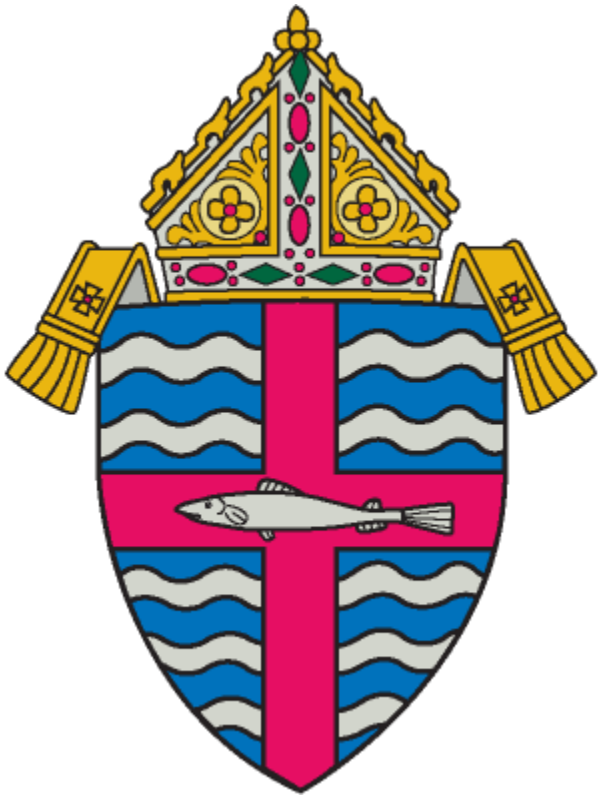

Diocese of Madison
ParishSOFT Standard Operating Procedures
As of September 1, 2009

Diocese of Madison

ParishSOFT Standard Operating Procedures

TABLE OF CONTENTS

For your convenience, changes from the last version are highlighted in yellow.

ParishSOFT Standard Operating Procedures 3
Families Registered at a Different Parish 4
SOP # PS-1 4
Assigning Registration Status to Family and Member 5
SOP # PS-2 5
Data Entry Standards When Adding a New Family 7
SOP # PS-3 7
Selecting Proper Faith Type When Entering Sacrament Details 12
SOP # PS-4 12
Scheduling Ministers - Utilizing Ministry Group and Events Functionality 13
SOP # PS-5 13
Adding and Editing Funds 15
SOP # PS-6 15
Setting Up and Maintaining Staff Directory Information 17
SOP # PS-7 17
Offertory and Contribution Entry 19
SOP # PS-8 19
Electronic Record Keeping Responsibilities 22
SOP # PS-9 22
Configuring Tables and Performing Table Set-up Activities 23
SOP # PS-10 23
Synchronizing the Database and Data Backup 24
SOP # PS-11 24
Database Performance and Maintenance and Snowbirds 25
SOP # PS-12 25
Religious Education Classes and Tuition 26
SOP # PS-13 26
Sacraments 27
SOP # PS-14 27
Customizing Reports, Queries, Forms 30
SOP # PS-15 30
Utilizing the Bannon Letters Program as Part of the Diocese of Madison's Parish Offertory Program 31
SOP # PS-16 31
Religious Education Tuition 32
Religious Education Tuition 32
SOP # PS-17 32
Importing (Moving) Family Members 33
SOP # PS-18 33
Future Standard Operating Procedure Topics (Subject to Change) 35

ParishSOFT Standard Operating Procedures

ParishSOFT is an integrated parish census data system that allows for synchronization of parish records with the diocese and export of offertory/financial data to QuickBooks. The program allows entered data to be used and formatted in multiple ways for reports, merges, and other functions by more than one parish. It is critical, therefore, that data be entered in a consistent and appropriate manner to ensure quality data and performance throughout the system. The quality of reports and advanced functions depend on the accuracy and consistency of data entry as well as proper set-up of information.

This document provides parishes with the Diocese of Madison's standard operating procedures to guide in the entering of data and monitoring the quality of entries to ensure accurate information and reporting.

Please follow these standard operating procedures as outlined and contact us with any questions or comments.

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Families Registered at a Different Parish

SOP # PS-1

AREA: Family and Member Information

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 at another parish**. When a new family is added into a parish's database, the system asks you to perform an automatic look-up in the diocesan directory to determine if that family is already registered at another parish.

PROCEDURE DETAILS:

- When adding a family into the parish database, do a name search 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. **To avoid duplication of records, it is extremely important to do a name search before entering a family.**

- A parish may "import" a family that is registered at another parish into their database, without registering them for the purposes of:
  - Posting contributions;
  - Adding a member(s) to Time and Talent;
  - Sending contribution envelopes;
  - Adding a student to a Religious Education class

- **Only the parish of registration** is able to modify family and member detail information, including sacramental information. All updates to this information must be sent to the parish of registration for the change.
  - Example: a student is entered into your parish's religious education class for Confirmation preparation but their family is registered at another parish (this may happen frequently in cluster parish situations). Once syncing with the diocese has begun, the parish of the religious education class will "import" the family into their database and code them based on #PS-2. Once the child is Confirmed, this parish will send the sacramental information to the parish of registration to update.

- If a family changes their registration status, simply enter a check mark in the Currently Registered Family box on the Family Information page. By doing so ParishSOFT will un-register them at the parish they are currently registered with (this method occurs once syncing with the diocese has been established; before your parish is syncing with the diocese you will need to send an email to the parish of registration).

Assigning Registration Status to Family and Member

SOP # PS-2

AREA: Family and Member Information

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.

PROCEDURE DETAILS:

The following scenario chart lists how members should be represented in the parish. To ensure that the proper family and member status is used, complete the Family Group, Currently Registered Family, and Member Status fields in the manner which is described in the table below, based on their specific scenario.

Diocesan definitions for parishes when determining Family and Member Status:

- Registered – completed the parish registration form and shared their personal information; wish to be an active part of the parish community.
- Unregistered – decided they are not members of the parish and/or chose not to complete the form.
- Active – parishioner who is being tracked by the parish for one of the following activities – donations, volunteer activities, involvement in religious education, etc. They have some involvement in the parish in some visible way.
- Contributor – a person who does not wish to register with the parish but contributes. These individuals should receive offertory envelopes.
- Visitor – a person who may attend events but does not contribute and is not registered. If a person visits and contributes, use the term Contributor.
- Inactive – a parishioner who has no visible involvement or activity in the way of donations, volunteer activity, education, etc.
- Adults – are defined as persons who are 18 or older, regardless where they live or who supports them. Normally this is the voting age for the parish. Church law states that Confirmed persons under the age of 18 are also considered adults but this is more difficult to track.
- Staff – any person who works for the parish (paid or unpaid); whether they use ParishSOFT or not, ALL staff must be entered as such. This is a compliance issue involving Safe Environment regulations.

Scenario	Family Group	Currently Registered	Member Status
1. Standard active registered family	Active	Yes	Active
2. Non-member, not registered contributor	Contributor	No	Inactive
3. Visitor – attends but is not registered and does not contribute	Visitor	No	Inactive
4. Contributor – contributes but is not registered	Contributor	No	Inactive or Active depending on individual status in parish
5. Clergy, religious, registered	Clergy / religious	Yes	Active
6. Clergy, religious, not registered	Clergy / religious	No	Active
7. Clergy, religious, inactive	Clergy / religious	Yes	Inactive
8. Staff, registered parishioner	Active	Yes	Active
9. Staff, not registered parishioner	Staff	No	Active
10. Staff, not registered parishioner, Non-Catholic	Staff	No	ActOther
11. Non-Catholic, member of registered Family	Active	Yes	ActOther
12. School only	School Only	No (unless they are required to register to attend)	Child in School: Active Child ---------- Rest of family: Inactive
13. Inactive registered family	Inactive	Yes	Inactive
14. Registered family that has moved	Moved	No	Inactive
15. Sacrament Only Family	Sacrament Only	No	Inactive
16. Religious Ed Family	RelEd Only	No (unless they are required to register to attend)	Religious Ed member: Active ---------- Rest of family: Inactive
17. Deceased	Remains what it was unless entire family is deceased	Remains what it is unless entire family is deceased	Must enter Date of Death before changing to Deceased (date located in Sacraments, Funeral section) then change to Inactive
18. Entire family is deceased	Fam Deceased	No	Deceased
19. Family moves away	Moved	No	Inactive

Data Entry Standards When Adding a New Family

SOP # PS-3

AREA: Family and Member Information

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is attempting to add a new family to the family directory when they are **not registered at another parish**. 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 look-up to see if that family is already within a database.

PROCEDURE DETAILS:

When adding a new family, proper spelling and punctuation should be used at all times, otherwise mistakes will cause duplicate records. 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. Always check your entries for accuracy before leaving the record.

- 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. Do not use all capitals for names or problems will arise when sending mail merge letters or other communications to that family.

- It is **extremely important** to add family and member names correctly, and the entry in the mailing field both for consistency and to respect the preferences of the person being entered into ParishSOFT. Therefore, the question should be asked of the person or couple when registering them about how they would like to see their names appear on letters and mailings. Once you know their preference, the following reference link will help you properly format the data - Etiquette for Addressing Individuals and Couples. Please use these recommendations to complete the Mailing Name field for all parishioners. In the new ParishSOFT release there will be three mailing fields, which will allow more flexibility for your parish to choose from different options. When the new fields are available this Standard Operating Procedure will be updated. A few points to remember are:
    - Although current trends allow for either the man or woman's name to be listed first, for consistency throughout the diocese the husband or man's name is always entered first - Mr. and Mrs. John Smith
    - Do not use characters such as hyphens or forward slashes to indicate a couple. Do not use an ampersand (&) in place of the word 'and'.
    - For men: Mr. John Smith, Sr.; Mr. John Smith, Jr.; Mr. John Smith, I; Mr. John Smith, II; Mr. John Smith, III, etc.
    - If you encounter a title that does not appear in the Title field, please contact the diocese so we can create a consistent entry for you, update these Procedures, and notify other ParishSOFT users.
    - Remember to complete all name fields on both the Families and Members tabs.
    - For women with hyphenated names, unmarried adults living together, or exceptionally long names the Mailing Name field can hold 100 spaces and characters and it will word wrap when merged. This means you can enter it all in that field and not overlap to an Address field.

- There are three address sections that can be completed for a family: Home, Mailing, and Other. Home is the defaulted address and should consist of the main physical address of the family; Mailing can be used for post office boxes, mail sent to the office address, etc.; Other is used for a second location such as snowbird or temporary addresses. If addresses are entered into Mailing or Other, make sure the Primary Address field is set to the proper address (Mailing or Other) for mailings.
- Do not use all capitals for either the addresses or the names. Use proper upper and lower case so that merged documents look attractive.
- The Mailing Name field will remain the formal field used by the diocese and Informal Name is for parish use. The parish can choose which format to default on their mailings – Click the About menu, ParishSOFT System Info, Preferences. Choose your parish's choices, click Close to save and exit.
- Member screen fields must be completed and then Formal Salutation and Informal Salutation are automatically populated by the diocese before syncing and can be manually populated at the parish by clicking the Auto Fill button. ParishSOFT pulls the information keyed into the member fields of Title, First Name, Last Name, and Goes By to populate these fields. The variety of fields was added to allow the diocese and parish to format mailings in different levels or formality depending on the type of mail being sent.
- The Goes By field, otherwise known as parishioner nicknames or what they want to be called (i.e., Robert wants to be called Bob) must be completed even if there is no nickname (Vicky is called Vicky) because it's used in several places in ParishSOFT, especially for populating some of the mailing fields. The Goes By field populates with the information keyed in the First Name field, but should be reviewed for accuracy based on the preference of the parishioner.

- It is extremely important to enter clergy, military, non-Catholic, and civic titles correctly, as well. Please use the following reference document to enter this data uniformly and accurately - Correct Forms of Address.pdf

- Entering addresses:
  - For both mailing and street addresses, use upper and lower case – not all capitals.
  - Please follow the addressing rules as determined by the United States Postal Service. The document is very large, so use these links to take you to specific areas (keep in mind the Post Office update this document without our knowledge so the page numbers may no longer be valid; use the Search field to find the new page number):
    - Proper Addressing of Mail - page 51 – Post Office equipment reads mail from the bottom of the address to the top.
    - Use standard abbreviations – page 61 - Official Abbreviations
    - Examples of how your envelopes should look - Address Types - Examples - go to page 53
    - International Addressing - go to page 54

- Entering Member Roles:
  - Everyone must be given a Role in the Member tab. Incorrect use of Roles can cause problems with some of the reports (Bannon letters).
  - Every family record MUST have one of the following roles for the program to work properly: Head, Husband, or Wife.
  - For consistency, married couples are added as role Husband for the man and Wife for the woman.

- Head is only used for single persons. A common example would be newly separated or divorced families – the husband and wife, once separated, would become Head of their newly formed families.
- Daughter and Son are used for children, along with Foster Daughter, Foster Son, and Stepchild, based on the circumstance.
- Two single adults who live together should be included together in one family record. One person should be designated as Head and one as Adult. Individuals in each record can have their own envelopes. If there is a need to have two separate records (which creates a duplicate record for the address), indicate the relationship by using the Extended Family tab. Keep your duplicate households in mind (make a workgroup to track them) when providing census household figures to the diocese. Unmarried adults who are living together and registering for the first time should complete separate registration forms.
- Other family member roles are based on who they are in relation to the Husband or Wife. For instance, if the husband's mother moves in with them, her role would be Mother because she is the Mother of the husband, not Grandmother to the children. If you have questions about Roles, please call the diocese.
- Unknown should only be used until you can investigate and identify the proper Role.

- Non-Catholic or non-participating spouses – **Enter spouses that are non-Catholic** whether they participate in Church activities with the family or not as well as spouses that choose not to participate in any religious activities. All members of the family should be entered in the family record so you are creating an accurate representation of the family. Choose each person's faith in the Status field. If the non-Catholic spouse does not participate you can label them as Inactive and then complete the Religion field (that becomes available when you click on ActOther or Inactive).

- Birth dates are very important and allow many of the reports to run accurately, therefore please enter a date of birth for all parishioners. If you see ???? on reports or screens, this indicates that the person involved does not have a birth date entered.

- Gender must be manually updated.

- The Area Code field is prefilled based on the zip code entered in the Zip field. This means that when you enter only the seven digits of the phone number in the Phone field, ParishSOFT will automatically enter the area code associated with that zip code. Once you enter the seven digit phone number and tab out of the field, the area code will appear. You can choose to enter all 10 digits at once, if you prefer. If this phone number requires a different area code, simply type it in – the area code associated with the zip code will not override the number you manually entered. Having a number in the Area Code and an area code in the Phone field will not duplicate the area code anywhere.

- Entering Education and Career information
  - Careers – Choose the parishioner's profession from the options in the drop down box and type their job title in the Details field. A career is defined as the particular occupation a person is trained to do and a job title is the name of the culmination of duties the person performs. For instance, a police officer's career is considered to be Law Enforcement and his title might be Detective. Do not attempt to add new career choices. Children would be listed as "Student." For details about the Career choices for parishes in the Diocese of Madison go to this link on the diocesan ParishSOFT website:

- "Disabled" is not a career option. If your parish wishes to track persons with disabilities for ministry to the handicapped, use a Workgroup. Also put a checkmark in the Special Needs box on the Member screen and type in Disabled once the extra field appears.
- Grad(uation) Year – ParishSOFT calculates the high school graduation year of the member based on the date of birth and prefills this field but it should be reviewed and corrected if needed. This field is always for graduation from high school or when the GED was accomplished, if they did not graduate from high school.
- Grade - Grade is the highest grade completed.
- School - the School field is prefilled with all the public and private schools located in the Diocese of Madison (and several big universities and colleges in Wisconsin) and consists of the school most recently attended (or attending).
- Education – the parishioner's highest level of schooling or their degree.

- Entering Additional Info:
  - As a identify theft prevention precaution DO NOT track Social Security numbers in ParishSOFT.

- Entering Language – this would be the main language for each member. There is no default, so a language must be chosen. The Offertory (Bannon) letters utilize this field to determine the language on the letters, whether English or Spanish.

- Entering Ethnicities – The Ethnicity/race field is located next to First Language on the Members screen. If your parish does not see that field, it must be turned on. Click Utilities, Plug-In and Display Set-up, check the Allow View and Select Ethnicity box, click Done/Save to exit. The field will now appear. The Diocese of Madison has chosen to adopt the use of the following categories for the choices in the Ethnicity field on ParishSOFT, as found below.
  - American Indian or Alaska Native – A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.
  - Asian – A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
  - Black or African American – A person having origins in any of the black racial groups of Africa
  - Native Hawaiian or Other Pacific Islander – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
  - White – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.
  - Hispanic – A person having origins in any of the cultures of Mexico, Puerto Rico, Cuba, Central or South America or some other Spanish culture, regardless of race.
  - Nondisclosed – The person chose not to answer.
  - Other – The person answered with something other than what's listed here.
  - Two or more races – (multi-racial) The person is listed more than once on this list.
  - Unknown – The person stated they do not know.

- The Diocese of Madison has designated ParishSOFT software as the census program for all parishes to use. The Catholic Church is, by its very name, universal and inclusive of all mankind. Therefore, persons in the parish from all ethnic groups and races should be entered and tracked in this program. No separate tracking of certain ethnic groups in other programs such as Word or Excel is acceptable because it negatively affects the census numbers of a parish and creates the appearance of certain groups being treated differently. One main point of having a standard software program is the benefit of having all parish census data in one

location. The guidelines provided in this document for adding families and members applies to ALL people and ethnicities in the parish.

- Please use the diocesan registration form located on the website for gathering parishioner information – whether new members or a full parish registration – because it was created with spaces for the census information discussed in this document. Diocesan Registration Form. Feel free to use the registration form provided within the ParishSOFT program, as well.

Selecting Proper Faith Type When Entering Sacrament Details

SOP # PS-4

AREA: Family and Member Information

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, it is assumed that the person is Catholic and the default in the Faith of Baptism field is Catholic. On the main Member tab, if the person is designated as ActOther, a field appears so that you may select that person's religion. 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.

PROCEDURE DETAILS:

- 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 press the tab key 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 there is a sacramental details button that 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 Baptist church, then the faith type would need to be changed to Baptist. Use the choices that are available in the drop-down box.

Scheduling Ministers - Utilizing Ministry Group and Events Functionality

SOP # PS-5

AREA: Ministry Groups and Events

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is attempting to set up all ministry groups, ministers, and events within the ParishSOFT system. The Time and Talent module in ParishSOFT should be used as a companion to the Diocese of Madison's Time and Talent Program (Time, Talent, and Treasure, which is the Parish Offertory Program) and we strongly encourage its use to help parishes manage and add to their available volunteers.

PROCEDURE DETAILS:

Ministry Groups and Ministries have already been globally assigned and preloaded into the parish version of ParishSOFT to cover the vast majority of groups, committees, clubs, and events that occur in the Diocese of Madison.

Parishes need to seriously consider how they plan to implement these choices for their parish because the Time and Talent module is extremely powerful and is used for communication, scheduling, and organizing volunteers into appropriate Groups, Ministries, and Roles. Proper planning and management of this tool will allow your parish and the diocese to fully utilize the enormous variety of time and talent offered by the many volunteers in the diocese. Parishes should feel free to personalize this as needed to fit their parish requirements while remembering that ministries and/or ministry groups that are added incorrectly can cause major clean-up afterwards because the reports and screens will not work properly.

When using the Ministry Groups four tabs, remember the following:

- For the most current diocesan suggestion for Ministries and Ministry Groups click here: Time and Talent Diocesan Suggestions – you can manually change yours to match these if you wish.
    - Parishes no longer need to create their own system for tracking the Safe Environment data that must be reported to the diocese. The Time and Talent module can be used for this activity - consider adding our suggested groupings as shown in this link: Time and Talent Diocesan Suggestions

- You can assign parishioners to multiple Ministry Groups and multiple Ministries.

- Ministry Roles:
    - You may create and also assign a Ministry Role to each ministry but understand that a parishioner can only have one Role per ministry. If you choose another Role, the new choice overwrites and eliminates the prior Role.
    - In order to capture the interested status to a ministry, a parish can make use of the Ministry Role field with Interested, Trained, Actively Involved, etc., or the Comments field within each minister's detail. Notes can be made in the comment field in the Time/Talent module and will appear in the Family Directory tab. The Role field's only purpose is to appear on the Minister Directory screen as an aid when reviewing the parish list of volunteers.
    - The Ministry Roles field is not used in the Scheduler.

- Each Ministry Group requires at least one Event. If an Event is not applicable to the Ministry, then an entry must be made with a value of N/A.

- The Liturgical Scheduler schedules the desired number of ministers, as assigned by the parish, for each Liturgical event in the ministry group of Liturgy. The auto select utility prioritizes the selection of ministers for an event based on the number of times they have served since the Time Served Count Start Date setting. The scheduler will not allow anyone to work more than one time per weekend. It will also not assign the minister to more than one ministry per week.

- The Liturgical Scheduler can be used to schedule any group listed in the Group field.

- Enter beginning and end dates for all volunteers. If a specific event does not have a designated time frame, enter the calendar dates that coincide with the parish's yearly Time and Talent campaign. For instance, the Time and Talent program begins in the pews in October and runs on a calendar year basis. People who volunteer at the start of the program would have a beginning and end date of 1/01/09 and 12/31/09. If they start in April, their date may look like 5/01/09 but it will always end by 12/31/09. If you have questions about or want to start participating in the Bannon/Diocese of Madison Time, Talent, and Treasure Offertory Program, contact the Office of Stewardship and Development at 608-821-3045.

- Enter and maintain exception dates for your volunteers – the specific dates that they cannot serve in parish ministry – via the Manage Minister Exception area located on the Minister Directory screen. Volunteer exception dates are not directly connected to the Snowbird function in Utilities; however once the snowbird dates are updated click the Add Snowbird Dates to the Exclusion List in the Time and Talent tab of the Member's screen to update the parishioner's ministries.

Adding and Editing Funds

SOP # PS-6

AREA: Funds

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is adding or editing funds within the Offering Module of ParishSOFT.

PROCEDURE DETAILS:

- All parish offertory income is entered into ParishSOFT, such as weekly envelopes, loose contributions, building maintenance collections, offertory, etc. The following categories on the Parish Chart of Accounts are involved with ParishSOFT postings: 24000 - Funds Held for Others (diocesan and national collections), 40000 - Parish Offertory Income, 44000 - Special Collections Income, 46100 - Religious Education Income, 46500 - Youth Ministry Income, and 46700 - Adult Education Income. Bill payments, investments, Altar Society, Daycare, etc. will be entered directly into QuickBooks (once your parish is using it) or into your current financial software program. The list of acceptable Fund choices for ParishSOFT users in the Diocese of Madison are located on the web in this link so review your Funds and make them match, both in account number and tax deductible status: Chart of Accounts If you have questions about QuickBooks, contact the diocese at 608-821-3023.

- Only the pastor or person responsible for recording the parish finances (bookkeeper) is authorized to decide on adding a new Fund.
  - To clarify terminology, a Fund in ParishSOFT refers to an account in the Parish Chart of Accounts.
  - For consistency and because the Funds in ParishSOFT must interface with the Parish Chart of Accounts and in QuickBooks, **parishes are not authorized to add Funds to their ParishSOFT database without contacting the Diocese of Madison first.** The proper procedure is to call the diocese (608-821-3023) and tell us what subaccount Fund you wish to create so we can make sure the primary account you are choosing to create it within is consistent throughout the diocese. We encourage parishes to consider creating subaccounts when that kind of detail would be helpful – but please remember to call first.
  - Again, The list of acceptable Fund choices for ParishSOFT users in the Diocese of Madison are located on the web in this link so review your Funds and make them match, both in account number and tax deductible status: Chart of Accounts
  - Subaccounts should consist of seven digits, with the subaccount number being the last two digits after the first five numbers designated by the Diocese of Madison Chart of Accounts. For example, an Ascension subaccount Fund on ParishSOFT would look like: 4010001 Ascension. Parish subaccount balances will “roll-up” into the primary account, so in this example, the Ascension Fund will appear in the total amount for account number 40100 for the diocese but will appear in detail for the parish.

- To clarify the creation and naming system relating to Funds:
  - In order to properly track contributions to pledges, those subaccount Funds that require the tracking of pledges must be set-up annually on a calendar year basis (January) for the different campaigns and should have the name of the campaign and the year in the title. For instance, Offertory 2004, Offertory 2005 and Building Campaign 2004-2005.

- Parishes can not create a new pledge Fund at the end of the fiscal year or pledge information will become inaccurate. Parishes will be posting to one Fund over two separate fiscal years so that parishioner pledge information, which takes place on a calendar year basis, will report accurately on Bannon letters and pledge reports. For example, the parish pledge program started in the pews in October 2003 with parishioners promising a gift for the next year; the donations actually start in January 2004 and continue through December 31, 2004. All offertory must be posted to this one Fund regardless of the fact that the parish fiscal year ends on June 30, 2004. In this example, a new Offertory 2005 Fund can be created in January 2005.
- The diocese will send parishes new account numbers to use before January 1st.
- Funds that do not involve pledges and are only for contributions can be set up without a year being specified in the name, such as Christmas and can be used from year to year. Again, **parishes are not authorized to add Funds to their ParishSOFT database without contacting the Diocese of Madison first.**

- Funds cannot be hidden, merged, or deleted. If you no longer need/want a fund to be used, edit the name and add USE NO MORE to the front of the title so it shows on the screen if someone tries to post to that account. For example, Offertory 2005 would become USE NO MORE Offertory 2005.

- The ParishSOFT to QuickBooks export was completed and will eventually be distributed to all the parishes in the diocese. This export tool takes the offertory postings from ParishSOFT and copies them in summary by Fund/Chart of Account number into your parish QuickBooks. Use of this module is required once your parish receives it. This new export product was created for efficiency and financial accuracy. The requirement for this tool to work successfully is that ParishSOFT Fund numbers match the QuickBooks chart of account numbers exactly – we do this by requiring parishes to use the diocesan chart of accounts for both ParishSOFT and QuickBooks. If your parish is not currently doing so, please make the necessary changes now. You can locate the diocesan chart of accounts on the diocesan website under Finance: Diocesan Chart of Accounts

Setting Up and Maintaining Staff Directory Information

SOP # PS-7

AREA: Staff

DESCRIPTION:

This standard procedure describes the process that should be followed when a parish is setting up the Staff section while in Family Directory. This procedure also applies to when new staff members join and when staff members leave. It is very important for parishes to keep their staff list current and accurate.

PROCEDURE DETAILS:

- Add **all** staff members (whether they are parishioners or not) into the staff directory.
    - Staff – any person who works for the parish (paid or unpaid); whether they use ParishSOFT or not, ALL staff must be entered as such. This is a compliance issue involving Safe Environment regulations.
    - Choose a Staff Type. This field is prefilled with choices approved by the diocese. If your parish needs an additional job title, contact the diocese (608-821-3023).
    - Complete all the Name fields.
    - The POL Logon Username must consist of a valid email address. If the staff member does not have an email address the diocese can provide one. Understand that each staff member must have an email address to be entered into the Staff Management screen into ParishSOFT, but they don't have to use the email address.
    - All staff must be added, whether they use ParishSOFT or not. If they do not use ParishSOFT, uncheck the box that says Grant Login on the Staff Management screen. This will remove their ability to access the program but their name and information will still remain in the staff list.
    - All staff must have a unique password that is not shared with others.
    - All volunteers that will have access to ParishSOFT must be added.
    - The Parish Administration check box will allow a staff person to change permissions for all staff. This choice should **only** be given to the very few persons authorized to change permissions, one of whom must be the Pastor.
    - After the individual is added to the staff list the system administrator must then select the correct access permissions for that user on the Access Rights screen. Again, the Parish Administrator box should only be used for a select few staff members who are authorized to change permissions for everyone. The table below will help you determine proper permissions for some Staff Types.
    - When selecting Access Rights for each staff position always provide the fewest permissions needed for that person to do their job. This means, don't give more permissions and access rights than the person really needs to get their job done.
    - Exclusive Admin and System Admin are for diocesan use only and should never be used by any parish staff, which also means that no staff email is to be added to the Staff Details page for either one.

- When a staff member leaves employment, **do not** use the Remove User button; instead, for diocesan purposes, simple check the Acct Disabled box and manually enter a date in the Account Disabled On field. What this does is remove their ability to log in but they stay in the Staff list with their historical information. If they return to employment in your parish or another one in the diocese they can be reinstated with new permissions.

- Parishes should not delete any historical information from family or member records. Therefore,

limit the number of staff who are given this permission, Delete, in Access Rights.

- Staff should always log in under their own username and not share with anyone else.

- First responsibility for managing permissions, access rights, and identities belongs to the Pastor, since he is the supervisor for all parish staff.
    - The Pastor will have an administrative account on ALL computers and software at the parish for the purpose of managing users and passwords.

Suggested Access Rights: This table is a draft of example Access Rights for some job positions to consider before completing yours for the parish. Please review and give the diocese feedback (608-821-3023 or Parishsoftcontact@straphael.org) on these and others not listed so we can create a table showing suggested permissions for all the positions listed in the Staff Type field based on actual parish experience. Keep in mind that if a parish has one person filling multiple roles, give them the fewest rights they need to complete all their functions. It is more prudent to give fewer rights and add more as it is determined they are needed, than too many and encounter problems.

Staff Job Position	Parish Administrator	Family Directory	Time & Talent	Contributions/Pledges	Religious Ed
Pastor – Select All Rights	Yes	All	All	All	All
Business Manager	Yes	All	All	View Print	View Print
Secretary	No	View Add/Edit Print	View Add/Edit Print	View Print	View Print
Religious Ed Coordinator	No	View Add/Edit Print	None	None	View Add/Edit Print
Bookkeeper	No	View Print	None	View Add/Edit Delete Print	View Add/Edit Delete Print
Custodial Services	No	None	None	None	None

Offertory and Contribution Entry

SOP # PS-8

AREA: Offering and Pledges

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is entering offertory information into the ParishSOFT system.

PROCEDURE DETAILS:

- All deposits should be entered using the batch function with a figure entered into the Declining Batch field. The batch function was created by ParishSOFT as a mechanism for accuracy when entering multiple checks. Do not post checks to family or member records outside of batching and using the Declining Batch field.

- The Tuition portion in the Religious Education module is the only exception to using a batch for all contributions because it only allows for individual posting by family. If you are using the Tuition section to invoice religious education fees, you **must** post tuition payments here and not in offertory or the program will be unable to accurately track tuition balances.

- When posting payments, turn on the audio on your computer so you can hear any error warning sounds caused from keying into the wrong field.

- The posting date of the batch should be tied to the Sunday date of the weekend, not Saturday. The posting date automatically becomes part of the batch title, so you don't need to include it in the batch description. If a donation envelope comes in on Wednesday, April 9th, and it was designated for the weekend of 4/06/08, include it with the very next deposit – there is no need to back date it.

- It may occur that a family submits one payment of which portions are designated for multiple Funds. You can enter portions of payments to as many different ParishSOFT Funds as necessary within the same batch. Example of split payments: On 1/2/05 Sue Brown encloses a check for $40.00 in her weekly envelope and puts it in the 9AM Mass collection. On the envelope she has designated $20 is for the regular offertory and $20 to the building fund. The check is bundled and totaled as part of the 9AM Mass batch. When posting the batch you would post $20.00 to the proper offertory Fund from the Chart of Accounts Fund field for Sue Brown; Then change the Fund field to the proper building Fund and post the remaining $20. Make sure that you note the check number on both funds. As you begin entering the next check the Fund field will automatically return you to the Fund designated in the Chart of Accounts Fund field on the top left of the screen. Continue posting the remaining batch for the 9AM Mass. The batch total and tape match the Contribution Detail Summary Report. All three totals agree; however, the funds are detailed individually on the report.

- Every financial transaction requires a physical audit trail that supports and explains it. Therefore, the Diocese of Madison has chosen to require the closing of all batches when entry is complete (via the Batch Processing, Close Batch command). Closed batches cannot be altered in any way and will require adjustment postings to be applied in the event they need to be changed (for returned checks, incorrect postings, etc). These adjustment postings will create audit trails explaining the change(s).

- To correct a posting to a closed batch and to handle NSF or other returned checks, please follow the ParishSOFT instructions located in the Volume 1 Teletraining Manual in the Offering and Tuition Student Guide (see the link on the web page) or contact the diocese for step-by-step instructions. When the adjustment batch is closed, print a batch detail report (Batch Processing, View Batch List, click on batch and click Print Posted Contributions for Selected Batch button). Attach any correction documentation to this report to complete the audit trail for these adjustments.

- Parishes should not delete any transactional history from family or individual records.

- When posting a contribution as a one time gift, it is important to set up one time gifts as a one time pledge if your parish tracks offertory through pledges for budgeting. This must be done **prior** to posting the contribution. If the gift is set-up as a contribution without a pledge it will not appear within the pledge reports.

- **When posting check payments, it is necessary to record all check numbers**. This information is required for audit purposes. All checks **must** be recorded.

- All deposits must be associated with a member so to post non-member checks or cash, create a family named Loose Cash and use it when posting the loose change or check contributions – label it Not Registered or Inactive. You can create Loose Cash and Loose Checks if you would like them separated.
    - Out-of-state checks are to be copied and posted to Loose Cash – the check number and contributor's name must be entered in the memo field.
    - If the loose check is from within the state of Wisconsin and the contributor is not found as registered in our diocese, you must build a family detail record for that contributor. Why? Because they may contribute at another parish in the diocese and once their record is created it can be used by multiple parishes, thus capturing their giving history. The family group would be listed as Contributor, the registration status as Unregistered, and the individual member status as Inactive. Include the Last Name, First Name; Mailing Name, and address on these records.
    - Copy all checks $250 or more to keep as a record for sending the contribution acknowledgment letter.

- ACH contributions should be batched separately by fund. Use a posting date that matches the actual date the ACH transaction took place – go by the bank's date so they match to the parish bank statement. Batching by fund will also allow you to clone batches that will be repetitive and then just change the date.

- When the batch is complete and closed, print a batch detail report (Batch Processing, View Batch List, click on batch and click Print Posted Contributions for Selected Batch button). Attach the matching deposit slip to this report to complete the audit trail for these contributions. This applies to every batch.

- The ParishSOFT to QuickBooks export was completed and will eventually be distributed to all the parishes in the diocese. This export tool takes the offertory postings from ParishSOFT and copies them in summary by Fund/Chart of Account number into your parish QuickBooks. Use of this module is required once your parish receives it. This new export product was created for efficiency and financial accuracy. The requirement for this tool to work successfully is that ParishSOFT Fund numbers match the QuickBooks chart of account numbers exactly – we do this by requiring parishes to use the diocesan chart of accounts for both ParishSOFT and QuickBooks. If your parish is not currently doing so, please make the necessary changes now.

You can locate the diocesan chart of accounts on the diocesan website under Finance: Diocesan Chart of Accounts

Electronic Record Keeping Responsibilities

SOP # PS-9

AREA: Administration

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

PROCEDURE DETAILS:
The following information is <u>required to be maintained</u> in full in the ParishSOFT system, and should be kept complete and accurate at all times:

Staff directory: Many staff may already be in the staff directory if they were included in the data at conversion to the ParishSOFT system. All remaining ParishSOFT and non-ParishSOFT users on the parish staff should be added and maintained in the staff directory as well. See PS-7.

Offertory and Contribution Pledges and Transactions: All parish offertory income is entered into ParishSOFT. The Diocese of Madison **strongly encourages parishes the use of the Time, Talent, and Treasure program (Bannon).** See PS-6 and PS-16.

Sacramental details: Parishes are required to maintain complete and accurate sacramental details performed in the parish in the hard copy Sacramental Register and to keep the Register current based on changes as they occur. Entries should always be made in a timely manner in the Register. Specific information for reporting and certificate purposes must be entered into ParishSOFT; however, not all data in the Register is added to ParishSOFT. These electronic ParishSOFT entries DO NOT replace the physical Sacramental Register. As with Register entries, ParishSOFT entries must be made in a timely manner for future reporting purposes. See PS-14.

Religious Education: Religious education information and history must be created and maintained for all students and class. Set-up of historical records is encouraged; however, all new classes and student accomplishments must be maintained in ParishSOFT. Use of the milestones function is also encouraged (Religious Ed module; Student Record tab). See PS-13.

The Diocese of Madison **strongly encourages the use of the Time and Talent module** to organize and maintain your lists of volunteers and within that, the Lookup Tables, which are used to group, schedule, and maintain your committees and liturgical events. See PS-5.

Configuring Tables and Performing Table Set-up Activities

SOP # PS-10

AREA: Administration

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is performing the initial ParishSOFT set-up. There are certain look-up tables that have been configured specifically for overall diocesan needs that cannot be altered. Some of the look-up tables are modifiable based on the parish's specific needs.

PROCEDURE DETAILS:

- Lookup tables that can be changed by parishes are: Celebrants, Ministry Groups, and Ministries. The Celebrant table has been filled with the names of all deacons and priests of the diocese (at the time of a parish's conversion and/or synchronization). They should only be revised by the Parish System Administrators in the parish and should not be altered by any other users.

- The following tables and areas should NOT be altered in any way. If you feel that there should be a modification to any of these tables please contact the diocese (608-821-3023) so that the modification can be discussed and if implemented, uniformly applied to all parishes.
    - Staff type
    - Member Titles
    - Career Type
    - Faith of Baptism
    - Family Group
    - Religions
    - Member Suffix
    - Ethnicity
    - Education
    - Languages
    - Gift Types

Synchronizing the Database and Data Backup

SOP # PS-11

AREA: Administration

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

PROCEDURE DETAILS:

- Data Backup – Database Backup and Scheduler screen
  - Each Parish Administrator is responsible for the backup of the ParishSOFT database on a daily 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 and that the backups are successful.
  - Backups should be daily, so check the box next to each day of the week.
  - Enter a time for the backup – usually the same time every day and it must occur while the computer is on.
  - Place a check mark in the FTP box.
  - Place a check mark in the Enable Auto-Run Backup on "Master Computer"
  - Do not click the Clear History button. This will clear the entire record of past backups, which may be useful in the event of a question about the success of a backup. If you feel a need to clear this area, call Computer Support first (608-821-3094).
  - The Synchronize and Backup tool must remain on at all times for both the backups and synchronization to continue working automatically. It appears on the screen when you first open ParishSOFT and remains as a tiny pink icon in the bottom right hand tray of your computer. If you are maintaining this tool and click Exit, always click No when asked if you wish to exit the program because you want it to remain running in the background while you work.

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

- Before upgrading to a new version remember to click on the Backup Report Files Locally button which copies all the custom queries and reports. If this backup is not done before a new version or update is applied to your computer all custom queries and reports will be irretrievably lost. Make it a habit to backup your queries and reports on a regular basis.

- Synchronization
  - Parish databases are set-up to synchronize to the diocesan database at regular intervals. The synchronization is set to synchronize every 10 minutes.
  - It is the responsibility of the ParishSOFT Administrator to ensure the synchronization manager is active and running. Synchronization manager should only be run on the designated Master machine. Under no circumstances should there be more than one instance of synchronization manager running at the parish.

Database Performance and Maintenance and Snowbirds

SOP # PS-12

AREA: Administration

DESCRIPTION:

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

PROCEDURE DETAILS:

- Parish administrators must run the database maintenance utility and the Compact and Repair utility to optimize the system at least once per week.

- Parish administrator must select settings on any anti-virus software to NOT scan any of the ".mdb" files. Contact Computer Support (608-821-3094) for assistance in configuring the parish anti-virus software.

- Run Compact and Repair under your normal login. ParishSOFT will provide an error message if someone else is logged in.

- Click the Update Snowbird Mailing Addresses Option under the Utility menu monthly so that family addresses reflect the alternates during valid dates. At the same time, make sure the parish Time and Talent Manage Minister Exceptions dates are accurate, which are the "snowbird" dates for volunteers working in any ministry. Create a Workgroup for parishioners who have alternate addresses during the year so that you can track and keep them current.

Religious Education Classes and Tuition

SOP # PS-13

AREA: Religious Ed

DESCRIPTION:
This standard procedure outlines the process that should be followed when scheduling Religious Ed classes.

PROCEDURE DETAILS:

- When entering class detail, remember to follow proper protocol when completing the Catechist 1, 2, and 3 fields. Although not labeled as such, the fields represent:
  - Catechist 1 field is for the main teacher
  - Catechist 2 field is for the co-teacher, if applicable
  - Catechist 3 field is for the aide or helper, if applicable

- If your parish allows non parish members to attend religious education classes, these individuals must also be entered into the ParishSOFT system. See PS-1 for proper coding of the family and members.

- The Diocese of Madison encourages consistency in naming sessions and classes. By doing so, sessions and classes can be easily cloned (copied) from year to year as needed.
  - Sessions should be named by the day of the week on which they are held. If more than one class is held on the same day, add the time of the class.
  - Classes should be named by grade, or topic if there is no grade (such as adult education, Confirmation, etc.
  - Your Religious Education Directory should look like this:
    - 2008
      - Sunday 11:45 a.m.
        - PreSchool 3
        - PreSchool 4
      - Sunday 3:00 pm
        - Grade 3
        - 1st Communion Prep
        - Our Hearts Were on Fire Adult Ed
      - Tuesday
        - Grade 5
        - Confirmation Prep

- Milestones was created primarily for keeping track of religious education class projects that involve service hours. It is located on the Members tab of Family Information in Family Directory under Student Record. However, the Milestones section can be used to track any other type of goal activity such as manuals/handbooks, Virtus or other training, background screening, etc. Milestones do not have to even be affiliated with children or students. The Diocese of Madison encourages you to utilize Milestones and keep the data within ParishSOFT instead of creating extra spreadsheets or separate documents for tracking. Milestone reports are located in ParishSOFT Reports, Religious Ed Reports Menu, Milestone Reports.

- Parishes should not delete any religious education history from individual records.

Sacraments

SOP # PS-14

AREA: Member Information

DESCRIPTION:

This standard procedure outlines the process that should be followed when entering information regarding sacraments for members.

PROCEDURE DETAILS:

- Parishes are required to maintain complete and accurate sacramental details performed in the parish in the hard copy Sacramental Register and to keep the Register current based on changes as they occur. Entries should always be made in a timely manner in the Register. However, a change to this policy of regional Confirmation was made in June 2009 by the Office of Worship and here is an excerpt:
  - "In the Diocese of Madison, when Confirmation includes persons from several different parishes, we ask that you record the Confirmation in the records (ParishSOFT and Sacramental Register) of the parish sending the person to be Confirmed (rather than at the site of the Confirmation) . . . Date and place of Baptism should be noted in the Confirmation register (this can be very helpful when the person is looking for a Baptismal certificate later). Notification of the church of Baptism of the fact of Confirmation should be made asap. Notification should include name of the recipient, the date of baptism, the place and date of Confirmation. The names of the minister, parents, and sponsor are not required." Please contact the Office of Worship at 608-821-3080 for more details about this change.

- Specific information for reporting and certificate purposes must be entered into ParishSOFT; however, not all data in the Register is added to ParishSOFT. These electronic ParishSOFT entries DO NOT replace the physical Sacramental Register. As with Register entries, ParishSOFT entries must be made in a timely manner for future reporting purposes.

- No information marked "confidential" in the Sacramental Register should ever be entered into ParishSOFT, nor any reference to, or information about, adoptions.

- Details of sacraments are to be considered highly confidential information and they are not for public knowledge. Direct access to the Sacramental Register is claimed only by the pastor and his designate. Designated persons need written authorization from the pastor and proper training on basic recordkeeping before working with the Register. Once written authorization is given to delegates, the person is required to sign an oath of confidentiality, which is called a Statement of Agreement. **This same process applies to staff given access to ParishSOFT**. Sample Authorization and Statement of Agreement forms can be found as a link on the diocesan ParishSOFT web page: Sacrament documents

- Do not share any sacramental history or records with anyone other than the person who received the sacrament, the priest, the guardian, or a parish/diocesan representative. If your parish has any questions about documenting sacraments, canonical questions, or the hard copy Sacramental Register, please contact the Diocese of Madison Tribunal at 608-821-3061

- Entering historical sacramental details for members is strongly encouraged if parishioners have provided the information. If they haven't, the parish should simply start entering detailed information in the future as sacraments take place.

- For security and practical purposes, only the information that would appear on a certificate will be entered into ParishSOFT for sacraments. ParishSOFT will only be used for future reporting purposes, NOT for creating Baptismal certificates with notations at this point. Also, ParishSOFT is NOT being used for reporting purposes to the diocese – that must be done manually through the data in the Register until further notice.

- Adoptions are very complex and extremely confidential. The parish must follow the criteria set by the USCCB for registering Baptisms of adopted children. No notes, identification, or comments about adoption should exist in ParishSOFT, regardless of the reason. When adoptions are involved, please follow the requirements for entering information properly into the hard copy Sacramental Register. Contact the Diocese of Madison Tribunal at 608-821-3061 for more details.

- Remember, the hard copy Sacramental Register is for parishes to document sacraments performed at that parish. For easy cross referencing in ParishSOFT always complete the Registry Volume, Registry Page, and Registry Number fields. (Note: manual cross referencing must happen when any certificates are created from ParishSOFT.) Required fields to complete are:
    - At the very least, check the box showing whether they have received the sacrament – this allows your parish to see on reports who to evangelize or contact about more information. If your parish has very little historical information entered into the current census program that was converted, start with checking sacrament boxes and then entering detailed information going forward.
    - Matrimony: Completed, Status, Annulment field, Maiden Name, Spouse, the Canonical, Former Marriage, Mixed Religion, and Disparity of Cult fields, Date, Parish, Celebrant, Best Man, and Maid of Honor in both spouse's records.
    - Funeral: Completed, Date of Death, Next of Kin, Funeral Celebrant, and Cemetery Name. You must complete the Date of Death or ParishSOFT will create an error message. If you see an error message, please call the diocese at 608-821-3023. Don't forget to change the family and/or member status also.
    - Baptism: Completed, Prep Year (if known), Date, Parish, Celebrant, Faith of Baptism, and Sponsors.
    - RCIA: Completed, Date, Prep Year (if known), Place, and Celebrant. If RCIA is completed, there should be information listed in the Baptism fields, as well.
    - Reconciliation Prep: Completed, Date, Prep Year (if known), and Parish. This information is used only for religious education tracking purposes – see the "Important information about certificates" section in this SOP.
    - First Eucharist: First, middle, and last Name, father and mother's name, Baptism information, Completed, Date of First Eucharist, Prep Year (if known), Parish, and Celebrant.
    - Confirmation: Completed, First, middle, and last name, Prep Year (if known), Parish, and Celebrant.
    - Holy Orders: Completed, Date, Place, and Celebrant on each tab and all fields on the Diaconate tab except Laicization Date.
    - Religious Profession: Completed, Place, Celebrant, and Religious Order.
    - General Member Info tab (not a sacrament but within the sacrament screen): Birth Date – age will calculate as you tab out of the field, Father and Mother's Name, Birthplace, and Gender.

- Important information about certificates:
  - Unlike other certificates, the Certificate of Baptism is a canonical document that indicates the person's canonical status in the Church. When completed it must be verified against the Sacramental Register and include full and accurate notations on the reverse side. We are currently working with ParishSOFT for proper canonical compliance for notations and until they are complete parishes must create their own Notations page manually for the reverse side of the Certificate of Baptism or Certificate of Profession. DO NOT use the ParishSOFT Notation page at this time because it may not be complete. If you have questions about Notations, call the Diocese of Madison Tribunal at 608-821-3061.
  - Do not use the Reconciliation certificate unless the wording is changed to say First Reconciliation Prep or something similar. Canonically, it is not possible to provide a certificate showing that Reconciliation itself has ever occurred because of the sanctity and confidentiality of the Sacrament of Confession.
  - If your parish wishes to use their own certificate template, it must be preapproved by the diocese for canonical accuracy and consistency. Certificates should have a consistent format so they are easily identified as produced by the parish. Call the Diocese of Madison Tribunal for information at 608-821-3061.

- Parishes should not delete any sacramental history from individual records in the Sacramental Register or ParishSOFT; however, parishes should NOT enter confidential or inappropriate data from the Sacramental Register into ParishSOFT. If confidential or inappropriate information has been entered into ParishSOFT it must be deleted as there is no possibility to adequately restrict access to this information. If you have questions regarding this issue, please call the diocese at 608-821-3061 to notify us about the situation.

- The parish must create a record for all sacraments conferred, regardless whether the person is a member (also see information on adoption, above). Electronic reporting from ParishSOFT has not yet been approved, but may occur in the future. Until then, all reporting of sacraments must be done from the Sacramental Register.

Customizing Reports, Queries, Forms

SOP # PS-15

AREA: Reports

DESCRIPTION:

ParishSOFT provides a multitude of different reports for parishes to use. If a parish wishes to customize a certain report that is lacking some necessary detail or they wish to create a completely new report, ParishSOFT functionality allows them to do so.

PROCEDURE DETAILS:

- ParishSOFT is powered by Microsoft Access and consists of many linked tables and a great number of data fields. Only qualified, trained staff at the parish should attempt to customize reports, queries, and/or forms. ParishSOFT offers a teletraining class on Indepth Reports to aid in this training process. Contact the diocese (608-821-3023) if you need help with reports, queries, or forms because there may be another report or form that can provide you with the information you need before you spend time trying to customize. Also, the diocese or ParishSOFT may already have created the same custom report, query, or form you are trying to make and would have it available for you to use.

- Do not change the standard report, query, or form – Save As a custom item for your parish's use. Also, if you customize the standard reports you will lose your changes when a new version is applied to your computer.

- Name your customized report, query, or form using this format:
    - Start all of them with cq (for Custom Query)
    - Enter your initials – this way everyone in the parish can see who made this customization and should not alter it without asking permission of the person who created it.
    - Use an underscore.
    - Give it a name that you will recognize six months from now and others will understand – avoid names like "Vickysreport"
    - For consistency and ease use all lower case in the entire name
    - Example of a full name: cqvas_allmemberbirthdatesquery

- If you make a mistake and accidentally damage your standard report, query, or form, call the diocese (608-821-3023) and we can replace the file with the original for you so it works again. Please do not hesitate to call and get it fixed.

- Before upgrading to a new version remember or better yet, after creating a customization, click on the Backup Report Files Locally button (Utilities, ParishSOFT System Info, Perform Backup) which copies all the custom queries and reports. If this backup is not done before a new version or update is applied to your computer all custom queries and reports will be irretrievably lost. Make it a habit to backup your queries and reports on a regular basis.

- All query results can be exported to Excel to be easily customized for lists and merging. Call the diocese (608-821-3023) if you need assistance working in Excel.

Utilizing the Bannon Letters Program as Part of the Diocese of Madison's Parish Offertory Program

SOP # PS-16

AREA: Offertory - Pledges

DESCRIPTION:

In 2007, the Office of Stewardship and Development introduced a new Parish Offertory Program. The program was designed to build upon the principles of true stewardship. The use of the Bannon companion letters is encouraged as a way to increase parish income.

PROCEDURE DETAILS:

- Proper entering of pledge data is crucial to the accuracy of the reminder letters.
  - Pledge Date must be the year in which the pledge will be valid. Example: If the pew campaign starts in November 2009 and a person pledges at that time, the date in the Pledge Date field must still be 1/01/10.
  - The 1st Payment Date field is generally filled with 1/01/10 (for this year) but it could be different if the giver provides some alternate future date, but it must still be in 2010.
  - Pledges must be entered before the payment is applied so the system recognizes the relationship between the two transactions.
  - Post all payments in batches with all other offertory transactions. Do not post pledge payments on the pledge screen.

- Always spot-check a few pledge letters and confirm the accuracy of the data before sending them to parishioners.

Religious Education Tuition

SOP # PS-17

AREA: Religious Ed

DESCRIPTION:

This standard procedure outlines the process that should be followed when invoicing and receiving payments for religious education Tuition.

PROCEDURE DETAILS:

The Tuition section is used to send invoices and track religious education bills and payments. Tuition is located in the Religious Ed module under Reports, Tuition, and is self-contained – everything from billing to reports are located together. The Diocese of Madison encourages parishes to use Tuition for their religious education class needs.

- If you invoice religious education fees from Tuition, all tuition payments must be posted here to allow proper tracking of balances.

- Tuition is the only exception to batch posting because it is limited to individual posting by family.

- Every financial transaction requires a physical audit trail that supports and explains it.
    - After each invoicing session, print copies of the statements and the Tuition Statements Entered and provide to the bookkeeper to post Account Receivables, along with the Tuition Statement – Summary by Total Billable Item. A Standard Operating Procedure in QuickBooks will be provided to explain the process for posting Account Receivables.
    - Provide a Tuition Report – Late Payments List to the bookkeeper at least monthly.
    - All posted payments need to be printed and matched with a deposit slip to create a physical audit trail. When tuition posting is complete print the Detailed Report W/Names tuition report (Queries and Reports, Contribution Report Menu) and attach deposit slip to give to bookkeeper.
    - **Do not use the Billing Statements section under Statements.** The balances and data showing are not correct. ParishSOFT is redesigning this section for the future.

Importing (Moving) Family Members

SOP # PS-18

AREA: Member Information

DESCRIPTION:

This standard procedure outlines the process that should be followed when moving a member from one family to another.

PROCEDURE DETAILS:

There will be situations where one family member becomes part of another family. The process to move members out of one family record and into another is called Importing.

- To import a member you need to be on one of the Members screens in the new family – where the person will be moved to.
    - Click on Import and type the person's last name in the Search field and click on the Search button.
    - Locate the person you wish to import, select their name and click Accept. Answer Yes to the question, "Are you sure you want to import "Name" into this family?"
    - The moved member's information is copied into the new family and they now have a Members tab within that family record.

- Importing simply creates a duplicate member record so the information does not need to be retyped. However, to complete this task you must take care to complete both the old and the new records accordingly:
    - Place a note in the old member record explaining the move and where the record went: "Lisa married Tom Wendler on 8/26/08." Also place a note on the new record: "Lisa Smith was moved from the John Smith family record on 8/26/08 because of her Marriage to Tom Wendler."
    - Change the old record to Inactive and unregister them. Update the new record to reflect their current status. You will need to update both the family and member records.
    - Update the new Members tabs to reflect any sacrament changes, especially if the move was precipitated by a wedding or a divorce.
    - Change the name and address fields in both the new family and member record.
    - If you are moving men or women, don't forget to move the children attached to the family record, also, and anyone else who should be reflected in the new family record.

- The financial giving record stays with the old family record.

- Parishes should not delete any historical information from family or member records and this includes the old member record.

ParishSOFT Timeline

After reading this entire document, you deserve a treat! Here's a helpful timeline to remember about when certain functions need to be accomplished in ParishSOFT.

Procedure	What Needs to be Done?	When
Snowbird Updates	Run Snowbird utility	Monthly
Time & Talent Exceptions	Create Workgroup for all snowbirds and volunteers with exception dates. Update Time & Talent dates in conjunction with Snowbird utility	Monthly
Backups	Set up to work automatically; manually check weekly to make sure backups are successful	Daily backups/weekly verification of their success
Back up custom queries	Click the Backup Report Files Locally	Monthly
Send pledge letters	Produce Bannon letters or Periodic Contribution Statements for parishioners to show them pledge and payment status. Randomly check a few for accuracy before sending.	Quarterly (or as pastor designates)
Update pledge Fund account number	Diocese will send new offertory subaccount number – update Fund list in November or when pledge process begins in parish.	October/November
Print populated registration forms with year-end statements	Print ParishSOFT registration forms showing parishioner data and send with year-end contribution statements, asking for updates.	January (see year-end checklist on the website)
Prepare and send year-end contribution statements	Print Periodic Contribution Statements showing pledge and payment status. Randomly check a few for accuracy before sending.	January (see year-end checklist on the website)
Prepare for Religious Education season	Clone classes; send prepopulated Religious Education registration form	July/August
Update staff list and permissions	Check staff names and permissions and update accordingly	As staff movement occurs
Run Compact and Repair and the database maintenance utility program	The Administrator should run these utilities to keep the program working at peak performance.	Weekly
Review and verify envelope list	Verify addresses with envelope company and determine, based on their status, which parishioners should receive/be removed from the list.	Yearly
Update parishioner files	All the time! Use the diocesan registration form or the form provided within ParishSOFT to collect as much data as new members will share.	Ongoing

Future Standard Operating Procedure Topics (Subject to Change)

Census Reports and Data
QuickBooks Export Procedure
Handling Duplications
Pledge Records
ParishSOFT Parish Websites
Family and Dynamic Workgroups
Online Catholic Directory
CASS Certification
ACH Transactions and Module