

Best Practice Procedure of ParishSOFT Software

Note: The general instructions for how to input the sacrament data into the program can be found in the Help link at the top of the website page. The instruction found here are only meant to show how the Diocese of San Bernardino wants information to be input.

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Reasons to Start doing Sacramental Input into ParishSOFT

The sacramental books are where the official records of the sacraments are recorded. These books should be kept in a safe place according to the guidelines given in the “**Policies and Procedures for Parish Sacramental Registers**”. As part of keeping these records safe and secure the Archives office has scanned these books so that a copy of them can reside in archives. However, since these scans do not update as additions or corrections are made the ParishSOFT software can be used to backup these records.

At the end of each fiscal year the data for the Status Animarum and OCD need to be collected. It has been set up so that if you collect the data for the Status Animarum first, the data from that can be mathematically manipulated to then give you the data easily you need for the OCD. If you only put the sacraments into the registries, then you must go back and count the records in the registries. If you have the data in the ParishSOFT program correctly you can run a report or a query and get the data, you need.

Process on How to Get Started

The first step in starting to input the sacraments into the ParishSOFT program is creating a goal that is practical. We suggest having a starting date that you are going to start inputting all the sacraments performed from that date forward and if you have not started already that date should be in the present. For example, let’s say that today’s date is Wednesday 2-1-12. We should have the goal that every sacrament performed starting on 2-3-12 will be recorded in the ParishSOFT program. So that means come Monday any Marriages, Baptisms, First Communion and Confirmations should be then recorded into the ParishSOFT program. Then as you get comfortable putting in these current records and can keep up with them then you can start putting in the ones in the past working backwards. This would mean any on 1-31-12 then on 30 and 29... Then after some time you would start going through 2011 then 2010 and so on.

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General Instructions for Sacramental Input

Note: The “Policies and Procedures for Parish Sacramental Registers” document can be found at the following address in both English and Spanish:

<https://dioceseofsb.wixsite.com/archivesoffice/projects-minimalist>

This document is referenced at various points for clarity on how data should be input. Please refer to that document for clarity on how to fill in the data to the ParishSOFT software as the same logic also applies to the Sacramental Registry book. If you have questions, please contact the Archives Office at (909) 475-5397.

Custom Queries are referred to in this document and they can be found in the document located at:

<https://www.sbdiocese.org/docs/isoffice/iqqueries.pdf>

The Screen shot to the right for Baptism is the same for First Eucharist and Confirmation, for Reconciliation Prep the Celebrant is missing.



The screenshot shows a form with the following fields:

- Completed:
- Completed On: (with a calendar icon)
- Prep Year:
- Parish: (with a dropdown arrow icon)
- Celebrant: (with a dropdown arrow icon)

When filling these screens out some things to note:

Completed Check Box: When checked indicates that they have received this sacrament but does not indicate that all the information is filled out.

Completed On: Date the sacrament was received.

Prep Year: The year they are going to receive the sacrament.

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Parish: Clicking on the button with three dots (⋮) will open a screen where you can pick the parish where the sacrament was received. If this is your parish, make sure the POL (Organization ID) number is correct when picking your parish. When running the sacrament reports if it is not your parish or if it is not filled out then the sacrament won't be counted.

Celebrant: Clicking on the button (▼) will drop down a list of Celebrants, if the Celebrant you are looking for is not there then the system admin will be able to add that for you.

To make it easier to find the sacrament in the registry book you will find the items in the picture to the right on each of the sacrament tabs. Place the Registry Volume, page, and Number in these boxes so that when you look up the person you can find the record in the Registry book easier. These fields can only accept 10 characters.

Registry Vol.:	<input type="text"/>
Registry Page:	<input type="text"/>
Registry #:	<input type="text"/>

Note: Recommended practice for numbering books

If you have 3 - Baptism, 2 - First Communion, 3 - Confirmation, 3 - Marriage, and 3 -Death they should be labeled as:

Baptism Vol. 1	First Communion Vol. 1	Confirmation Vol. 1
Baptism Vol. 2	First Communion Vol. 2	Confirmation Vol. 2
Baptism Vol. 3	Death Vol. 1	Confirmation Vol. 3
Marriage Vol. 1	Death Vol. 2	
Marriage Vol. 2	Death Vol. 3	
Marriage Vol. 3		

If your parish does not follow this method or if you have questions please contact the Archives Office at (909) 475-5397.

Since only 10 characters can be entered the volumes can be input for example as:

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Bap V. 1
Com V. 1

Page number would just be the page number.

Registry Number is the number of that line or if it's not there you can count the first record on that page a 1 then 2 and so on and place that number in the box.

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General Member Info

When in the Member details Screen there are some important pieces of information to fill in which are indicated by the black boxes below. They are: Birth Date, Birth Place, Father Name, Mother Name, Mother Maiden Name. Sacrament Notes can be used to put in any information about the sacraments that don't fit into one of the predefined fields.

Note: See Parishsoft documentation for program on Responsible Adult.

The screenshot shows the 'Member Details (1)' screen in ParishSOFT. At the top, there are tabs for 'Family Details' and 'Member Details (1)'. Below the tabs are 'Add' and 'Import' buttons. The main form is divided into several sections. The 'Personal Information' section includes fields for Gender, Title, First Name, Nick Name, Middle Name, Last Name, Suffix, Maiden Name, and Role. The 'Status & Demographics' section includes Status, Birth Date, Birth Place, Age, Date of Death, Religion, Language, Ethnicity, Marital Status, and Envelope #. The 'General & Communication' section is highlighted with a black box and includes Father Name, Mother Name, Mother Maiden Name, Responsible Adult, and Sacrament Remarks. The 'Education & Career' section includes Career Type, Details, School, Education, and Grad Year. The 'Additional Information' section includes Username, Soc Sec #, Aux ID, Vendor ID, and Member Notes. At the bottom, there are 'Edit Details' and 'Close' buttons.

This information is required to have reports and queries run properly. For example Birthdate is needed to know what the age of the child was at time of baptism and other sacraments for the statistics needed for Status Animarum and Kennedy. Father, Mother and Mother's Maiden is needed for certificates that the program can run.

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Baptism

Edit Baptism record for [REDACTED]



Member DUID: [REDACTED]

Completed:

Completed On:

Prep Year:

Parish:

Celebrant:

Baptismal Name:

Faith of Baptism:

Sponsors:

Witnesses:

Member Details

Title:

First Name:

Middle Name:

Last Name:

Suffix:

Registry Vol.:

Registry Page:

Registry #:

General Remarks:

Save Cancel Delete

The screen shot below shows the information recorded in the book which would need to be put into the corresponding fields above and on the General Member Info.

5 YEAR ANNUUS		REGISTER OF REGISTRUM				BAPTISMS BAPTIZATORUM				5
NUMBER NUMERUS CURSUS	NAME: FAMILY; BAPTISMAL NOMEN: FAMILIAE; BAPTISMALE	DATE, PLACE OF BIRTH ADDRESS DIES, LOCUS, NATIVITATIS DOMICILIUM	FATHER: NAME, RELIGION MOTHER: NAME WITH RELIG. NOMEN PATRIS; RELIGIO NOMEN MATRIS (Præpositio) RELIG.	DATE OF BAPTISM DIES BAPTISMI	SPONSORS (BY PROXY) PATRINE PROCURATORIBUS	MINISTER MINISTER	CONFIRMATION CONFIRMATIO CHURCH ECCLESIA CITY DIES	REMARKS-NOTANDA V.C. CONFIRMATA, RE-CONVERSUS, CONJUGATUS VEL NON, MATRIMONIUM, SUBSACRATUS, PROFESSIO, SCLAMINE, LICENTIA PAROCHI PROPRII		
30	Whitney "Martha Carada"	March 23 rd 1955 Los Angeles California	Richard E. Whitney Roman Catholic Ferdinando Carada Catholic	Jan 6 th 1956	Maribeth Jean Campbell Thomas Jay Cook	M. J. [unclear]				

Information software needs to have in order to get statistical data at end of year. The Member needs to have the birth date filled in, Date of baptism, Completed needs to be checked, parish needs to have correct local parish name.

The custom query **"SABaptismCounts0-6"** list the counts of baptisms between the Start date and end date entered for those that don't have a birthday, less than 1, and between 1 and 6. This assumes that the parish selected for the baptism is the same parish that the query is being run from.

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The 7 to 17 and adult baptism numbers can be found using the “Kennedy Statistics Report” which is found later in this document.

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Reconciliation

Form titled "Edit Reconciliation Prep record for [redacted] ([redacted])".

Member DUID: [redacted]

Member Details:

- Title: [text box]
- First Name: [text box]
- Middle Name: [text box]
- Last Name: [text box]
- Maiden Name: [text box]
- Suffix: [text box]

Reconciliation Prep Information:

- Prep Completed:
- Completed On: [calendar icon]
- Prep Year: [text box]
- Parish: [dropdown menu]

General Remarks: [text area]

Buttons: Save, Cancel, Delete

Reconciliation Prep. is not required for any official recording purposes but can be used by a parish to record when a person did their first confession for their records and to help generate the stats needed by Archives. To do this record the date, the parish should be your parish and the completed check box. The custom query “**SARconciliationCounts**” is used to generate the numbers.

The fields for Registry Volume, Registry Page and Registry Number cannot be filled as there is no Sacramental Register for the Sacrament of Reconciliation. Please leave blank.

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First Communion

Edit First Eucharist record for [REDACTED] ([REDACTED])



Member DUID: [REDACTED]

Completed:

Completed On:

Prep Year:

Parish:

Celebrant:

Member Details

Title: <input type="text"/>	Registry Vol.: <input type="text"/>
First Name: <input type="text"/>	Registry Page: <input type="text"/>
Middle Name: <input type="text"/>	Registry #: <input type="text"/>
Last Name: <input type="text"/>	General Remarks: <input style="width: 100%; height: 40px;" type="text"/>
Maiden Name: <input type="text"/>	
Suffix: <input type="text"/>	

The screen shot below shows the information recorded in the book which would need to be put into the corresponding fields above and on the General Member Info.

	80 REGISTER OF FIRST COMMUNIONS 1957	81 REGISTER OF FIRST COMMUNIONS 1958
	DATE June 2, 1957	DATE May 25, 1958
	REGISTRUM NEO-COMMUNICANTIUM	REGISTRUM NEO-COMMUNICANTIUM
	NAME: FAMILY; BAPTISMAL NOMEN: FAMILIAE; BAPTISMALE	NAME: FAMILY; BAPTISMAL NOMEN: FAMILIAE; BAPTISMALE
	PARENTS	PARENTS
	DATE OF BIRTH DIES NATALIS	DATE OF BIRTH DIES NATALIS
	BAPTISM BAPTISMA ECCLESIA-URBS DIES	BAPTISM BAPTISMA ECCLESIA-URBS DIES
	Harvey Alvin John Harvey Isabella Davis 1945 St. Mary's Gallup New Mexico 1945	Audet J. David Gordona A. Audet Margaret E. Chevre July 25 St. Ann, Needles Calif October 2, 1957

The counts for first communion numbers can be found using the “Kennedy Statistics Report” which is found later in this document.

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Confirmation

The screen shot below shows the information recorded in the book which would need to be put into the corresponding fields above and on the General Member Info.

106 REGISTER OF CONFIRMATIONS					REGISTER OF CONFIRMATIONS 107				
REGISTRUM CONFIRMATORUM					REGISTRUM CONFIRMATORUM				
DATE Feb. 6-1954 ADMINISTERED BY Most Rev. Charles Francis Buddy					DATE Feb. 22-1954 ADMINISTERED BY Most Rev. Richard H. Ackerman				
NAME: FAMILY: BAPTISMAL	PARENTS	SPONSOR	BAPTISM	NOTICE	NAME: FAMILY: BAPTISMAL	PARENTS	SPONSOR	BAPTISM	NOTICE
NOMEN: FAMILIAE: BAPTISMALE	PARENTES	PATRINUS	ECCLESIA: LIBER: DIES	NOTITIAM	NOMEN: FAMILIAE: BAPTISMALE	PARENTES	PATRINUS	ECCLESIA: LIBER: DIES	NOTITIAM
				ANS. VEL INSCRIP.					ANS. VEL INSCRIP.
CANDELARIA Julia Mary	Romero	Aurea, Martin	Feb 12 1954	Francis Buddy	Candelaria P. Mazuela	Sto Candelaria	Francis	Feb 22 1954	Richard H. Ackerman

The custom query “SAConfirmationCounts” lists the counts of Confirmations between the Start date and end date entered for those that don’t have a birthday, less than 18, and 18+. This assumes that the parish selected for the Confirmation is the same parish that the query is being run from.

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RCIA

Note: In the event that there is a special book for RCIA, the sacraments still need to be recorded in the respective books: Baptism, First Communion and/or Confirmation.

Form fields visible in the screenshot:

- Completed:
- Completed On: [Date Picker]
- Prep Year: [Text Field]
- Parish: [Dropdown Menu]
- Celebrant: [Dropdown Menu]
- Member DUID: [Text Field]
- Member Details:
 - Title: [Text Field]
 - First Name: [Text Field]
 - Middle Name: [Text Field]
 - Last Name: [Text Field]
 - Maiden Name: [Text Field]
 - Suffix: [Text Field]
- Registry Vol.: [Text Field]
- Registry Page: [Text Field]
- Registry #: [Text Field]
- General Remarks: [Text Area]

For the purpose of getting the stats of RCIA for the Status Animarum the following needs to be done.

Check the completed button and input a date of completion for catechumen and candidates that received their sacraments at Easter Vigil.

For celebrant please refer to the Sacramental Register Policies and Procedures.

The custom query “**SARCIACounts**” will pull the Catechuments that have this button checked and that at the same time received Batptism, First Communion and Confirmation on the same date.

The query will also pull the Candidates that have this button checked and that at the same time received First Communion and Confirmation on the same date.

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Marriage



Member DUID: XXXXXXXXXX

Completed:

Completed On:

Prep Year:

Parish:

Celebrant:

[Show Marriage History](#)

Marital Status:

Spouse:

Best Man:

Maid of Honor:

Canonical:

Banns:

Disparity of Cult:

Former Marriage:

Mixed Religion:

Annulment ID:

Date Ended:

Registry Vol.:

Registry Page:

Registry #:

General Remarks:

A: This section refers to Matrimony Dispensations that have been granted. Please refer to the **“Policies and Procedures for Parish Sacramental Registers”** for what they mean.

The screen shot below shows the information recorded in the book which would need to be put into the corresponding fields above and on the General Member Info.

52 YEAR ANNUS 1953		REGISTER OF REGISTRUM				MARRIAGES MATRIMONIUM				52
NUMBER NUMERUS CURSUS	CONTRACTING PARTIES PARTES CONTRAHENTES	ADDRESS DOMICILIUM	PARENTS PARENTES	BAPTISM BAPTISMUM ECCLESIAE USUS DIES	WITNESSES TESTES	DATE, PLACE OF MARRIAGE DIES, LOCUS MATRIMONII	FRIEST PRESBYTER (DELEGATUS)	REMARKS-NOTANDA V.C. DISPENSATIO PROPHII, TESTES	NOTICE NOTITIAM MARI. V.S. INSCRIPSI	
1.	POLICH LEE KISSINGER KATHLEEN MAE	Lowell California Lowell California	Leo Polich Frances Jacobovich Frank Kissinger Thelma Blakesley	Aug 28 - 1957 St. Michael's Lowell, NEW MEX May - 24 - 1953 St. Raymond Lowell, Calif.	James Warden PROPR. Dispensatio Benedicta Warden	May - 24 - 1953 St. Raymond Lowell, Calif.	Leo J. Henley	Null. Banns #3504 Prelatorum Jan 25 1949 Clerk County Nevada, Nevada		

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The counts for Marriage numbers can be found using the “Kennedy Statistics Report” which is found later in this document.

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Holy Orders



Member DUID: ██████████

Completed:

Parish: ...

DiaconatePresbyteralEpiscopal

Date: 

Parish: ...

Celebrant: ▼

Classification: ▼

Role: ▼

Laicization Date: 

Permanent Diaconate:

Spouse Consent:

Diaconal Documents:

Dismissorial Letter:

Letter Giver: 

This sacrament is currently not recorded to ParishSOFT.

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Funeral



Member DUID: [REDACTED]

Completed:

Completed On:

Parish: ...

Celebrant:

Date of Death: ...

Anointed:

Funeral Title:

Burial Date: ...

Burial Type:

Next of Kin: ...

Vigil Place: ...

Vigil Celebrant:

Cemetery Name: ...

Grave Details: Section Block Lot Grave

Purchase Date: ...

Purchase Cost:

Cause of Death:

Deed Issue Date: ...

Deed Owner: ...

Member Details

Title:

First Name:

Middle Name:

Last Name:

Suffix:

Registry Vol.:

Registry Page:

Registry #:

General Remarks:

The screen shot below shows the information recorded in the book which would need to be put into the corresponding fields above and on the General Member Info.

Death					Register				
No.	NAME OF DECEASED	RESIDENCE	AGE	PARENTS, WIFE OR HUSBAND	DATE OF DEATH	SACRAMENTS	PRIEST	PLACE AND DATE OF BURIAL	REMARKS
38	Louis G. Hernandez	239 Pacific Ave. Highgrove, Calif.	62	(wife) + Rose Hernandez	Febr. 17, 1954	Annie Community Hosp.	Voluntine, Rev. U. M. S.	Chicowood Febr. 28, 1954	Buried in Highgrove

Some of the fields that may need clarification are:

- Funeral Pl. → is the name of the parish performing the funeral, graveside or service for the person. If the location is different from the parish then that location would be placed in the box next to the “funeral date”.

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- Next of Kin → Parents, wife or husband
- Cemetery Name → Place of Burial

The custom query “**SADeathCount**” will count records where the “Funeral Pl.” is your parish, the completed checkbox is checked, Funeral date is not blank, and the date of death is between a “start date” and “end date”.

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Anointing of the Sick

There is not a place to record Anointings of the Sick except the checkbox located on the Funeral Screen for the last anointing called the viaticum. These are only recorded in the book.

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Kennedy Statistics Report

The below report is used for gathering some of the statistics needed below. This report is found in (1) Family Directory → (2) Reports → (3) Statistics → (4) Kennedy Statistics.

The screenshot shows the ParishSOFT software interface. At the top, there is a navigation bar with several tabs: Home, Family Directory (1), Religious Ed., Offering, Ministry Scheduler, Tuition, IQ, Administration, and Facility Calendar. Below this is another navigation bar with tabs: Family List, Member List, Sacraments, Family Workgroups, Member Workgroups, Group Events Entry, Reports (2), and Import. The main content area is titled 'Family Directory Reports'. On the left, there is a 'Select Report - Kenedy Statistics' panel with a table:

Report Type	Report
Sacrament	Kenedy Statistics (4)
Statistics	Parish Statistics
Census	
Audit Contact Info	

Below this is a 'Select Filtering Options' panel with 'Select Date Range' and two checked options: 'Start Date' and 'End Date', each with a date picker. The main report area is titled 'Kenedy Statistics' and contains several sections:

- Receptions Into The Church:** Infant Baptisms, Minor Baptisms, Adult Baptisms, Not Specified Baptisms, Received Into Full Communion, First Communions, Confirmations.
- Marriages:** Catholic, Interfaith, Total, Not Specified Marriages.
- Census Summary:** Registered Parishioner Households, Individual Catholics, Total Deaths.
- Number of Full Time Ministers:** Brothers, Sisters, Lay Ministers.
- Religious Educations:** Elementary Students, High School Students, Total K-12.

Minor Baptisms: baptism date completed is between dates; baptism is marked complete by the check box checked; the parish the baptism was done is the parish the report is run from and the age is greater than 6 and less then 18

Adult Baptisms: baptism date completed is between dates; baptism is marked complete by the check box checked; the parish the baptism was done is the parish the report is run from and the age is greater than or equal to 18

First Communions: First communion date is between dates; first communion is marked completed by the check box checked; the parish the paptims was done at is the parish the report is run from.

Marriages:

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Catholic: Date Completed is between the dates, Groom Religion and Bride religion are marked catholic, Date ended is blank, complete is checked, Marriage Status is married

Interfaith: Date Completed is between the dates, Groom Religion or Bride religion are not marked catholic, Date ended is blank, complete is checked, Marriage Status is Married

Total: the conditions for catholic and interfaith apply

Not Specified: Date completed is between dates; Groom and Bride religion are blank; groom or bride is not listed; date ended is blank and marked as completed and status is married

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