Catholic Diocese of Salt Lake City

ParishSOFT Standard Operating Procedures

Version 2.0

As of April 20, 2013

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Family and Member Information

Title: Assigning Registration Status to Family and Member

Description: This standard procedure outlines the process that should be followed when a parish is adding a new family and must specify the family's status as well as the member's status. There are several scenarios that could occur within a parish that must be identified. A proper family status and member status combination will describe an individual's unique standing within the parish.

Details: The following example scenarios list how a person may be represented in the Parish.

                      To ensure that the proper family and member status is used, look up the scenario in which the family or person applies in the table and complete the family, registered, and member status fields in the manner in which it is described in the table. For example, if a person is being added to the parish database that is a member of the clergy or has a religious role and is registered and active within the parish, then clergy/religious would be selected for their family group status, the registered box would be selected, and the member status would be active.

                      A family can be REGISTERED in one parish but can be ACTIVE in many. Ask the parishioner which parish they consider their "home".

                      College students or adult children should have their own family record.

                      If a Grandmother moves in with adult children, she is to be kept separate for mailing and contribution purposes.

                      If a family is moving out of the diocese, the family should be listed as MOVED, UNREGISTERED and members made INACTVE. Remember to uncheck "send envelopes".

                      A minor child should not be entered as "head of household".

Family Information

Help

Families | Members

Family ID: 10133

Last Name	O'Malley
First Name(s)	John
Mailing Name	Reverend John O'Malley
Informal Name	Father John O'Malley
Formal Salutation	Reverend O'Malley
Informal Salutation	Father O'Malley

Auto Fill

Primary Address: Home   ☐ Do not Send Mail

Home | Mailing | Other

Addrs: 1234 Main St

City: Salt Lake City   State: UT

Zip: 84106 3954   Area Code: 801

Phone: 801-123-4567

Find Postal Code

Primary Phone: 801-123-4567
Emerg. Ph.:   Desc.:
Email:

Family Group: Clergy/Religious
☑ Currently Registered Family
Membership Date: 10-10-2011

Parish of Registration: Diocese of Salt Lake City Bishops ...

Notes

Notes | Pastoral | WorkGroups | Health Info | Log File | Ext. Family

This is a TEST for PS SOP. kn

Family Photo

Find Photo
Enlarge
Remove

☑ Publish Phone
☑ Publish Email
☑ Publish Address
☐ Send Magazine

Edit Bank Account Info

☐ Send Contrib. Env.   Diocesan ID   Annual Gift $
Env. #   0

Next Avail Envelope # | Skipped Envelopes | Giving History

Map Code:
Last Updated: 01-19-2012

Update
Close
✕ Cancel

If the wife chooses to retain her maiden along with her husband's surname, please follow this format. The wife's name is entered as:

Last Name	**Doe**
First Name(s)	**John and Jane**
Mailing Name	**Mr. John Doe and Mrs. Jane Dixon-Doe**
Informal Mailing Name	**John Doe and Jane Dixon-Doe**
Formal Salutation	**Mr. Doe and Mrs. Dixon-Doe**
Informal Salutation	**John and Jane**

Be sure and ask the female parishioner if she prefers the title of Ms. or Mrs.

Catholic Diocese of Salt Lake City
ParishSOFT Standard Operating Procedures
_____

The following process should be followed:

Scenario	Family Group	Currently Registered	Member Status
Active, Registered Family	Active	Yes	Active
Inactive, Registered Family	Inactive	Yes	Inactive
Visitor, Active in other parish	Visitor	No	Inactive
Visitor, Not Active in Church	Visitor	No	Inactive
Contributor, Unregistered	Contributor	No	Inactive
Staff, Registered Parishioner	Active	Yes	Active
Staff, Unregistered, Non-parishioner	Staff	No	Inactive
Non-Catholic, Member of Registered Family	Active	Yes	Actother
Registered family that has moved (out of state)	Moved	No	Inactive
Sacrament Only Family	Sacrament Only	No	Inactive
Clergy, Religious, Registered	Clergy/Religious	Yes	Active
Deceased – Single Head of Household	Deceased	No	Deceased
Deceased – Member of Household	Active	Yes	Deceased
Deceased – Surviving Adult Member(s) Non-Catholic	Inactive	No	ActOther

A VISITOR donates an occasional weekly contribution where as a CONTRIBUTOR doesn't attend a parish and will donate a larger sum for a specific fund, such as capital campaign. If a VISITOR continues to contribute to the parish, contact the family to complete a registration, STATUS is then changed to ACTIVE, REGISTERED.

Handling Multiple or Duplicate Registrants

Title: Adding multiple or duplicate registrants

Description: This standard procedure outlines the process that should be followed when a parish is attempting to add a new family that ParishSOFT identifies as already registered in another parish. When a new family is added into a parish's database, the system performs an automatic search in the master diocesan directory to determine if that family is already registered at another parish.

Details: The following process should be followed:

REGISTERING A FAMILY

When adding a family into the parish database, search the Family database to see if that family appears as registered in another parish's database. It is possible at this point to find the family being added in the list of search results.

If the family is marked as registered and you are importing the family because they have requested to be registered at your parish, a message from the Administrative Message Center will be sent to the previous parish of registration notifying them of the change.

IMPORTING WITHOUT REGISTERING

Without registering a family, a parish may "import" a family that is registered at another parish into its database for the purposes of:

        a. Posting Contribution
        b. Adding a member(s) to time and talent
        c. Sending contribution envelopes
        d. Adding a student to a Religious Education class*
        e. Adding sacraments

If you are importing without registering the family, please remember to mark the UNREGISTERED box on the Family Details page. Please note you will not be able to modify basic contact and family detail information if you are not the parish of registration.

* The parish of registration is able to modify contact and member detail information for the family. All updates to information must be sent to the parish of registration for addition or deletion.

Using Data Entry Standards when Adding a New Family

Title: Data Entry standards for family names

Description: This standard procedure outlines the process that should be followed when a parish is attempting to add a new family to the database. Data entry standards should be used to ensure the proper formatting of mailing lists, letters, and emails. Correct spelling of a family's name along with the inclusion of member birthdates will also help in the reduction of duplicate entries. When adding a new family, the system performs an automatic search to see if that family is already within a database.

Details: The following process should be followed:

When adding a new family, proper spelling and punctuation should be used at all times. Please use the full legal name. After entering the family name that is to be added to the database, always check to see if the family is already listed or listed incorrectly in your database. If the family is listed, but spelled incorrectly, go into the Family Details page and correct any misspellings.

When adding a family that is not present in the database, be sure to capitalize the first letter of each first name as well as the first letter of the last name. Failure to adhere will cause problems when sending mail merge letters or other communications to that family.

Upon entering member information, a married couple is to be entered as husband and wife, whereas a single person would be head of household. It is important to complete member information with prefix as well as gender for auto fill purposes.

Always use proper prefixes such as Mr. and Mrs. when entering family information into the Mailing Name Fields. Priests should be Reverend, such as Reverend John Smith.

Member information must be updated prior to AUTO FILL process, AUTO FILL will not populate correctly with hyphenated names. Hyphenated names must be entered manually.

<u>Do not</u> use a character such as forward slash to indicate a couple. A dash or space is acceptable. The wife's name should be entered as it appears on her legal documents. Do not use an ampersand (&) in place of the word "and". Use the following formats in the Mailing Name fields for the situations listed:

Last Name	**Doe**
First Name(s)	**John and Jane**
Mailing Name	**Mr. and Mrs. John Doe**
Informal Mailing Name	**John and Jane Doe**
Formal Salutation	**Mr. and Mrs. Doe**
Informal Salutation	**John and Jane**

A person can have a:

First Name
Middle Name
Father's Last Name
Mother's Last Name

The member may use the Father's and Mother's Last Name as their last name.   For example:

Maria Sofia Vargas Alvarez

Last Name: Vargas Alvarez
First Name: Maria
Mailing Name: Ms. Maria Vargas Alvarez
Informal Mailing Name: Maria Vargas Alvarez
Formal Salutation: Ms. Vargas Alvarez
Informal Salutation: Maria

The middle name would only be placed in the Member Details, however, not normally used.

Using Data Entry Standards when Adding a New Family

Title: Data Entry standards for addresses

Description: This standard procedure outlines the process that should be followed when a parish is attempting to add a new address to the family directory. This standard follows US Postal Service regulations. Data entry standards should be used to ensure the proper formatting of mailing lists and letters and emails.

Details: "Home" should be used for physical address.
"Mailing" should be used if a PO Box is preferred for mailing
"Other" should be used for families with two different houses, e.g., Snowbirds.

Be certain the Primary Address drop down points to the <u>correct</u> mailing address.

Please note that this format follows USPS guidelines.

Yes, Use This Format	Do Not Use This Format
1234 S Main St	1234 South Main St.
5648 S 200 W	5648 South 200 West
45 E 9933 S Nbr 456	45 E. 9933 S., #456
PO Box 123	P.O. Box 123

No punctuation, symbols or special characters are to be used in these fields.

Family Information

Help

Families | Members

Family ID: 10134

Last Name	Doe
First Name(s)	John and Jane
Mailing Name	Mr. John Doe and Mrs. Jane Dixon-Doe
Informal Name	John Doe and Jane Dixon-Doe
Formal Salutation	Mr. Doe and Mrs. Dixon-Doe
Informal Salutation	John and Jane

Auto Fill

Primary Address: Home   ☐ Do not Send Mail

Home | Mailing | Other

Addrs	1234 Main St
City	Salt Lake City State UT
Zip	84106 4408 Area Code 801
Phone	801-555-1212

Find Postal Code

Primary Phone 801-555-1212
Emerg. Ph.   Desc.
Email

Family Group: Active   Membership Date:
☑ Currently Registered Family   10-10-2011

Parish of Registration: Diocese of Salt Lake City Bishops   ...

Notes

Notes | Pastoral | WorkGroups | Health Info | Log File | Ext. Family

This is a TEST family for PS SOP. kn

Family Photo

Find Photo
Enlarge
Remove

☑ Publish Phone
☑ Publish Email
☑ Publish Address
☐ Send Magazine

Edit Bank Account Info

☐ Send Contrib. Env.   Diocesan ID   Annual Gift $
Env. #   0
Next Avail Envelope #   Skipped Envelopes   Giving History
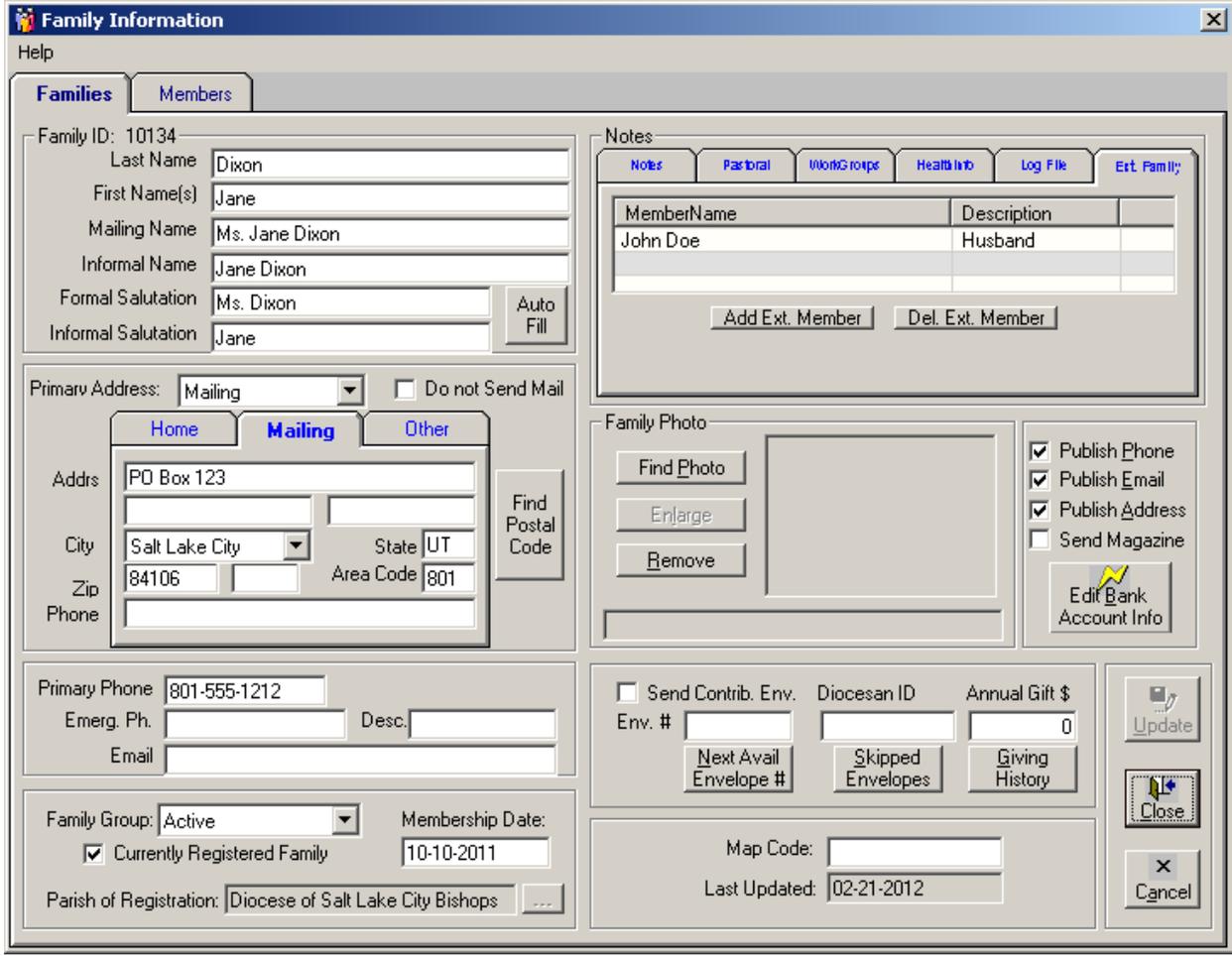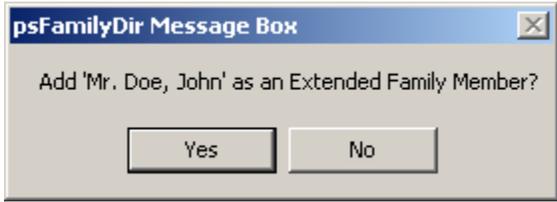
Map Code:
Last Updated: 01-19-2012

Update
Close
Cancel

DIVORCED FAMILIES: If the spouse is not an active Catholic, mark the non-Catholic as inactive in the member record and add a NOTE stating husband and wife are divorced. The most current NOTE information is to be entered on top line of the NOTES area. Be sure to update the Salutation field and change the Member Type for the active Catholic as HEAD OF HOUSEHOLD. If both husband and wife are Catholic create a New Family record (this will create a member record that we will eventually delete. Click on the Member tab and import the member record from the original family to this family. The new family should contain the member who is least active in the church. Delete the Member record in the first tab.

psFamilyDir Message Box

Add 'Mr. Doe, John' as an Extended Family Member?

[Yes]   [No]

Family Information

Help

Families | Members

Family ID: 10134

Last Name	Dixon
First Name(s)	Jane
Mailing Name	Ms. Jane Dixon
Informal Name	Jane Dixon
Formal Salutation	Ms. Dixon
Informal Salutation	Jane

[Auto Fill]

Notes

Notes | Pastoral | WorkGroups | Health Info | Log File | Ext. Family

MemberName	Description	
John Doe	Husband	

[Add Ext. Member]   [Del. Ext. Member]

Primary Address: Mailing ▼   ☐ Do not Send Mail

Home | **Mailing** | Other

Addrs   PO Box 123

City   Salt Lake City ▼   State UT

Zip   84106   Area Code 801

Phone

[Find Postal Code]

Family Photo

[Find Photo]
[Enlarge]
[Remove]

☑ Publish Phone
☑ Publish Email
☑ Publish Address
☐ Send Magazine

[Edit Bank Account Info]

Primary Phone   801-555-1212
Emerg. Ph.   Desc.
Email

☐ Send Contrib. Env.   Diocesan ID   Annual Gift $
Env. #   0

[Next Avail Envelope #]   [Skipped Envelopes]   [Giving History]

Family Group: Active ▼   Membership Date:
☑ Currently Registered Family   10-10-2011

Parish of Registration: Diocese of Salt Lake City Bishops [...]

Map Code:
Last Updated: 02-21-2012

[Update]
[Close]
[Cancel]

When you add an item to the EXTENDED FAMILY tab you can detail the relationship. In the example above the Doe family is divorced. The children live with Jane. John is imported into his own record. John is cross referenced to Jane and the children and vice versa. This can be used to denote grandparents, etc.

This is extremely useful for blended families.

<u>Sacramental Details</u>

Selecting Proper Faith Type when Entering Sacramental Details

Title: Proper faith type when entering sacramental details

Description: This standard procedure outlines the process that should be followed when a parish is attempting to add sacramental details about a family member within the Family Directory in ParishSOFT. Within the Member Information Tab, a person's religion type is recorded. If the person is active in the Status area, it is assumed that the person is Catholic. If the person is ActOther, a menu appears so that you may select which religion the member is. The Sacramental Details tab for each member shows information concerning the baptism of that individual as well as the faith under which that person was baptized. It is acceptable to be listed under the Catholic religion, but have baptism information listed as a different religion.

Details: The following process should be followed:

If the individual is not active in the Catholic Church but is active in another church, then the person should be listed as ActOther. By choosing this option when you tab, a dropdown menu will appear that will allow you to choose the specific religion that the individual practices.

As sacramental details are being captured, it is important to note the faith of the baptism. Within the Sacraments Tab, a Sacramental Details button will show specifics about the member's baptism. Under the baptism tab, the faith must be selected. If the person was baptized in a Catholic Church, you may leave the religion as Catholic; however, if the person was baptized in a Protestant church, then the faith type would need to be changed to Protestant Christian.

Also, be sure to include any information about adoption within the sacramental details page. The adoption information shall be placed in the General remarks field within the general tab in sacramental details.

Sacramental Details

Screens **Create Certificates** **Send Notifications** **Help**

Mrs. Jane Doe
Member ID: 16060   Member DUID: 306051

Baptism

☑ **Completed**

Date | 04-10-2006 | Prep Year | [ ]
Parish | The Cathedral of the Madeleine | ...
Celebrant | Mayo, Msgr. Joseph | ...

Reconciliation Prep.

☑ **Completed**

Date | 04-10-2006 | Prep Year | [ ]
Parish | The Cathedral of the Madeleine | ...

First Eucharist

☑ **Completed**

Date | 04-10-2006 | Prep Year | [ ]
Parish | The Cathedral of the Madeleine, | ...
Celebrant | Mayo, Msgr. Joseph | ...

Confirmation

☑ **Completed**

Date | 04-10-2006 | Prep Year | [ ]
Parish | The Cathedral of the Madeleine | ...
Celebrant | Mayo, Msgr. Joseph | ...

Version: 3.7.34

Baptism | Reconciliation | First Eucharist | Confirmation

Baptismal Name | Jane Ann Doe
Faith of Baptism | Catholic

Sponsors | Ms. Carolyn Johnson | ...
| Ms. Bridget Sullivan | ...
Witnesses | [ ] | ...
| [ ] | ...

General Remarks

Registry Volume | 5
Registry Page | 15
Registry Number | 42

This is a TEST for PS SOP. kn

General | RCIA | Matrimony
Holy Orders | Religious Prof. | Funeral

Update | Close | Cancel

Unknown

DECEASED MEMBER: If you have a deceased single "head of household", specify in the member status field DECEASED. Upon doing so, you will receive two reminders. Add the date of death for this member and complete the funeral information. The FAMILY GROUP is changed to DECEASED. If you have a deceased "member of household", the member status is changed to DECEASED however, the FAMILY GROUP remains ACTIVE.

Reminder: Edit all name fields as needed to remove the name of the deceased member in the Salutation field.

Member and family records of deceased people should not be removed or deleted from your Family Directory.

The word DECEASED should not be entered in the SALUTATION or ADDRESS field of the family.

Edit record of surviving spouse via the Family Information screen. Click the **Sacraments** tab for the surviving spouse. Click the **Edit/View Sacramental Details** button. Click the Matrimony button on the Sacramental Details screen. The Matrimony screen will open. Edit the marital **Status** to Widowed.

Setting Up and Maintaining Staff Directory Information

Title: Setting up and maintaining staff directory

Description: This standard procedure describes the process that should be followed
                     when a parish is setting up the staff directory within the family directory.
                     This procedure also applies when new staff members join and when staff
                     members leave. It is necessary to keep information within the staff
                     directory current to utilize the background check most effectively.

Details: The following process should be followed:

                     Add **all** staff members (whether they are parishioners or not) into the staff
                     directory.

                     After the individual is added to the staff list, the system administrator must
                     then select the access rights for that user. Some users will not have any
                     access into the ParishSOFT system. Next, the staff type and staff
                     information must be entered. The staff type for each staff member must
                     be selected within the staff details tab. This will allow the proper
                     background check to be performed for each specific staff type.

                     It is important to maintain the information within the staff members' family
                     directory and member screen. As a staff member changes email
                     address, staff type, or has left the position, an update must be made to
                     the member screen.

Collecting Information for Catholic Directory Manager Updates (formerly Kenedy Directory)

Title: Collecting information for the Catholic Directory Manager

Description: This standard procedure outlines that process that should be followed
                     when a parish is required to submit information for the Catholic Directory
                     Manager updates. The current process will be altered due to the
                     functionality and capabilities of the ParishSOFT Diocesan system. The
                     Parish must comply with any data requests for the purpose of updating
                     the Catholic Directory Manager.

Details: This policy will be developed and communicated to all parishes during the
                     upcoming year.

Electronic Record Keeping Responsibilities

Keeping Electronic Records Requirements

Title: Electronic records requirement policy

Description: This standard procedure outlines record keeping requirements for certain records that each parish must ensure is complete and accurate in the ParishSOFT system.

Details: The following information is **required to be maintained** in full in the ParishSOFT system, and should be kept complete and accurate at all times:

- **Staff directory** Many staff will already be in the staff directory as they are included in the directory if they are set up with access to the ParishSOFT system. All remaining non-ParishSOFT users on the parish staff should be added and maintained in the staff directory as well.

- **Sacramental details** Parishes are required to maintain complete and accurate sacramental details for all Sacraments performed in the Parish in *both* the parish Sacramental Register and ParishSOFT. **Any** Sacrament performed at a Parish **must** be recorded in ParishSOFT. Details for all sacramental records from January 1, 2005 onward must be entered into ParishSOFT.

- **Religious education** Religious education information and history must be created and maintained for all students and class. Set-up of historical records is encouraged. As of January 1, 2010, all new classes and student accomplishments must be maintained in ParishSOFT.

Synchronizing Database and Data Backup

Title: Data Back-up and Synchronization

Description: This standard procedure outlines the process that should be followed when a parish is backing up the system or the data.

Details: The following processes should be followed:

<u>Data Backup</u>

Each Parish Administrator is responsible for the backup of the ParishSOFT database on a regularly scheduled basis. The database backup scheduler is configured so that automatic backups will occur as specified in the scheduler. It is the Administrator's responsibility to verify that these are occurring as scheduled.

It is highly recommended that in addition to the scheduled ParishSOFT backup you backup your complete system on a regular basis.

Note: The Administrator's computer must be "on" for this to take place.

Parishes with DSL or high speed internet connections are automatically set to backup daily by FTP to the diocese where the information will be stored.

If a parish does not have access to high speed and is using a dial-up connection, the parish will need to perform back-ups manually.

Synchronization

Parish databases are setup to synchronize to the diocesan database at regular intervals. The synchronization is set to synchronize every 10 minutes. It is recommended to do a manual sync once a week. To do so, click on Diocese in any ParishSOFT module, Sync Data to Diocese and Sync All Now. Upon completion, respond NO to Exit Application.

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Database Performance

Title: Database performance policy

Description: This standard procedure outlines that process that should be followed to ensure optimum database performance.

Details: The parish administrators must run the database maintenance utility and the Compact and Repair utility to optimize the system at least once per week. Also the parish administrator must select settings on any anti-virus software to NOT scan any of the ".mdb" files. This database maintenance process will check to make sure everything is correct in the system, such as rebooting the computer or at least closing it down on occasion verifies all settings are functional. If this process is not done periodically, the database can become corrupted causing problems in the application. This process should be done at minimal once a month but best if done weekly.

Run the database maintenance by completing the following steps:

1. Open the ParishSOFT system information screen
2. Click on the System and Database Utilities in the upper left corner
3. Select Database maintenance check
4. Click Yes

Run Compact and Repair by completing the following steps:

1. Ensure that everyone is off the system
2. Log in to Family Directory as System Administrator
3. Close Synchronization Manager
4. Open the ParishSOFT system information screen by going to About on the main menu
5. Click on the System and Database Utilities in the upper left corner
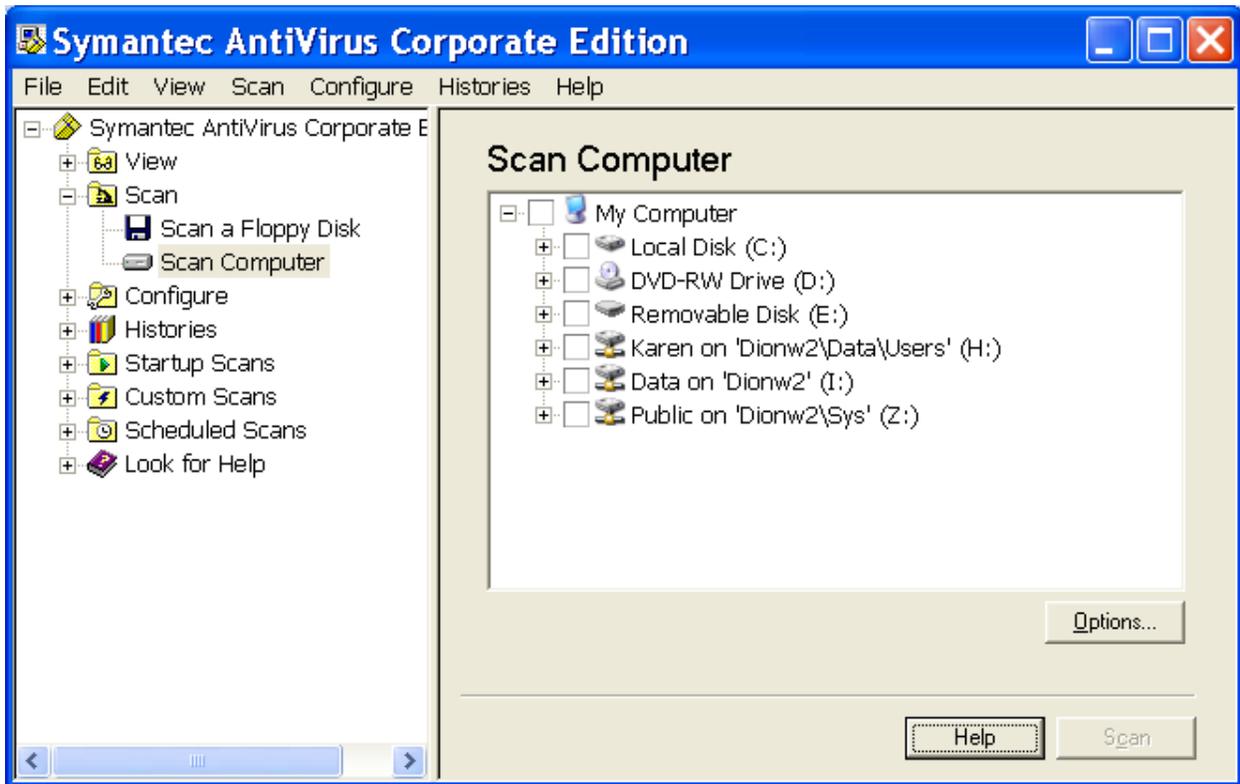6. Select Compact and Repair
7. Click Yes

Disable virus scan on ".mdb" files by following these steps:

1. Open antivirus by double clicking on the icon in the lower right corner.
2. Click on "Scan computer".
3. Click on "Options".
4. Click on "Exclude files and folders.
5. Click on "Exclusions".
6. Click on "Check file for Exclusion before scanning".
7. Chick on "Extensions".
8. Type **mdb** in box.
9. Click on "Add".
10. Click "OK" three times and close application.

Note: Rebooting and closing down should be done periodically so that the system will reset.