DIOCESE OF WINONA

CONNECTNOW FAMILY SUITE
STANDARD OPERATING PROCEDURES

SEPTEMBER 1, 2015

CONTENTS

INTRODUCTION

ParishSOFT is an integrated parish census data system that allows for synchronization of parish records with the diocese. The demographic, sacramental, and limited financial information inputted and managed by the parish is then synchronized at the diocesan level. The Diocese uses this information for *The Courier*, CMA Campaign Materials, Youth Events, Educational Workshops, RIF Capital Campaign, TV Mass, Respect Life mailings, and other diocesan office contacts.

This document provides parishes with the Diocese of Winona's Standard Procedures to guide in the entering of data and maintaining the quality of entries to ensure accurate information and reporting.

DATA ENTRY STANDARDS WHEN ADDING A NEW FAMILY (SOP #1)

DESCRIPTION:

This standard procedure outlines the process that a parish should do when adding a new family to the family directory **that is not registered at another parish**. 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 helps 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 the database. When doing a name search less is more. Starting with a simple last name search is recommended.

PROCEDURE DETAILS:

When adding a new family, at all times use the proper spelling and punctuation. Otherwise, mistakes cause duplicate records. **Before** entering the family name that is to be added to the database, always check to see if the family is already listed or listed incorrectly in your database. If the family is listed but spelled incorrectly, go into the family details page and correct any misspellings. Always check your entries for accuracy before leaving the record.

When adding addresses, phone numbers, and email addresses you have the option to publish or not publish them in reports. You can make a decision for your parish and make all entries the same, or you can ask individual members for their preference.

ENTERING NAMES

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. Do not use all capitals for names or appearance when sending mail merge letters or other communications to that family this violates United States Postal Services Standards.

It is critical when adding family and member names and the entry in the mailing field that both be correct for consistency and to respect the preferences of the person being entered. Therefore, the question should be asked of the individual or couple when registering them about how they would like to see their names appear on letters and mailings. Once you know their preference, the following reference list helps you properly consistently format the data that in compliance with current United States Postal Service (USPS) standards.

- For consistency, the husband or man's name is always entered first – John and Susan
- 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'.
- Do not use punctuation when abbreviating.
- Use the proper titles and suffixes supplied in the drop-down list. If you need one that is not included, please contact the diocese so it can be added to the global table for everyone to use.
- For men: Mr John Smith, Sr; Mr John Smith, Jr; Mr John Smith, III, etc.

- For women: Mrs Jane Smith MD etc.
- Do not use spaces in names beginning with Mc, Mac etc. Use: McDonald, MacDonald Not: Mc Donald, Mac Donald.
- Do not use space in hyphenated names.
  Use: Mary Owens-Jones, Not Mary Owens – Jones.

Remember to complete all name fields on both the Families and Members tabs.

Do not use all capitals for the names. Use proper upper and lower case so that merged documents look attractive

It is paramount to enter the clergy, military, non-Catholic, and civic titles correctly, as well.

ENTERING FAMILY AND MEMBER ROLES:

Everyone must be given a Role in the Member tab. incorrect use of Roles can cause problems with some of the reports.

Every family record MUST have one of the following roles for the program to work properly: Head, Husband, or Wife.

- For consistency, married couples are added as role Husband for the man and Wife for the woman.
- Head is only used for single persons. A common example would be newly separated or divorced families – the husband and wife, once separated, would become Head of their newly formed families.
- Daughter and Son are used for children, along with Foster Daughter, Foster Son, and Stepchild, based on the circumstance.
- Two single adults that live together should have separate family records, both with roles of Head. Other family member roles are based on who they are in relation to the Husband or Wife.

For instance, if the husband's mother moves in with them, her role would be Mother because she is the Mother of the husband, not Grandmother to the children. If you have questions about Roles, please call the diocese. Unknown should only be used until you can investigate and identify the proper role.

Non-Catholic or non-participating spouses – **Enter spouses that are non-Catholic** whether they participate in Church activities with the family or not as well as spouses that choose not to participate in any religious activities. All members of the family should be entered in the family record, so you are creating an accurate representation of the family. Choose each person's faith in the Status field. If the non-Catholic spouse does not participate, you can label them as Inactive and then complete the Religion field (that becomes available when you click on ActOther or Inactive).

Birth dates are crucial and allow many of the reports to run accurately, therefore, please enter a date of birth for all parishioners. If you see "????" on reports or screens, this indicates that the person involved does not have a birth date entered.

ENTERING ADDRESSES:

Please follow the addressing rules as determined by the United States Postal Service.

There are three address sections that can used for a family: Home, Mailing, and Other. Home is the defaulted address and should consist of the main physical address of the family. Mailing can be used for post office boxes, mail sent to the office address, etc.; Other is used for a second location such as Snowbird or temporary addresses. If addresses are entered into Mailing or Other, make sure the Primary Address field is set to the proper address (Mailing or Other) for mailings.

Do not use all capitals for the addresses. Use proper upper and lower case so that merged documents look attractive

If addresses are entered into Mailing or Other, make sure the Primary Address field is set to the proper address (Mailing or Other) for mailings.

STANDARDIZED ADDRESS FORMAT

A standardized address is one that is spelled out fully or is abbreviated by using the Postal Service standard abbreviations (sample and the table below).

For both mailing and street addresses, use upper and lower case – not all capitals. Post Office equipment reads mail from the bottom of the address to the top. Therefore, the most important information (the zip code) should be the last thing in the address line.

ADDRESS GUIDELINES

```
Rev James Brown OSM                                  ┌──────┐
St Paul Catholic Church                              │      │
22222 Anywhere St                                    │      │
Winona, MN 55987                                     └──────┘

                        Mr and Mrs James Smith Jr
                        2965 Anywhere Ln
                        Winona, MN 55987
```

For more information, visit USPS address guidelines http://pe.usps.gov/text/pub28/welcome.htm

STREET SUFFIX ABBREVIATIONS

For	Use	For	Use
Avenue	Ave	Pike	Pike
Boulevard	Blvd	Pine	Pine
Heights	Hts	Road	Rd

Highway	Hwy	Route	Rte
Isle	Isle	Shore	Shrs
Junction	Jct	Square	Sq
Lane	Ln	Station	Sta
Mount	Mt	Street	St
Park	Park	Terrace	Ter
Parkway	Pkwy	Trail	Trl

For the complete list visit Street Suffix Abbreviations http://pe.usps.gov/text/pub28/28apc_002.htm

ENTERING EMAIL ADDRESSES

Because of the ease and widespread use of electronic communications, it is imperative to include email addresses for both family records and member records.

Using email as your first choice of communication assists in lowering postage costs and keeping additional information updated. People do not change their email address when they move.

Most people have multiple email addresses; therefore when adding a new family or member ask

- What email to use for family communications
- Which email to use for individual member communications.
- Do you want only electronic communications
- Do you want only paper communications
- Is it okay to show this information on reports

TYPES OF EMAILS

FAMILY RECORD EMAIL
This email address is for the family.

MEMBER RECORD EMAIL
This email address is for an individual family member. Each member can have a unique email address.

This field shares data with the Email Address field on the Assignment/Position Details screen. A change on one screen carries over to the other screen.

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 describe an individual's unique standing within the parish.

PROCEDURE DETAILS:

The following scenario chart lists how members should be represented in the parish. To ensure that the proper family and member status is used. Complete the Family Group, Currently Registered Family, and Member Status fields in the manner which is described in the table below, based on their particular scenario. 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.

SCENARIO CHART

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 another church	Visitor	No	Inactive
4. Registered family that has moved away	Moved	No	Inactive
5. Clergy, religious, registered, Active	Clergy / religious	Yes	Active
6. Clergy, religious, not registered, Active	Clergy / religious	No	Active
7. Clergy, religious, inactive	Clergy / religious	No	Inactive
8. Staff, registered parishioner	Active	Yes	Active
9. Staff, not registered	Staff	No	Inactive
10. Non-Catholic, member of registered Family	Active	Yes	Active Other
11. School only	School Only	No, (unless they are required to register to attend)	Student: Active ---------------------- Rest of family: Inactive
12. Registered Family, no longer Active	Inactive	No	Inactive
13. Sacrament Only Family	Sacrament Only	No	Inactive

14. Religious Ed Only Family	Religious Ed Only	No, (unless they are required to register to attend)	Student: Active ----------------------- Rest of family: Inactive
15. Deceased (Married)	Stays what it was would	Stays what it was	Change to Deceased and Must enter a Date of Death Must Change Spouses Matrimony Details Status to Widowed
16. Deceased (Single)	Inactive	No	Change to Deceased

FAMILIES REGISTERED AT A DIFFERENT PARISH (SOP #3)

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is adding a new family and ConnectNow identifies as already registered at another parish. When a new family is added into a parish's database, the system asks you to perform an automatic look-up in the diocesan family directory to determine if that family is already registered at another parish.

PROCEDURE DETAILS:

When adding a family into the parish database, do a name search to see if that family appears in another parish's database. It is possible at this point to find the family in the list of search results. To avoid a duplication of a record, it is critical to do an accurate name search before entering a family.

A parish may "import" a family from another parish into their database, without registering them (see SOP #4) for the purposes of:
- Posting contributions (see SOP # 8)
- Sending contribution envelopes (see SOP # 8)

Only the parish of registration can modify family and member detail information. All updates to this information must be sent to the parish of registration for addition or deletion.

Example: A student is entered into your parish's religious education class for Confirmation preparation, but their family is registered at another parish (this may frequently happen in cluster parish situations). Once syncing has begun, the parish of the religious education class can "import" the family into their database and code them based on #PS-4. Once the child is Confirmed, this parish is to send the sacramental information to the parish of registration to update.

If the family wants to change registrations, simply enter a checkmark in the Currently Registered Family box on the Family Information page. By doing so, ConnectNow unregisters them at the parish they are currently registered. This process occurs once the syncing has been established.

Please be sure to contact the parish the parishioner was originally at to let them know that the parishioner is no longer in their parish.

IMPORTING (MOVING) FAMILY MEMBERS (SOP #4)

DESCRIPTION:

This standard procedure outlines the process that should be followed when moving a member from one family to another.

PROCEDURE DETAILS:

There are situations where one family member becomes part of another family. The process to move members out of one family record and into another is called Importing.

To import a member, please refer to page 1 of the Frequently Asked Questions.

The financial giving record stays with the old family record because donations are not recorded by individual member.

DESCRIPTION:

This standard procedure outlines the process that should be followed when a couple is divorced or separated.

PROCEDURE DETAILS:

There are situations where husband and wife become divorced or separated. The original family record should be split into two records. (See Frequently Asked Questions on page 4) The following scenario chart lists how to handle a particular situation.

If children are involved, they should only be listed under one family group. The question should be asked of the members which parent is the custodial parent. If joint custodians, the question asked should be, under which parent's family profile the child(ren) should stay.

Scenario	Family Record	Family Workgroups	Children's Member Record
Divorced/Separated with children. One parent leaving parish	Create a new family record for the spouse that is leaving and import their member record out of the original family record into the new single family record.	If this spouse wishes to continue to receive communications from you about their children's activities at the parish add this family record to your Divorced Parents workgroup.	Children should be listed under the family record requested by the parents.
Divorced/Separated with children. One parent leaving parish	Create a new family record for the spouse's record that does not contain the children and import their member record out of the original family record into the new single family record.	If this spouse wishes to continue to receive communications from you about their children's activities at the parish add this family record to your Divorced Parents workgroup.	Children should be listed under the family record request by the parents.
Divorced/Separated with no children. One parent leaving parish	Create a new family record for the spouse that is leaving and import their member record out of the original family record into the new single family record.	NA	NA
Divorced/Separated with no children. Both staying at your parish	Create a new family record for the spouse that is moving to a new address and import their member record out of the original family record into the new single family record.	Review your family workgroups to see if this new family record should be added to any of the workgroups they were previously a part of when in their combined family record.	NA

COMMUNICATIONS WITH DIVORCED/SEPARATED PARENTS

There are situations when you need to maintain contact with both parents after a divorce or separation. Creating a Work Group for divorced parents is the best way to handle this situation. The work group should be created for the parent that does not have the children listed in their family group. A separate workgroup allows for quick identification and communication of information regarding the couple's children.

SELECTING PROPER FAITH TYPE WHEN ENTERING SACRAMENT DETAILS (SOP #6)

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 ConnectNow. 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, and the default in the Faith of Baptism field is Catholic. On the main Member tab, if the individual is designated as ActOther, a field appears so that you may select that person's religion. 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 faith.

PROCEDURE DETAILS:

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 shows 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 might leave the religion as Catholic; however, if the person was baptized in a Baptist church, then the faith type would need to be changed to Baptist. Use the choices that are available in the drop-down box; only use Christian or Other if no other specific choice applies.

SACRAMENTS (SOP #7)

DESCRIPTION:

This standard procedure outlines the process that should be followed when entering information regarding sacraments for members.

PROCEDURE DETAILS:

Parishes are required to maintain complete and accurate sacramental details performed in the parish in the paper Sacramental Register and to keep the Register current based on changes as they occur. Entries should always be made promptly in the Register.

WHAT TO ENTER

Specific information for reporting and certificate purposes must be entered into ConnectNow; however, not all data in the Register is added to ConnectNow. These electronic ConnectNow entries DO NOT replace the physical Sacramental Register. As with Register entries, ConnectNow entries must be made promptly for future reporting purposes.

No information marked "confidential" in the Sacramental Register should ever be entered into ConnectNow, nor any reference to, or information about, adoptions.

Do not share any sacramental history or records with anyone other than the person who received the sacrament, the priest, the guardian, or a parish/diocesan representative. If your parish has any questions about documenting sacraments, canonical questions, or the paper copy Sacramental Register, please contact the diocese.

Entering historical sacramental details for members is strongly encouraged.

ADOPTIONS

Adoptions are very complex and extremely confidential. The parish must follow the criteria set by the USCCB for registering baptisms of adopted children. No notes, identification, or comments about adoption should exist in ConnectNow, regardless of the reason. When adoptions are involved, please follow the requirements for entering information properly into the paper copy Sacramental Register.

SACRAMENTAL REGISTER

Remember, the hard copy Sacramental Register is for parishes to document sacraments performed at that parish. For easy cross-referencing in ConnectNow always complete the Registry Volume, Registry Page, and Registry Number fields. (Note: manual cross-referencing must happen when any certificates are created from ConnectNow.)

Required fields to complete are:
- **Matrimony:** Completed, Status, Annulment field, Maiden Name, Spouse, the Canonical, Former Marriage, Mixed Religion, and Disparity of Cult fields, Date, Parish, Celebrant, Best Man, and Maid of Honor in both spouse's records.

- **Funeral:** Completed, Date of Death, Next of Kin, Funeral Celebrant, and Cemetery Name. You must complete the Date of Death. Don't forget to change the family and member status also.
- **Baptism:** Completed, Date, Parish, Celebrant, Faith of Baptism, and Sponsors.
- **RCIA:** Completed, Date, Prep Year (if known), Place, and Celebrant. If an RCIA is complete there should be information listed in the Baptism fields, as well.
- **Reconciliation Prep:** Completed, Date, Prep Year (if known), and Parish. This information is used only for religious education tracking purposes – see the "Important information about certificates" section in this SOP.
- **First Eucharist:** First, middle, and last Name, father and mother's name, baptism information, Completed, Date of First Eucharist, Prep Year (if known), Parish, and Celebrant.
- **Confirmation:** Completed, First, middle, and last name, Prep Year (if known), Parish, and Celebrant.
- **Holy Orders:** Completed, Date, Place, and Celebrant on each tab and all fields on the Diaconate tab except Laicization Date.
- **Religious Profession:** Completed, Place, Celebrant, and Religious Order.
- **General tab:** (not a sacrament but within the sacrament screen used for creating certificate information) Birth Date – age calculates as you tab out of the field, Father and Mother's Name, Birthplace, and Gender.

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 full and accurate notations on the reverse side.

Parishes should not delete any sacramental history from individual records in the Sacramental Register or ConnectNow; however, parishes should NOT enter confidential or inappropriate data from the Sacramental Register into ConnectNow. If confidential or inappropriate information has been entered into ConnectNow, it must be deleted.

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, above).

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.

OFFERING AND PLEDGES

OFFERTORY AND CONTRIBUTION ENTRY (SOP #8)

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is entering offertory information into ConnectNow.

PROCEDURE DETAILS:

All deposits should be entered using the batch function with a figure entered into the Declining Batch field. The batch function was created by ParishSOFT as a mechanism for accuracy when entering multiple checks. Do not post checks to family or member records outside of batching and using the Declining Batch field.

The posting date of the batch should be tied to the date of receiving the collection, and it is highly recommended that deposits match the entire amount of the collection baskets. Please see page 6 of the Frequently Asked Questions on how to match deposits with the count sheets.

It may occur that a family submits one payment of which portions are designated for multiple Funds. You can enter portions of payments to as many different funds as necessary within the same batch. An example of split payments can be found on page 12 of the ConnectNow Family Suite training manual. Make sure that you note the check number on both funds. As you begin entering the next check, the Fund field automatically returns you to the Fund designated in the Chart of Accounts Fund field on the top left of the screen. The batch total and tape match the Contribution Detail Summary Report. All three totals agree; however, the funds are detailed individually on the report.

Every financial transaction requires a physical audit trail that supports and explains it. Therefore, the diocese has recommended the closing of all batches when entry is complete (via the Batch Processing, Close Batch command). Closed batches cannot be altered in any way and requires adjustment postings to be applied if they need to be changed (for returned checks, incorrect postings, etc). These adjustment postings create audit trails explaining the change(s).

To correct a posting to a closed batch and to handle NSF or other returned checks, please see page 5 of the Frequently Asked Questions on how to make corrections when a batch is closed. When the adjustment batch is closed, print a batch detail report (Batch Processing, View Batch List, click on the batch, and click Print Posted Contributions for Selected Batch button). Attach any correction documentation to this report to complete the audit trail for these adjustments. Parishes should not delete any transactional history from family or individual records.

When posting check payments, it is recommended to record all check numbers.

- All deposits must be associated with a family/member. To post non-member checks or cash, create a family named Loose Cash and use it when posting the loose change or check contributions – label it Not Registered or Inactive. You can create Loose Cash and Loose Checks if you would like them separated. This can also be found on page 6 of the Frequently Asked Questions.
- When visitors from out-of-state submit checks, they are to be copied and posted to Loose Cash – the check number and contributor's name must be entered in the memo field.

ADDING AND EDITING FUNDS (SOP # 9)

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is adding or editing funds within the Offering Module of ConnectNow.

PROCEDURE DETAILS:

- All parish offertory income is entered into ConnectNow, such as weekly envelopes, loose contributions, building maintenance collections, Diocesan, and National collections, plus Religious Ed fee etc.

- Only the pastor or person responsible for recording the parish finances is authorized to decide on adding a new Fund.
  - Please reference the Chart of Accounts (below) to set up new funds.

Diocese of Winona Funds

COA ID	Account	Description
1	8-00	Offertory
2	10-00	Holy Day
3	10-01	All Saints
4	10-02	All Souls
5	10-03	Ascension
6	10-04	Ash Wednesday
7	10-05	Assumption of Mary
8	10-06	Holy Thursday
9	10-07	Immaculate Conception
10	10-08	Mary Mother of God
11	10-09	Palm Sunday
12	10-10	Thanksgiving
13	10-11	Envelope Loose
14	10-12	Father's Day
15	10-13	Mothers Day
16	10-14	Sacrificial Giving
17	10-15	Christmas
18	10-16	Easter
20	12-00	Misc Parish Collection
21	13-00	Christmas Flowers
22	13-01	Christmas Memorial

23	13-02	Easter Flowers
	5-00	Adult Support
	5-01	Stock Contribution
	15-00	Diocesan Collections
	15-01	Latin America
	15-02	Catholic Communications
	15-03	Aid Church in Eastern and Central Europe
	15-04	Rice Bowl
	15-05	Catholic Relief Services
	15-06	Holy Land
	15-07	Catholic Charities
	15-08	Peter's Pence
	15-09	Home Mission
	15-10	Black / Native American
	15-11	Propagation of Faith
	15-12	Campaign for Human Development
	15-13	Retirement Fund for Religious
	15-14	Catholic University
	15-15	Archdiocese for the Military Service
	15-16	Pastoral Solidarity Fund for the Church in Africa
	15-17	Missionary Cooperative Plan
	15-18	Natural Disaster Assistance
	20-00	Memorial
	25-00	Building/Maintenance
	25-01	Utilities
	30-00	Religious Education
	35-00	Courier
	40-00	Charity
	45-00	Cemetery Care
	50-00	Catholic Ministries Appeal
	55-00	Rooted in Faith
	60-00	Seminarian Burse
	65-00	Newman Center - Winona
	70-00	Newman Center - Mankato
	75-00	IHM Seminary

STAFF

SETTING UP AND MAINTAINING STAFF DIRECTORY INFORMATION (SOP #10)

DESCRIPTION:

This standard procedure describes the process that should be followed when a parish is setting up the Staff section while in Family Directory. This procedure also applies to when new staff members join and when staff members leave. It is imperative for parishes to keep their staff list current and accurate.

PROCEDURE DETAILS:

ADDING STAFF AND CONNECTNOW ACCESS

- Add all staff members (whether they are parishioners or not) into the staff directory.
  - Choose a Staff Type/Position. This field is prefilled with choices approved by the diocese. If your parish needs an additional job title, contact the diocese.
  - Complete all the Name fields.
  - Once someone is setup an e-mail will be sent to them with the password to login.
  - Staff should always log in under their username and not share with anyone else.
  - All volunteers that have access to ConnectNow must be added.
  - The Parish Administration check box allows a staff person to change permissions for all staff. This choice should only be given to the very few persons authorized to change permissions.
  - After the individual is added to the staff list, the system administrator must then select the correct access permissions for that user on the Access Rights screen. Again, the Parish Administrator box should only be used for a select few staff members who are authorized to change permissions for everyone.
  - When selecting Access Rights for each staff position always provide the fewest permissions needed for that person to do their job. In other words, don't give more permissions and access rights than the person needs to get their job done.
  - System Admin is for initial setup and ParishSOFT use only and should never be used by any parish staff, which also means that no staff email is to be added to the Staff Details page for either one.

REMOVING STAFF ACCESS

- When a staff member leaves employment, put a date in the End Date to disable access. If they return to employment in your parish or another one in the diocese they can be reinstated with new permissions.
- Parishes should not delete any historical information from family or member records. Therefore, limit the number of staffs who are given this permission, Delete, in Access Rights.
- The first responsibility for managing permissions, access rights, and identities belongs to the Pastor since he is the supervisor for all parish staff.

Adding and Removing staff can also be found on page 1 of the Frequently Asked Questions.

CONFIGURING TABLES AND PERFORMING TABLE SET-UP ACTIVITIES (SOP #11)

DESCRIPTION:

This standard procedure outlines the process that should be followed when a parish is performing the initial ConnectNow set-up. There are certain look-up tables that have been configured specifically for overall diocesan needs that cannot be altered. Some of the look-up tables are modifiable based on the parish's specific needs.

LOOKUP TABLES THAT CAN BE CHANGED BY PARISHES

- o Schools
- o Celebrants

They can only be revised by the Parish System Administrators in the parish.

LOOKUP TABLES THAT CAN NOT BE CHANGED BY PARISHES

- The following tables and areas should NOT be altered in any way. If you feel that there should be a modification to any of these tables, please contact the ParishSOFT helpdesk so that the modification can be discussed and if implemented, uniformly applied to all parishes.
  - o Staff type (pre sync) (post sync only the diocese can change Positions)
  - o Member Titles
  - o Career Type
  - o Faith of Baptism
  - o Family Group
  - o Religions
  - o Member Suffix
  - o Ethnicity
  - o Education
  - o Languages