



ParishSOFT RE & Extended Tuition

Building School Year in ParishSOFT: Before creating school year, plan session and class structure on paper specific to your parish needs. Consider all programs when planning.

<u>Session</u>	<u>Class</u>
Monday 4pm	Mon 4pm 1A, Mon 4pm 1B
Monday 6pm	Mon 6pm 5A, Mon 6pm 5B
At Home Programs	Homestudy Gr1, Homeschool Gr1
First Communion	9am Mass, 1pm Mass
FC Private Schools	Holy Redeemer, Pinecrest Academy
Confirmation Prep	Group 1, Group 2
Confirmation	Group 1, Group 2, Private School
Adult Formation	RCIA, Bible Study: Matthew

Cloning School Year: If you decide to use the basic structure of sessions and classes from a previous school year with some editing, you **MUST** clone the school year first. Cloning does not copy students – only the structure of sessions and classes.

Adding Sessions:

- Sessions will not show in the Student Directory of the RE module until a class is added to the session
- Naming convention – be descriptive: *Monday 4pm, Confirmation*
- Enter start and end dates and times and meeting day
- Click Update Calendar Session Dates
- Choose calendar session dates (uncheck boxes of dates with no classes)
- Click Update

NOTE: If you change start and end dates and update the calendar, ParishSOFT will assume you have classes each day in the time period.

Adding Classes:

- Select School Year
- Add New or Edit Class Name (Remember to tab through fields)
- Naming convention – be descriptive: *Mon 4pm 1A, Confirmation Gr 1*
- Select Grade and Session – this will auto fill the class dates and times
- Update Class Details



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Adding Students:

- Highlight desired class in RE Module
- Click Add Student to a Class (top of screen)
- If entering from stacks of registration forms, search by age range and select students to add at one time
- Ctrl + Click to pick one by one
- Shift + Click to pick range
- Click Accept One or Accept All Selected if adding a range of students

Sacramental Records

- Sacramental details are entered in the Family Directory module for the Member by clicking Edit/View Sacramental Details
- Sacramental records are to be maintained in both the parish sacramental registry and in ParishSOFT, per Archdiocesan Policy.
- Treat data entry of sacramental details in ParishSOFT like your sacramental registry
 - Only enter dates of Sacraments received if you have a recently issued Baptismal Certificate providing the information (for young children, parent's original certificate is permitted with pastor discretion)
- Sacramental information listed on Parish Registration Forms
 - In ParishSOFT, only use checkboxes off sacraments for each person according to Parish Registration Forms
 - Do not enter dates and/or places listed for sacraments based on Parish Registration forms
 - EXCEPTION: Dates for Matrimony may be entered in ParishSOFT without recently issued Baptismal Certificate

Milestones:

- Use milestones to track goals or assignments for students or classes
- Access Milestones through ParishSOFT Reports / Religious Ed Reports Menu and Member tab / Student Record



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Extended Tuition

- Add school funds to your Chart of Accounts in the RE Module
 - Pastor and Finance Council must approve funds before they are created in ParishSOFT.
 - Click PS Reports, Tuition
 - Needed info: Acct # (could be the GL #) and a description. Specify if the acct is tax deductible (pastor's discretion) and if it is a tuition fund.
- Build one template which includes all possible RE fees
 - Tuition
 - Book Fees
 - Retreat Fees
 - Scholarships, etc....
- Set up Family Billing
- Post Tuition Payments
- Create Tuition Reports

Need Help?

http://www.archatl.com/offices/parishinfosys/training_docs.html