

11th Archdiocesan Users Conference

WELCOME 9:00 AM

Brad Wilson, *Chief Financial Officer*
Michael Warren, *Controller*
Peter Faletti, *Master Planner*
Deacon Ray Egan

VENDOR BOOTHS ALL DAY

Our Sunday Visitor
The Hartford

Vijay Jeste, *Product Manager*
Hunter Rodgers, *Retirement Education Specialist*

MORNING GENERAL SESSION 10:00 AM

[ParishSOFT AIM Reload Data Mapping Plan of Action](#)

Andy Jobst, *VP of Customer Service, ParishSOFT, LLC*

MORNING BREAKOUT 10:45 AM

[D&L Borrowing / Logos: Go Global](#)

Patrick Warner, *Parish Information Systems Manager*
Alejandro Henao, *Finance Manager*

[ParishSOFT Parish IQ](#)

Shannon Wiggins, *Training Coordinator*

[ParishSOFT Religious Ed](#)

Carol Hathaway, *Sacramental Coordinator, St Benedict Catholic Church*

[TLO / Benefits Update](#)

Lily Gallagher, *Benefits Manager*
Maria Teresa Velez, *Volunteer and TLO training*
Tom Merlino, *Paychex*
Albert F. Koch III, *Paychex*

[Catholic Directory Manager](#)

Andy Jobst, *VP Customer Service, ParishSOFT, LLC*

[SEP & Human Resource FAQ](#)

Jennifer Broel, *Director of Safe Environment*
Chaundra Louard, *HR Specialist*
Stephanie Landrum, *Volunteer Coordinator*

LUNCH 12:15 PM

AFTERNOON GENERAL SESSION 1:15 PM

[Sacramental Records Handbook Overview](#)

Carolyn Denton, *Director of Archives and Records*

[Grace Scholars](#)

Pat Mannelly, *Executive Director, Grace Scholars*
Rick Medina, *Director Grace Scholars*

AFTERNOON BREAKOUT 2:30 PM

[D&L Borrowing / Logos: Go Global](#)

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[Connect Now Census Product](#)

Andy Jobst, *VP Customer Service, ParishSOFT, LLC*

[SEP & Human Resource FAQ](#)

Jennifer Broel, *Director of Safe Environment*
Chaundra Louard, *HR Specialist*
Stephanie Landrum, *Volunteer Coordinator*

[Standards for Sacramental Registers](#)

Carolyn Denton, *Director of Archives and Records*

[Our Sunday Visitor Online Giving](#)

Vijay, Jeste, *Project Manager, Our Sunday Visitor*

CLOSING PRAYER 4:00 PM

SESSION DESCRIPTIONS

ParishSOFT AIM Reload (Data Mapping Corrections) Process

Andy Jobst, *VP of Customer Service, ParishSOFT, LLC* and AoA Staff will discuss the process parishes will participate in as we begin the process to correct the data mapping issues. General timeline will be discussed.

D&L Borrowing / Logos: Go Global

Loan Borrowing: Everything you wanted to know about deposit and loans with the opportunity to ask questions:

- Definitions
- D & L process
- Calculations
- Year End Review - Review the fiscal year-end process in Logos

Go Global: View how parishes will soon be able to work with the Logos application securely and remotely from offsite locations.

ParishSOFT Parish IQ

“How can I get a list of parishioners that pledged to a Fund last year, but not this year?”
“How many 16 year olds do we have in the parish that have not received Confirmation?”

Find out how to get these answers and more with Parish IQ. **Hands on training** will allow you to practice creating queries to extract data from your ParishSOFT database – without learning Microsoft Access! Create, modify and share queries from other staff and parishes!

TLO & Benefits Update

TLO: Learn about the newly implemented Online Time Sheet tracking at the Chancery. Hear the time saving aspects for managing your staff from an administrative perspective and keep track of hours worked and vacation & sick time available for your personnel.

HR Benefits Update: Get the latest news on:

- Health Care Reform Update
- 403(b) Status
- Lay Retirement 2010 Reminder
- Workers Compensation Update

ParishSOFT Religious Education

Carol Hathaway, *Sacramental Coordinator for St Benedict's Catholic Church* in Johns Creek will lead you through the steps of how to manage a successful RE school year. Learn the fundamentals:

- Build a new school year, and create sessions and classes
- Add students to your classes / Edit and Delete students
- Create RE tuition template and print statements with balances due.

SESSION DESCRIPTIONS

Catholic Directory Manager

Andy Jobst, *VP of Customer Service ParishSOFT LLC* will give you a guided tour of the next ParishSOFT module the Archdiocese will be implementing – the Catholic Directory Manager. This module allows for parishes to submit their sacramental and canonical appointment data for the annual Kenedy reports electronically.

SEP & Human Resource FAQ

Spend some time getting acquainted with essential HR processes followed by an open Question-and-Answer session. Discover HR Online features that allow you to:

- Future date employee changes
- Guarantee your documents are received
- Submit demographic changes

Learn the best practices for Safe Environment updates like:

- Screening renewals
- User access
- Status Changes

Sacramental Records Handbook Overview

The Archdiocese at long last has authorized the use of a Sacramental Records Handbook to assist parish personnel in recording, managing, storing, and preserving their sacramental registers according to Canon Law. While the Handbook does not cover every complexity regarding sacramental records, it will assure consistent recordkeeping in terms of best practices throughout the Archdiocese.

Connect Now Census Product

Andy Jobst will show you a sneak peak of a new feature available in the next version of ParishSOFT. Parishioners can register, update and keep their contact information up to date ...all from an internet connection! Save your staff valuable hours of updating contact information including address and email details.

Our Sunday Visitor Online Giving

Vijay Jeste, *Product Manager Our Sunday Visitor* will show you how to increase your offertory income by offering an option to give electronically. OSV's web-based Online Giving product offers several unique features and complements its offering envelopes. Parishes using it are reporting overall increase in collections. Find out how you too can benefit.

SESSION DESCRIPTIONS

Standards for Sacramental Registers

Because Sacramental Registers are vital records of the church and created on paper as a manuscript, they are by nature archival materials. Meet with Carolyn Denton, a certified archivist, to learn the “dos and don’ts” of creating and handling parish registers. She will also answer any preservation questions you may have regarding any type of record, including digital records. Bring items in question to the session for evaluation.

Grace Scholars

Pat Mannelly, Executive Director of Grace Scholars will discuss the strategic importance of Grace Scholars to the Atlanta Archdiocese. Pat will introduce the new Director of Grace Scholars, Rick Medina.