



Diocese of Metuchen
ParishSOFT
Standard Operating Procedures

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Family and Member Information

Assigning Registration Status to Family and Member

SOP# F-1

Title: Recording family and member status

Description: This standard procedure outlines that 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.

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

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 other church	Visitor	No	Inactive
4. Clergy, religious, not registered	Clergy / religious	No	Active
5. Staff that is a registered parishioner	Active	Yes	Active
6. Staff, unregistered parishioner	Staff	No	Active

7. Non Catholic – Member of registered Family	Active	Yes	ActOther
8. School only	School Only	No	Family Inactive/Child Active
9. Inactive registered family	Inactive	No	Inactive
10. Registered family that has moved	Moved	No	Inactive
11. Sacrament Only Family	Sacrament Only	Yes/No	Inactive
12. Religious Ed family that is not registered	Religious Ed Only	No	Family Inactive/ Child or Member Active
13. Visitor, not active in church	Visitor	No	Inactive
14. Clergy, religious, registered	Clergy / religious	Yes	Active
15. Student currently attending Rutgers	RCM Student	Yes	Active
16. Graduate of Rutgers	RCM Alumni	Yes	Inactive

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

Handling Multiple or Duplicate Registrants

SOP# F-2

Title: Adding multiple or duplicate registrants

Description: This standard procedure outlines that 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 performs an automatic look-up in the master diocesan directory to determine if that family is already registered at another parish.

SOP Details: The following process should be followed:

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

If the family is marked as registered:

1. Contact the parishioner to determine reason for leaving parish of registration
2. Send an email notification to the parish of registration listing reasons the family is leaving parish.

Only the Parish of registration is able to modify contact information for the family. A parish may pull a family into their database that is registered at another parish, but will not be able to modify basic contact and family detail information, until listed as registered in the new parish.

If the family being added is listed but spelled incorrectly, edit the misspelling and edit the family information as necessary to reflect the proper registration. Again, if the family is registered at another Parish, then the Parish of registration should be contacted to decide the proper registration status.

If a search result for a family shows two families with nearly exact information and they appear to be a duplicate entry, merge the two files and delete one of the entries. Make sure all information is present in the new entry.

Using Data Entry Standards when Adding a New Family

SOP# F-3

Title: Data Entry standards for adding a new family

Description: This standard procedure outlines that process that should be followed when a parish is attempting to add a new family to the family directory. Data entry standards should be used to ensure the proper formatting of mailing lists, letters, and emails. Correct spelling of a family's name 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.

SOP Details: The following process should be followed:

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

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

Always use proper prefixes such as Mr. and Mrs. when entering family information into the Mailing Name Fields.

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.

Use the following formats in the Mailing Name field for the situations listed:

Two doctors: Dr. John and Dr. Mary Smith *or* Drs. John and Mary Smith

She is a doctor and he is not: Mr. John and Dr. Mary Smith

He is a doctor and she is not: Dr. and Mrs. John Smith

Selecting Proper Faith Type when Entering Sacramental Details

SOP# F-4

Title: Selecting the proper faith type when entering sacramental details

Description: This standard procedure outlines that 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. If the person is ActOther, a menu appears so that you may select which religion the member is. The sacramental details tab for each member shows information concerning the baptism of that individual as well as the faith under which that person was baptized. It is acceptable to be listed under the Catholic religion, but have baptism information listed as a different religion.

SOP Details: The following process should be followed:

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

As sacramental details are being captured, it is important to note the faith of the baptism. Within the sacraments tab 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 Protestant church, then the faith type would need to be changed to Protestant Christian.

In cases of adoption, the adoptive parents and their surname should be recorded in the general remarks field within the general tab in sacramental details. But with a notation to the effect that they are not the natural parents and that the child is legally adopted.

The National Conference of Catholic Bishops, in accord with the prescriptions of canon 877§3, hereby decrees that:

- (I) *For children baptized after their adoption is finalized, the following information shall be entered in the register:*
 - a) *the Christian name(s) of the child as designated by the adoptive parent(s);*
 - b) *the name(s) of the adoptive parent(s);*
 - c) *the date and place of birth;*

- d) *the names of the sponsors selected by the adoptive parent(s);*
- e) *the place and date of baptism;*
- f) *the name of the minister performing the baptism.; and*
- g) *the fact of adoption but not the names of the natural parents.*

Baptismal certificates issued by the parish for adopted children will be no different from other baptismal certificates. No mention of the fact of adoption shall be made on the baptismal certificate.

(II) For children baptized before their adoption is finalized, the following notations shall be added to the baptismal register, but only after the adoption has been finalized and with due regard for the civil law of the jurisdiction:

- a) *parentheses shall be placed around the names of the natural parents;*
- b) *the name(s) of the adoptive parent(s) shall then be added;*
- c) *the child's former surname shall also be parenthesized and the new surname added; and*
- d) *a notation shall be made that the child was legally adopted.*

Baptismal certificates issued by the parish for these individuals shall give only the name(s) of the adoptive parent(s), the child's new legal surname, the date and place of baptism, and the name of the minister who conferred the sacrament. The name(s) of the sponsor(s) shall not be given, and no mention of the fact of adoption shall be made on the baptismal certificate.

For future ease in reference, and to afford what may often be the only possibility of reference after the adoption has been finalized, a baptismal entry for the adopted child can be made in the baptismal register of the adoptive parents' parish, citing the date and location of the original baptismal record, and listing only the name of the adoptive parents, and the date and place of birth.

Parish personnel having access to the parish registers have an obligation not to disclose to any person any information which would identify or reveal, directly or indirectly, the fact that a person was adopted.

Other Functions

Utilizing the Ministry Group and Events Functionality to Schedule Ministers

SOP# O-1

Title: Setting up the ministry groups, ministers, and events

Description: This standard procedure outlines that process that should be followed when a parish is attempting to set up all ministry groups, ministers, and events within the ParishSOFT system. Within ParishSOFT, there are levels determining the types of ministers and assignments within the scheduler. Parishes must utilize the available functionality within ParishSOFT as to make use of the functionality of the liturgical scheduler.

SOP Details: The following process should be followed:

Create a Ministry Group such as weekend liturgy and then assign at least one Event and one Ministry to that Ministry Group (Note: ministry group may be a member type). 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.

In order to capture the interested status to a ministry, a parish can make use of 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. Use of this comments field can be used to indicate whether the individual is interested or level of commitment they are making to that ministry.

The auto select utility selects ministers for an event based on the number of times they have served. The auto select 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.

Using ACH

SOP# O-2

Title: Using ACH

Description: This standard procedure outlines that process that should be followed when a parish uses the ACH electronic banking function of the ParishSOFT software. Each parish will be held responsible for maintaining individual bank account information.

For more information please contact the Diocese of Metuchen Information Systems Office at 732-562-1990 ext. 1530

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

Adding and Editing Funds

SOP# O-4

Title: Adding and editing funds

Description: This standard procedure outlines that process that should be followed when a parish is adding or editing funds within the Offering and Tuition Module of ParishSOFT. The parish business manager, accountant, and/or parish staff member responsible for entering offering or tuition data, (“responsible financial member”) should be the only ones adding or editing funds within the Offertory and Tuition module. Funds needing to be tracked on a yearly basis should be set up as one fund per year. Others not needing to be organized by year may be set up as one fund.

SOP Details: The following process should be followed:

The “responsible financial member” must add, edit or delete funds. In order to properly track contribution to pledges, those funds that require the capture of a pledge must be set-up for each year(s) for the campaign. Funds requiring no pledges can be set up without a year being specified. Funds that require a year specification should be set up with the campaign years in the title. If necessary, a fund should be set up on a yearly basis with a title corresponding to that year of the fund.

Example:

- “Offertory 2004”, “Offertory 2005” Funds that needs to be created each year
- “Building Campaign 2004-2005” fund shows the campaign years in the title
- “Christmas” fund that tracks contributions only

A person accessing the extended tuition portion of ParishSOFT shall not add or edit funds for any reason. Only the “responsible financial member” should make edits to the funds.

** For Extended Tuition module information see System Administrator Standard Operating Procedure, SOP# S-4*

Setting Up and Maintaining Staff Directory Information

SOP# O-5

Title: Setting up and maintaining staff directory

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

SOP Details: The following process should be followed:

Add **all** staff members (whether they are parishioners or not) into the staff directory by adding new users within the family directory. As staff is added to the directory, ParishSOFT will search the database for the person being added. If the staff member is already in the database, then click on the name as it appears in the list and click accept to select that individual. If the person is not in the database, then click on the Add new family member in directory button. The staff member must be added to the directory and listed as unregistered, active so that the information concerning this staff member reaches the diocesan level.

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

After all members have been added to the staff directory, it is important to maintain the information within the directory. As a staff member changes email address, changes staff type, or has left the position, an update must be made to the staff directory to reflect these changes.

Offertory and contribution entry

SOP# O-8

Title: Entering batches, posting to a fund, recording one time gifts

Description: This standard procedure outlines that process that should be followed when a parish is entering offertory or one-time gift information into the ParishSOFT system. This process details the processes that may affect reporting if not completed correctly.

SOP Details: The following process should be followed:

After entering batch information, the batch must not be closed until all required entries have been recorded. A batch cannot be closed until the balance on the batch equals zero.

It may occur that a family submits two payments for two different funds at one time. You may enter the amount into the first fund designated and then into the next fund. This may be done when posting into the funds provided the payment is included in a Batch.

EXAMPLE POSTING 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 offertory for Sue Brown; Change funds to building fund and post the remaining \$20. Make sure that you note the check number on both funds. You would then return to the offertory fund and 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.

When posting a contribution as a one time gift, it is important to set up one time gifts as a one time pledge. This must be done prior to posting the contribution. If the gift is set up as a contribution without a pledge it will affect reporting outcomes of your pledge. The family will still receive credit; however, it will not post appropriately to the fund intended.

When posting check payments, it is now necessary to record all check numbers. This information is required for audit purposes.

Tracking attendance through batches

SOP# 0-8

Title: Mass attendance tracking

Description: This standard procedure outlines the tracking of mass attendance using batch posting. If your parish requires an attendance tracking mechanism the following outlined procedure should be followed.

Note: In order to track families who do not attend mass but give:

- Click Post Contributions
- Note Reminder, Click OK
- Select your "Weekly Offertory" Fund and the Batch Date (Date to Post to)
- Click Batch Processing
- Click New Batch
- Enter Batch Description (Non Mass Attendance, Givers)
- Click OK
- Enter Batch Total Amount
- Click OK
- Select Batch Description (you will see name and posting date as the Description)
- Click large box under search criteria
- Enter either envelope number or last name
- Press Enter
- Enter Amount Press Enter
- Press Enter
- Cursor is now back in large box
- Continue until complete.
- When done, go to Batch Processing and Close Batch.

Electronic Record Keeping Responsibilities

Keeping Electronic Records Requirements

SOP# E-1

Title: Electronic records requirement policy

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

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

- **Staff directory** (Many staff will already be in the staff directory as they are included in the directory if they are set up with access to the ParishSOFT system. All remaining non-ParishSOFT users on the parish staff should be added and maintained in the staff directory as well)
- **Sacramental details** (Complete sacramental details for parishioners should be maintained in ParishSOFT. Parishes are encouraged but not required to update this information for existing families, but all sacraments performed or all parishioners added after the system has been implemented should contain complete and accurate sacramental details).
- **Religious education** (Religious education information and history must be created and maintained for all students and class) Again, set-up of historical records is encouraged, and all new classes and student accomplishments from the point the new system is implemented should be maintained.

System Administration

Configuring Tables and Performing Table Set-up Activities

SOP# S-1

Title: Configuration Table Changes by Parish Administrators

Description: This standard procedure outlines that 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 the overall diocesan needs that cannot be altered. Some of the look-up tables are modifiable based on the Parish's specific needs. These tables are to be changed only by Parish System Administrators and should not be accessed by any other users.

SOP Details: The following process should be followed:

The following tables should **NOT** be altered in any way:

Staff type	Member Title
Security Profiles	Sacraments
Pledge Gift Type	Marriage Status
Faith Type	Member Religion
Member Status	Pledge Payment Frequency
Member Suffix	Member Type

The following tables **MUST** be modified by Parish after implementation:

Schools	Ministry Groups
Special needs	Sessions
School Calendar	Classes
School District	Staff list
Ministry Types	Workflow Groups
Event types	Chart of Accounts

The following tables have been predefined for the Parishes, but **MAY** be modified later if so desired:

Career Type
Member Education
Family Groups
Education Level
Member Language

Synchronizing Database and Data Backup

SOP# S-2

Title: Data Back-up and Synchronization

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

SOP Details: The following processes should be followed:

Data Backup

Each Parish Administrator is responsible for the backup of the ParishSOFT database on a regularly scheduled basis. The database backup scheduler should be utilized so that automatic backups will occur as specified in the scheduler. It is expected that all parishes backup daily during the work week at a minimum, with the ability to do so seven days a week. If users will be on the system at all on weekends, it is recommended that the Parish schedule backups daily.

The Parish administrator must also set up the scheduler to backup the system as well as dictate which days the backups are performed. If the database is located on the server, and the server goes through a regular back-up process, that is sufficient for the database back-up.

An alternative for the Parishes is to backup by FTP to ParishSOFT where they will store the information. It is up to the Parish if they would like to utilize this FTP service or use their own means of backup.

Exception: If a parish does not have access to high speed and are using a dial-up connection, the parish will still need to perform back-ups as listed above.

Synchronization

Parish databases must be setup to synchronize to the diocesan database at regular intervals. The synchronization should be set to synchronize every 10 minutes. The steps to alter the synchronization intervals are as follows:

1. Open Edit and View Detailed Synch Setup Info tab
2. Select the Every n Minutes option from the list
3. Change interval number to 10
4. Click the save changes button

Exception:

The system will not automatically synchronize if it is not connected to a high speed internet access, so it must be done manually. In this case, parishes must **manually execute a manual synchronization at the end of each business day** by completing the following steps:

1. Enter URL information to the Diocesan Synchronization
2. Enter the username and password
3. Click on the Check connection to Diocese button
4. Click synchronize parish data to diocese now button

Database Performance

SOP# S-3

Title: Database performance policy

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

SOP Details: The parish administrators must run the database maintenance utility to optimize the system at least once per week. Also the parish administrator must select settings on any anti-virus software to NOT scan any of the “.mdb” files.

Run the database maintenance by completing the following steps:

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

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

1. Enter the settings portion of the virus scan software and de-select “.mdb” extension files from being scanned
2. Save changes
3. Close virus scan software