

Diocese of Houma-Thibodaux ParishSOFT Standard Operating Procedures (SOP)

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Handling of Sacramental Registers (Hand Written)

- Sacramental registers document the rights and privileges of the faithful.
- They also illustrate the lived faith and Catholic heritage of families that has passed from one generation to another.
- Sacramental records are a mixed nature: private and public.
- In accordance with Canon 535, each parish is to have baptism, marriage and death registers as well as those prescribed by the conference of bishops of the diocesan bishop.
- These registers are to be accurately inscribed and carefully preserved.
- There are several reasons for moving sacramental registers to the diocesan archives, (i.e. suppression of a parish, damaged records, or for the protection of older registers.
- Access to these registers is governed by the passage of time and local custom.
- Label each register on the inside of the first page with: Name of parish, city, date span (ex. January 1, 1950 December 31, 1965), sacrament and book number (ex. Baptism Book #3).
- Make all entries in permanent ink. Do not use gel pens, pencils, sharpies, or marks-alot. Test your pens. Using a test piece of paper (not register), write on page and wet for 5 minutes to determine if pen is permanent.
- Clearly write notations.
- Do not leave papers stuck in the books.
- Do not tape envelopes to the back of the book.
- Do not staple, clip, paste, or tape anything to the pages of the book.
- Do not use Post-it notes for notations.
- Notify the Archives if the book needs repairing.
- Keep up to date with entries.
- Do not decorate the book with colored markers or sharpies.
- Hand Written Registers should be in the parish!! Any records over 50 years may be sent to archives, but it is recommended that the registers are kept in the parish.

In the event of a hurricane/natural disaster or evacuation:

- Evacuate Sacramental Registers All sacramental registers must be evacuated from the parish.
- **Protect Vital Records** Place vital records (i.e., marriage preparation files, current finance records, architectural plans, inventories of parish holdings, school records and data, etc.) in sealed storage containers and move vital records to a high place in your parish office or school office.
- **Backup your computers** and take the backup device with you.

Family and Member Information

Assigning Registration Status to Family and Member

Title:

Recording family and member status

Description:

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

an individual's unique standing within the parish.

Details:

The following process should be followed:

The following example scenarios list how a person may be

represented in the Parish.

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		Currently	
Scenario	Family Group	Registered	Member Status
Standard active registered family	Active	Yes	Active
Non-member, not registered, contributor	Contributor	No	Inactive
Non-member, not registered, contributor	Contributor	No	Active
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
Inactive registered family	Inactive	Yes	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	Only	No	Family Inactive/ Child or Member Active
13. Clergy, religious, registered	Clergy / religious	Yes	Active

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.

- Note: if you are unsure about entering in the status, contact the diocese office for guidance.
- For intended purposes, registered does not necessarily mean active/inactive. Registered refers to the way we keep track of an individual family. No family should be registered in multiple parishes!!

Adding a New Family

Title:

Adding a New Family

Description:

This standard procedure outlines the process that should be followed when a parish is attempting to add a new family. 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.

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. For a genuine change of parish, send a courtesy email notification to the parish of registration listing reasons the family is leaving parish.
- 2. If a courtesy email is not received, you can assume that the record is being pulled for sacramental record changes.

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.

Adding a family to your parish is not necessary when they make a one-time contribution, for example, a donation of \$20. However, if it is a large contribution, over the \$250 threshold, they do need to be added because of end-of-year procedures and tax reporting purposes. When a family makes contributions to your parish, but is registered at another parish, you would pull the family in, but mark them: "Not Registered; Contributor Only".

Using Data Entry Standards when Adding a New Family

Title:

Data Entry standards for adding a new family

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. 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.

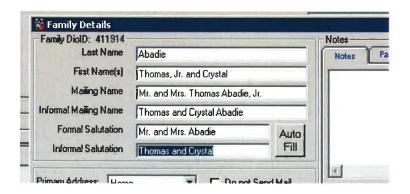
Details:

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. Several fields are available for use in formal and informal communication. It is at the discretion of individual parishes how to utilize these options, ex. Spelling out and or using & in a title.

When adding a family with a Jr., Sr., III, etc., the last name field does not contain the suffix. If suffix is entered in the last name field, the records do not alphabetize correctly. See example below for proper entry:



Adding Member Records:

Member fields:

Gender: obtained from census record

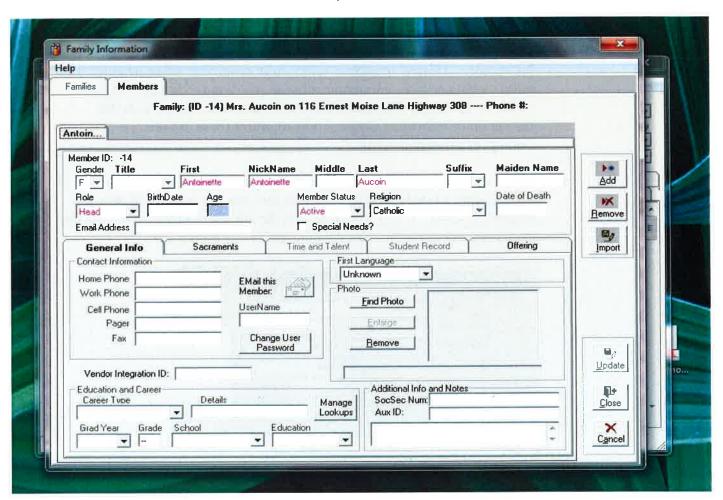
Title: templates shouldn't have titles on the sacraments, i.e. baptism certificate.

Last name: should be the person's current last name.

Middle: retain middle name if you have it and add maiden name to field. If no middle name enter maiden name here.

Role: every member needs to have a defined role. **Married couples should have role husband and wife. The role head is only for single households.

General Info: required field—ethnicity must be entered. (In order to see this, your screen settings have to be set to show ethnicity. If need help, contact diocese office.)



Selecting Proper Faith Type

Title:

Selecting the proper faith type

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. If the person is actOther/Inactive, 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.

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/Inactive. 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 and enter the denomination.

Note:

It is acceptable to be listed under the Catholic religion, but have baptism information listed as a different religion.

The correct faith of Baptism in our diocese is Catholic.

Entering Sacramental Details

Title: Entering Sacramental Records

Description: This standard procedure outlines the process that should be followed when a parish is adding sacramental details about a family member within the family directory.

Important Notes: Anyone, employees or volunteers, with access to the sacramental details needs to recognize the seriousness of the confidential nature of this information. Any changes being made to sacramental information must be supported by the proper legal documentation.

Details: The following procedure should be followed:

Parishes are required to maintain complete and accurate sacramental details performed in the parish in the hard copy (hand written) 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.

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, the proper faith of baptism is Catholic; however, if the person was baptized in another faith, the recognized faith type by the Catholic Church would need to be changed to reflect that baptism. Some baptisms in other faiths are considered valid by the Catholic Church.

Sacramental details:

Baptism: Check completed when a canonical baptism is done in your parish. Date is the actual date of baptism. Prep year is just the four-digit year of the baptismal preparation seminar. Parish and celebrant can be populated by searching the menu to the right of the box.

Baptismal name should include the full name of the child at baptism. Faith of baptism should indicate the faith in which the child was baptized. For the Diocese of Houma-Thibodaux recording purposes, we record Catholic for a canonical baptism.

Sponsors should be confirmed Catholics, at least 16 years of age and in good standing with the Church. Each child being baptized must have at least one sponsor, according to Cannon law.

Note: Those who qualify as sponsors are: Catholics, who have been confirmed, are at least 16 years old and are leading "a life in harmony with the faith and the role to be undertaken" (Canon 874).

Witnesses are for Christian witnesses of other denominations.

Note: A person who belongs to a non-Catholic ecclesial community may not be a sponsor at the baptism of a Catholic, but may be recorded as a witness together with a Catholic sponsor (Canon 874)

Sponsors/Witnesses can never be changed once the child is baptized, unless written permission is obtained from the Bishop.

The hard copy (hand written) sacramental register is for parishes to document sacraments performed at that parish. For easy cross referencing in ParishSoft always complete the Registry volume, record and record number fields.

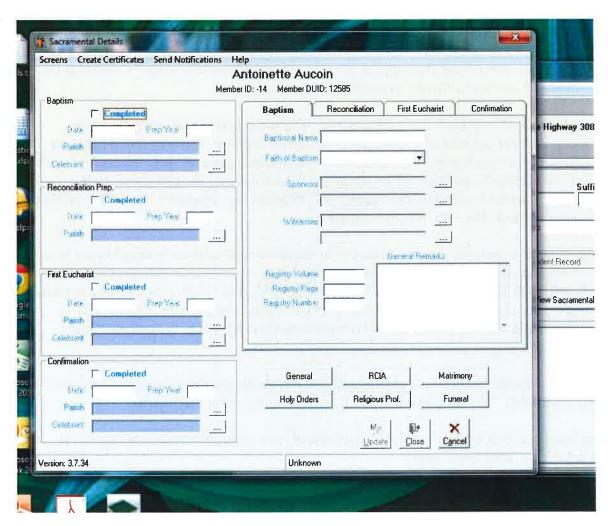
Registry volume is the year of the record and must be four digits, i.e. 2012.

Record is the assigned number from the series of records and must be a three-digit number, i.e. 001.

Record number is the registry number and record combined, i.e. 2012001.

General remarks should only contain information on proxy, marriage notations, annulments or RCIA information. This information is retained and placed on the baptismal register.

General remarks do not print on the certificate, but do print on the registers.



Reconciliation: The date of reconciliation should never be recorded and a certificate should never be issued with a date of reconciliation. We can never verify if the reconciliation actually took place. For Religious Education and 1st Communion Preparation purposes, you may check off the box, enter the prep year and the parish. Certificates can only state that they completed the preparation for the sacrament.

First Eucharist and Confirmation: These fields should be recorded to have a completed historical record. This information can be recorded in the general remarks field, per parish discretion, i.e., child was baptized in a different parish out of state/out of parish and they have been granted eligibility to receive the sacrament of confirmation by a pastor.

Each sacrament contains an individual tab with information to be completed. For example, confirmation requires saint name and sponsor name.

Also, for each sacrament, this is where the register number, record and register volume are recorded. Follow number requirements on previous page.

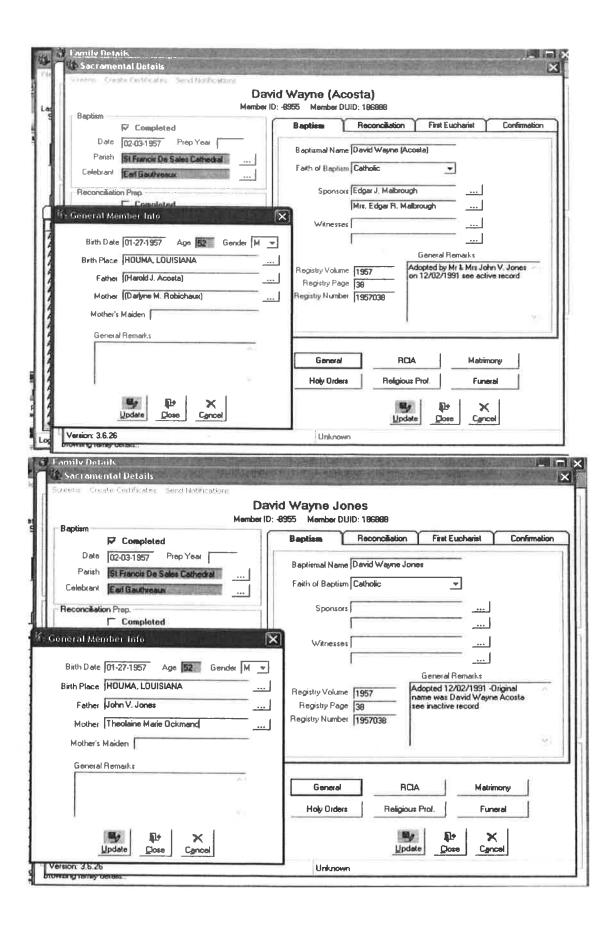
Recording adoptions after baptism: When recording an adoption of an already baptized person, the original record history must not be lost. Do not delete or change any information in the existing record, rather, build a new member record in that family. The old member record is marked inactive and a note is made in the remarks field referencing the adoption, i.e. Adopted by Mr. & Mrs. John S. Doe 12/02/1991 – see active record. Parentheses are placed around the last name in the member name field. Parentheses area also placed around the parent's names in the General Tab screen and the last name in the Name at baptism field.

A new member record is created and marked active. The name is recorded using the new surname along with the original date, place and minister of baptism. The adoptive parents are entered in the General Tab information using the same date and place of birth. The names of the sponsors are not added. No mention of the adoption will be made on the certificate. In the remarks field, a notation is recorded referencing the adoption, i.e. Adopted 12/02/1991- original name was John Samuel Doe – see inactive record.

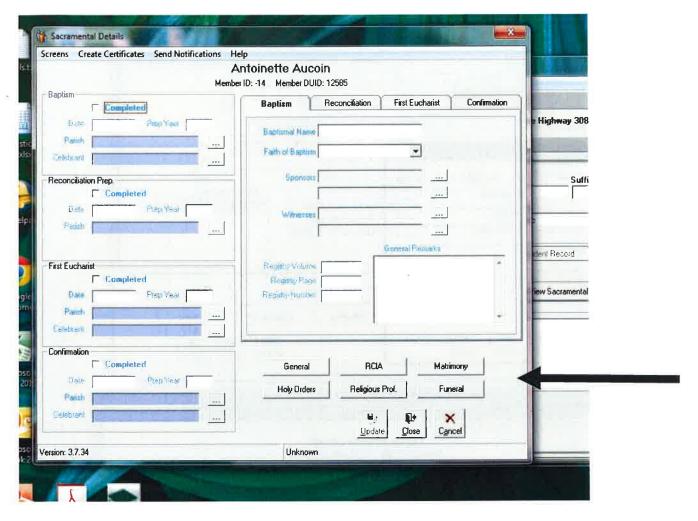
Adoptions: Should be entered as a new member in the family and cross referenced in the notes section in Sacramental Details. The old member record is set as an inactive member sacramental record only. NEVER DELETE THE OLD SACRAMENTAL RECORD. Also, be sure to include any information about adoption within the sacramental details page on both records. The adoption information shall be placed in the General remarks field within the general tab in sacramental details.

When recording sacraments in an adopted record, the birth/natural record should contain the baptismal information. The adopted record will contain all the other sacraments.

Recording should stop in the birth/natural record and all new or future sacraments should be recorded in the new, adoptive record.



Tabs in Sacramental Details Screen:



General Tab: Enter birth date and gender. Birth place should be the city and state of birth. Enter Father's full name (first, middle, last). Mother's name should contain the mother's full maiden name, ex. Jane Smith Doe. (Note: for our diocese, we do not use the maiden name field)

RCIA tab: please do not enter any information in the registry fields. Date/prep year and parish information only. Only check completed if program was completed. There is a query in the query library to pull RCIA information by date.

Matrimony: only valid, Catholic marriages should be recorded in the sacramental detail fields. A workgroup should be established for civil marriages.

Tip: Record in the female record <u>then</u> link to the male record. It saves steps for inputting data in fields.

- 1. Click Add
- 2. Check completed (makes it True).
- 3. Status should reflect married.
- 4. Find and select spouse.

Make an assessment of family/member before entering. When first entering a marriage, the family being worked on should be established prior to recording the marriage (in your parish). If out of diocese, a new family will have to be created.

General remarks: if three witnesses are required, the third one should be recorded in remarks.

Canonical MUST be checked.

Registry volume is the year of the record and must be four digits, i.e. 2012.

Record is the assigned number from the series of records (from hand written records) and must be a three-digit number, i.e. 001.

Record number is the registry number and record combined, i.e. 2012001.

Disparity of Cult: is a marriage of a Catholic and unbaptized person. Dispensation notes should be recorded in the general remarks field.

Con-validation is a marriage outside of church, but blessed, Canonical must be checked when blessed and the date of blessing recorded in the date field. The civil marriage date should be recorded in the general remarks. The civil marriage must then be removed from the civil marriage workgroup.

If out-of-state or out-of-parish marriage and parish of baptism is yours, marriage notation has to be put in baptism general remarks and the marriage general remarks.

Annulments: are recorded in the marriage tab. The status is changed to annulled, and the annulment record ID is recorded. Details of the annulment are entered in the "General Remarks" of the marriage tab (such as: date of annulment; PN #; any restrictions). If another marriage takes place, a second marriage record is created.

Holy Orders & Religious Prof.: for religious only.

Funeral: enter date of death on member field and it populates in the tab.

Place of funeral must be the recording parish. If the actual funeral is held elsewhere (such as funeral homes), it must be recorded in the general remarks so it will print on the register.

General remarks: burial information. i.e. plot number. These notes will print on register.

Notifications: Notifications should be sent when a person receives a sacrament (Confirmation and Marriage) in your parish but was baptized in another parish.

Legal rights of Church for disclosure of sacraments:

Sacramental history and records are not to be shared with anyone other than the person who received the sacrament, the priest, the guardian (if involving children under 18), or a parish/diocesan representative. If your parish has any questions about documenting sacraments, canonical questions or the hard copy of the sacramental register, contact the diocese.

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 the full and accurate notations on the reverse side.

Parishes should not delete any sacramental history from individual records in the sacramental register or ParishSoft without proper legal documentation.

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). 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 (hand written).

Baptism certificates should only be printed by the baptizing parish. Each time a certificate is requested, the register (hand written) should be pulled and information in ParishSoft verified. If corrections are necessary, make according to register (hand written).

Genealogy Research:

This should never take place in the parish. Anyone requesting genealogy records or research should be referred to the Archives Department in Thibodaux.

Setting Up and Maintaining Staff Directory Information

Title:

Setting up and maintaining staff directory

Description:

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

directory as current as possible.

Details:

The following process should be followed:

Please contact the diocese for help with the staff directory.

Collecting Information for Kenedy Directory Updates

Title:

Collecting information for the Kenedy Family Directory

Description:

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

Details:

There is a report available in ParishSoft Reports under the Census Menu to run the Kenedy Report with all the necessary information. Please select the correct year to obtain this information.

Offertory and contribution entry

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.

Details: The following process should be followed:

Refer to the ParishSoft manual (online) for offertory and contribution

entries.

ParishSOFT Query Library

A variety of pre-set queries are available online for retrieval from the ParishSoft website, in the ParishSoft Query Library.

Implement a Query from the ParishSOFT Query Library

- 1. Select the query you need from the query library (click the link above to view the library).
- 2. Verify that it is compatible with your version of ParishSOFT software.
- 3. Highlight the query text and press **<Ctrl> + <C>** or right click on the highlighted text and select **Copy** from the menu option.
- 4. Open any ParishSOFT module and select **Reports > ParishSOFT Reports**.
- 5. From the Main Reports Menu, select Utilities > Build Custom Queries.
- 6. Ensure the **Query Name** and the **Query** fields are blank. If they are not blank, select the blank guery name from the drop-down list and then clear the contents of the Query window.
- 7. Paste the query (press **<Ctrl>** + **<V>**, or click **Edit > Paste** from your Access menu.
- 8. Type a name for the query in the **Query Name** field. If the query has a dependency on another query, your query name must be identical to the name used in the original ParishSOFT Query Library.
- 9. Select Save Query.
- 10. Select **Display Query**. If prompted, enter the requested information to execute the query.
- 11. Your results will be displayed on the screen in query format.

Note: If the query results you need are based on additional subqueries or are dependent on another query, ensure that you follow these steps naming the first query exactly as it appears in the ParishSOFT Query Library.

View Your Query Data in Excel

Once you have displayed a query, you can analyze it in Excel using the following procedure:

- 1. Select Tools Office Links Analyze it with Microsoft Excel from the main Access menu.
- 2. The data collected from your query will open on an Excel spreadsheet.
- 3. Manipulate the query data in Excel as needed, or do Mail Merges with the query results by using this spreadsheet as your source for the Mail Merge.

Reuse Your Saved Query

Once you have run and saved a query from ParishSOFT's Query Library, you can use it again and again. Just click **Utilities > Build Custom Queries** in ParishSOFT Reports, choose the name of the query from the drop-down list, and click **Display Query**.

Synchronizing Database and Data Backup

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.

Details:

The following processes should be

followed: Data Backup

Each Systems 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 at least once a week, with the ability to do so seven days a week.

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.

If unsure on how to schedule a backup, please contact the

diocese. 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. Only one computer in the parish is considered the master unit and it should be synced at all times. For help setting this up, please contact the diocese.

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