.25
277877	ID: 277877 - Test Batch	Offertory - Sunday Mass	Open	11/03/2021		--	\$0.00	--	\$1,000.00

A Batch is considered Balanced when the Accumulate Contributions Amount (2) exactly equals the Batch amount (3), as was shown on the Postings screen above. This same balance monitoring is also displayed on the Batch Details screen, as shown below.

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Home > Offering > Batches > Batch Details

Organization Sacred Heart Parish	Pledge Count: 0 of	
Fund* Offertory - Sunday Mass	Pledge Amount: \$0.00 of	0
Batch Id 277877	Contribution Count: 2 of	
Description* Test Batch	Contribution Amount: \$300.00 of	1000
Created 11/3/21, 2:28 PM	Accumulate Contributions amount	Batch amount

A Batch must be Balanced before the User can change Batch status to Review state, or Closed state. Contribution Amounts are obtained from parish counter records. Once each Batch is balanced and closed, the Batch Amount should subsequently be posted, by Fund, into the general ledger. The Batch Amount should reconcile, tie-out, as follows:



- Tie-out counters' tape to bank deposit receipt
- Tie-out bank receipt to ParishSOFT Batch Amount, and Batch report
- Tie-out the ParishSOFT Funds totals to general ledger journal entry into either
 - Quick Books
 - ParishSOFT Ledgers & Payables

Changing Fund, Type, or Contribution Date Postings within a Batch Contribution Posting

Each Batch can specify multiple Funds, Payment Types and Posting Dates. On any Posting Line it is possible to specify an alternate Fund, Payment Type, or Contribution Date than the default. Please reference the ParishSOFT Support article Contribution Postings: [How to change the contribution date or the fund of a contribution posting in an open batch](#) for details.

Posting

Posting assigns Contributions per Family or Member, and Postings become the basis for reporting periodic Contribution statements, including end of year Contribution statements for tax purposes.

1. Postings are assigned to a particular Family, or Member, by Env # (Envelope Number), or by Last Name (actually Last Name, First Name and Address).
 -  Env # (1) lookup occurs as the name is keyed on a type ahead basis.
 -  Last Name (2) lookup executes lookup after the entire Line Item is entered. Both Family and Member records appear in the lookup list
2. Post check donations by recording the Check # (3) and set payment Type as Check (see [Changing Fund, Date, or Type Postings within a Batch](#) to change Line Item Type).

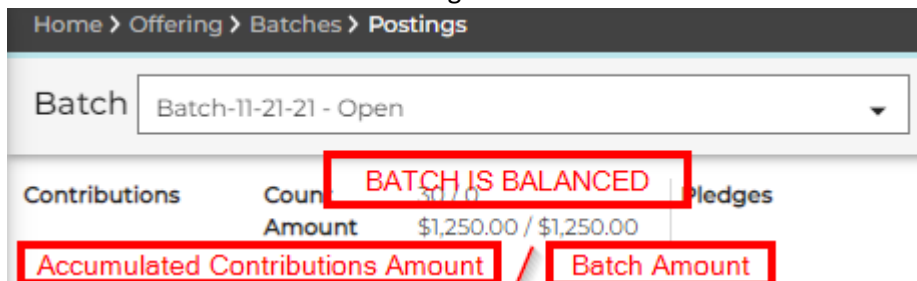
PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- Anonymous, cash and other Contributions which don't need to be assigned to a specific Family or Member should be assigned to the [Loose Cash](#) Family. Begin by typing "Cash" in the Last Name field. When Posting checks to Loose Cash, record the Check # and note the donor's name in the Memo (4) field.
- Postings designate which Fund receives the Contribution. Fund designation may be specified by the donation envelope, by check notation, or as otherwise specified by the Family. (see [Changing Fund, Date, or Type Postings within a Batch](#) to change Line Item Fund.)
 - If multiple Funds are designated (as example, a single check designates both Offertory Plate Collections as well as Special Contributions for Loan Retirement) Post multiple Line Items, recording the same Check # on each and "split donation" or other notation in the Memo field.
- Posting Date should be set to the date when the donation collection was taken. (see [Changing Fund, Date, or Type Postings within a Batch](#) to change Line Item Date.)
 - Contributions received mid-week are best included in the upcoming money count, bank deposit, Batch and related Posting.
- Contributions from a Family registered elsewhere in the diocese, but not at your parish ([Family Groups, Not registered](#)), can be assigned to that Family after using [Move Selected Family, As Unregistered](#) with [Family Group Contributor Only](#) methods to share the Family record.
- Contributions Posting for a Family not yet registered in the parish, nor elsewhere in the diocese, can be assigned to that Family by creating a new Family record. See [Add New Family](#). Set Registration and Family Group values as appropriate.

Batch Balance, Commit and Close Batch

Batch Balance is reached when accumulated Contributions Amount is equal to the Batch Amount. A Batch must balance to change its status to Review and then to Close. Review is an intermediate state which allows further Posting edits. A Closed Batch cannot be changed or Edited. Use Review to verify and document Postings when Batch Balance is achieved.

- Batch Balance is achieved when the accumulated Contributions Amount is equal to the Batch Amount.
 - Batch Balance as shown in the Postings screen.

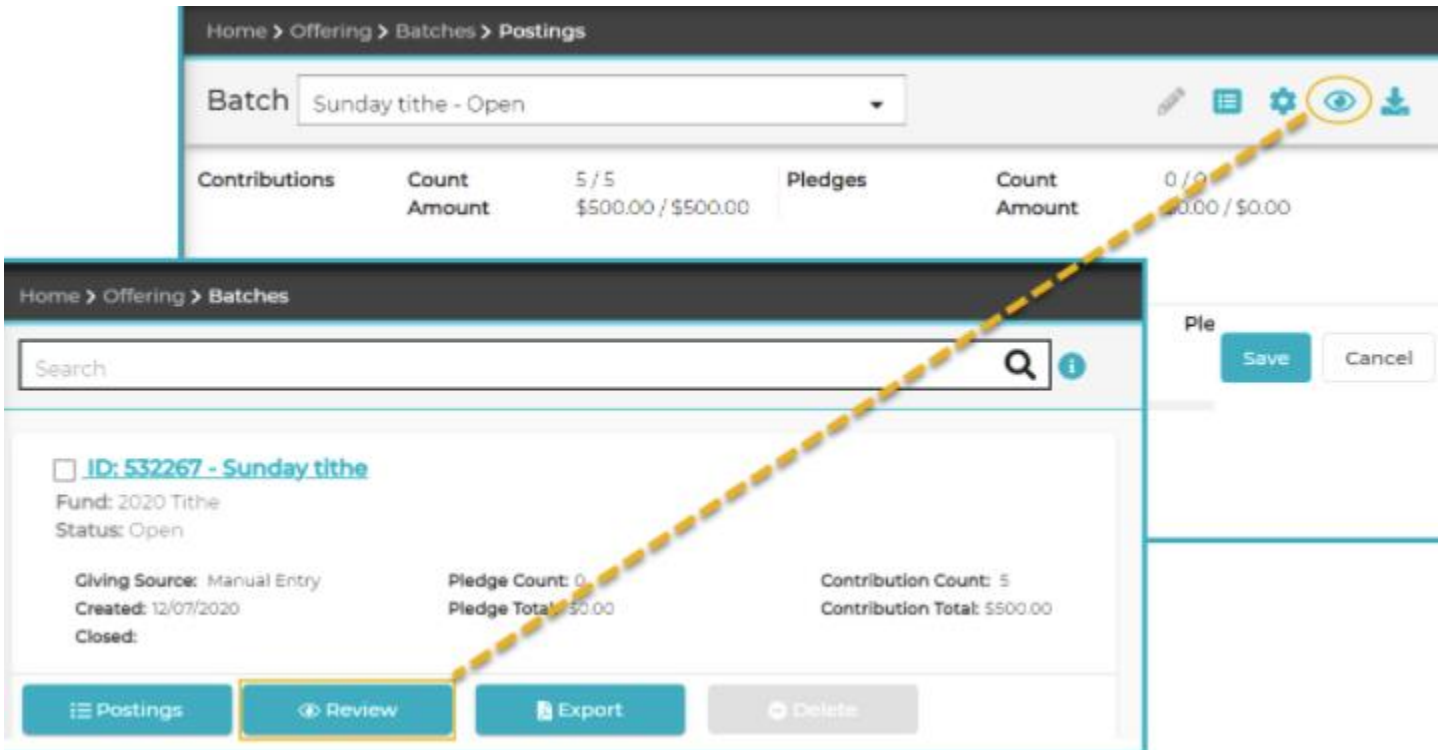


- Batch Balance as shown in the Batch screen.

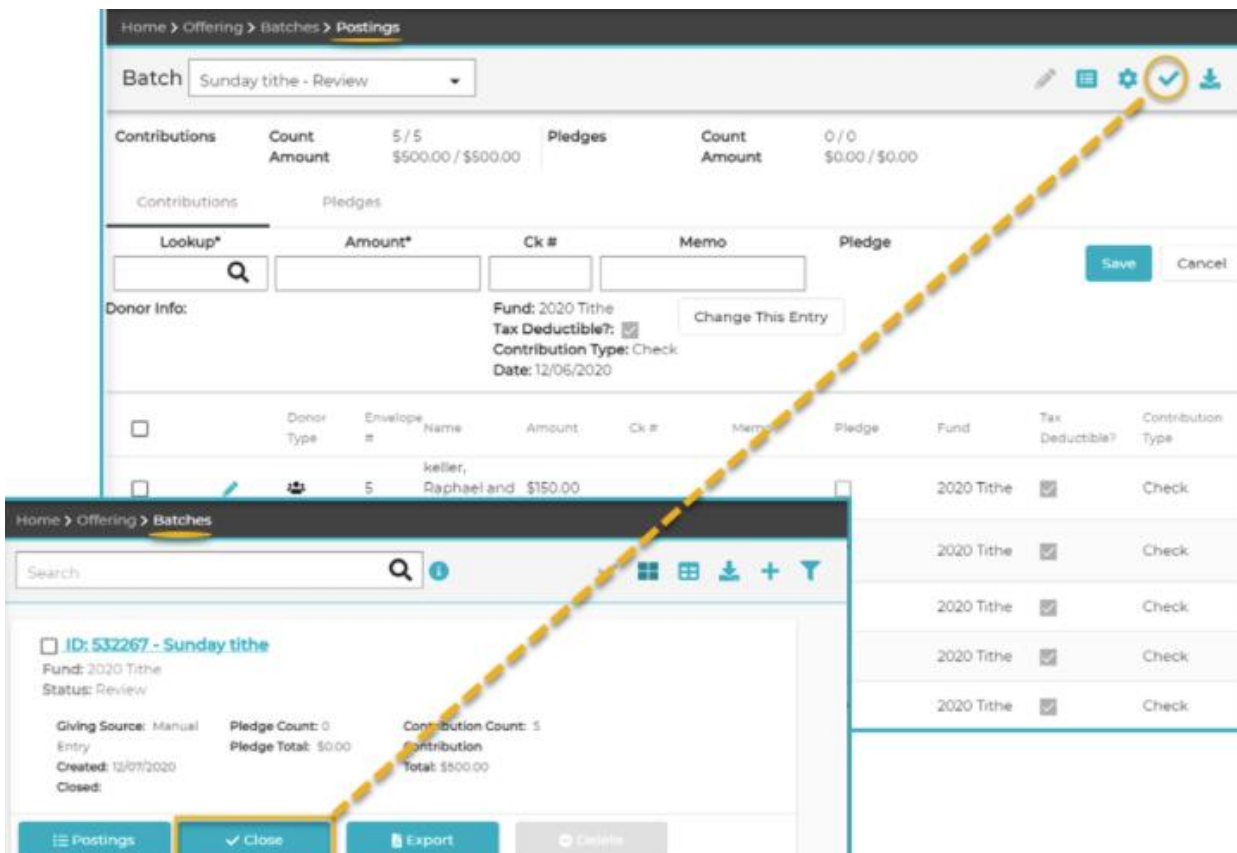


- Click the Review icon, or button, to move the Batch to Review status.

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3. Click the Close icon, or button, to Close the Batch.



PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Adjustment Batch(es)

Adjustment Batch, or Batches, are used to correct Postings which made to a Batch which has since been Closed. Corrections may include a Posting reversal due to a non-sufficient funds (NSF) check, or a check that has been returned for other reasons. A correction may also be needed when an amount error was discovered after a Batch was Closed. An adjustment Batch documents the reason for the reversal, the amount, donor, date, check # if applicable and Fund affected by the reversal. For an NSF check, a single adjustment Batch and related Posting reverses the amount originally Posted. For an incorrect amount Posting to a Batch which is now Closed both an adjustment Batch to reverse the original Posting, and another adjustment Batch to correctly Post the new amount are needed. Additional details can be found in ParishSOFT [Help](#) or in support articles: [How to create a correction batch \(Donor, Fund, Contribution Date, Contribution Type, Memo, Tax-Deductible Flag\)](#)".

- ! Note that the Adjustment Batch must be done in Detailed Posting. It is not possible to enter a negative dollar amount in Quick Entry Posting, which makes Detailed Posting the only choice for this process.

Sacramental Records

Sacramental Recording in sacramental registers

- ! **Census software records DO NOT replace the Sacramental Registers. Sacramental Registers are the only valid sacramental record, and the only recognized source for information related to sacraments.**

The Chancery Office of the Diocese of La Crosse should be consulted when questions arise concerning the official recording of sacramental records, or sacramental registers and their use.

The pastor is ultimately responsible for the care and confidentiality of the sacramental registers themselves as well as any reproductions. He may designate other persons to make entries in the registers and to prepare certificates or notifications. These may be employees or volunteers, but their number should be small. These designated persons must be well known to the pastor, must be capable of careful work and protecting confidentiality, and must be adequately trained to work with the registers. Their work with the registers is not to exceed their mandate from the pastor.

The Diocese of La Crosse's [Handbook for Sacramental Records](#) documents policy directives, processes and norms for recording sacraments. Please refer to that document for proper recording in the sacramental registers.

- ! The Handbook and the registers themselves take precedence over any electronic software records or processes, including those outlined below.

Sacramental Recording in parish census software

Sacraments are recorded in the parish census database software for several reasons:

1. Member level sacramental software data assist staff in locating and referencing official entries in sacramental registers. Sacramental registers are the only canonically valid record. The digital software records serve as a referential convenience to supplement the sacramental registers.
2. Parish level sacramental data reflect the health and vitality of the community. Software records can help report parish sacramental data and show sacramental trends.
3. Accurate census software records allow a convenient method for producing Certificates and Notifications.

- ! Certificates and Notifications must be verified with the original, hardcopy, book registry records prior to distribution.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

! The parish of Baptism, or the parish of Ceremony may appropriately generate Certificates or Notifications. No other parish may generate certificates, or notifications.

4. Digital sacramental software records can serve as backup references in the event a parish sacramental registry becomes lost or destroyed.


Accuracy and completeness in sacramental software record keeping protects each individual's data and enhances the vitality of the church.

! Census software records **DO NOT** replace the Sacramental Registers.

! Never record sacramental data in the registry or in software prior to the celebration of the sacrament.

! No information marked "confidential" in a Sacramental Register should ever be entered into census software records.

! Do not share sacramental software records, history or information with anyone other than the person who received the sacrament, the priest, guardian, or a parish/diocesan representative. Questions about documenting sacraments, canonical questions, or about the Sacramental Registers should be referred to the Chancery Office.

 Recording historical Sacramental details for existing Members and transcribing Sacraments from the Sacramental Registers into the parish census database is allowed but is not required.


Parishes of record

Sacramental database entries may be recorded by one parish, or several, depending on which sacrament is celebrated, where it is celebrated, and the recipient's parish affiliation. The parish of baptism, the parish of ceremony and the parish of registration each have specific database documentation needs and responsibilities. Sometimes a single parish fulfills all three parish roles, and other times the roles are dispersed. Responsible persons should evaluate each sacramental situation to determine how best to accomplish appropriate database protocols. The general principle is that a Catholic individual's electronic sacramental data should be appropriately recorded at the parish of ceremony and, when appropriate, notice sent to the parish of baptism where it may also be appropriately recorded. Finally, the parish of registration may, for convenience, compile an electronic sacramental record for their members.

- *Parish of baptism* The parish of baptism is the authorized source of an individual's sacramental data. An electronic record should be entered at the parish of an individual's baptism whenever official notice of a sacrament is received.

! Official notice includes credible sacramental certificates as may be presented by the individual, or official notifications as sent by the parish of ceremony. Certificates should have an official appearance and should be issued in a consistent format. All certificates must bear the name and complete address of the parish. Certificates must be typed, printed by computer or hand-printed in ink. They are to be signed by the pastor or his delegate and impressed with the parish seal, normally raised. Photostat and facsimile copies of certificates are not considered authentic documents.

- *Parish of ceremony* An electronic record should be entered by the parish of ceremony for each sacrament celebrated. In the case when confirmation is conferred upon Members from two or more parishes at one ceremony, the parish of registration should enter electronic sacramental records for its Members.
- *Parish of registration* The parish of registration may build up an electronic record for its Members of their Sacramental history. Sacramental records should be entered at the parish of registration whenever official notice of sacraments are received.

 A Parish of baptism, or Parish of ceremony may need to generate new record for Family and Member, or share another parish's Family/Member records before recording sacramental data. See, [Add New Family](#) and [Move](#)

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

[Selected Family](#) for details. The appropriate record settings are Family-unregistered, Family Group-Sacrament only, Member Status-Inactive.

Member Details, Sacraments

Member Details, Sacraments tab displays summary data for Sacraments the Member has received. Navigate first to the appropriate Member Detail from the Family Directory (1)/Member List (2)/selecting the appropriate Member (3). Double-click the Member name to select it.

The screenshot shows the ParishSOFT Family Suite interface. The 'Family Directory' tab is selected and highlighted with a red box and the number '1'. Below it, the 'Member List' tab is also highlighted with a red box and the number '2'. In the Member List table, the first row is highlighted in green and has a red box with the number '3' over it. The table has columns for Member Last, Member First, Age, Birth Date, Home Phone, Mobile Phone, and Member E-Mail. The first row shows 'Spudola Bartolome' with age 4 and birth date 12/5/1953. The second row shows 'Spudola-Spudster Elvina' with age 58 and birth date 5/2/1960. The third row shows 'Spudrink Elmer'. Above the table, there are filters for 'spud' and a 'Delete Selected Members' button.

Member Last	Member First	Age	Birth Date	Home Phone	Mobile Phone	Member E-Mail
Spudola	Bartolome	4	12/5/1953			
Spudola-Spudster	Elvina	58	5/2/1960			
Spudrink	Elmer					

Sacrament Entry/Summary

On the Member Details (1) screen, select the Sacraments (2) tab to display the Sacrament Entry/Summary screen. 5 fields of Sacrament Summary data display (3). Not shown on this screen are Summary entries for Funeral, Rite of Reception, or Religious Profession. Also not shown on this screen are many of the Sacrament-specific data fields associated with each unique Sacrament. While some Sacrament data can be entered for some Sacraments in the Summary field there is additional important data which can only be entered using the [Edit Sacrament](#) screen. One method for navigating to Edit Sacrament screens is by clicking the Details (4) link at right of each Sacrament.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

The screenshot displays the 'Member Details' page for Bartolome Spudola. The interface includes a navigation bar at the top with 'Family Directory' selected. Below it, the 'Member Details (5)' tab is active. A green banner indicates that changes to data in fields with red text apply only to Good Shepherd Parish. The member's profile shows a silhouette, name 'Bartolome', and various personal and religious details. The 'Sacraments' sub-tab is selected, showing a table of sacrament entries. A red box highlights the 'Details' link for the 'Anointing of the Sick' sacrament.

Sacrament	Completed	Date	Prep Year	Parish	Celebrant
Baptism:	<input checked="" type="checkbox"/>	2/5/1954		St James The Apostle Parish	Schuman, Reverend
First Eucharist:	<input checked="" type="checkbox"/>	5/2/1961		St John The Baptist Parish,	Schuman, Reverend
Confirmation:	<input checked="" type="checkbox"/>	5/18/1966		St John The Baptist Parish,	Schuman, Reverend
Marriage:	<input type="checkbox"/>				
Anointing of the Sick:	<input type="checkbox"/>	6/7/2018	2016	The Episcopal Diocese of E	A Sitting Bull

The Details link only appears when Summary Sacrament data has been entered and saved.

It is recommended to use the Edit Sacrament screen for all data entry, as shown in the following section.

Edit Sacrament

Edit Sacrament screens for each Sacrament display all corresponding fields found on the Sacrament Entry/Summary screen. From the Family Directory tab (1) choose Sacraments (2) and then Add/Edit Sacraments (3). Select the Sacrament you wish to Add/Edit from the Sacrament dropdown box (4) at left. Click Search to find records and expose the Create New Record button which opens the Edit Sacrament screen.

- ! Edit Sacrament is only available to:
 - o the parish of ceremony for any particular Sacrament designating that Parish
 - o the Member's parish of baptism, or parish of registration may Edit Sacrament for all the Member's Sacraments.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

The screenshot shows the Parishsoft Family Suite interface. At the top, the 'Family Directory' menu is highlighted with a red box labeled '1'. Below it, the 'Member List' menu is highlighted with a red box labeled '2'. The 'Sacraments' section is active, with the 'Add/Edit Sacrament' button highlighted by a red box labeled '3'. A dropdown menu for 'Sacrament' is open, showing options like 'Baptism', 'First Eucharist', 'Confirmation', 'Marriage', 'Anointing of the Sick', 'Funeral', and 'Rite of Reception', with the 'Baptism' option highlighted by a red box labeled '4'. The search area includes a 'Search' button highlighted by a red box labeled '5'. The search fields include 'Sacrament', 'Name', 'Maiden Name', 'First Name', and 'Completed On'. A note states: 'Before adding new sacrament records you must do a search to make sure it does not exist. Search below.'

For each Edit Sacrament screen corresponding data of the Member Sacrament Summary screen displays at top (1).

- ! Completed and Completed On fields refer to the date when the Sacrament was celebrated, not the date when the sacrament is recorded.

Member Details (2) display in the lower left, a block for entering sacramental Registry references and General Remarks (3) display in the lower right. Midway in the screen, top-to-bottom, are Sacrament-specific fields which vary for each Sacrament (4).

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Edit Baptism record for Bartolome Spudola (6679237)

The screenshot shows the 'Edit Baptism record' interface for Bartolome Spudola (6679237). The interface includes a profile picture placeholder with 'Member DUID: 1057339' below it. A red box labeled '1' highlights the 'Completed' status (checked) and 'Completed On' date (Fri Feb 05 1954). Below this, 'Prep Year' is an empty field, 'Parish' is 'St John The Baptist Parish, Union Grove' with a plus sign icon, and 'Celebrant' is 'Schuman, Reverend Albert J.' with a dropdown arrow. A second red box labeled '2' highlights the 'Member Details' section, which includes 'Title: Mr.', 'First Name: Bartolome', 'Middle Name', 'Last Name: Spudola', and 'Suffix'. A third red box labeled '3' highlights the 'Registry' section, including 'Registry Vol.', 'Registry Page', 'Registry #', and 'General Remarks'. A fourth red box labeled '4' highlights the 'Sponsors' and 'Witnesses' fields, each with a plus sign icon. At the bottom, there are 'Save' and 'Cancel' buttons.

! Only persons who are specifically authorized by the pastor should record Sacrament data in the census software, and only according to canonical norms. Data should come from official civil documents (such as birth certificates), official parish certificates or notifications which have valid parish seals.

! Only official certificates or notifications from the parish ceremony, or parish of baptism should be used when qualifying candidates during sacramental preparation.

Parish

Parish refers to any location where the Sacrament may be celebrated. The census software displays references for most Roman Catholic parishes in the US, and many other institutions. However, the list is not comprehensive.

[Add Custom Organization](#) to include a new location such as civil locations, cemeteries, hospitals or funeral homes in the 'Parish' list. The organizations added become available in Sacrament screen Parish dropdowns.

1. From the Home tab (1), select Organization Directory (2).
2. Click the plus sign (3) which will display the Add Custom Organization window.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

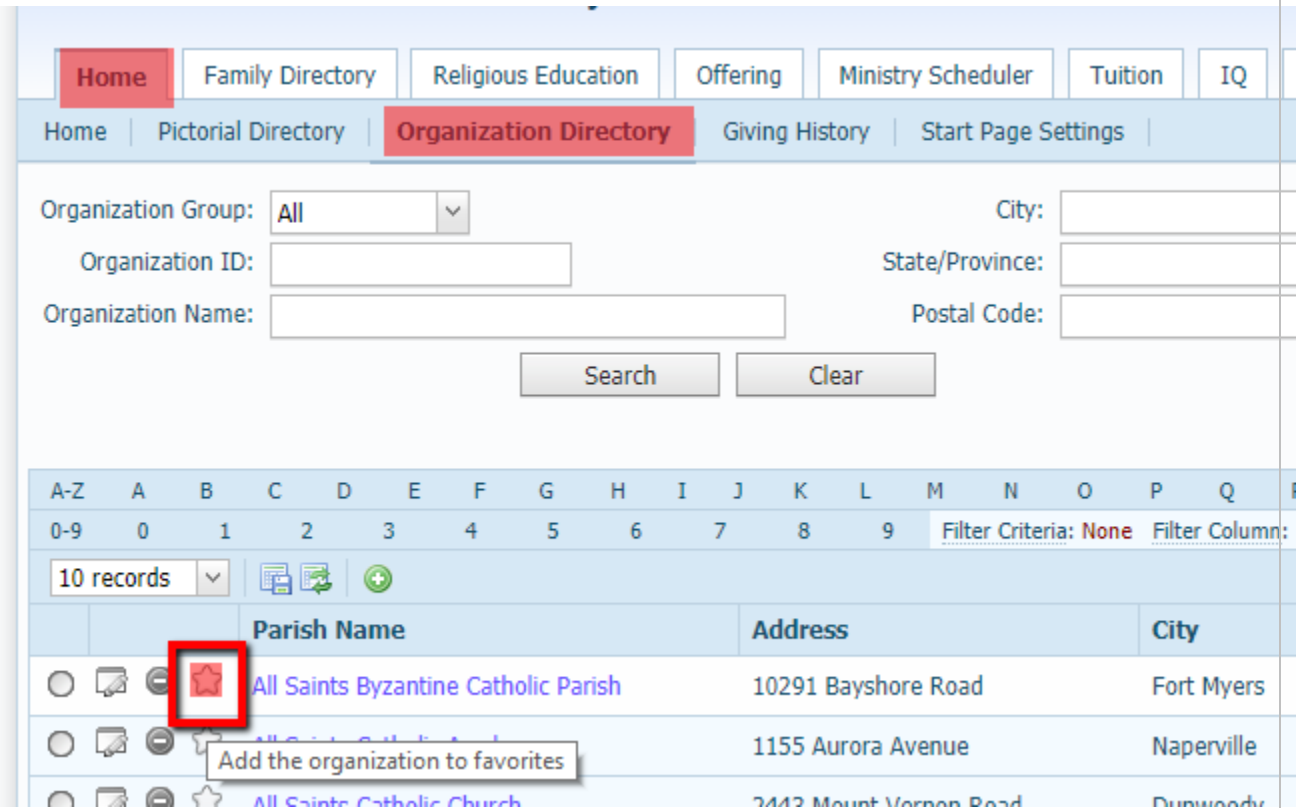
The screenshot shows the ParishSOFT Family Suite interface. The top navigation bar includes tabs for Home, Family Directory, Religion, Education, Offering, Ministry Scheduler, and Tuition. Below this is a secondary navigation bar with Home, Pictorial Directory, Organization Directory, Giving History, and Start Page Settings. The Organization Directory tab is selected. Below the navigation is a search form with fields for Organization Group (set to All), Organization ID, Organization Name, City, State/Province, and Postal Code. Search and Clear buttons are present. Below the search form is a table with columns for Parish Name and Address. A red box labeled '3' highlights a green plus icon in the table header, with a tooltip that says 'Add a custom organization'.

3. Complete the Add Custom Organization form. Jurisdiction (1) (required) refers to whichever dioceses may be responsible for that organization. If Jurisdiction is unknown choose "Other". Click Save (2) when finished.

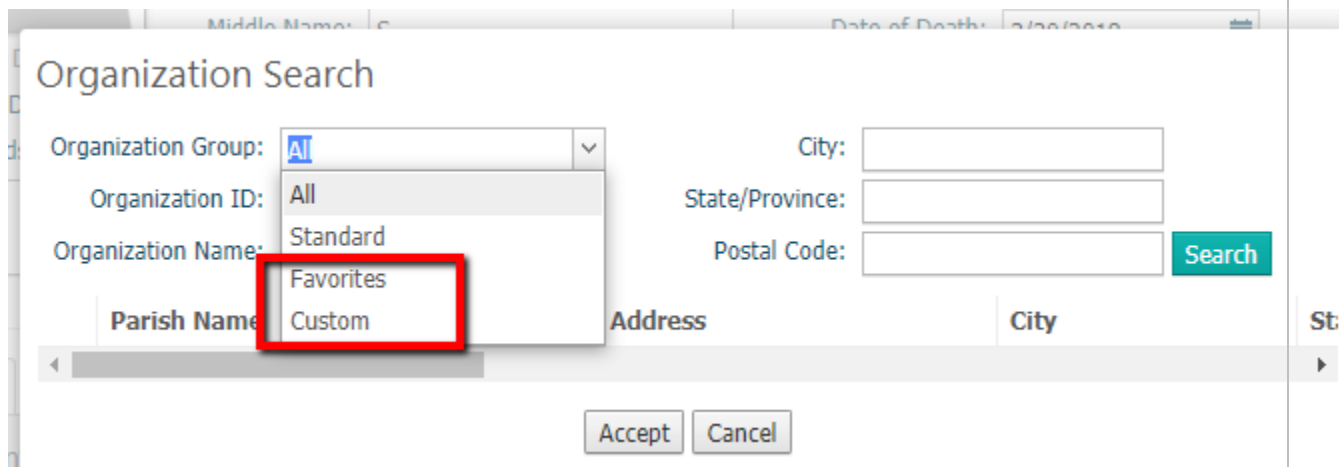
The screenshot shows the 'Add Custom Organization' form. The Organization Name field contains 'New 'Parish' Location'. The Jurisdiction field is set to 'Other' and is highlighted with a red box labeled '1'. The Country field is set to 'United States'. The Address Line 1 field contains '123 Hickory Lane'. The City field is set to 'Anywhere'. The State/Region field is set to 'Wisconsin'. The Postal Code field contains '54601'. The Area Code field contains '612'. The Save and Cancel buttons are at the bottom, with the Save button highlighted by a red box labeled '2'.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- To assist Organization search results display designate them as a favorite by clicking the star icon to the right.



! Customer Organizations, those entered at your parish, cannot be designated as a favorite. Select the appropriate Organization Group when searching, Favorites or Custom, as shown below.



Celebrant

Celebrant refers to the person who administered the Sacrament. Use Add “Celebrant” Record when additional references are needed.

- From the Administration tab (1) select Lookups (2).

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

2. Select Celebrants (3) and then the plus sign + (4).
3. In the Description field (5) type in the new Celebrants name.
4. Click Save (6) when finished. The new Celebrant will appear in the Sacrament Celebrant dropdown list.

The screenshot shows the ParishSOFT Family Suite interface. The 'Administration' menu is highlighted with a red box and the number 1. The 'Lookups' menu is highlighted with a red box and the number 2. In the 'Tables' list on the left, 'Celebrants' is highlighted with a red box and the number 3. In the 'Celebrants' table, the '+' button to add a new record is highlighted with a red box and the number 4. A modal window titled 'Add "Celebrant" Record' is open, with the 'Description' field containing 'New Celebrant Name Here' and highlighted with a red box and the number 5. The 'Save' button in the modal is highlighted with a red box and the number 6.

A	C	Description	# in Use	Creator Organization	Organi
<input type="checkbox"/>		A Sitting Bull	#	Good Shepherd Parish,Toled	2134
<input type="checkbox"/>		Rev. Bob Dickinson	#	Diocese of Demos,Ann Arbo	21021
<input type="checkbox"/>				rd Parish,Toled	2134
<input type="checkbox"/>				rd Parish,Toled	2134
<input type="checkbox"/>				rd Parish,Toled	2134
<input type="checkbox"/>		Auth, James	#	Diocese of Demos,Ann Arbo	21021
<input type="checkbox"/>		St. Bernard's	#	Diocese of Demos,Ann Arbo	21021

5. To arrange the order of Celebrant listing in the Edit Sacrament Celebrant dropdown box select the Celebrant checkbox to the left (1), click the Move selected items to the top icon (2) and then Save List Order (3).

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Lookups Management Good Shepherd Parish, Toledo

Tables

- Family Directory
 - Career Types
 - Celebrants**
 - Ethnic Background
 - Faith of Baptism
 - Family Group
 - Language
 - Member Education Level
 - Member Strengths
 - Religion
 - School

Celebrants

Celebrants are specific names of individuals who officiate at a religious ceremony, such as a baptism, wedding or funeral. Examples: Deacon Lawrence Adams and Reverend Father Buckley.

100 records Sort A to Z Sort by ID Save List Order

	Description	Use	Creator Organization	Organization
<input type="checkbox"/>	Rev Paul O'Connell	#	Good Shepherd Parish,Toledo	2134
<input type="checkbox"/>	A Sitting Bull	#	Good Shepherd Parish,Toledo	2134
<input type="checkbox"/>	Rev. Bob Dickinson	#	Diocese of Demos,Ann Arbor	21021
<input checked="" type="checkbox"/>	Bircumshaw, Reverend Monsign	#	Good Shepherd Parish,Toledo	2134

Registry Vol:

Registry Volume is intended as a cross-reference to the hardcopy sacramental register where the Sacrament is recorded. Volume number is typically the date of the very first entry on the first page of hardcopy register. Use mm/dd/yyyy format, ex. 09/06/2018.

Registry Page:

Registry Page is likewise a cross-reference. Use 3 digit number nnn format, ex. 004.

Registry #:

Registry # is likewise a cross-reference. If applicable use 3 digit number nnn format, ex. 095.

Baptism

Baptism has Sacrament-specific fields for Baptismal Name, Faith of Baptism, Sponsors and Witnesses.

Baptismal Name

Baptismal Name refers to persons without Christian name who choose one for Baptism. Use this field only if the recipient's Baptismal Name does not match his/her legal name and is not one resulting from a legal name change.

General Remarks

General Remarks can be used to record unusual circumstances related to the Baptism such as when a Christian joins the church through a profession of faith, as in conjunction with RCIA. General Remarks are also appropriate to record emergency baptisms, or conditional baptisms.

- ! No notes, identification or comments about adoptions should be recorded in the census software.
- ! No notes, identification or comments about children's unknown parentage should be recorded in the census software.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Reconciliation Prep

Has no Sacrament-specific fields.

First Eucharist

Has no sacrament-specific fields.

Confirmation

Displays fields for Confirmation Name and Sponsor. In the case of joint celebrations, such as at the Cathedral, Confirmation should be recorded in the census software at the parish of registration. Note of the confirmand's parish of registration may be made in the General Remarks field.

Marriage

- ! Marriage Sacrament Data entered in the Member Details (1) and Spouse Details (2) fields is restricted to the Edit Marriage record only. Those data values do not update the Member, Spouse, or Baptism Sacraments records. For these reasons it is recommended that both Member and Baptism Sacraments records should be thoroughly updated before initiating a Marriage Sacrament record. A new Marriage Sacrament record inherits data previously entered in each respective Member/Spouse (also a Member) records and respective Baptism Sacrament records. Data for the following Member and Baptism Edit Sacrament fields should be updated for both Members before creating a Marriage Sacrament record.

Member fields	Baptism Edit Sacrament fields
Title, Middle Name, Last Name, Maiden Name, Suffix	Baptismal Name, Date of Baptism, Faith of Baptism, Place of Baptism (aka Parish)

- ! Record the Marriage Sacrament data for the male spouse first.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Edit Marriage record for Elvina Spudola-Spudster (2523381)

Completed:

Completed On: Sun Jul 02 2017

Prep Year:

Parish:

Celebrant:

Member DUID: 1057439

Member Details

Title: Ms

First Name: Elvina

Middle Name:

Last Name: Spudola-Spudster

Maiden Name:

Suffix:

Baptismal Name: Elvin Spudster

Date of Baptism:

Faith of Baptism:

Place of Baptism:

Spouse Details

Title: Mr.

First Name: Bartolome

Middle Name:

Last Name: Spudola

Suffix:

Baptismal Name:

Date of Baptism:

Faith of Baptism:

Place of Baptism:

Save Cancel

Sacrament-specific displays include:

- Lookup fields for:

1. [Marital Status](#) (Do not use this field in the Marriage Sacrament screen) This field in the Marriage Sacrament record is linked to Marital Status fields in the Member/Spouse Family record screens.

! Tested behaviour of the Marital Status suggests that this field does not consistently update across the Marriage Sacrament and Member record screens. Also, this field appears to lock Member/Family screen updates for certain values, including Envelope #, in certain circumstances. (Do not use this field in the Marriage Sacrament screen)

2. Spouse, Best Man and Maid of Honor. (Names can be entered without using lookup.)

- Checkbox fields for:

1. Canonical – designates a Catholic church wedding
2. Banns – prior notice of the marriage has been published in the parish
3. [Disparity of Cult](#) – marriage involves an unbaptized spouse
4. Former Marriage – Do not use this field unless, or until a Marriage is ended.
5. Mixed Religion – marriage involves non-Catholic spouse

- Fill-in fields for:

1. Annulment ID – if this marriage later becomes annulled record the Annulment ID here.
2. Date Ended – date marriage ended due to death, annulment or divorce.

! Date Ended, when used, removes the Marriage record from both the Member and Spouse record display on their respective Member/Sacrament Summary screen. A record of the Marriage is retained in the Add/Edit Sacrament screen. Date Ended does not change the Marital Status, nor does it remove either Member or Spouse from the Family. These further changes must be done manually.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- [Marriage History](#) displays a summary History of Marriages recorded. The behaviour of this field is inconsistent. A more thorough method of obtaining Marriage records may be to use the Search, as shown below. Select Sacrament (1), enter a few letters of the Last Name (2), select Search (3) and review results (4).

- **Member Details (1) and Spouse Details (2)** – The data fields for these sections are pre-filled from the respective Member records, and Baptism Sacrament records, if Member and Baptism records exist.
- **General Remarks** field can be used to record additional information related to convalidation, sanation, dispensations and permissions or to note additional data related to annulments.

Anointing of the Sick

Sacrament-specific displays a History of Anointing’s recorded.

- ! Anointing History displays inconsistent results. To obtain an accurate listing of recorded Anointing’s use the Search method outlined in Marriage History, above.

Holy Orders

Has sacrament-specific tabs: Diaconate, Presbyteral and Episcopal. These records are reserved to the Vice Chancellor of the diocese.

- ! Do not record data related to Holy Orders. These records are reserved to the Vice Chancellor of the diocese.

Funeral

Funeral Sacrament-specific fields are referenced in [Funeral \(Sacrament\)](#) , above. The [Date of Death](#) (1) will populate through to the Member record in the field of the same name. See [Steps for recording a Member death](#).

- ! Date of Death does not affect other fields such as [Registration Status](#), [Member Status](#), [Role](#) or [Marital Status](#). These must be manually updated.

Rite of Reception (RCIA)

Has no Sacrament-specific fields.

Religious Profession

Sacrament-specific fields include a lookup field for Religious Order and a date field for Released from Solemn Vows.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Group Sacrament Entry

- ! Group Sacrament Entry is not recommended. This screen intends a more efficient way to record Sacrament records for multiple Members (a group) receiving the same Sacrament at the same time and place. However, it does not allow data entry for Sacrament specific data such as Sponsors or Witnesses, nor to enter registry information. For this reason, the Group Sacrament Entry function and screen is not recommended for entering Sacrament data.

Certificates

Certificates for specific Sacraments use data previously entered in the census software to fill out field references in templates provided by the software, or custom templates made available by users of the software.

- ! Sacrament Certificates may only be generated by the parish of ceremony where the sacrament was celebrated or by the parish of baptism. No other certificate is valid, and no other parish should issue sacrament certificates than either the parish of ceremony or the parish of baptism.
- ! Sacrament Certificates must be generated from data recorded in the hardcopy sacramental register. Data referenced in the census software is for convenience only. All data printed on any Sacrament Certificate must be as recorded in the hardcopy sacramental register.
- ! Sacrament Certificates data must be verified with the hardcopy register data before any Certificate is signed, sealed or delivered.

Follow this link to for instructions on how to generate a [Sacrament Certificate](#).



















Notifications


Notifications are similar to Certificates and are most commonly used to advise the parish of baptism when a person has received additional sacraments. Notifications can be generated for specific Sacraments using data previously entered in the census software to fill out field references in templates. Though no Notification templates are provided by the software, there is a custom Notification template available in Mail Merge. Follow the instructions on how to generate a Sacrament Certificate, however at step 5 "Select ParishSOFT Templates" choose instead Global Templates (1) and then Confirmation Notification (2) instead, as shown below.

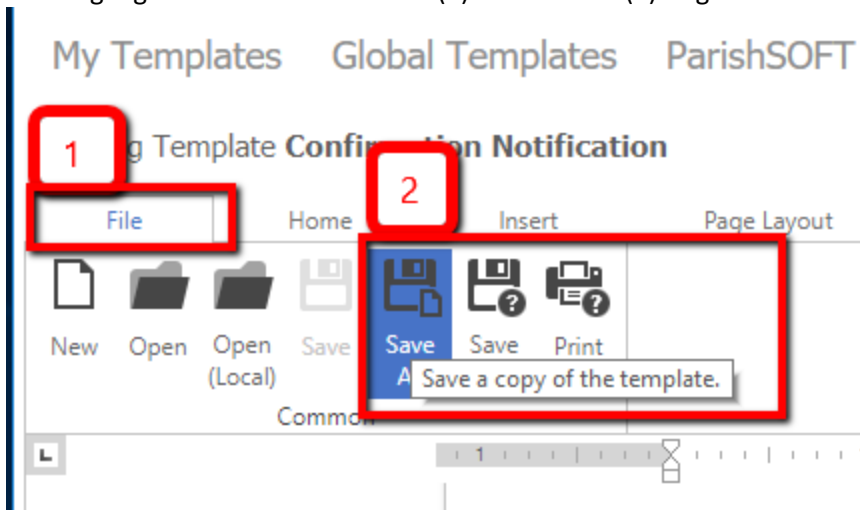
PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

My Templates **1** Global Templates ParishSOFT Templates Mail Merge (1 Records)

Select a template below, [create a new one](#) or [open one](#).

	Template Name
  	#10 Envelope
  	Anointing_10-2017
  	Baptismal-no notations
  	CCD Registration Template
  	Confirmation Certificate
  	Confirmation Notification 2

 The Confirmation Notification template can be modified for use with other sacraments, to include other language or as needed. Use File (1) and Save As (2) to generate a new template with any modifications.



Administration

Administration refers to controls and settings for administering Staff Assignments, Positions, Access Rights as well as Username logins and resetting passwords for both Staff and parishioner Member records. Staff records, like all other census records, are built upon an underlying Family and Member record. Staff Assignments, Positions and Access Rights are closely related to the Member record.

! Clergy Staff records are restricted


Clergy Staff records pertain to priests and deacons. Maintenance of clergy Staff record Assignments and Positions as Priest or Deacon is restricted to diocesan curia offices. Contact the Vice Chancellor in the Chancery office with any proposed changes to Clergy Staff record Assignments, and Priest or Deacon Positions.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- Parish offices may not change clergy [Assignment](#), Priest or Deacon [Positions](#), official email, mail, phone and contact information, or [Sacramental Records](#) for clergy Staff records.

! Do not change Staff Positions which contain Priest or Deacon.

- Parishes may assign other Staff Positions such as Safe Environment Contact, DRE-CRE and set ParishSOFT Module [Access Rights](#) and [Fund Permissions](#) for clergy Staff records as needed.

 Parishes may also create, or share, an additional, non-Staff parishioner Family and Member record for a priest, or deacon if needed. A non-Staff parishioner record is appropriate for managing personal information such as a personal email address, envelope and [Contributions data](#), a deacon's Family record and so on.

- Use [Member List Search, Filters](#) to find Staff Family and Member records existing at the parish.

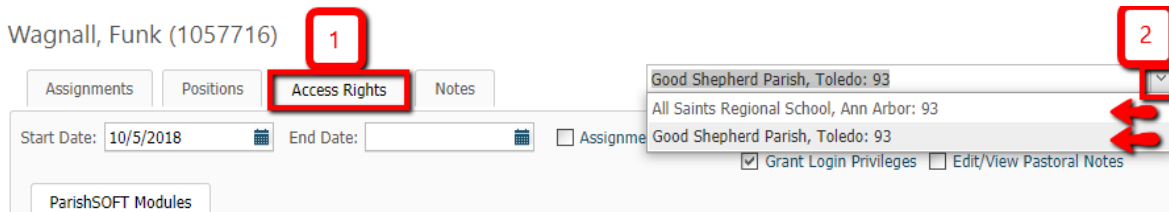
! Member List Search will not find Family and Member records for clergy which may have been created at another parish. The [Add New Family](#) screen, [Find Family](#), will find records created by other parishes. Those records should be shared using the [Move Selected Family](#).

- Use [Add New Family](#) to create a new, nonStaff, parishioner record for clergy.

Assignment

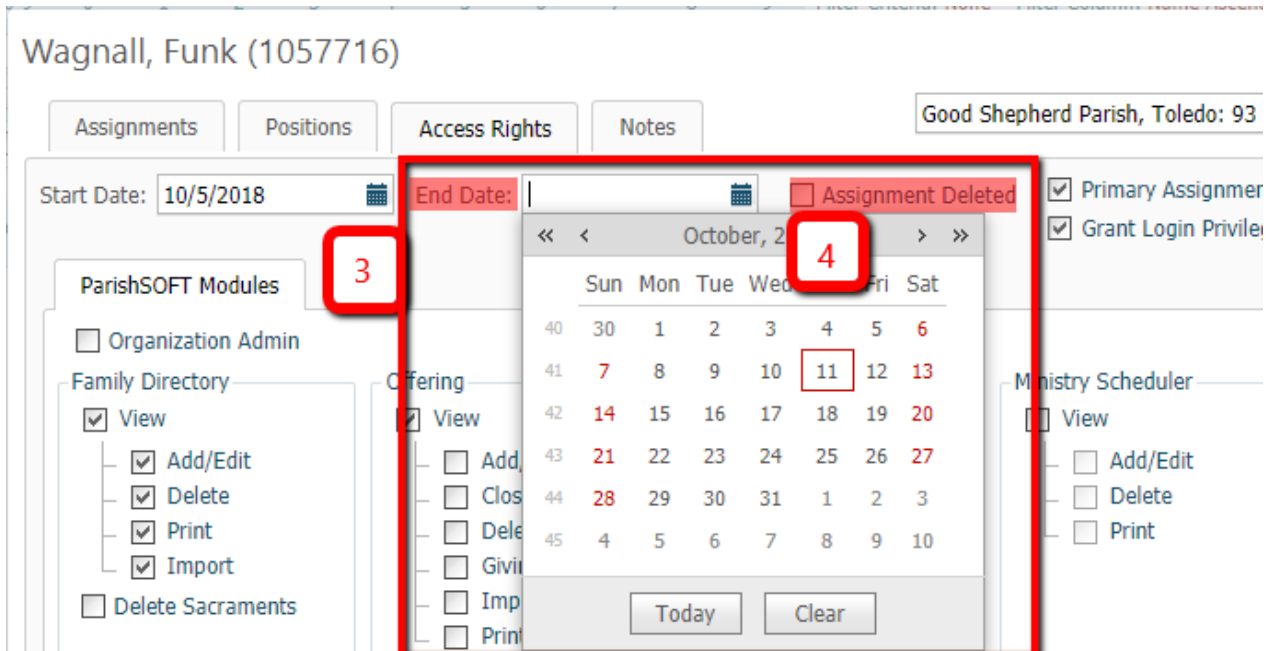
Assignment indicates that a Staff Member is actively serving an Organization. Staff may serve multiple Organizations and thus have multiple Assignments. A Primary Assignment is required; the Primary designation affects which parish displays as the login default display.

[Assignment End Date](#) terminates an Assignment. Choose the Access Rights tab (1). If the Staff Member serves at more than one parish use the dropdown box at top right to select the appropriate parish (2).



Select an End Date (3), or select the Assignment Deleted checkbox (4). This will assign an End Date and remove the Staff Member from the parish Staff list.


PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES



! Assignment End Date terminates both the Assignment and all Positions for that Staff Member at that Assignment.

Positions

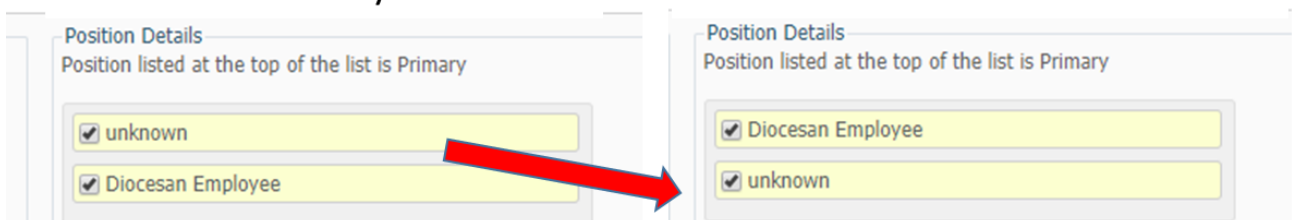
Positions designate ministry roles for the Staff Member at their Assignment Organization. Staff Position Type, the available Position role descriptions, are maintained by diocesan curia. Staff may be designated for one or more Positions at each Assignment. For each Assignment, whichever Position is listed first becomes the Staff Member's Primary Position. Only non-Primary Positions can be deleted.

 By default, the software generates a Primary Position, named as Unknown, when a new Staff Assignment is made. The Unknown Position should always be deleted after the Staff Member's actual Position has been selected from the Position listings.

! To delete the Unknown Staff Position, or any other Position, it must first be moved to a lower listing. Drag and drop the Unknown, or other Position, lower in the list and then uncheck it to delete.

“unknown” cannot be deleted
because it is top of list and
Primary

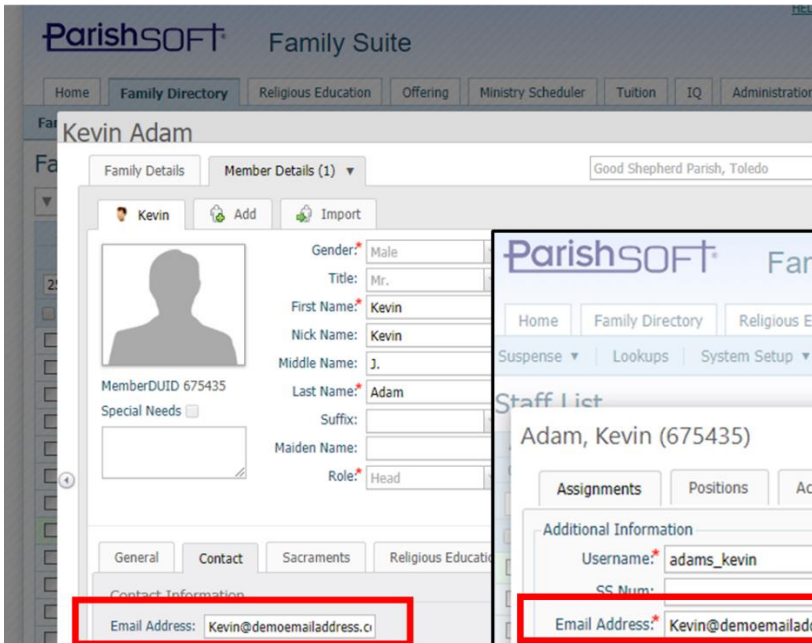
“unknown” after being dragged to
lower listing can be
deleted



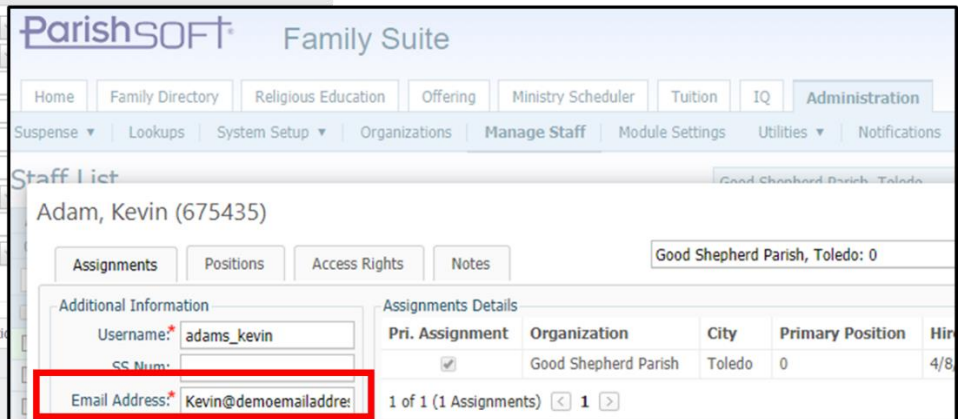
PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- ! Staff and Member records share a single email address, as shown below. A change made to the Email Address field in the Staff record will also change the Email Address field in the corresponding Member record, and vice versa. There are many situations when separate, that is multiple, email addresses are necessary; one email address for private matters and parishioner’s correspondence and a second email address for Staff correspondence.

Member record



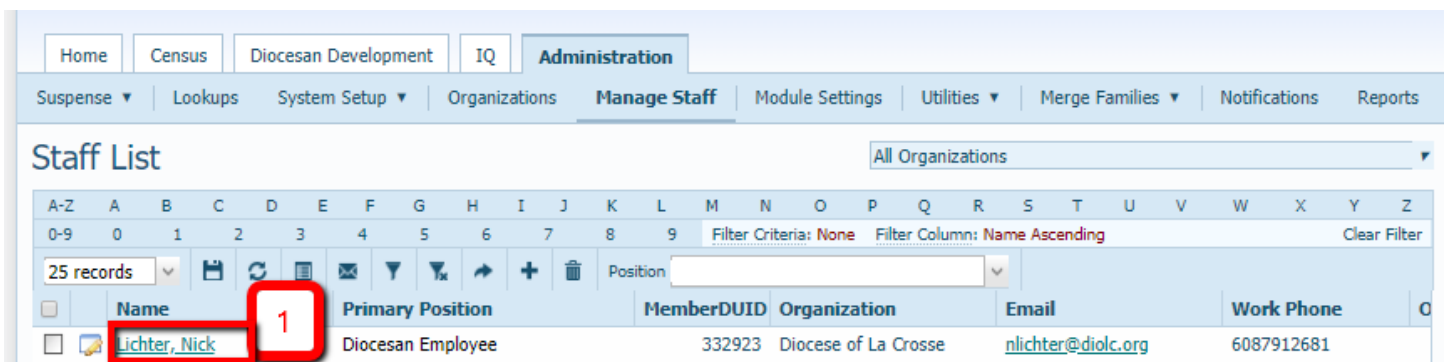
Staff record



All Staff records should be administered separately from a parishioner’s Family/Member record. Use [Add New Staff](#) to generate a separate, unregistered, Staff specific, record.

- ✎ The [Parish Staff Listing](#) specifies staff position names, which positions are required, or optional, for parishes and designates which positions will receive the Chancery Bulletin. The most current version of the Parish Staff Listing is available for download on the diolc.org/PIMS website.

From the Staff List, click on the Staff person’s hyperlinked name (1) to open their Staff record screen.



PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

In the Staff record choose the Position tab (1) then, select Edit Details (2) at bottom. Use the scrollbar at right (3) to navigate to the Position you wish to assign. Choose the checkbox (4) to assign the Position. Lastly, select Save at the bottom of the screen.

Lichter, Nick (332923)

Assignments **Positions** (1) Rights Notes

Diocese of La Crosse, La Crosse: Diocesan Employee

Edit Position
Diocesan Employee

Org Directory Order
Update Position

Position Notes

Position Details
Position listed at the top of the list is Primary

Diocesan Employee (3)

Administrative Assistant or Secretary

Bulletin Editor

Catechist or Evangelization Contact

Cemetery Contact

Deacon - all

Deacon - other

Deacon - parish assignment

Deacon - senior status

(4)

(2) Edit Details Close

Add New Staff

Add New Staff automatically generates a new Family record and corresponding Member record. From the Administration tab (1) select Manage Staff (2) and then Add New Staff (3).

ParishSOFT® Family Suite

Home Family Directory Religious Education Offering Ministry Scheduler Tuition IQ **Administration** (1)

Suspense Lookups System Setup Organization **Manage Staff** (2) Module Settings Utilities Notifications

Staff List Good Shepherd Parish, Toledo

A-Z 0-9 10 records Filter Criteria: None Filter Column: Name Ascending

+ (3)

Name	Title	Suffix	Primary Position	Date of Birth	Organizat
Adam, Kevin	Mr.	Kevin	0	2/6/1959	Good Shep

The Find Member dialog box appears. Type in Last Name (1), then Search (2).

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Find Member

Organization: All

Last Name*: Searchname **1**

First Name:

City: **Search** **2**

Cancel

The Member Search screen appears, perhaps listing the person's parishioner record. **Do not choose any of the displayed records. This will incorrectly attach a staff assignment to a member's parishioner record.**

Choose Add New Staff (1). The goal is to create an entirely new Staff record, one separate of the parishioner's existing Family and Member record.

Member Search

Last Name*: Searchname

First Name: **Search**

Member Name	First Name	Last Name	EmailAddress
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< >

1 **Add New Staff** **Accept Selected Member** **Cancel**

The Add Staff screen appears. Fill in the required fields (those marked with a *) and select Save& Edit (1) at the bottom.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- ! Email Address is a required field. For those Staff who have no email address use none@fake.email as a placeholder email address.
- ! For both Add Staff and Edit Staff (screen is untitled) only limited Member record data is presented for data entry or editing. There is a corresponding Staff Family record which must be edited to maintain correct Staff standards. Use [Member List Search, Filters](#) to find and review the corresponding Staff Family and Member records. Select the Member DUID checkbox in the search dropdown, enter the Staff Member DUID in the search criteria box. This will present the full Staff Family and Member data screens. The following field values are required for all Staff records.

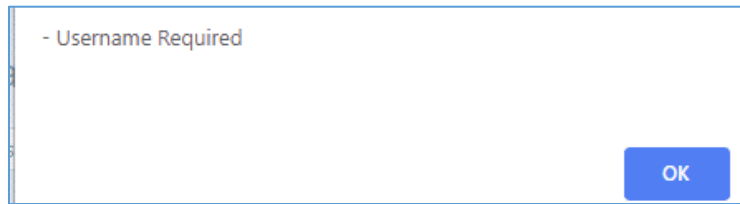
Staff Family record values		Staff Member record values	
Formal Mailing Name	Must be filled in	Title	blank
Family Group	Staff Only	Role	Head
Registration Status	unchecked	Status	Inactive
Home Address	Use Staff Member's home address		
Send Mail, Publish, Photo etc.	unchecked		Inactive Member Status prevents double-counting of Staff in census reports

Edit Staff

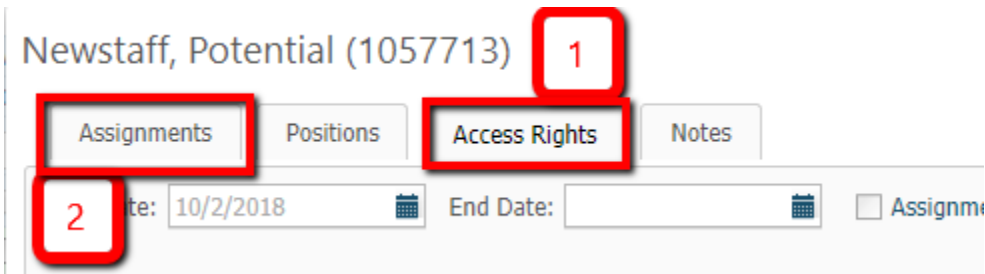
Edit Staff (screen is untitled) displays the Staff Member Name and MDUID. The initial screen displayed will be Access Rights, (1) as shown below. However, it is not possible to Edit Staff until a Username has been assigned. Username is found on the Assignment tab.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

- ! An error message displays when Edit Staff is attempted prior to assigning the Username.



The Username field is found on the Assignment tab (2), furthest tab to the left. Click on the Assignments tab to display the Username field.



- ! The selected tab is indicated by slightly darker text font on the tab label. However, the font highlight is minor and easily overlooked. Click the desired tab to make certain it is selected.

Username and (Set) Reset Password

Username (2) and Reset Password (3) are accessible on the Assignments tab. The Edit Details button (1) must be clicked to make these fields available. ParishSOft automatically sends an email to new users whenever a new Username is saved to a Staff record.

- ! There is no notice to the person editing the Staff record that ParishSOft is sending, or has already sent, the new Staff user an email with login credentials. However, when the Reset Password button is clicked there is a popup notice and then a confirmation that new credentials have been sent.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Wagnall, Funk (1057716)

Assignments Positions Access Rights Notes Good Shepherd Parish, Toledo: 93

Additional Information

2 Username: * f_wagnall

SS Num:

Email Address: * fwagnall@wmsn.net

Email Username:

Email Password:

Outgoing Mail Server:

3 Reset Password

Add Assignment

Add Additional Assignment

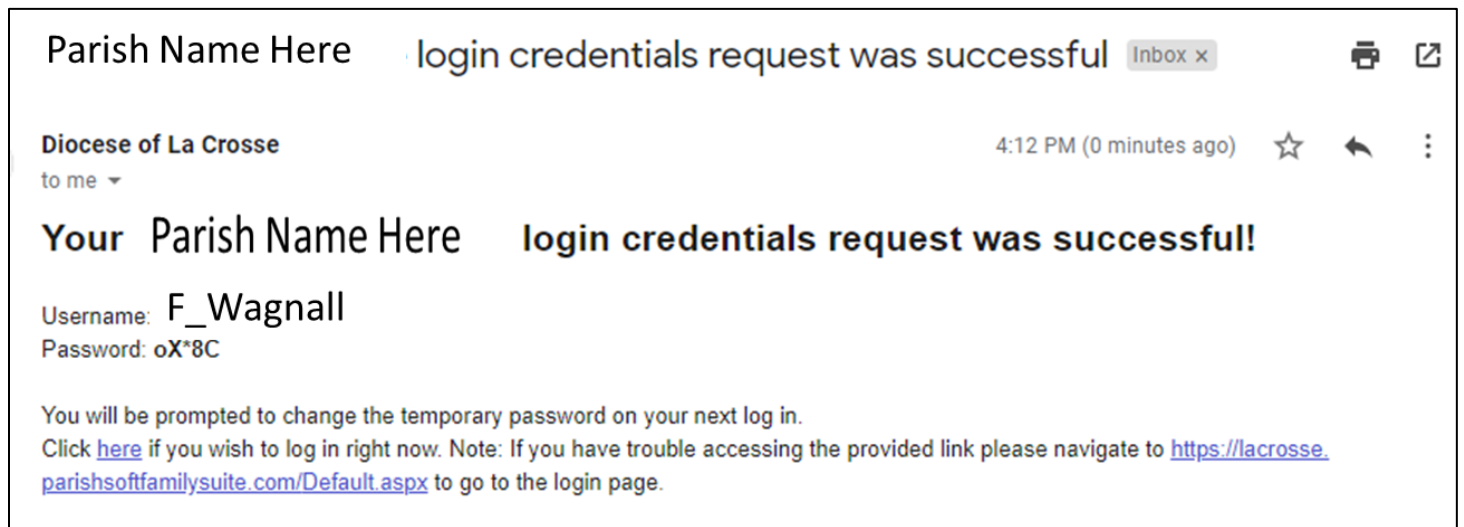
Assignments Details

Pri. Assignment	Organization	City	Primary Position	Hire Date	Release Date
<input checked="" type="checkbox"/>	Good Shepherd Parish	Toledo	93	10/5/2018	

1 of 1 (1 Assignments) < 1 >

1 Edit Details Close

Reset Password sends a temporary Password to the Staff Member via email as shown below. Use Reset Password as needed whenever a Member may be unable to login due to Password issues.




Access Rights

Access Rights is the tab where privileges, module permissions and Access Rights are set for Staff Members. There are many possible combinations of Access Rights.

- ! Family Directory Delete Access Right is preferably left unchecked. No users should Delete Family or Member records. Delete is only appropriate for [removing a Family or Member from a Workgroup](#).

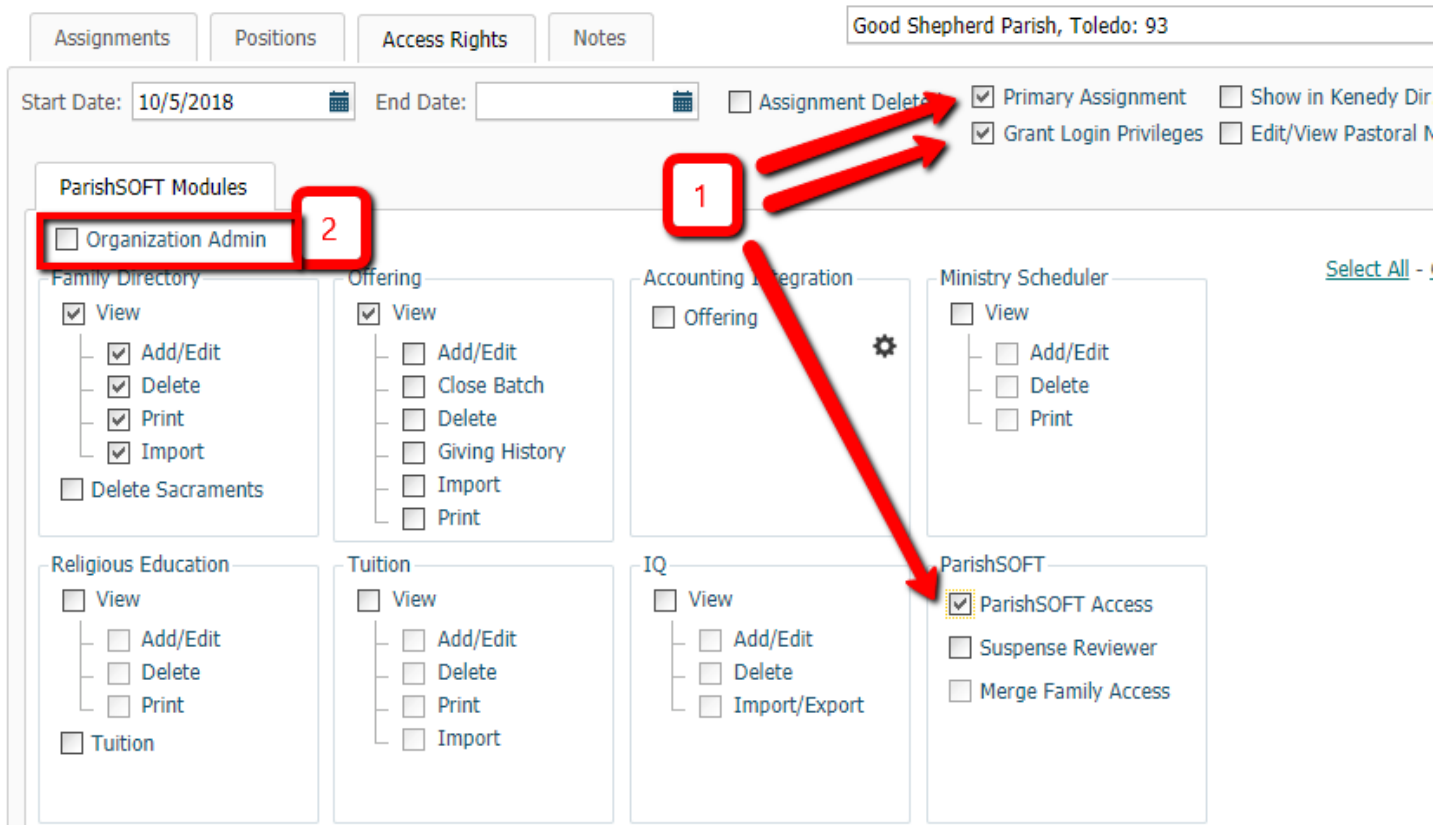
PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

 Whenever duplicate or unneeded Family records are found, it may be appropriate to [Merge Family](#) records. Each parish has access to Merge duplicate Family records within their own listings. For duplicates involving more than one parish please notify the diocesan offices. Typically, duplicate Family records, or duplicate Member records, are merged. Multi-parish records are merged at the diocesan level.

Primary Assignment, Grant Login Privileges and ParishSOFT Access.

Primary Assignment, Grant Login Privileges and ParishSOFT Access checkboxes (1) are required for Staff to use the software.

Wagnall, Funk (1057716)



Assignments | Positions | Access Rights | Notes | Good Shepherd Parish, Toledo: 93

Start Date: 10/5/2018 | End Date: | Assignment Deleted

Primary Assignment | Show in Kennedy Dir
 Grant Login Privileges | Edit/View Pastoral M

ParishSOFT Modules

Organization Admin (2)

Family Directory: View, Add/Edit, Delete, Print, Import, Delete Sacraments

Offering: View, Add/Edit, Close Batch, Delete, Giving History, Import, Print

Accounting Integration: Offering

Ministry Scheduler: View, Add/Edit, Delete, Print

Religious Education: View, Add/Edit, Delete, Print, Tuition

Tuition: View, Add/Edit, Delete, Print, Import

IQ: View, Add/Edit, Delete, Import/Export

ParishSOFT: ParishSOFT Access (1), Suspense Reviewer, Merge Family Access

Select All - !

Organization Admin

Organization Admin (2 above) grants Access Rights to all modules as well as Staff records. These comprehensive Access Rights are only appropriate for Pastors, Administrative Assistants or Secretaries, or other Staff as designated by the Pastor.

ParishSOFT Modules

ParishSOFT Modules refer to functional groupings of user screens including Family Directory and Offering which are required modules. Optional modules which may have been purchased for your Organization (parish) include IQ, Ministry Scheduler and Religious Education. Religious Education also includes the Tuition module. Accounting Integration may be available if ParishSOFT Ledgers and Payables has been purchased as an accounting software. Access Rights should be configured as may be appropriate to Staff Positions.

PARISH CENSUS SOFTWARE STANDARD OPERATING PROCEDURES

Fund Permissions are maintained separately of Access Rights, and in conjunction with Offering Access Rights. Offering Access Rights are required before Staff can be granted Fund Permissions.