

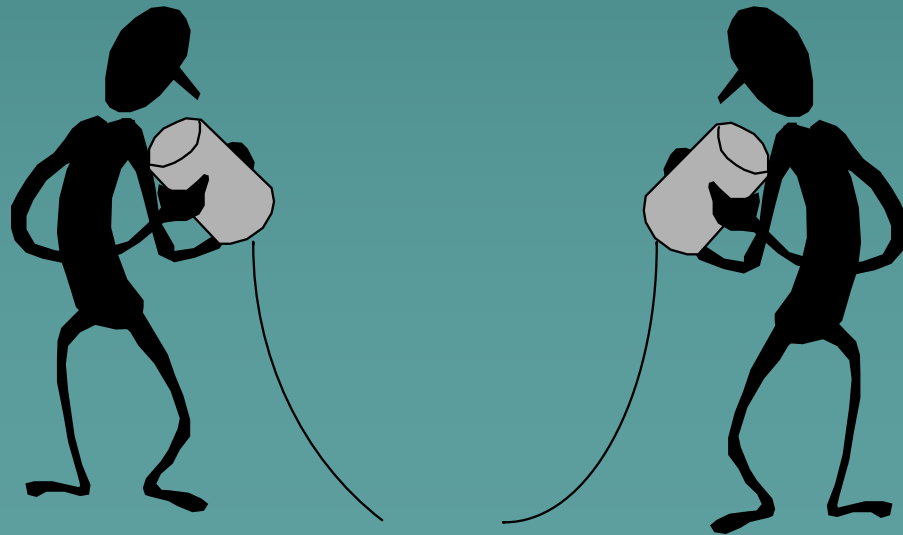
A black silhouette of a person juggling five red balls. The person is in a dynamic, slightly crouched pose with arms raised, balancing the balls. The balls are arranged in a pattern above the person's head.

Do I Make A Difference?

A discussion of
Standards and Policies

Why have standards and Policies?

Standards allow free flow of information between similar or dissimilar sites.



Policies

Policies are not a punishment or torture designed by the Archdiocese!





But are there to step you
safely through the
minefields of technology.

What are standards



"Standards are documented agreements containing technical specifications or other precise criteria to be used consistently as rules, guidelines or definitions of characteristics, to ensure that materials, products, processes and services are fit for their purpose."

That being said.....

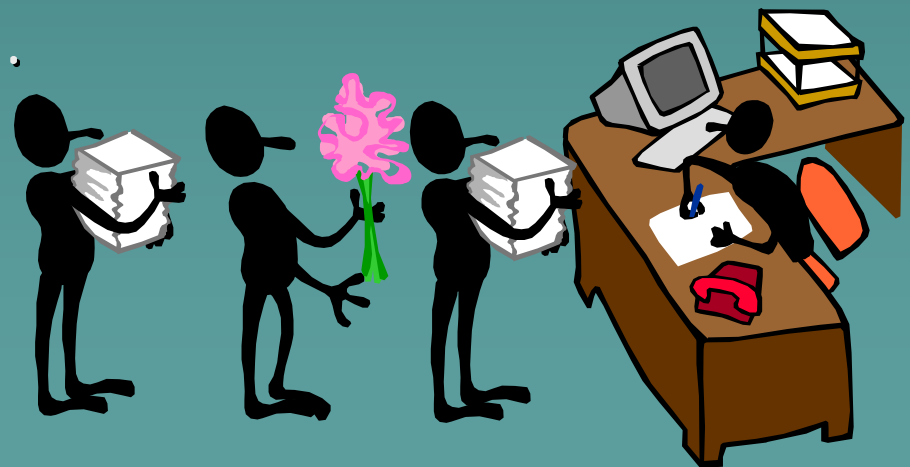




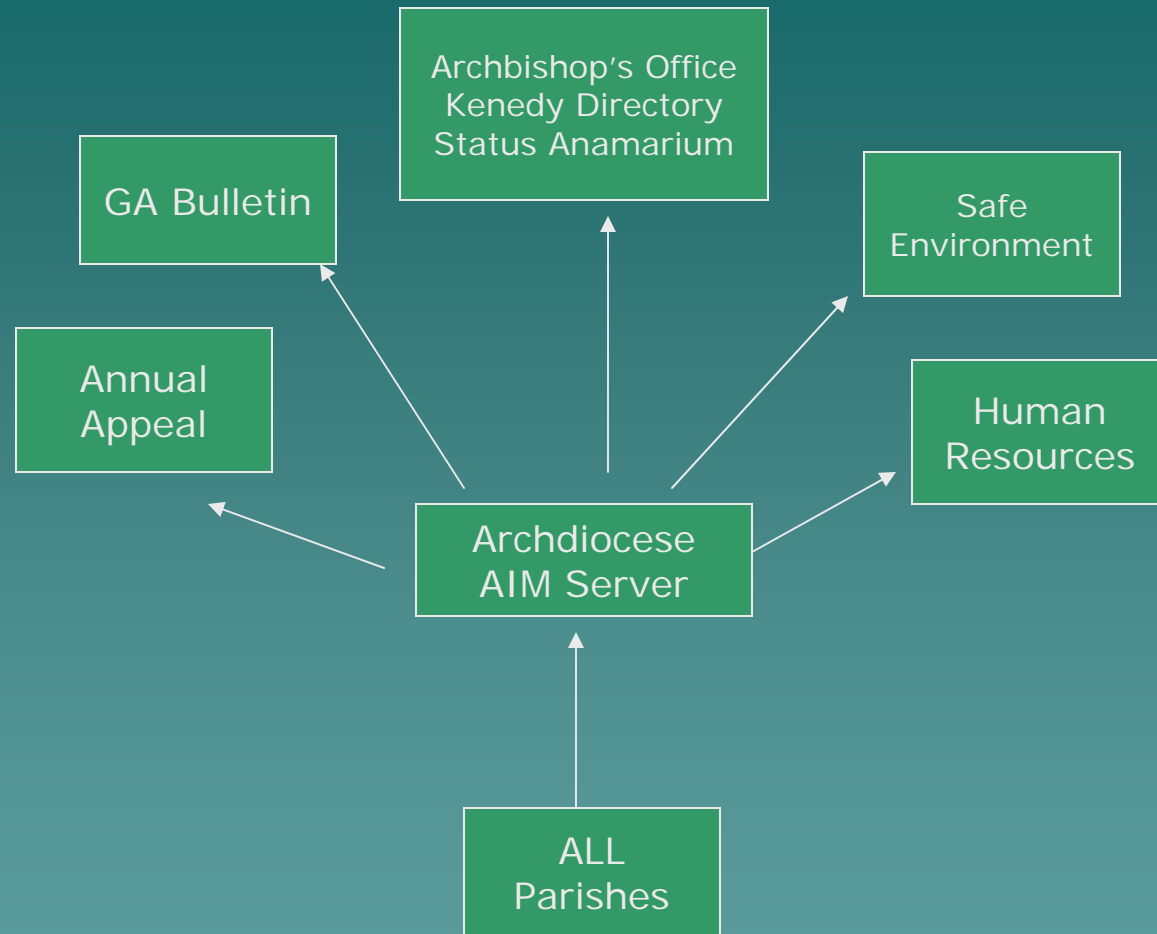
Standards are good Technical
Stewardship!

Adherence to Standards and Policy provides

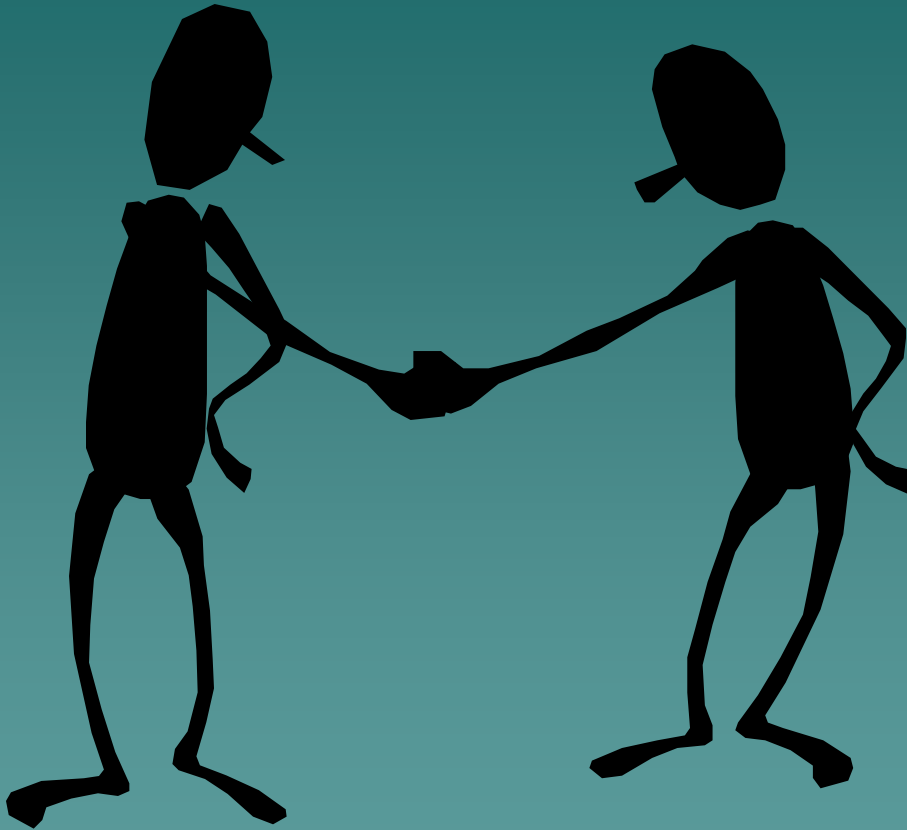
- Ability to use data in multiple locations for multiple purposes.
- Creates time and cost savings for the entire organization.



How does the system work?



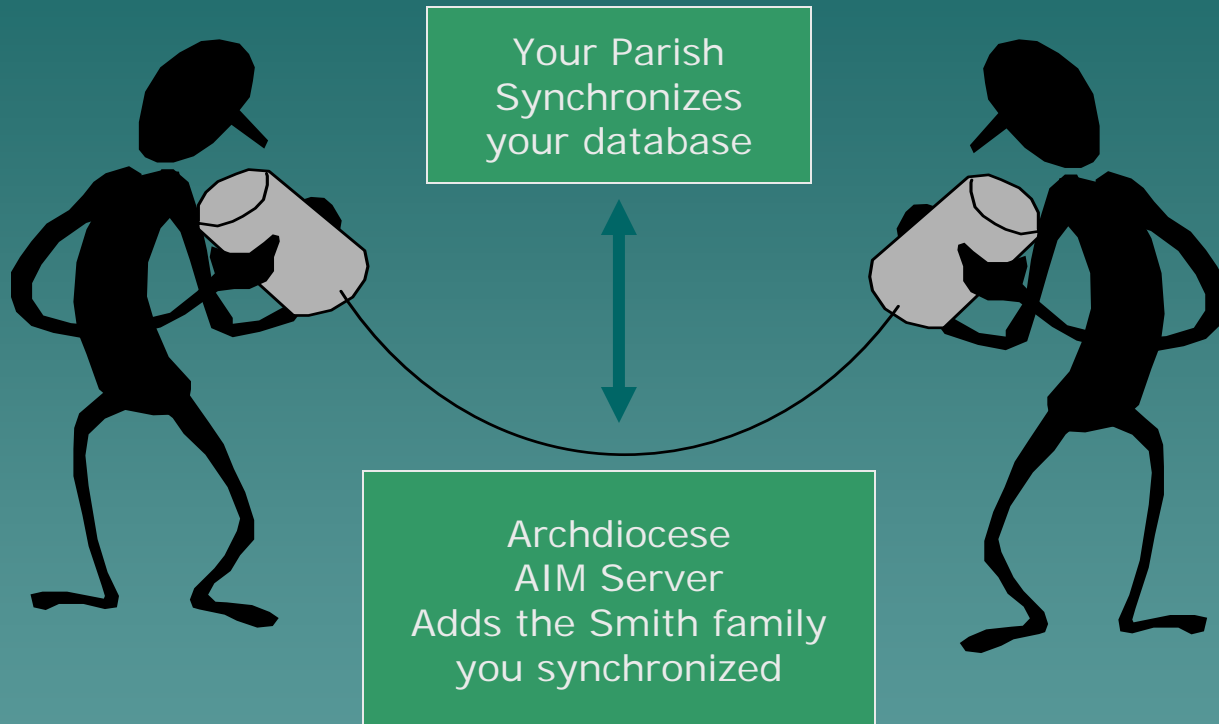
How does my parish affect anyone?



Let's look at what happens when your parish receives a registration for the Smith Family and enters it into ParishSOFT

Typical Life cycle of a Parish Family

Your Parish enters the data into ParishSOFT

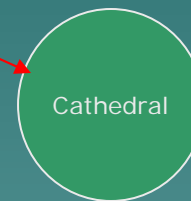


Archdiocese
AIM Server
Adds the Smith Family
from Your Parish

The Smith Family attends Mass
at the Cathedral and makes a
contribution.....

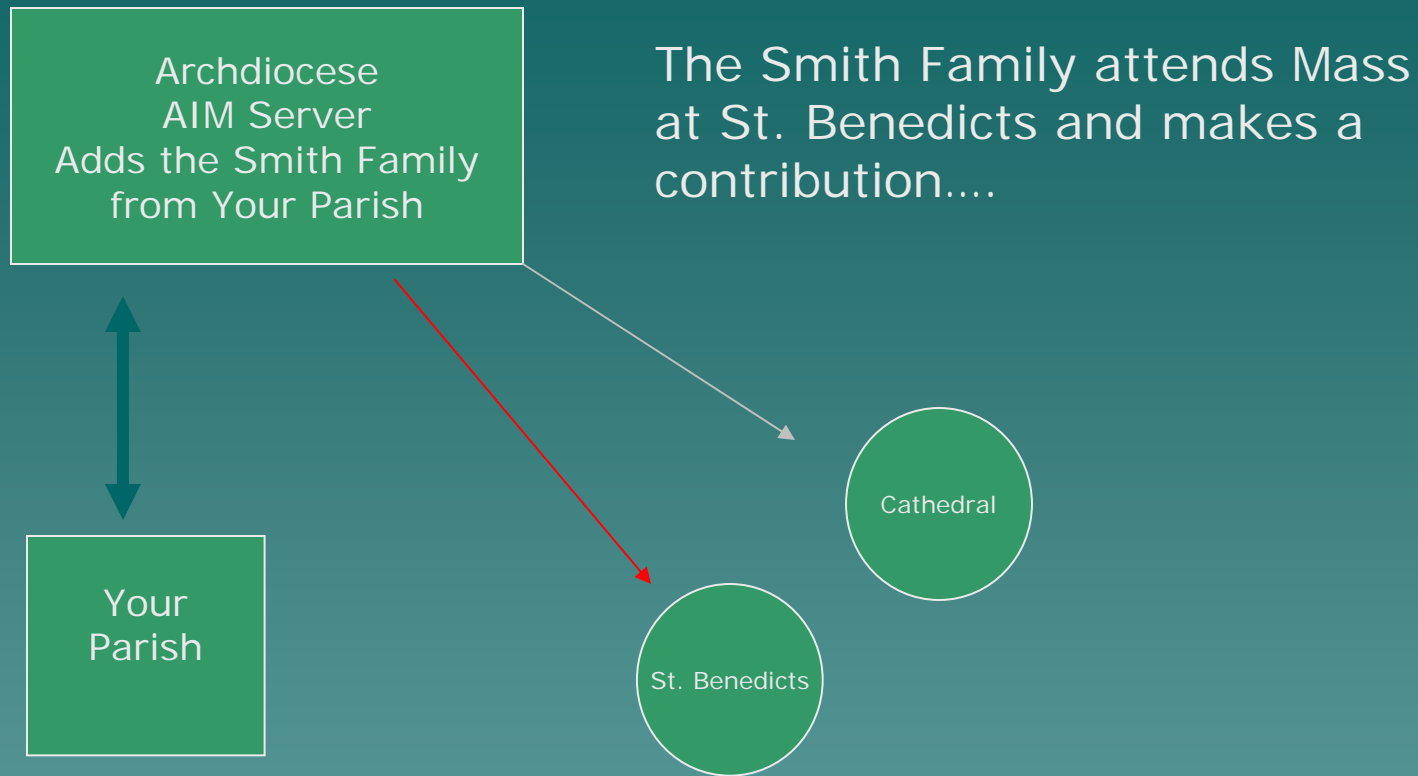


Your
Parish



...The Cathedral imports the family to post the
contribution....

...They are now connected to the
Smith Family in your database.

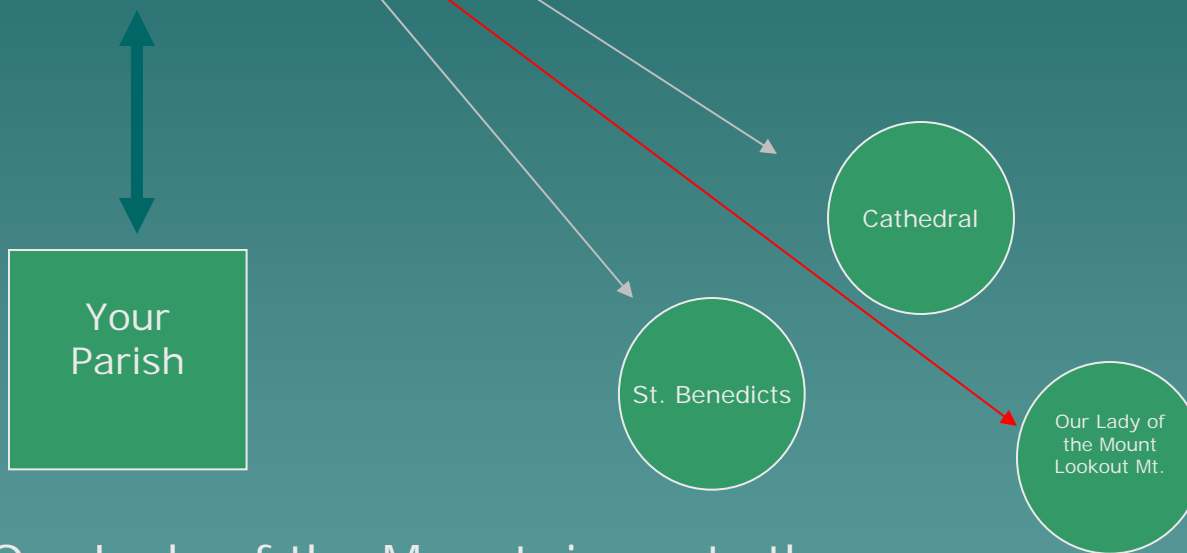


...St. Benedict's imports the family to post the contribution.

...one more link!

Archdiocese
AIM Server
Adds the Smith Family
from Your Parish

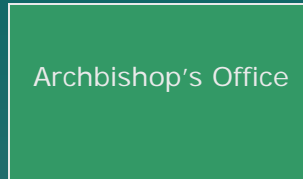
The Smith Family visits North
Georgia and contributes to Our
Lady of the Mount.....



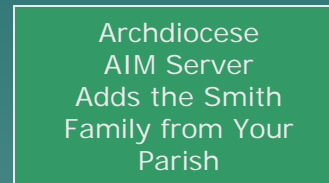
...Our Lady of the Mount imports the
family to post the contribution...

...And yet another
connection to your Smith
family is established.

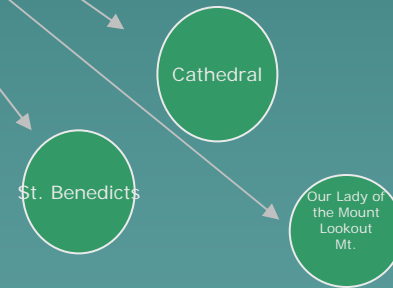
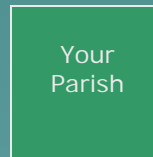
The Archbishop's office needs to submit the Kenedy Directory



...They use the info in AIM to compile the directory.

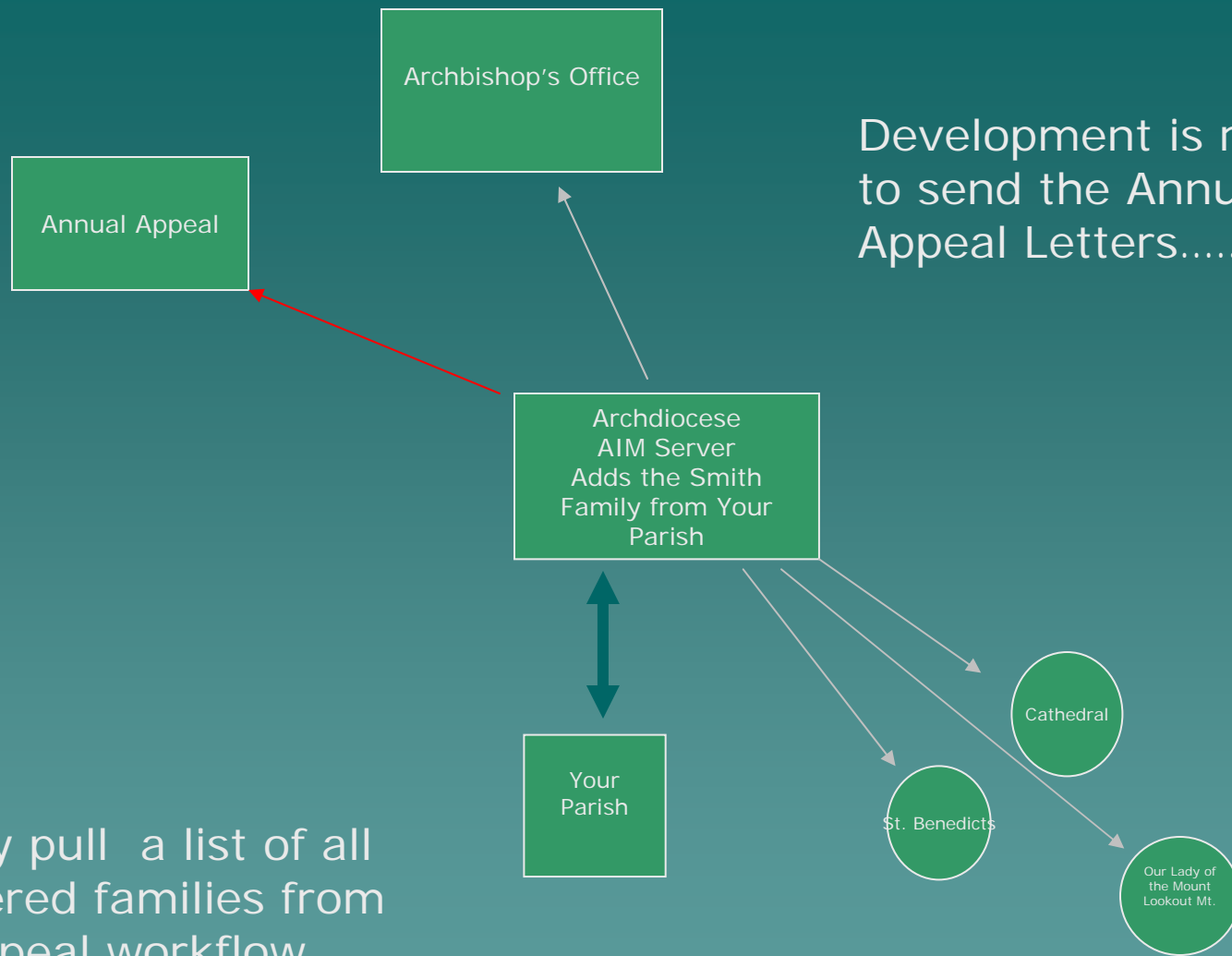


The Archbishop is preparing his Status Animarum.....

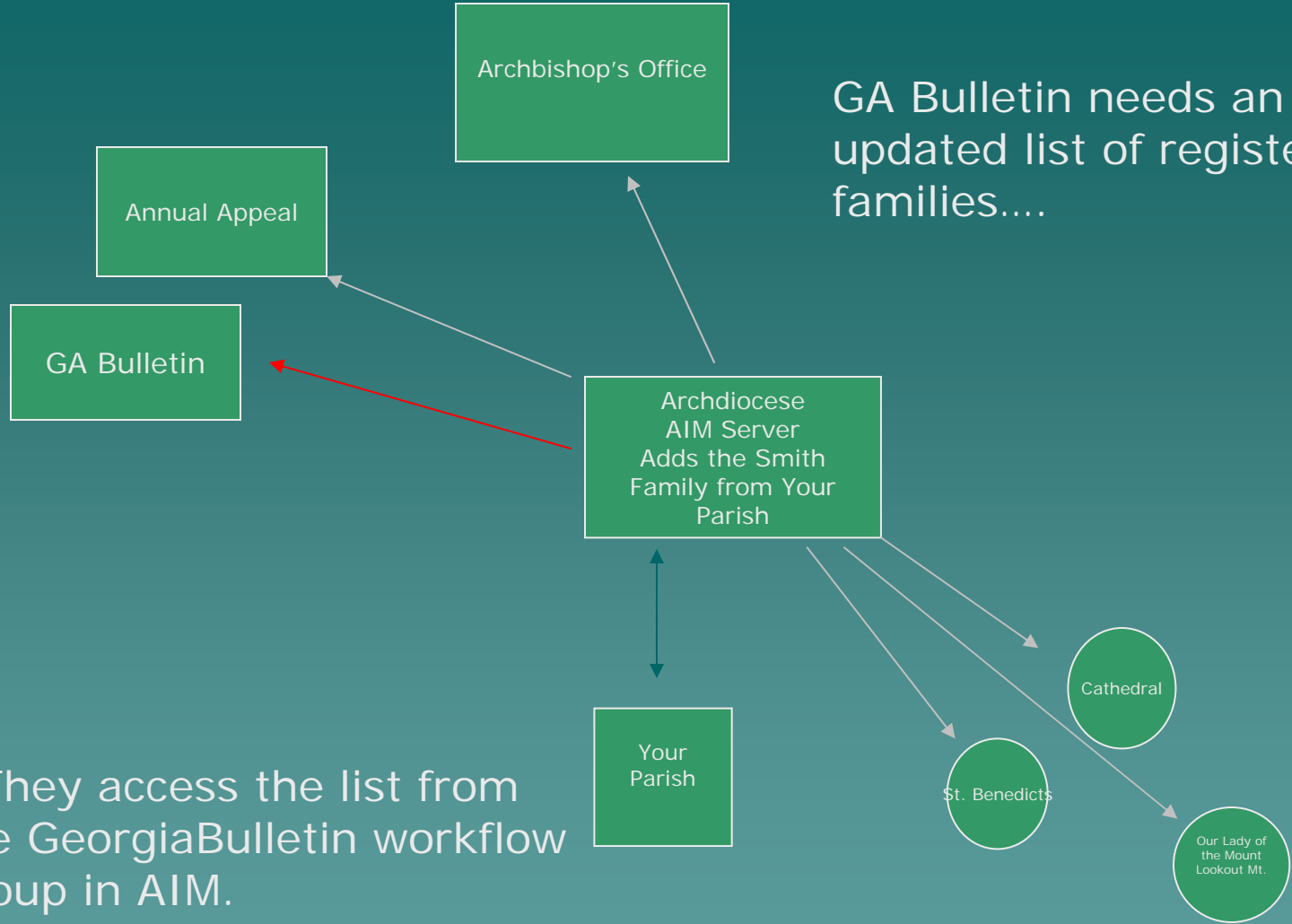


... all the data he needs has been synchronized to AIM

....They pull a list of all registered families from the Appeal workflow group.

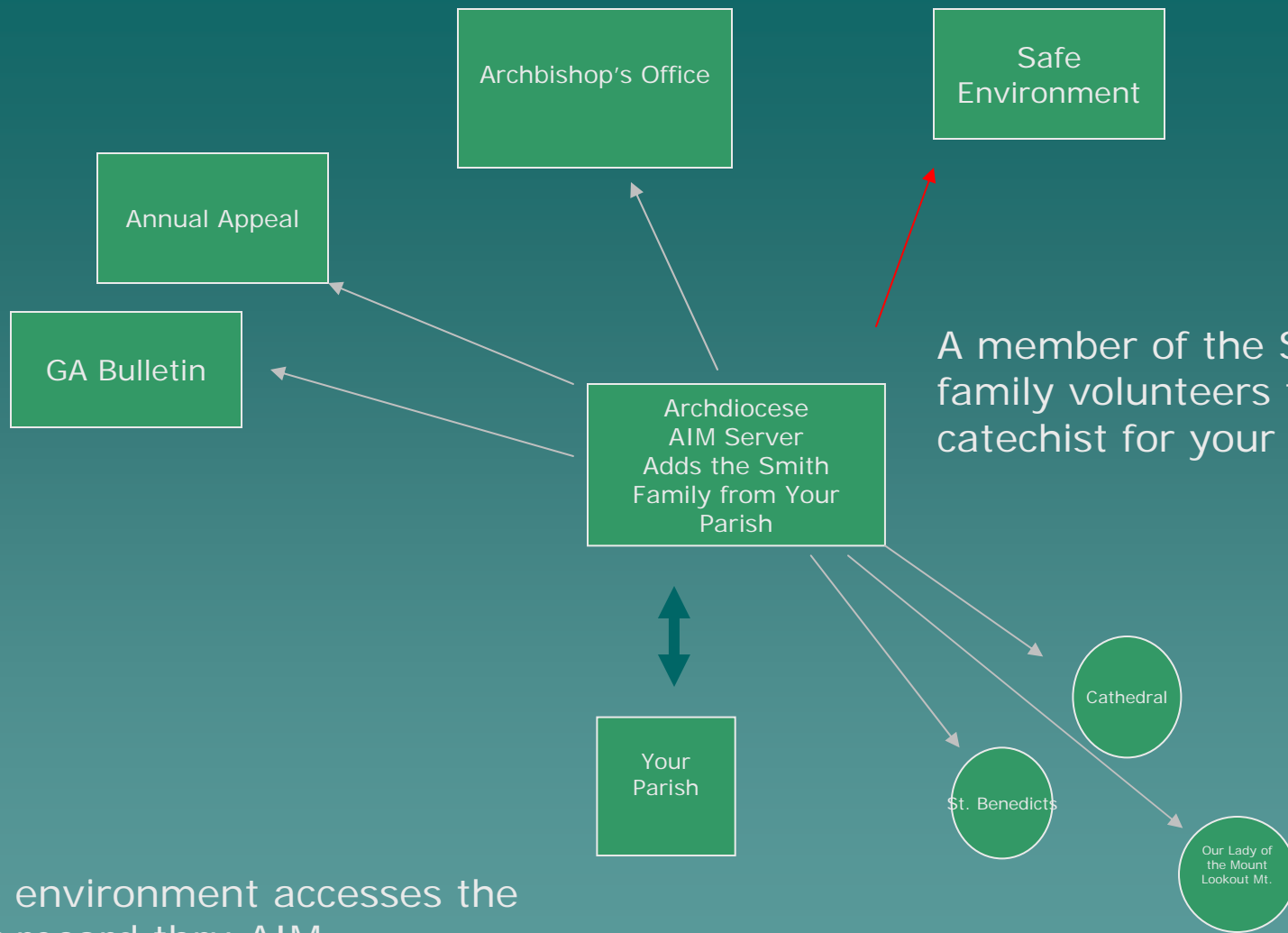


Development is ready to send the Annual Appeal Letters.....



GA Bulletin needs an updated list of registered families....

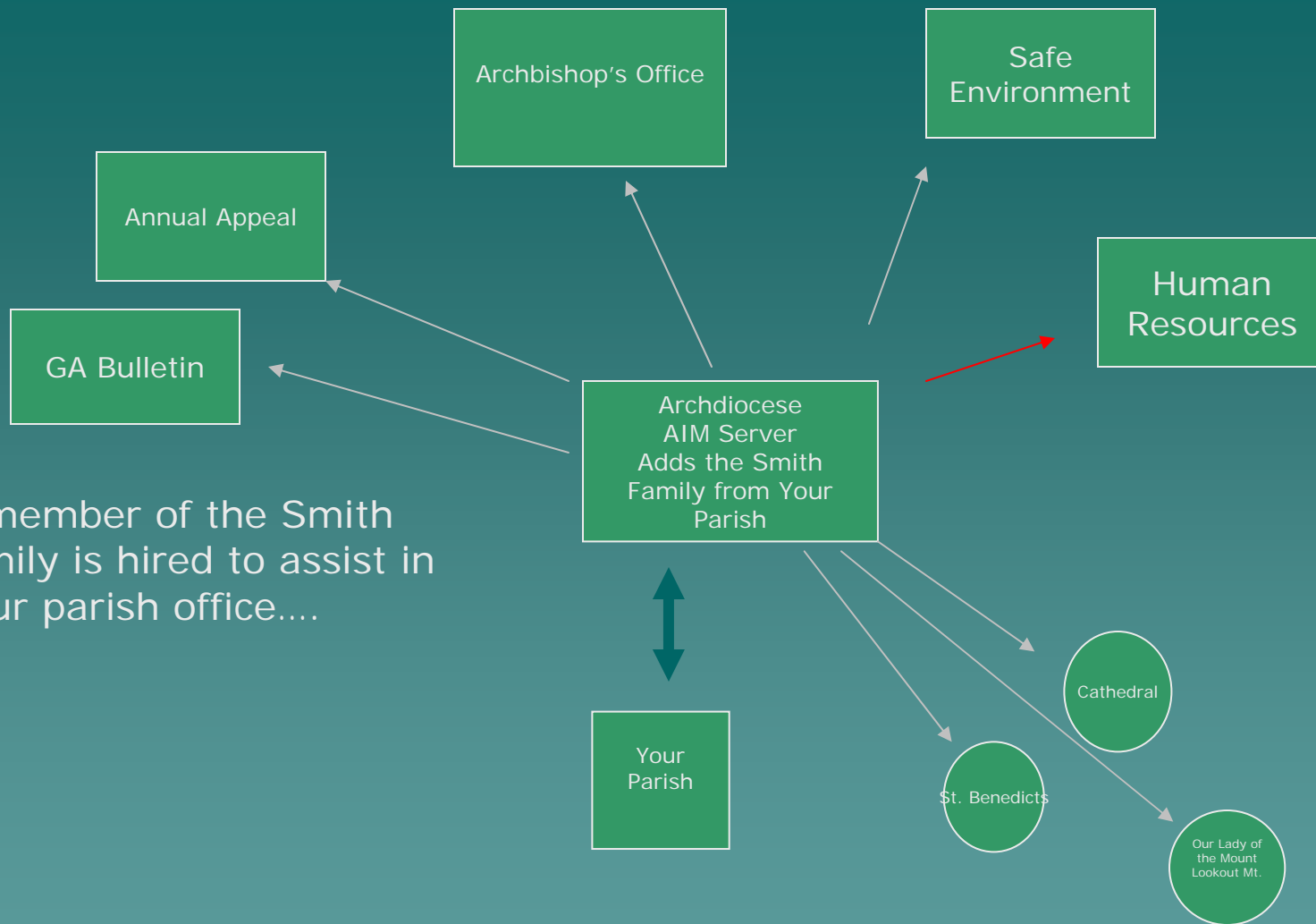
...They access the list from the GeorgiaBulletin workflow group in AIM.



A member of the Smith family volunteers to be a catechist for your parish...

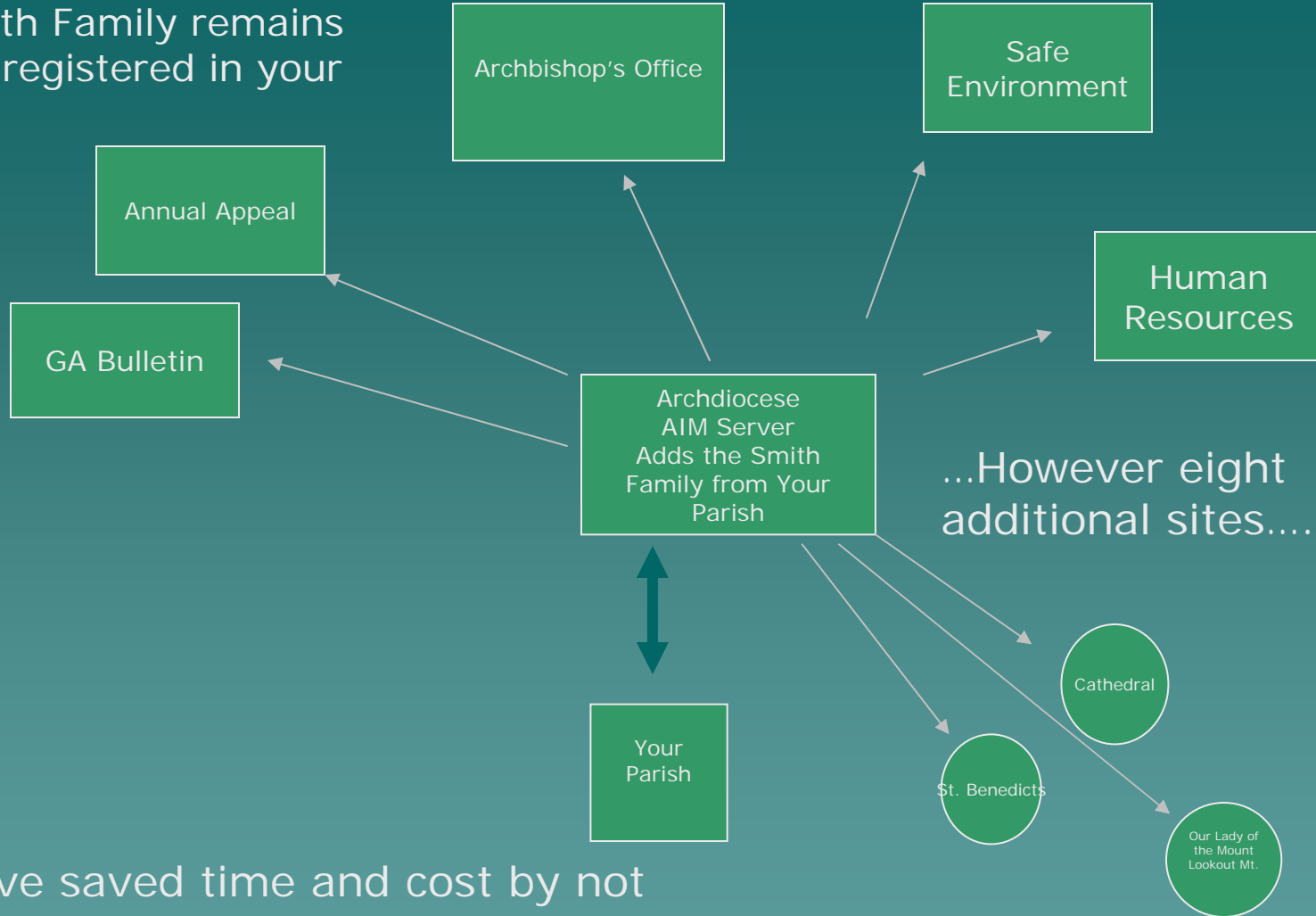
...Safe environment accesses the family record thru AIM

A member of the Smith family is hired to assist in your parish office....



...HR accesses the Member record thru AIM.

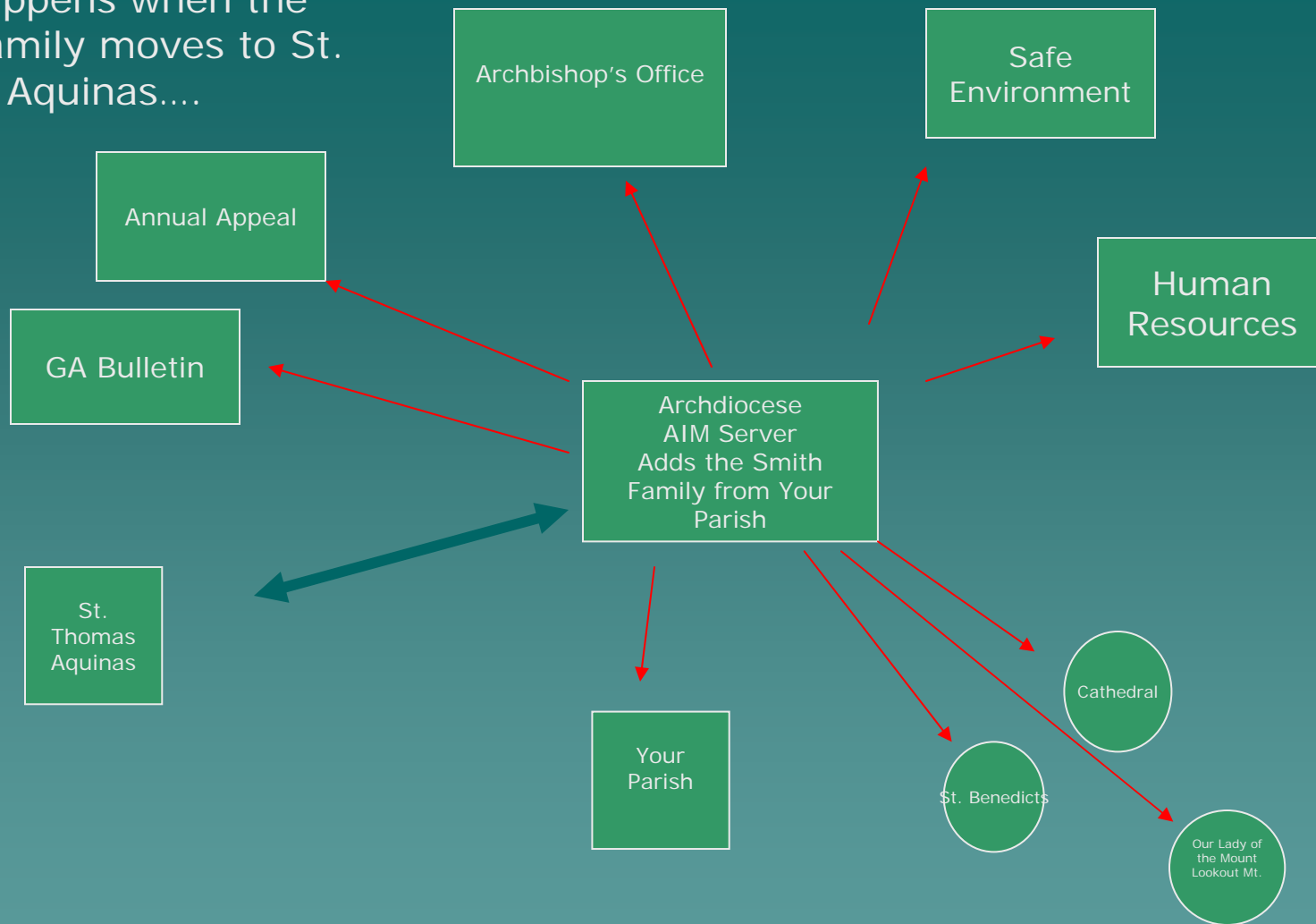
The Smith Family remains actively registered in your Parish...



...However eight additional sites...

...Have saved time and cost by not recreating the family info!

What happens when the Smith family moves to St. Thomas Aquinas...



...A message is sent to all entities connected to the Smith family with notification of the change.

Now that you have seen how the system works let's look at the standards and policies we have in place to ensure the quality of the data being sent on it's mission!

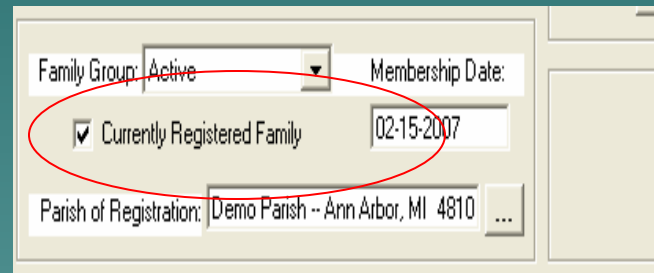
Policy

Assigning Proper Registration Status to Family and Member

A proper family status and member status combination will describe an individual's unique standing within the parish.

Standard

A Family status indicates whether or not the family is counted as part of your parish census.



The screenshot shows a software interface with the following fields:

- Family Group: Active (dropdown menu)
- Membership Date: (text field)
- Currently Registered Family (checkbox, circled in red)
- Parish of Registration: Demo Parish - Ann Arbor, MI 4810 (text field with a browse button)

There are only 2 choices in this

Registered

Non- Registered

Standard

Assigning Family Group Status to Family

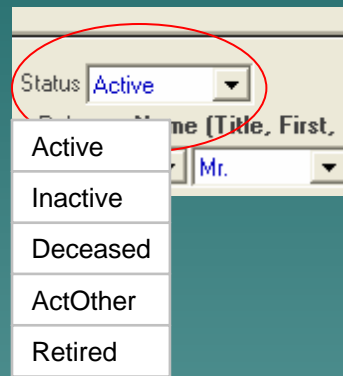
The screenshot shows a software interface with a dropdown menu on the left and a form on the right. The dropdown menu lists the following options: Active, Inactive, Staff, School Only, Clergy / Religious, Visitor, Contributor, Sacrament Only, Religious Ed Only, Moved, and School Only Family. The form on the right has a 'Family Group' dropdown menu set to 'Active', which is circled in red. Below it is a 'Membership Date' field with the value '02-15-2007'. There is also a checkbox labeled 'Currently Registered Family' which is checked. At the bottom of the form is a 'Parish of Registration' field with the value 'Demo Parish -- Ann Arbor, MI 4810' and a search button.

A proper family group assignment in conjunction with Family and member status will enhance the ability of the parish to quickly sort and filter varying levels of activity.

This is a global field and should never be added to the parish level. Adding to this field at the parish level will create a disconnect in the system.

Standard

Assigning Member Status



A screenshot of a web application interface showing a dropdown menu for member status. The dropdown is currently set to 'Active' and is circled in red. The menu options are: Active, Inactive, Deceased, ActOther, and Retired. Below the status dropdown, there is a label 'Name (Title, First, I' and a dropdown menu with 'Mr.' selected.

All Members will fall into one of five categories

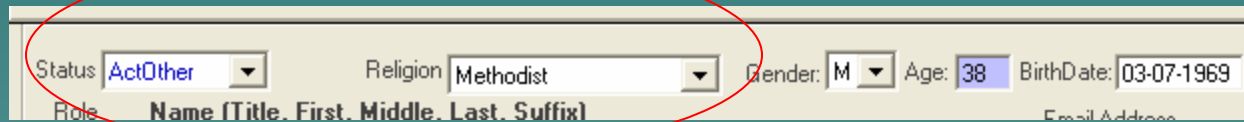
Retired is for use with Clergy/Religious only

This is a global field and should never be added to the parish level. Adding to this field at the parish level will create a disconnect in the system.

Standard

ActOther and Religion Type in Member Details

If the person is active, the system assumes that the person is Catholic. However, if the person is active in another religion then ActOther should be chosen.



A screenshot of a web form for member details. The form has a light beige background and a thin border. It contains several fields: 'Status' with a dropdown menu showing 'ActOther', 'Religion' with a dropdown menu showing 'Methodist', 'Gender' with a dropdown menu showing 'M', 'Age' with a text input field showing '38', and 'BirthDate' with a text input field showing '03-07-1969'. Below these fields, there are labels for 'Role', 'Name (Title, First, Middle, Last, Suffix)', and 'Email Address'. A red oval is drawn around the 'Status' dropdown menu.

This information affects:

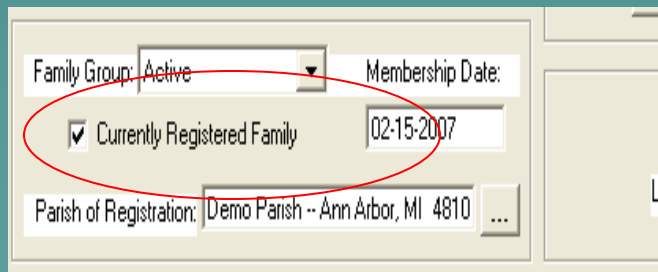
- Kenedy Directory
- Status Animarum
- Parish Statistics
- Sacraments
- Reports looking for Active Member Status

Standard

Assigning Registration Status to Family and Member

Family Status impacts:

- Pastoral Staffing
- Annual Appeal
- Kenedy Report
- Status Animarum (The **Status Animarum** report is an annual report that asks pastors to provide information about the sacramental and pastoral ministry, education, and outreach for their parish)
- Reports based on Status (Census Reports)



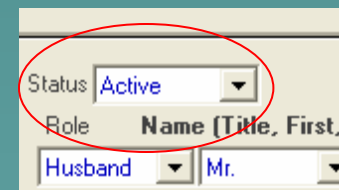
Family Group: Active Membership Date: 02-15-2007

Currently Registered Family

Parish of Registration: Demo Parish - Ann Arbor, MI 4810

Member Status Impacts:

- Kenedy Report
- Status Animarum
- SEP and HRI
- Time and Talent
- Sacraments
- Reports based on member status (Member Reports)



Status: Active

Role: Husband Name (Title, First, I): Mr.

Standard

Guide to assigning Registration Status to Family and Member

Scenario	Family Group	<input checked="" type="checkbox"/> Currently Registered	Member Status
Standard active registered family	Active	Yes	Active
Non-member, not registered, contributor	Contributor	No	Inactive
Visitor, active in other church	Visitor	No	Inactive
Clergy, religious, not registered	Clergy / religious	No	Active or Retired
Staff that is a registered parishioner anywhere in diocese.	Active	Yes	Active
Staff, unregistered non parishioner	Staff	No	Active
Non Catholic – Member of registered Family	Active	Yes	ActOther
School only	School Only	No	Family Inactive/Child Active
Inactive registered family	Inactive	Yes	Inactive
Registered family that has moved	Moved	No	Inactive
Sacrament Only Family	Sacrament Only	Yes/No	Inactive
Religious Ed family that is not registered	Religious Ed Only	No	Family Inactive/ Child or Member Active
Visitor, not active in church	Visitor	No	Inactive

Policy

Using Data Entry Standards when Adding a New Family

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.

Naming Standard



Family ID: 100	
Last Name	Shipley
First Name(s)	George and Norma
Mailing Name	Mr. and Mrs. George Shipley, Jr.

- ◆ Think of this as the only time you will every address the envelope or label.
- ◆ If you do it right - you will only have to do it once!

Naming Standard

Family ID: 100	
Last Name	Shipley
First Name(s)	George and Norma
Mailing Name	Mr. and Mrs. George Shipley, Jr.

- ◆ Never use all CAPS
- ◆ Always type out the word “and”
 - Never use an ampersand “&”
- ◆ Always build with Full Christian Names
- ◆ Never use characters such as hyphens or forward slashes to indicate a couple. 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



Naming Standard :

- ◆ Last name should be the family name (husband's).
- ◆ Never put Two family names in the Mailing Name
- ◆ Never include JR. or other suffix in the Last name field. (Add suffix in Member Screen and Mailing Name.)
- ◆ Never add # & @() in these fields.

Family ID:	100
Last Name	Shipley
First Name(s)	George and Norma
Mailing Name	Mr. and Mrs. George Shipley, Jr.

These standards affect:

- ◆ Annual Appeal Letters & Correspondence from the Archbishop
- ◆ Labels, Parish Mail, Sacramental records, Contribution Envelopes

Address Standard

Primary Address: Home Do not Send Mail

Home Mailing Other

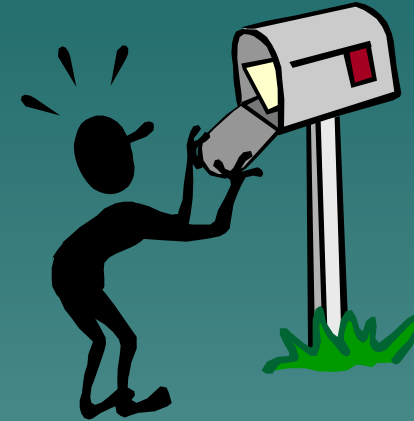
Addr: 11331 Orangewood CT Unit 1B

City: Atlanta State: GA

Zip: 30328 Area Code: 404

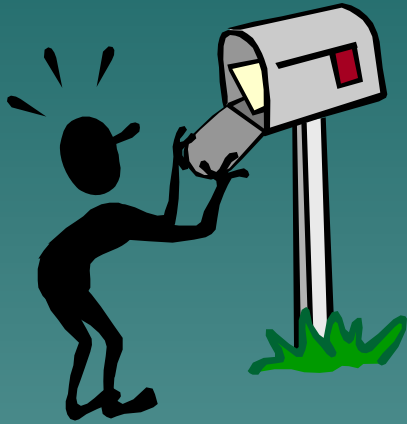
Phone: 404-359-1234

Find Postal Code



- ◆ Proper formatting of the address will ensure timely delivery
 - Apartment or Suite is added to the first line never the second.
- ◆ The post office reads the City, State, Zip line first then attempts to deliver to the location indicated on the line directly above.
- ◆ When would line 2 be used?
 - If a Rural Delivery Route is involved!

Address Standard



Primary Address: Home Do not Send Mail

Home Mailing Other

Address: 11331 Orangewood CT Unit 1B

City: Atlanta State: GA

Zip: 30328 Area Code: 404

Phone: 404-359-1234

Find Postal Code

- ◆ Proper formatting of the address will ensure cost efficiency!

Post Office Publication PUB28 indicates the acceptable abbreviations for Street (ST); Drive (DR) etc. For more information and a full list go to:

<http://www.usps.com/send/preparemailandpackages/labelsandaddressing/usingthecorrectaddress.htm>

Address Standard

Primary Address: Home Do not Send Mail

Home Mailing Other

Addr: 11331 Orangewood CT Unit 1B

City: Atlanta State: GA

Zip: 30328 Area Code: 404

Phone: 404-359-1234

Find Postal Code



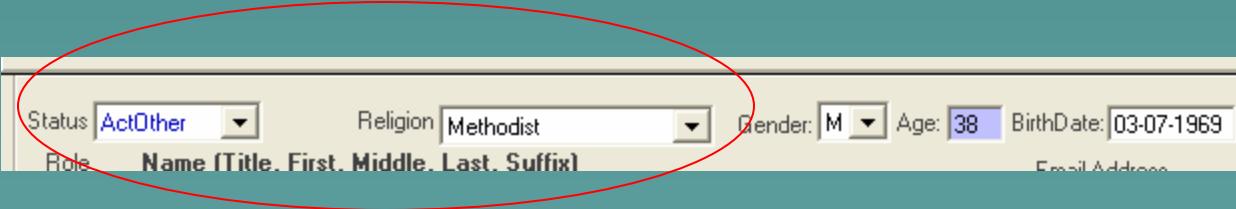
Never include “#” in the Address Line

- ◆ The post office machines do not read it correctly!

Policy

Selecting Proper Religion Type when Entering Member Details

If the person is active, the system assumes that the person is Catholic. However, if the person is active in another religion then ActOther should be chosen. When chosen and tabbed through the field a menu appears so that you may select which religion the member is active in.



A screenshot of a web form for entering member details. The form is light beige with a thin border. A red oval highlights the 'Status' and 'Religion' fields. The 'Status' field is a dropdown menu with 'ActOther' selected. The 'Religion' field is a dropdown menu with 'Methodist' selected. To the right of these are 'Gender' (M), 'Age' (38), and 'BirthDate' (03-07-1969). Below the highlighted fields, the 'Name' field is visible with the label 'Name (Title, First, Middle, Last, Suffix)'. The 'Email Address' field is partially visible on the right.

Status	ActOther	Religion	Methodist	Gender:	M	Age:	38	BirthDate:	03-07-1969
Role	Name (Title, First, Middle, Last, Suffix)							Email Address	

Standard

Religion Type - Member Details

Status: Religion: Gender: Age: BirthDate:

Name (Title, First, Middle, Last, Suffix) Email Address

Buddhist	Russian Orthodox
Catholic	Unknown
Church Of Chris	Non-Catholic
Episcopalian	Seventh-Day Adv
Greek Orthodox	Anglican
Hindu	Pentecostal
Jewish	Church of God
Lutheran	Non Catholic
Methodist	Christian
Mormon	Assembly Of God
Muslim	Christian Science
Non-Practicing	Church Of England
Nondenominational	Other
None	Unitarian
Other Christian	Congregational
Presbyterian	
Protestant	

This is a global field and should never be added to the parish level.

This information affects:

- Kenedy Directory
- Status Animarum
- Parish Statistics
- Sacraments
- Reports looking for Active Member Status

Policy

Creating an Appeal and Georgia Bulletin Workgroup

Each parish is required to place active registered families in the annual appeal workgroup and the Georgia Bulletin workgroup. The workgroups are titled "Appeal" and "GeorgiaBulletin" and should appear exactly so within the Parish database.

Standard

Appeal and Georgia Bulletin Workgroup

- ◆ Never delete the groups
 - If deleted and rebuilt the system adds a new unique ID and it makes finding the information difficult for Appeal and Bulletin
- ◆ Never Rename the groups
 - Renaming the group essentially has the same effect as deleting. Making it difficult to find the information.
- ◆ Keep the groups current
 - Add and delete families as they register or depart from your parish.

MembershipID	Env#	Lastname	Tag_Name
85	0	Adams	Henri and Carole
30	0	Anderson	Jim and Martha
3	19	Bailey	Todd and Nancy M
6	16	Eagle	Kim and Darlene
12	22	Kane	James and Patricia
71	27	Mayberry	Jeremy and Tina
39	77	Rodriguez	Daniel and Rachel
96	200	St Pierre	Thomas and Mabe
40	78	Stephens	Mark and Melissa
41	0	Stevenson	Joseph
26	4	Young	Mark

This information affects:

- Development
- Appeal Mailings
- Letters from the Archbishop
- Georgia Bulletin

Policy

Keeping Electronic Records Requirements

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**
 - Current member information must be maintained for all staff members.

- ◆ **Sacramental Detail**
 - Parishes are required to maintain complete and accurate sacramental details for all Sacraments performed in the Parish in *both* the Sacramental Register and ParishSOFT.

- ◆ **Religious Education**
 - Religious education information and history must be created and maintained for all students and class.

Standard

Staff Directory

Staff is always added directly through HRiPortal. When added into the portal the staff member is populated into the ParishSOFT staff Directory by the Portal.

HRi is depending on the family and member information being maintained correctly for:

- Background Screening
- Access rights
- Assignments



Standards

Keeping Electronic Records Requirements

Staff Directory

- ◆ Full legal Name
- ◆ Date of Birth

A screenshot of a web-based staff directory form. A red circle highlights the 'Name' and 'BirthDate' fields. The form includes the following fields: Status (Active), Gender (F), Age (36), BirthDate (12-11-1970), Role (Wife), Name (Mrs. Norma J Shipley), Email Address (NJ@LFMlighting.net), Member ID (394), Goes By (NJ), and a checkbox for Special Needs.

- ◆ Current Address
- ◆ Phone number
- ◆ Email

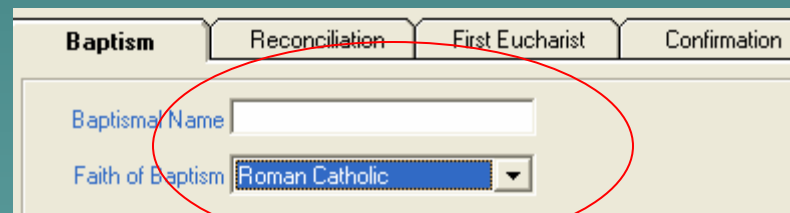
A screenshot of a web-based primary address form. A red circle highlights the address field. The form includes the following fields: Primary Address (Home), Do not Send Mail (checkbox), Address (11331 Orangewood CT Unit 1B), City (Atlanta), State (GA), Zip (30328), Area Code (404), Phone (404-359-1234), and a Find Postal Code button.

Policy

Entering Sacramental Details

Selecting Proper Faith Type

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.



The screenshot shows a software interface with four tabs: **Baptism**, Reconciliation, First Eucharist, and Confirmation. The **Baptism** tab is active. Below the tabs, there are two input fields: "Baptismal Name" (a text box) and "Faith of Baptism" (a dropdown menu). The dropdown menu is currently set to "Roman Catholic". A red oval highlights the "Faith of Baptism" dropdown menu.

Standard

Selecting Proper Faith Type when Entering Sacramental Details

Catholic	Baptism	Reconciliation	First Eucharist	Confirmation
Byzantine Catholic	Baptismal Name	<input type="text"/>		
Roman Catholic	Faith of Baptism	<input type="text" value="Roman Catholic"/>		
Ukrainian Catholic				
Christian				
Orthodox				
Greek Orthodox				
Other				

This field identifies the faith of baptism.

You would never add to this list.

This information flows through to the Status Animarum

Standard

Entering Sacramental Details

- ◆ Entering full and accurate info.
- ◆ Keeping records in a timely fashion.
- ◆ All sacraments from Jan. 1, 2005 in both ParishSOFT and Register

Miss Samantha Marie Slater
Member ID: 397 Member DUID: -397

Baptism **Completed**
Date: 03-24-2007 Prep Year:
Parish: St. Joseph Parish -- Bradenton, F ...
Celebrant: Astor, Rev. Zeb ...

Reconciliation Prep. **Completed**
Date: Prep Year:
Parish: ...

First Eucharist **Completed**
Date: Prep Year:
Parish: ...
Celebrant: ...

Confirmation **Completed**

Baptism Reconciliation First Eucharist Confirmation

Baptismal Name: Samantha Marie Slater
Faith of Baptism: Roman Catholic
Sponsors: Gregory Shipley ...
Teresea Slater ...
Witnesses: ...
 ...

Registy Volume: B12
Registy Page: 170
Registy Number: 17

General Remarks

General Member Info

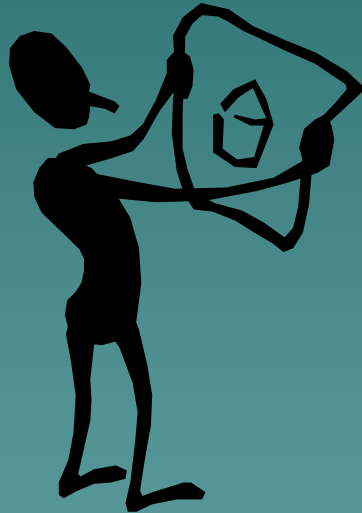
Birth Date: 02-01-2007 Age: Gender: F
Birth Place: Tampa, FL
Father: Mr. Lewis Slater
Mother: Mr. Carrie Slater
Mother's Maiden: Shipley

General Remarks

Affects:

Kenedy Report
Status Animarum

Keeping Sacramental history is what the Catholic Church does!



Think of your diligent record keeping as enabling a family to trace their history back to the house of David.

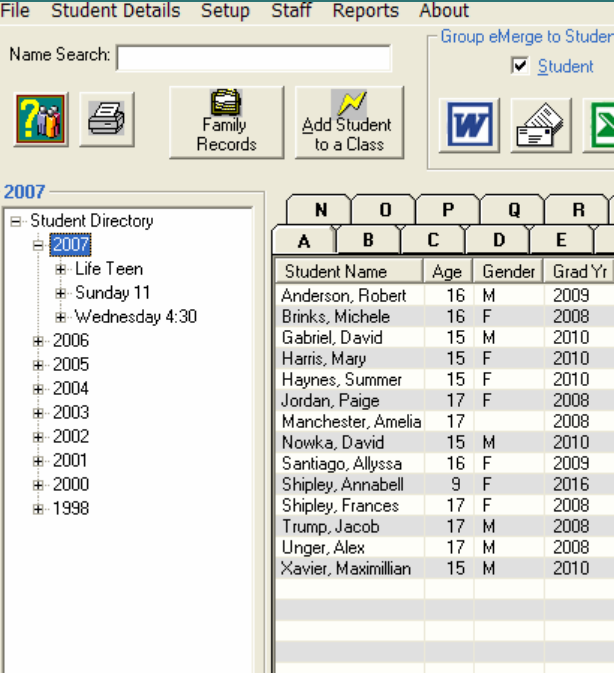
Policy

Religious Education Class Info Maintaining Classes and History for RE

Religious education information and history must be created and maintained for all students and class.

This affects:

- Status Animarum
- Department of Religious Education



	N	O	P	Q	R
A	B	C	D	E	
Student Name	Age	Gender	Grad Yr		
Anderson, Robert	16	M	2009		
Brinks, Michele	16	F	2008		
Gabriel, David	15	M	2010		
Harris, Mary	15	F	2010		
Haynes, Summer	15	F	2010		
Jordan, Paige	17	F	2008		
Manchester, Amelia	17		2008		
Nowka, David	15	M	2010		
Santiago, Allyssa	16	F	2009		
Shiple, Annabell	9	F	2016		
Shiple, Frances	17	F	2008		
Trump, Jacob	17	M	2008		
Unger, Alex	17	M	2008		
Xavier, Maximilian	15	M	2010		

Policy

Database Maintenance

Maintaining your database is essential for overall productivity

- ◆ Compact and Repair your DB weekly
- ◆ Run Database Maintenance weekly.
- ◆ Make sure Synchronization Manager is running

Rules to Live by

Never insert * (#@%&! in your data

These are access functions the system tries to do a calculation or something when it sees these characters.



Rules to Live by

Make your entry count! Be as thorough as possible use good data standards in all entries!

Everyone will thank you!



Rules to Live by

Never make your own additions to the following global tables



Family Groups Type
Member Status (Active, Inactive, Deceased, Retired)
Member Title (Mr. Mrs. Ms.)
Member Suffix (Jr. Sr. III etc.)
Member Roles (husband, wife, son, daughter)
Marriage Status
Member Religion
Faith Type
Sacraments
Pledge Payment Frequency
Pledge Gift Type
Security Profiles
Staff type

Rules to Live by

Maintain your Database Properly



Keep the data connected... so everyone receives info in a timely fashion

Rules to Live by

Follow the data standards and mind
the Policies!

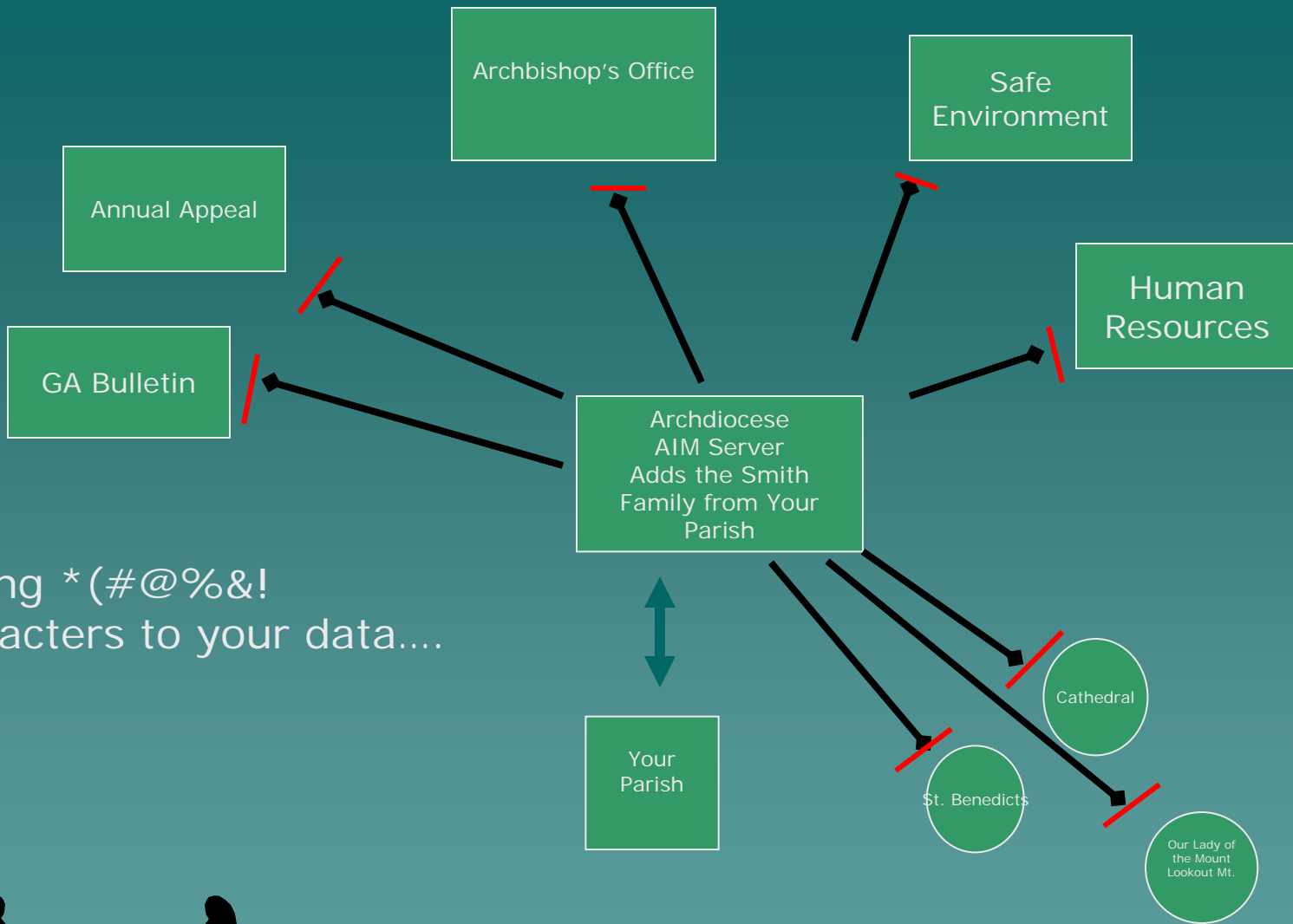
And everyone will benefit.



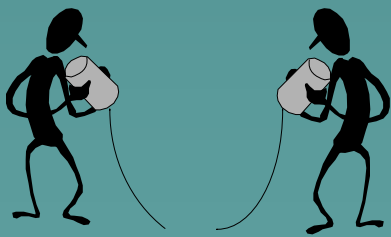
So what's the worst that can happen if I don't follow standards?



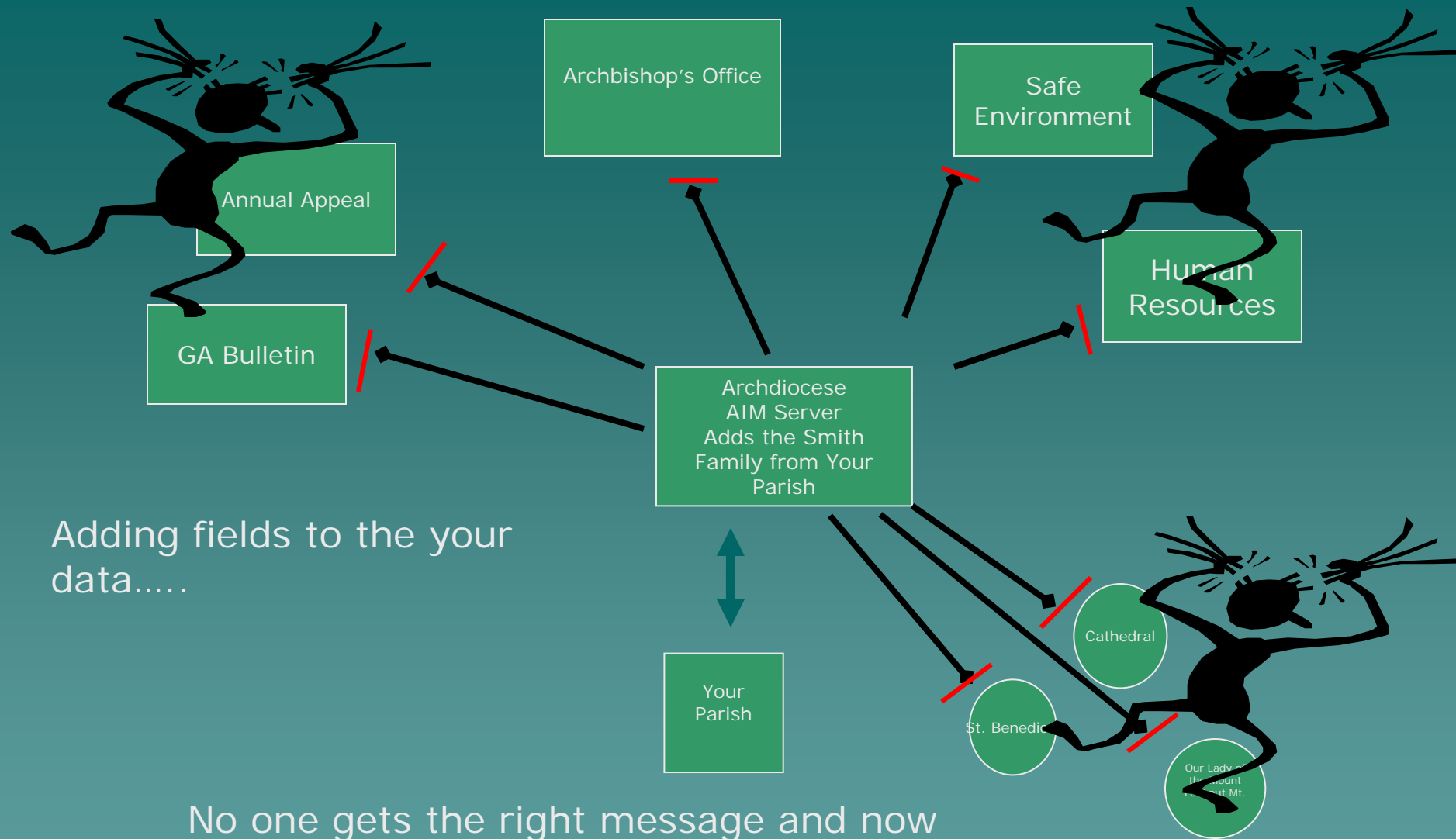
Let's look at the Smith
Family without Standards!



Adding * (#@%&! Characters to your data...

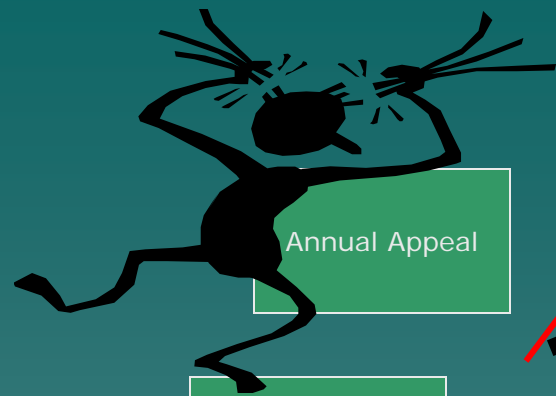


...No one gets the message!



Adding fields to the your data.....

No one gets the right message and now everyone's data is messed up and.....



Annual Appeal

GA Bulletin

Archbishop's Office

Safe Environment



Human Resources

Archdiocese AIM Server
Adds the Smith Family from Your Parish

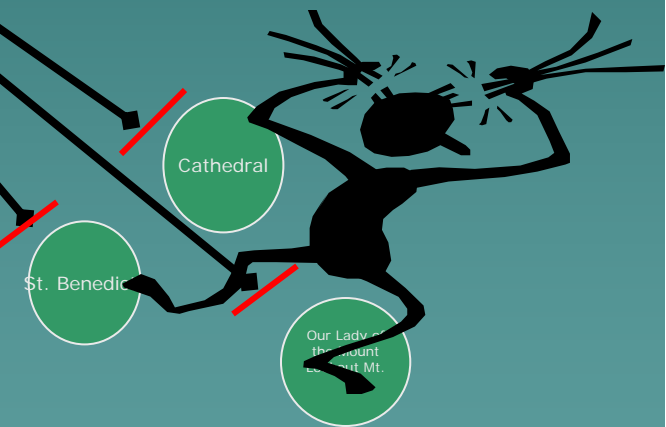
Don't follow data standards

Your Parish

Cathedral

St. Benedict

Our Lady of the Mount
L... Mt.



Everyone gets the garbage, everyone's data is messed up and.....

* (#@%&!

No one's
ParishSOFT
works
correctly!



Bless me Father, for I have added...

Manage Diocese-Wide Lookup Tables

Member Title	Member Suffix	Member Language	Ethnic Background	Position Type
Family Group	Life Event Category	Solicitation Group		
Career Type	Faith of Baptism	Member Religion	Lookup	Education Level
Most Blessed Sacrament P Global (Diocese-Wide)	Description Member Religion Lookup			
Archdiocese of Atlanta	Most Blessed Sacrament Parish	All Saints Par	anna Parish	Transfiguratio
	A.m.e.	WESLEYAN		AME
Anglican	C.o.g.i.c.	[new]		Armenian Orth
Assembly Of God	Holiness			Byzantine Rite
Baptist	Islam			Dutch Reform
Buddhist	Ocia			Fundamentali
Catholic	[new]			Jehovah Witn
Christian				Mennonite
Christian Scien				RLDS
Church Of Chris				Society Of Fri
Church Of Engla				United Church
Church of God				Unity
Congregational				Zoroastrian
Episcopalian				[new]
Greek Orthodox				

The archdiocese periodically cleans up the tables. But we highly recommend that you avoid the near occasion of sin!

So how do I get things added to fields?



Send your request via a support ticket at
<http://support.archatl.com>

On a final note
a thought or two to ponder



How do you measure up?

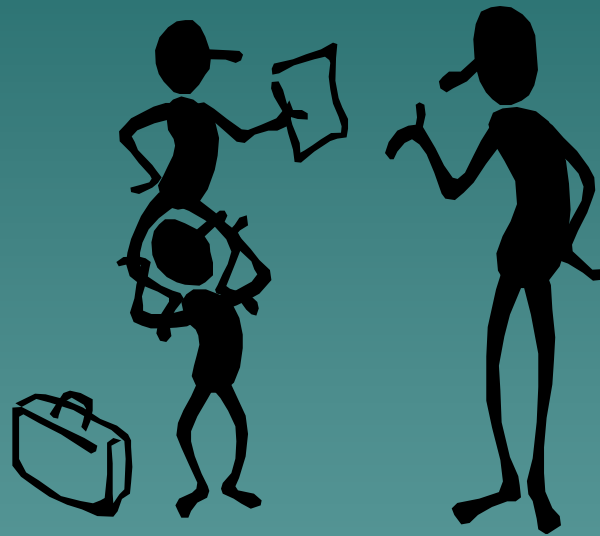


What did your parish do this year
that had an effect on your
neighbor's data?

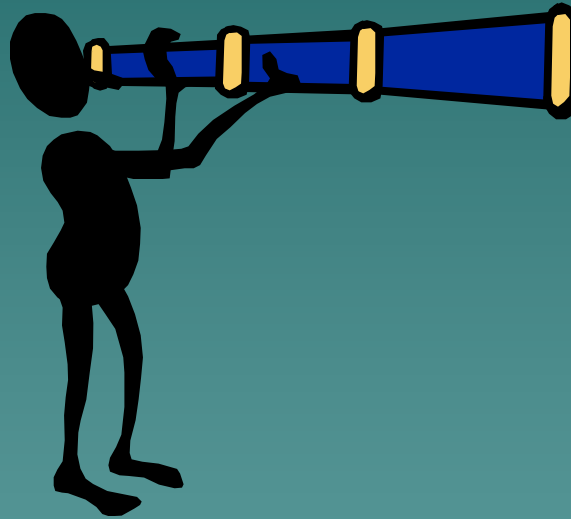


And...

What can you do now?



Questions and Answers welcome here!



Christine Heusinger
Christine Dandaraw

Development
Training