

Diocese of Juneau



ParishSOFT Standard Operating Procedures (SOP)

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ParishSOFT Standard Operating Procedures

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ParishSOFT is an integrated parish census data system that allows for synchronization of parish records with the diocese. 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's Standard Operating Procedures (SOP) 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. Contact the diocese with any questions or comments:

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Note: These recommendations are based on a fully synchronizing system.

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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 located 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 family directory to determine if that family is already located at another parish.

PROCEDURE DETAILS:

1. When adding a family into the parish database, do a name search to see if that family appears in another parish's database. It is possible at this point to find the desired family in the list of search results. To avoid duplication of records, it is extremely important to do an accurate name search before entering a family.
2. A parish may **“import”** a family from another parish into their database, without registering them for the purposes of:
 - a. Posting contributions;
 - b. Adding a member(s) to Time and Talent;
 - c. Sending contribution envelopes;
 - d. Adding a student to a Religious Education class
3. **Only the parish of registration** is able to modify family and member detail information. All updates to this information must be sent to the parish of registration for addition or deletion.
4. If the family wants to change registrations, 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.

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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. 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.

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, active in another church	Visitor	No	Inactive
4. Registered family that has moved away	Moved	No	Inactive
5. Clergy, religious, registered, Active	Clergy / religious	Yes	Active
6. Clergy, religious, not registered, Active	Clergy / religious	No	Active
7. Clergy, religious, inactive	Clergy / religious	No	Inactive
8. Staff, registered parishioner	Active	Yes	Active
9. Staff, not registered	Staff	No	Inactive
10. Non-Catholic, member of registered Family	Active	Yes	ActOther
11. School only	School Only	No (unless they are required to register to attend)	Student: Active ----- Rest of family: Inactive
12. Registered Family, no longer Active	Inactive	No	Inactive
13. Sacrament Only Family	Sacrament Only	No	Inactive
14. Religious Ed Only Family	Religious Ed Only	No (unless they are required to register to attend)	Student: Active ----- Rest of family: inactive
15. Deceased	Stays what it was unless this is the only member of the family, then it would change to Deceased	Stays what it was unless this is the only member of the family, then it would change to No	Change to Deceased and Must enter a Date of Death

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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 found 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 the 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. Always check your entries for accuracy before leaving the record.

1. 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 appearance when sending mail merge letters or other communications to that family may be impacted.
2. It is 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. A few points to remember are:
 - a. 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 – John and Susan.
 - b. 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.'**
 - c. For men: Mr. John Smith, Sr.; Mr. John Smith, Jr.; Mr. John Smith, III, etc.
 - d. If you encounter a title that does not appear in the Title field, please contact the Project Coordinator so we can create a consistent entry for you and the entire diocese. Remember to complete all name fields on both the Families and Members tabs.

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- a. There are three address sections on Family Detail screen:
 - i. **HOME** is the default and could be used for a **physical address** of a family.
 - ii. **MAILING** is used for all **mailings** and is the most critical and must be selected for each family entry.
 - iii. **OTHER** is used for a secondary location such as a **temporary address**.
 - b. Use proper upper and lower case so that merged documents look attractive.
4. It is extremely important to enter clergy, military, non-Catholic, and civic titles correctly, as well.
5. Entering addresses:
- a. Do not use **all caps** for both mailing and street addresses, use upper and lower case.
 - b. Please follow the addressing rules as determined by the United States Postal Service.
6. Entering Member Roles:
- a. Everyone must be given a Role in the Member tab: incorrect use of Roles can cause inaccurate information on some reports.
 - b. Every family record **MUST** have one of the following roles for the program to work properly: Head, Husband, or Wife.
 - c. For consistency, married couples are added as role Husband for the man and Wife for the woman.
 - d. Head is only used for non married 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.
 - e. Daughter and Son are used for children, along with Foster Daughter, Foster Son, based on the circumstance.
 - f. Two single adults that live together should have separate family records, both with roles of Head. Tie the two together by using the Extended Family tab and documenting the relationship. Keep them separate but connected so that the pledge, offertory, and role data is accurate.
 - g. Other family member roles are based on who they are in relation to the Head, 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 Project Coordinator.
 - h. Unknown should only be used until you can investigate and identify the proper Role.
7. 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

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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).

8. 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.
9. 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.
10. Please make sure that the box next to SEND MAGAZINE is checked to ensure that each Registered family receives *The Southeast Alaska Catholic* newspaper.

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ADDENDUM

April 26, 2011

Dear Parish Administrators,

The Southeast Alaska Catholic, official newspaper for the Diocese of Juneau, is provided to all registered families in the diocese. A parishioner should notify their parish office if they are not receiving *The Southeast Alaska Catholic* newspaper.

It is important that all registered families in your parish (mission) receive the diocesan newspaper.

ParishSOFT provides two queries in Parish Family Directory to easily create a list of all Registered families who **are** and who **are not** receiving *The Southeast Alaska Catholic*.

To access these queries, open Parish Family Directory:

1. Open **REPORTS**
2. Then click on **UTILITIES**
3. Then click on **“Build Custom Queries”**
4. In the drop down box, select either:
 - a. “Families with Send Magazine” (*families who are receiving The Southeast Alaska Catholic*); OR
 - b. “Families with NO Send Magazine” (*families who are not receiving The Southeast Alaska Catholic*).
5. Click on **DISPLAY QUERY**
6. **Print** the report to make necessary changes in Family Information.
7. If a Registered family is not receiving *The Southeast Alaska Catholic*, make sure the “Send Magazine” box is checked.
 - a. A Register family will receive two copies of *The Southeast Alaska Catholic* if they are Registered in two parishes with the “Send Magazine” box checked. A family should be Registered in only **one** parish (see SOP, page 4).
 - b. If a Registered family has: Moved, Deceased, Inactive, update this information and deselect Registered and the “Send Magazine” box. It is important to have the proper family and member status selected (see SOP, page 5)
8. If you have any questions, please contact the Project Coordinator, Ruth Vincent at 907.586.2227 ext. 24 or Email: ruthv@gci.net.

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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 faith.

PROCEDURE DETAILS:

1. 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; only use Christian or Other if no other specific choice applies.

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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. We strongly encourage its use to help parishes manage and add to their available volunteers.

PROCEDURE DETAILS:

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

1. You can assign parishioners to multiple Ministry Groups and multiple Ministries.
2. Ministry Roles:
 - a. 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.
 - b. 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 but will not 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.
 - c. The Ministry Roles field is not used in the Scheduler.
3. 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.
4. 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 in that ministry since the Time Served Count Start Date setting. The scheduler will not allow anyone to work more than one time per weekend.
5. The Liturgical Scheduler can be used to schedule any group listed in the Group field.
6. Enter beginning and end dates for all volunteers. If a specific event does not have a designated time frame, enter the calendar year dates. 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 1/01/10 and

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12/31/10. If they start in May, their date may look like 5/01/10 but it will always end by 12/31/10.

7. 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 connected to the Snowbird function in Utilities.

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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:

1. All parish offertory income is entered into ParishSOFT, such as weekly envelopes, loose contributions, building maintenance collections, Diocesan and National collections, plus Religious Ed fee's etc.
2. Only the pastor or person responsible for recording the parish finances (bookkeeper) is authorized to decide on adding a new Fund.
 - a. To clarify terminology, a Fund in ParishSOFT refers to an account in the Parish Chart of Accounts.
3. To clarify the creation and naming system relating to Funds:
 - a. In order to properly track contributions to pledges, those 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 2009, Offertory 2010 and Building Campaign 2009-2010.
 - b. Parishes cannot 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 pledge reports. For example, the parish pledge program started in the pews in October 2009 with parishioners promising a gift for the next year; the donations actually start in January 2010 and continue through December 31, 2010. All offertory must be posted to this one Fund regardless of the fact that the parish fiscal year ends on June 30, 2010. In this example, a new Offertory 2011 Fund can be created in January 2011.
 - c. 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.
4. 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.

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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:

1. Add **all** staff members (whether they are parishioners or not) into the staff directory.
 - a. Choose a Staff Type/Position. This field is prefilled with choices approved by the Diocese of Juneau. If your parish needs an additional job title, contact the Project Coordinator.
 - b. Complete all the Name fields.
 - c. The Logon Username should be filled in with First Initial, MiddleInitial, LastName.
 - d. 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.
 - e. All staff must have a unique password that is not shared with others.
 - f. All volunteers that will have access to ParishSOFT must be added.
 - g. 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.
 - h. 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.
 - i. 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.
 - j. Exclusive Admin is for finding/resolving duplicate families or members in your database and locks all others out of the program when used.
 - k. System Admin is for initial setup and ParishSOFT 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.

2. When a staff member leaves employment, use the REMOVE USER button; the Account

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Disabled field will be automatically dated. If they return to employment in your parish or another one in the Diocese of Juneau they can be reinstated with new permissions.

3. 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.
4. Staff should always log in under their own username and not share with anyone else.
5. First responsibility for managing permissions, access rights, and identities belongs to the Pastor, since he is the supervisor for all parish staff.
 - a. 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 example of Access Rights for some job positions to consider before completing yours for the parish. Please review and give the Diocese of Juneau feedback 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	All	All
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 Tuition	None
Custodial Services	No	None	None	None	None

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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:

1. 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.
2. 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.
3. 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.
4. The posting date of the batch should be tied to the Sunday date of the weekend, not Saturday, and deposits should match the entire amount of the collection baskets. For example, monies collected for the weekend of April 5th and 6th should have batch names and posting dates of: Weekly Collection 4/6/2010. The date entered as the posting date for all Weekend Masses would be 4/06/10 in this example. The posting date should be part of the batch title. If a donation envelope comes in on Wednesday, April 9th, and it was designated for the weekend of 4/06/10, include it with the very next deposit.
5. 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 1/2/10 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 Weekly Collection 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

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screen. Continue posting the remaining batch. The batch total and tape match the Contribution Detail Summary Report. All three totals agree; however, the funds are detailed individually on the report. We strongly recommend Posting Batches by Mass. Batch Descriptions would then be Weekly 9am 4/6/10 and Weekly 5pm 4/6/10.

6. Every financial transaction requires a physical audit trail that supports and explains it. Therefore, the Diocese of Juneau has recommended 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).
7. To correct a posting to a closed batch and to handle NSF or other returned checks, please follow the ParishSOFT instructions located in the Offering and Pledges User Guide (starting on page 92) or contact the Project Coordinator 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.
8. Parishes should not delete any transactional history from family or individual records.
9. 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.
10. When posting check payments, it is recommended to record all check numbers.
11. All deposits must be associated with a family/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.
 - a. 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.
 - b. If the loose check is from within the state of Alaska and the contributor is not found 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.
 - c. Copy all checks \$250 or more to keep as a record.

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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 required to be maintained in full in the ParishSOFT system, and should be kept complete and accurate at all times:

Staff directory: All ParishSOFT and non-ParishSOFT users on the parish staff should be added and maintained in the staff directory. See PS-7.

Offertory and Contribution Pledges and Transactions: All parish offertory income is entered into ParishSOFT. See PS-6.

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 Juneau **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.

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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:

1. 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 Project Coordinator so that the modification can be discussed and if implemented, uniformly applied to all parishes.

2. The list of lookup tables below should be placed in appropriate CANNOT alter:
 - a. Staff type (presync) (post sync only diocese can change Positions)
 - b. Member Titles
 - c. Career Type
 - d. Faith of Baptism
 - e. Family Group
 - f. Religions
 - g. Member Suffix
 - h. Ethnicity
 - i. Education
 - j. Schools
 - k. Celebrants
 - l. Languages

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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.

NOTE: Parishes on Remote Solutions will have backup and synchronization managed by ParishSOFT.

PROCEDURE DETAILS:

1. Data Backup – Database Backup and Scheduler screen
 - a. 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.
 - b. Backups should be daily, so check the box next to each day of the week.
 - c. Enter a time for the backup – usually the same time every day and it must occur while the computer is on.
 - d. Place a check mark in the **FTP** box to send an offsite backup to Parishsoft's secure ftp servers.
 - e. Place a check mark in the **Enable Auto-Run Backup** on "Master Computer"
2. It is highly recommended that in addition to the scheduled ParishSOFT backup you backup your complete system on a regular basis.
3. Synchronization
 - a. Parish databases are set-up to synchronize to the diocesan database at regular intervals. The synchronization is set to synchronize every 10 minutes.
 - b. 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.

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4. Database Performance and Maintenance

SOP # PS-12

AREA: Administration

DESCRIPTION:

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

PROCEDURE DETAILS:

1. Parish administrators must run the database maintenance utility and the COMPACT AND REPAIR utility to optimize the system at least once per month.
2. Parish administrator must select settings on any anti-virus software to NOT scan any of the “.mdb” files.
3. Run COMPACT AND REPAIR under your normal login. The ParishSOFT will notify you with an information message if someone else is logged in.

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4. Religious Education Classes

SOP # PS-13

AREA: Religious Ed

DESCRIPTION:

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

PROCEDURE DETAILS:

1. 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:
 - a. Catechist 1 field is for the main teacher
 - b. Catechist 2 field is for the co-teacher, if applicable
 - c. Catechist 3 field is for the aide or helper, if applicable

2. 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.

3. The Diocese of Juneau encourages consistency in naming sessions and classes. By doing so, sessions and classes can be easily cloned (copied) from year to year as needed.
 - a. 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.
 - b. Classes should be named by grade, or topic if there is no grade (such as adult education, confirmation, etc).
 - c. Your Religious Education Directory should look like this:
 - i. 2008
 1. Sunday 11:45 a.m.
 - a. Preschool 3
 - b. Preschool 4
 2. Sunday 3:00 pm
 - a. Grade 3
 - b. 1st Communion Prep
 - c. Our Hearts Were on Fire Adult Ed
 3. Tuesday
 - a. Grade 5
 - b. Confirmation Prep

4. Milestones was created primarily for keeping track of religious education class projects that involve service hours. It is located on the Member 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, or other training.

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Milestones do not have to even be affiliated with children or students. The diocese 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.

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

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6. 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:

1. 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.
2. 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.
3. No information marked “confidential” in the Sacramental Register should ever be entered into ParishSOFT, nor any reference to, or information about, adoptions.
4. 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 Project Coordinator.
5. Entering historical sacramental details for members is strongly encouraged.
6. 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 Project Coordinator.
7. 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:

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- a. 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.
 - b. Funeral: Completed, Date of Death, Next of Kin, Funeral Celebrant, and Cemetery Name. You must complete the Date of Death. Don't forget to change the family and/or member status also.
 - c. Baptism: Completed, Date, Parish, Celebrant, Faith of Baptism, and Sponsors.
 - d. 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.
 - e. 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.
 - f. 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.
 - g. Confirmation: Completed, First, middle, and last name, Prep Year (if known), Parish, and Celebrant.
 - h. Holy Orders: Completed, Date, Place, and Celebrant on each tab and all fields on the Diaconate tab except Laicization Date.
 - i. Religious Profession: Completed, Place, Celebrant, and Religious Order.
 - j. General tab (not a sacrament but within the sacrament screen used for creating certificate information): Birth Date – age will calculate as you tab out of the field, Father and Mother's Name, Birthplace, and Gender.
8. Important information about certificates:
- a. 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.
9. 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.
10. In general, reporting of sacraments takes place by the parish where the sacrament was conferred (an exception is possible for confirmation). 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.

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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:

1. 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 tele-training class on In-Depth Reports to aid in this training process. Contact the Project Coordinator 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. Check our Query Library for existing queries.
2. 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.
3. Name your customized report, query, or form using this format:
 - a. Start all of them your initials – then use an underscore.
 - b. Give it a name that you will recognize six months from now and others will understand – avoid names like “Vickysreport”
 - c. For consistency and ease use Proper case in the entire name
 - d. Example of a full name: kmc_qAllMembersBirthdates
4. If you make a mistake and accidentally damage your standard report, query, or form, call ParishSOFT support 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.

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Tuition

SOP # PS-16

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 invoice 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 Juneau encourages parishes to use Tuition for their religious education class needs.

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

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

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Importing (Moving) Family Members

SOP # PS-17

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.

1. To import a member you need to be on one of the member screens in the family – where the person will be moved to.
 - a. Click on Import and type the person's last name in the Search field and click on the Search button.
 - b. 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?"
 - c. The member's information is moved into the new family and they now have a member tab within that family record.

2. Importing moves the member record, if this was the only member in the family a placeholder member record is retained as our software requires every family to have a least one member. However, to complete this task you must take care to complete both the old and the new records accordingly:
 - a. Place a note in the old family record explaining the move and where the record went: "Lisa married Tom Wendler on 8/26/08" if this was the only member in the family.
 - b. 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.
 - c. Update the new member tabs to reflect any sacrament changes, especially if the move was precipitated by a wedding or a divorce.
 - d. Change the name and address fields in both the new family and member record.
 - e. 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.

3. The financial giving record stays with the old family record because donations are not recorded by individual member.

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