RCI
Raiche Consultants Inc.

Church Census System

Update-View: Part 2

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Raiche Consultants
Church Census System
Owner's Manual

Update/View Part 2 – Member Information

Overview

Selecting **Update/View** from the title screen brings you to the main screen for the Census Program, described in Pt. 1. At the bottom of the screen, pressing **MEMBERS** opens the screen for individual members' data. You can add a member, or select an existing member for editing.

Once you enter this area, you are able to move to each section by way of buttons designed to get you in and out quickly with a minimum of steps. You are able to input and edit all the information relating each individual member (Pt. 2).

Much effort has been taken to make this very important area simple and easy to use by both the novice and the experienced user.

It is not necessary to press a special "save" key when inputting your data. It is saved automatically as you move from field to field.

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Selecting **View\Edit** from the Main Menu opens the first page of the *family record*.

NOTE:
As in all sections of this manual,
all of the data shown is fictitious for demonstration purposes.

Open Family Members Page

Once you have opened the **Family Page**, select the family you are working with.
At the bottom of the page, click the **Members** button.

Members

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This opens the **Family Members** page:

Family Members

Existing Members

Daniel	J	August	S	12/3/1977
Donald	J	August	HH	11/14/1950
Marlene	S	August	W	8/30/1952
Michael	G	August	S	6/17/1981

VIEW

Add New Member

First Name:

Relationship:

ADD NEW

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This page contains:

- A window containing all the members within the family.
- A View button to open the record for a member
- Two entry fields:
    o First Name
    o Relationship
- Add New button

Add New Member

When you begin to enter data for a new family, the member window is blank. Each member is added individually.

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To add a new member:

1. Enter the **first name** of the member.

2. From the **Relationship** drop-down choose *how this member is related to the Head of Household.* There is a selection for **Head of Household** if this person is indeed the Head.

3. Press **Add New**.

This name is now entered into the Member window. Initially only the first name, last name (taken from the Family page) and relationship appear. Once you enter the middle initial and Date of Birth on the member pages, they will also appear here.

Note: *Each family MUST have a Head of Household for the Census program data to be accurate.*

See: **Overview/Census Menu** manual **(Table Updates)** for information on editing the contents of the Relationship drop-down list.

Select a Member for viewing/editing

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To select a member for editing/viewing you can either

Select the member and press **View**, or

Double click the name.

This will open the main Member page.

Member Page

Some important things to note: the Member page consists of three pages (screens) which are identified at the top each screen: **Members; Sacrament; Rel. Ed.**

Notice that **Members** (see figure below) is shown as a word while the others are buttons. As you click the buttons, you will notice how they change. You are able to go from Members to Rel. Ed. without passing through Sacraments.

Most of the fields are optional, but for complete functionality of the program, the more data you have the better the results. If you do not have all the required information, put in what you do have. You can always add additional data later.

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The **Members** page contains many of the basic information fields you need.
Since many are self-explanatory, we will describe those that may not be obvious.

Pre-filled fields:

When the page is opened for the first time, **some of the fields are *already filled in*** for you. The data is obtained from previously entered data:

Family Number; First Name; Last Name; Relationship

Member Number: a unique number generated by the census system to identify each individual and all their related data. This number cannot be changed.

User-input data fields:

Since there are situations where family members are of a different faith, such as a spouse or an adult child, we have included two fields to help identify them and not exclude them from your family record. These are **Religion** (a drop-down list) and **Registered (Y/N).**

Registered: Selecting **Y** indicates Catholic;
N indicated a non-Catholic or a non-member living at this address.

Religion: All members may be identified with respect to their faith.

MI: Enter the middle initial

Suffix: name suffix i.e. Sr. Jr. III

Occupation/Company: A drop-down list for occupation and a blank field to the right for Company (place of employment). The Occupation field has related reports which will be discussed later.

Cell Phone & E-mail: these items are the *personal* cell phone/e-mail of **THIS** member.

Date deceased: Once a date is entered here, this person is dropped from all reports and membership lists. Only reports relating to deceased parishioners contain these names.

HELP: When a person is deceased, there are several changes required to keep the remaining families record current. Clicking HELP opens a special window with a list of suggestions to help you complete this task. This list can be printed out by clicking the printer button.

Handicapped:

> The first field to the right is a comment field. The second field to the right is a drop-down list. There are reports related to this list which will help you identify parishioners with special needs. **SPECIAL NOTE:** there is a **separate listing** for children in the Rel Ed program with special needs which may not require an entry here. See Rel Ed page (in this manual) for more information.
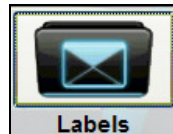
Language Proficiency

Second Language

> These fields, selected from a drop-down list, indicate the languages spoken by this member. Reports are available on both of these fields to give the pastor/staff a listing of people who speak any given language selected.
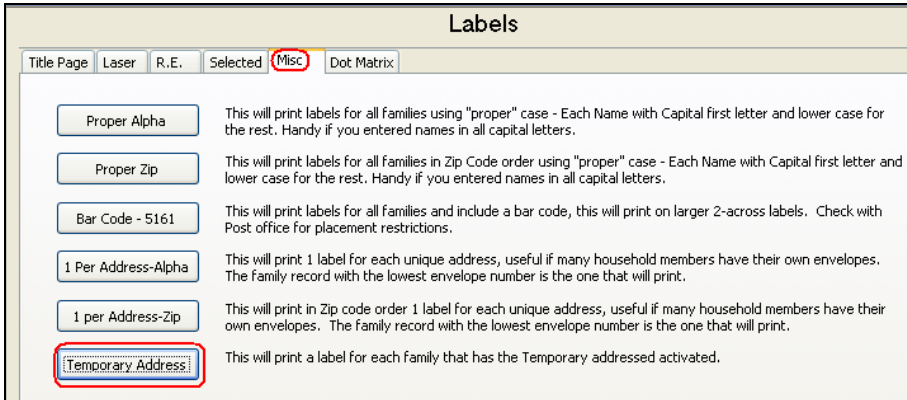
Temporary Address

> This is used, for example, by a college student or a person on an extended vacation. Enter the address; by clicking in the **Print Label** check-box a label can be printed for a newsletter or any other communication from the parish.

To print the labels: from the Main Screen, go to:

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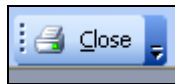Click on Misc. tab and Temporary Address

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A window will open to show you, in Print Preview, the label sheet.

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Click the Printer icon at the top of the page to print the labels.

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Activities, Interests; Ministries

Each member is able to have recorded their membership in all activities and/or ministries.
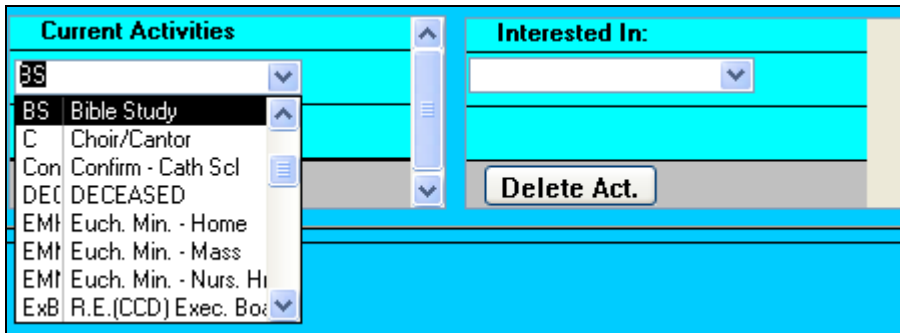

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In the above example you see that Activities are recorded in two categories:

Current Activities and **Interested In**

Both use the same Activity (table) drop-down list, but have different purposes.

When making an entry, click in the first empty box and the full list opens for you (see below).

Add a Current/Interested In Activity

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When you select an activity, *only the code remains visible*. Also a new, empty box appears below to accept the next entry.

There is no limit to the number of activities you can track per member.

Delete a Current/Interested In Activity

To delete an activity, click in the field you wish to delete, and press Delete Act.

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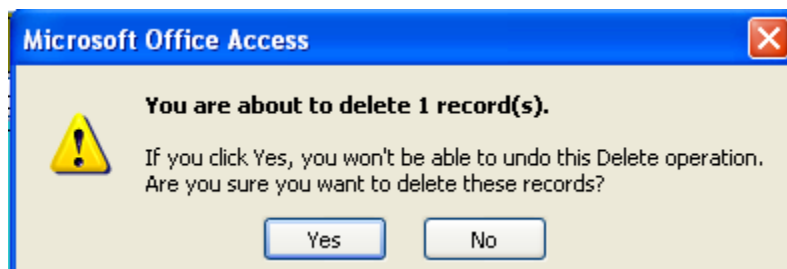
This screen will appear. Simply press **Yes** to confirm the deletion.
Press **No** to cancel the deletion.

See: **Overview-Census Menu** -- **Manage Census -- Member Tab – Manage Activity** for complete information on features related to *Current Activities*.

See: **Overview-Census Menu** – **Manage Census -- Member Tab – Member Interests** for complete information on features related to *Interested In*.

End of Member Section

Sacrament Page

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Click on the **Sacrament** button to open the Sacrament page:

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This page gives an overview of the sacramental history of the member.

At the top of the page notice that the word **Member** is now a button and that **Sacraments** is a word to identify the page title.

There are two pre-filled fields:
     Name: to identify the member you are viewing/editing.
     Relationship: how this member is related to the Head of Household
These fields use a green background and cannot be edited from this page.

The four sacraments tracked by the parishes are shown here. The remaining three sacraments, Reconciliation, Holy Orders, and the Anointing of the Sick are not recorded in this fashion, and therefore are not included.

Entering sacramental information

For accurate reporting, the more complete information you have the better the result.

Received: for Baptism, First (Communion) Eucharist and Confirmation the entry is Y/N
Default is N.

Month/Day/Year: These are separate fields for reporting purposes. You can enter partial information if necessary i.e. you know the month and the year, but do not remember the actual date. You must press either Enter or Tab to move between the fields.

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Select

Parish

City, State

For each sacrament you can enter the parish name and the city and state where the sacrament was received. Clicking in or tabbing to these fields allows you to enter the required information manually. However we have included the complete listing of parishes for the Diocese of Springfield, MA. Simply click the *down arrow* button in the *Select* field. You will see a listing of all the parishes. Click the one you need and the *Parish* and *City, State* fields are automatically filled in for you.

Add Church

If the sacraments were received outside the diocese, click **Add Church** and a window will open. This is the same window found in the Table Update screens. Scroll to the bottom, and begin by typing in the blank field. The program will automatically number the entry.

Refresh List

Once you have completed the entry, close the window and press Refresh List. This will allow your new entry to be readily available for your use.

Book, Page

Sometimes it is necessary to research an entry for a sacramental certificate. You have the option to enter the book ID and the page number where each entry was made. This data remains on the page – there are no reports connected to it.

Marital Stat

This identifies the marital status of each member. This list is created/edited in the Table Update section of the program. The default is Single.

Marriage Book

Marriage Page

Marriage Comment

To the right of the Marital Stat are the fields to use if this member is married. They include the month-day-year; marriage book & page. The marriage comment is a field used by pastors. However the information here could be highly confidential and should be used with discretion.

Married by priest

This is a Y/N field and has a report which the pastor can use to identify any member who may wish to have their marriage blessed or validated. The default for this field is N.

Attends Mass

Select from a list which is maintained in Table Updates. This response is usually obtained in a Census Questionnaire.
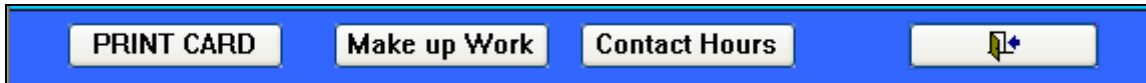
End of Sacrament Section

Religious Education Page

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From either the **Member Page** or the **Sacrament Page**, you can click on **Religious Education** to open the religious education page, shown below:

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These buttons, located at the bottom of the screen, will be discussed later in this chapter.

Important note - terminology

Over the years, parish religious education programs have been called by many titles: Confraternity of Christian Doctrine (CCD), Religious Education, and Faith Formation to name a few. During the development of this program we have tried to remain as generic as possible keeping the dozens of screens and reports friendly and useful. We have currently decided to use Religious Education (Rel. Ed.) as the banner for this section. You may encounter an isolated occurrence of something different. Please understand the every effort is being extended to keep our program uniform. Thank you for your understanding.

Overview

This page gives a comprehensive overview of the religious education of the member:
- In-parish religious education classes
  - Related public school information
- Catholic school attendance
  - Subsidy payment information
- Emergency and "second" contact information
- Catechist data, including CORI, and more.

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There are two pre-filled fields:
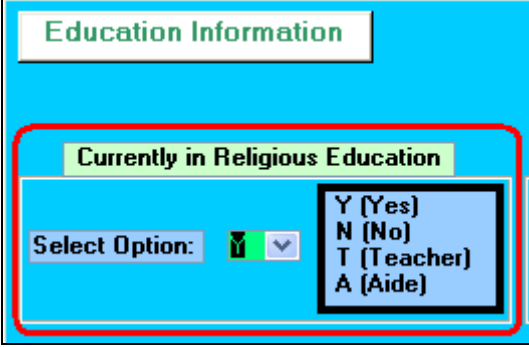
    Name: to identify the member you are viewing/editing.

    Relationship: how this member is related to the Head of Household

These fields use a green background and cannot be edited from this page.

Entering religious education information

For accurate reporting, the more complete information you have the better the result.

Currently in Religious Education

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Choose one of four responses for this question:

        Y (Yes):   the member IS in Rel. Ed classes
        N (No):   the member IS NOT in Rel. Ed. classes
        T (Teacher):   the member is a *catechist* (teacher) of Rel. Ed. classes
        A (Aide):   the member is a *teacher's* (catechist's) classroom *aide*

Various reports use these codes. For accuracy, please use the codes as described.

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R. E. Grade:

        Identifies the Rel. Ed. grade level of the member. If a person teaches more than one grade, this is described below.

R. E. Room:

        Location of the member's classes

R. E. Section:

In some Parish situations, students are grouped into a "section", a larger division of students designed to remain together as they move up through the grades.

R. E. Special Needs:

Y/N: this field identifies if a student has a special need. Some examples include special lighting, wears hearing aids.

This field to the right is for a description of the special need. There is a report available for this option.

Please note: Special Needs is NOT for identification of a handicap. There is a provision for this on the member's page for this information.

Home Class: Checkbox, Address, Phone

Under special conditions approved by the parish, some classes may be taught at a catechist's home. If this is your situation, you have this area to help you:

Checkbox: identifies the student as being in a home class. This must be checked to have the information on the available reports.

Address: the location of the class
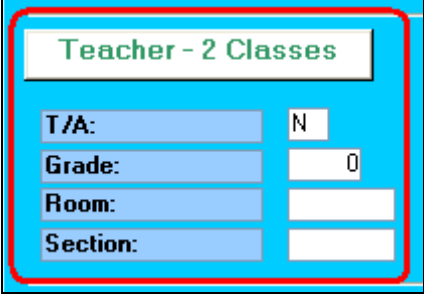
Phone: the telephone number at the location of this class.

Fund Tracking Child Envelope

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This is the envelope number assigned to this child. This is fully described in the **Fund Manual**.

Teacher – 2 classes
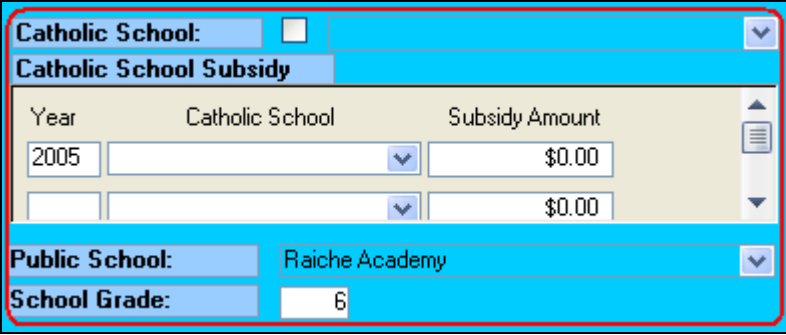
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When a member teaches more than one class, this section allows you to enter the following:

> **T/A:**   enter **T** for Teacher; **A** for teacher's Aide. **N** is the default, meaning neither.
> **Grade:** grade being taught
> **Room:**   assigned room
> **Section:** member of which section (as described earlier).

School Information

Catholic School Subsidy

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Whether the child is in public or Catholic school, the information is entered here.
- Enter the grade whether in public or Catholic school
  - Note: if your parish uses the Rel. Ed. function, the grades will automatically roll up when Move Student Up is activated. (Described in the Rel. Ed. Menu section).
- If the child is in public school, select school from the public school drop-down list.
- If the child is in Catholic school, **put a check in the checkbox** (very important).
  Then select the school from the Catholic School drop-down list.
- If your parish tracks **Catholic school subsidy**:
  - Enter the year

- - Select the school from the drop-down list
  - Enter the amount for the month.
- When you make an entry, another blank line will appear below for the next entry.
  - (not shown here)

Subsidy Reports

As with all finance-related reports, Catholic School Subsidy Reports are found in the **Funds** section of this program. For more details, see the **Funds Menu** manual.
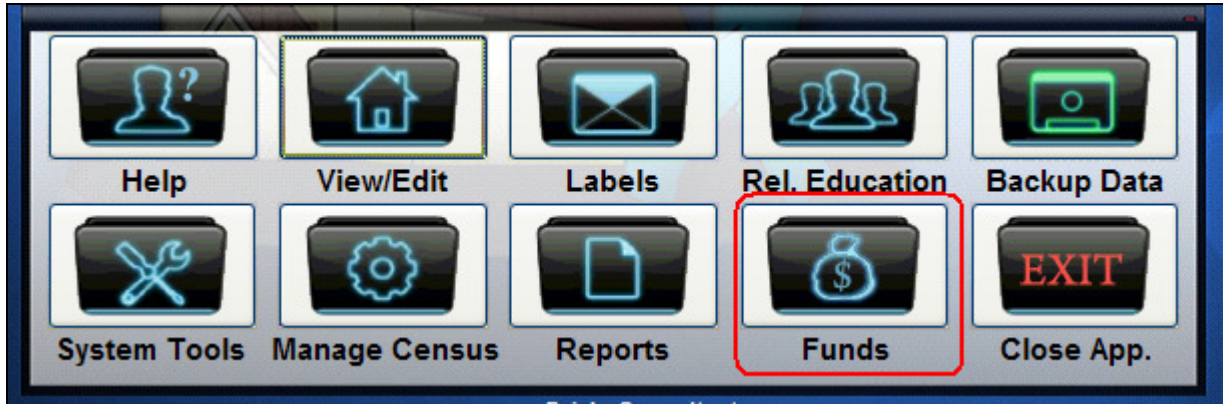
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Emergency Information

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Emg Name: Name of the individual to contact.

Emg Phone: Full phone number to use.

Emg Relationship: Relationship of contact person to member.

Previous Religious Education

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This area is used when a family moves into the parish, recording the *parish, location* and *grade* where school-aged children received previous religious education. This is very helpful when the children are registering for Rel. Ed. Classes.

Second Contact

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Second Contact is for situations where a parent or other important family member may be living at a separate address. *Name, Address, Relationship* and *Telephone* are included. If you check the **Send Mail** checkbox, you can generate a mailing label. See below:

From the *Main Menu* select,

 ,
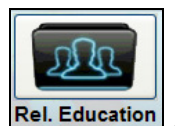
      then *Labels Tab.*

Select *Second Address*. (See below).

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From here you can view the labels on screen, then press Print to print them out.

Permanent Record Cards

Permanent Record Cards (reports) can be obtained by clicking the Print Card button on the bottom of the Rel. Ed. Screen.
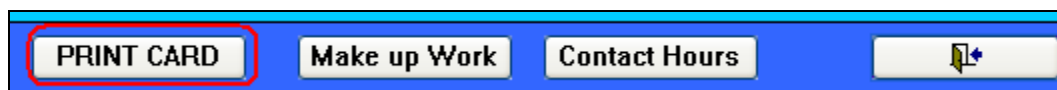
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The report will appear on the screen, which you can print if you desire.

Once the report has been viewed/printed, the date automatically appears as shown below.

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Notice the check in the checkbox. This is filled-in automatically, indicating that the card has been printed.

Working with Permanent Record Cards

Open the Religious Education Page from the Main Menu page;
    Click the **Perm Rec Cds.** Tab (See below):
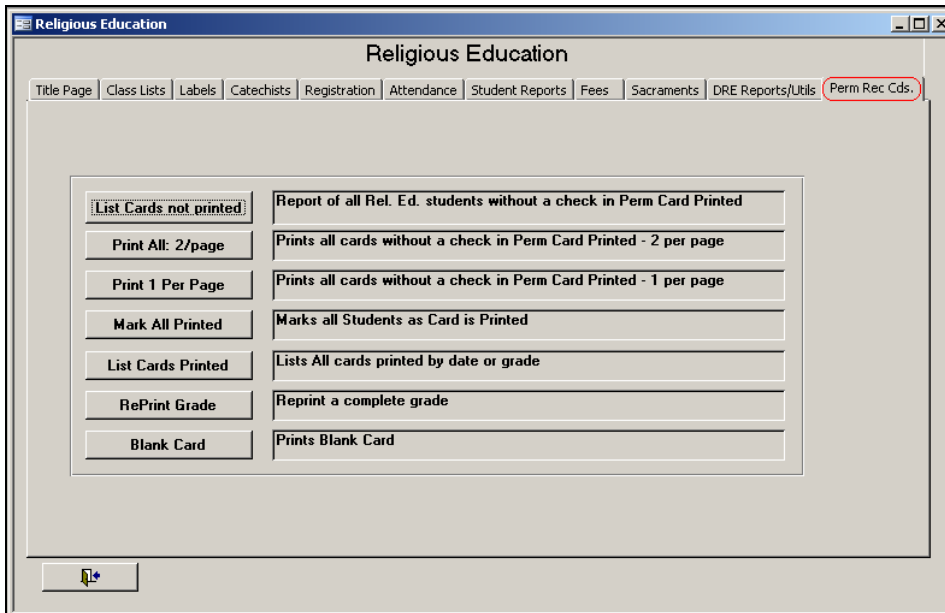
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More information will follow on this option screen. See *Religious Education Menu* document.

CORI Information
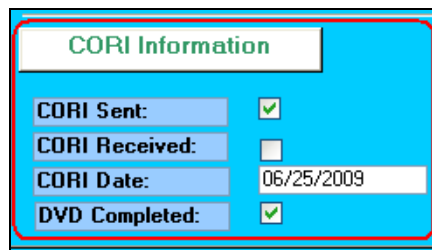
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CORI checks are now mandated for all individuals who work with children and youth. This box gives same basic data.

DVD Completed: was the CORI video viewed? Check box if *Yes*.

CORI Sent: Check box if *Yes*.

CORI Date: The date the form was sent out.

CORI Received: Although included, it is our understanding that you will not receive a reply unless there is a problem with this individual. Confidentiality must be maintained!
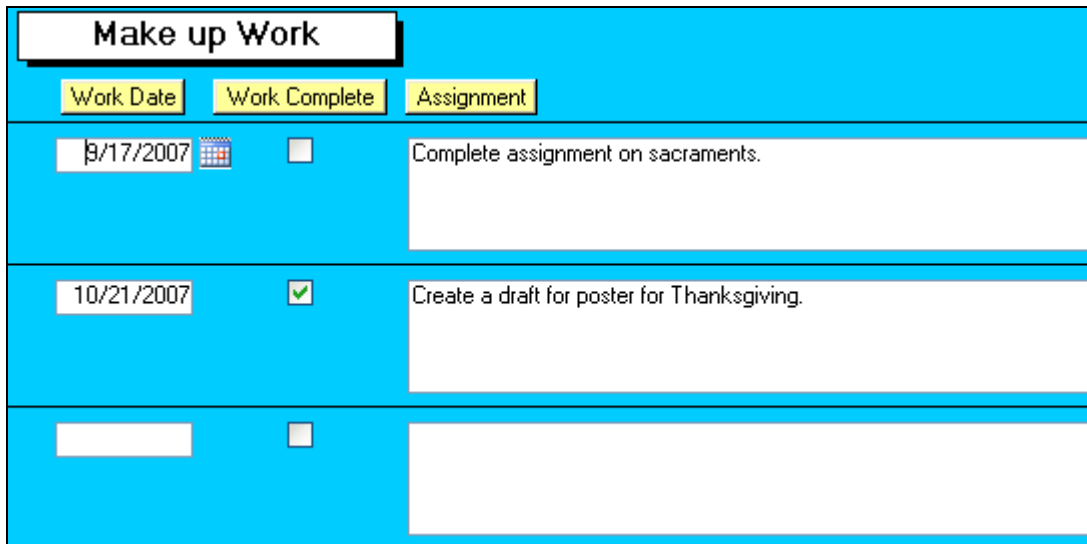
Make Up Work

Make Up Work assignments can be tracked from the Button (shown below) found on the member's Religious Education page.
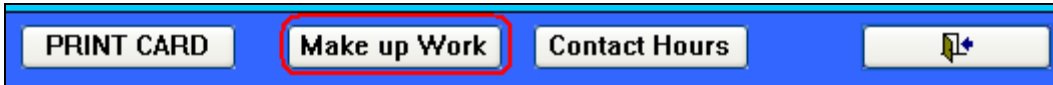
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Click on the button and the following page appears:

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You can enter the date, the Assignment, and if the work is complete, check the checkbox. Notice there is always an empty entry box at the bottom of the entry-page.

Reports are available from the Religious Education Menu on the main page, and then the **Student Reports Tab**. You have the choice of two options: *by Grade* and *Date Due*.
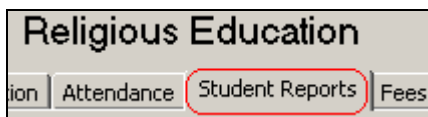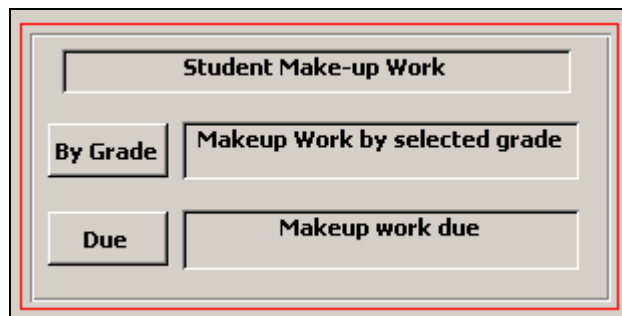
Ver. 17.5   **Ver. 17.5**

Below are sample reports from each option:

St. Columkille Parish
1400 Saint Jude Ln.
Southbridge, MA 11544

Makeup Work: by grade

Grade	Room	Name	Work Date	Work completed	Assignment
11					
		Adams!, Kristen			
			10/23/2003	☐	Needs to complete essay on Faith.
			10/30/2003	☑	Complete poster.
		CracolaJr., James			
			9/17/2007	☐	Complete assignment on sacraments.
			10/21/2007	☑	Create a draft for poster for Thanksgiving.

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St. Columkille Parish
1400 Saint Jude Ln.
Southbridge, MA 11544

Makeup Work Due

	Name	Work Date	Assignment
Grade 11			
Room			
	Adams, Kristen	10/23/2003	Needs to complete essay on Faith.
	Cracola, James	9/17/2007	Complete assignment on sacraments.

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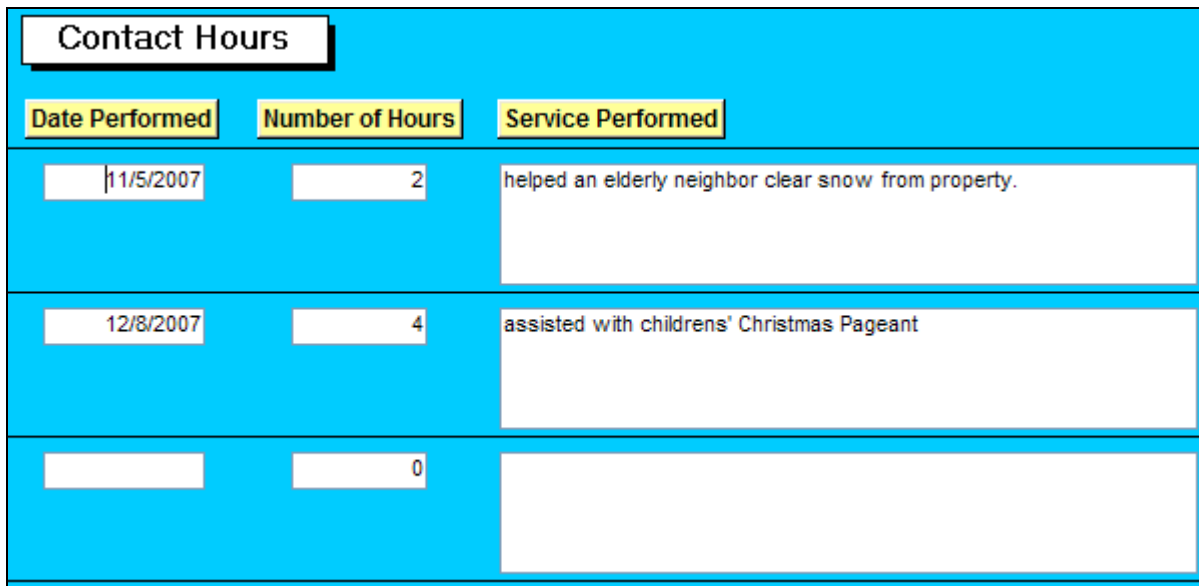
Contact Hours

Some parishes have adopted the concept of requiring and tracking Contact Hours.

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Click the button (as shown) the following screen will appear:

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Once you have information entered, a summary report, showing all hours for this member is available.

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Click **Summary** and the following report will appear: Click the **door** to close the window.
(Sample report is on the next page)

St. Columkille Parish
1400 Saint Jude Ln.
Southbridge, MA 11544

Contact Hours

Name: James   Cracola

	Date Performed	Number of Hours	Service Performed
November 2007			
	11/5/2007	2	helped an elderly neighbor clear snow from property.
December 2007			
	12/8/2007	4	assisted with childrens' Christmas Pageant

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Confirmation

From the Religious Education page there is a section on the **Sacrament of Confirmation**.

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Click on the **CONFIRMATION** button (shown above) and the following page will appear:

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Description of page:

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The top of the window shows the student's name (Confirmation candidate) and relationship to the head of household.

     These fields are auto-filled and cannot be changed from here.

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Bishop's Name: is the bishop who will *confer the sacrament*. This information will appear on some of the available reports.

Confirmation Name: This is the name chosen by the candidate which is given during the ceremony. This also appears on the appropriate reports.

Confirmation Year: the year this candidate received Confirmation. This data does not erase, and is used in the Parish Status report. If it is left blank, the student (member) will not show up in the reports.

The checkbox "This Year?" is asking if this Confirmation data is for the current Confirmation class. Even though you will enter the year (see below) you must check the box. The program does not validate with the computer clock/date functions.

Form received: In some parishes the student must submit their choice of Confirmation name on a written form. This checkbox is used to track which forms have been received. There is a report for this.

Sponsor Information: Depending on local policy, each Confirmation candidate (sometimes referred to as Confirmandi) is required to have one sponsor, and may have two sponsors. There are specific criteria for sponsors that are regulated by Canon Law, and need to be verified. Talk with your pastor to clarify any questions you may have on this topic.

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Sponsor 1 and 2, and Note: For each sponsor you can enter their name. On the second line is a note field which can include a relationship (aunt/uncle; grandparent, etc.) or, as shown in the above example, a proxy.

Sponsor 1 and 2: Verified: There are certain criteria for sponsors governed by Canon Law and the local diocese. Once the sponsor's information is verified, check the checkbox. There are reports which use the above information.

Service Projects

Service projects may be required in your parish situation. This section helps you track any activity in this area.

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Project Number: This is entered automatically by the program.

Project Name: Enter here any appropriate description of the project.
> Notice that when you begin to enter information, another Project Information box appears below. There is no limit to the number of projects each candidate can have.

Project Supervisor: Enter the name of the person who oversees the project and can verify it is being done correctly.

Project Location: Enter the project site.

Checkboxes: check the appropriate box as needed.

Reports

Confirmation reports are available from the main Religious Education Menu tab page (below)
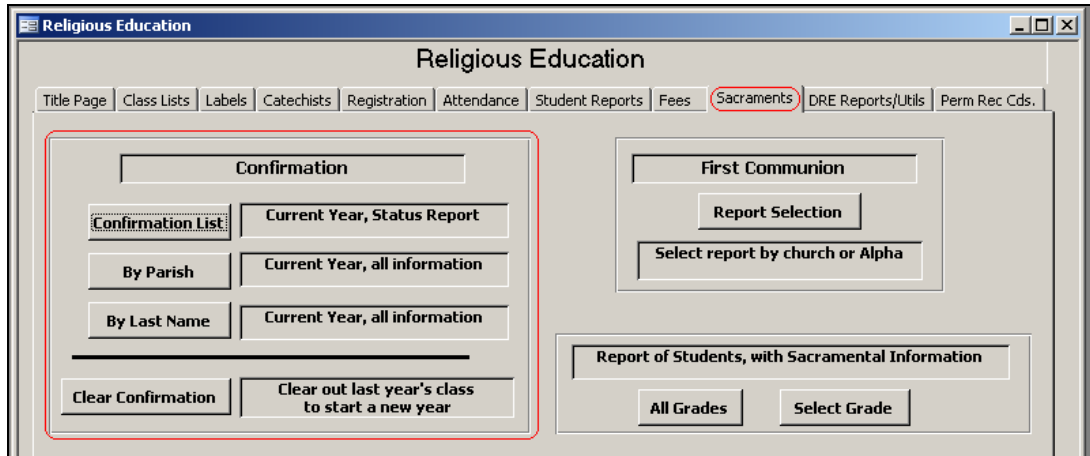
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Confirmation List

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This report will give you the names of the students in this year's Confirmation class with an overview of their required information. This includes the names of sponsors, their Confirmation Name, and a recap of their Service Projects, if any.

Students Confirmed this year – by parish

St. Columkille Parish
1400 Saint Jude Ln.
Southbridge, MA 11544

Students Confirmed this year

Name	Confirmation Name	Conferring Bishop	Baptism Date	Confirm Date	Parents' Names	Mother's Maiden Name	Sponsor
Parish Where Baptized:	*Blessed Sacrament, Holyoke, Mass*						
Michael Adams	John		/ /	05/16/2006	James Adams	Humphrey	
					8 Church St.		
					Your Town, MA 22022		

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SORTED BY PARISH: this report gives you specific information on all the students who were confirmed this year. When a person is confirmed, the baptismal parish must be notified so their sacramental book can be updated. This report allows you to submit a single report to each parish as needed.

Students Confirmed this year – sorted by last name

St. Columkille Parish
1400 Saint Jude Ln.
Southbridge, MA 11544

Students Confirmed this year

Name	Confirmation Name	Conferring Bishop	Baptism Date	Confirm Date	Parents' Names	Mother's Maiden Name	Sponsor
Michael Adams	John		/ /	05/16/2006	James and Adams	Humphrey	
Parish Where Baptized:	Blessed Sacrament, Holyoke, Mass						

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SORTED BY LAST NAME: This gives you an organized report to verify that all the information required has been submitted, and is correct.

PLEASE NOTE: these reports look very similar, but have different functions.

Clear Confirmation

This utility *will erase all the data* for the current year. Click the button to perform this task.

WARNING: *there is no window, no backing out, and no reversal*. Be sure you have printed out the other reports before you click this option.

This concludes the Update/View: Member Information Part 2 manual.