ParishSOFT® | Family Suite

Data Conversion Checklist Worksheet

This worksheet is designed to help you prepare to complete the information requested in the online conversion checklist from the link you were emailed. You will complete the worksheet below based on the information in the data you will be sending us for conversion.

IMPORTANT: You will <u>not</u> send this worksheet to ParishSOFT. We recommend you print and complete this form so you can fill out the online form easily.

<u>Please save your completed checklist worksheet to use as part of your data validation when your conversion is ready for review.</u>

Organization Name:	
City, State, and Zip Code:	
Primary Contact Name:	
Primary Contact Email:	
Is Data Conversion Contact Same as Primary Contact? If no, fill out below	Yes or No?
Data Conversion Contact Name:	
Data Conversion Contact Email:	
Software program your organization is converting from: *There are several standard choices in the online form to choose from; if your software is not listed you will choose Other*	
There is an agreement to acknowledge that you understand the importance of the checklist. You will need to acknowledge in the online form.	I Understand

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Family Census Information

Please provide information based on the software you are converting from.
These are questions about families or households – member questions.

Number of Families in Current Program: ***This would be ALL families***	
How many families are currently registered: ***Unregistered status is assumed if not registered***	
Explain how the registered number was obtained from the data: ***During the conversion process we match these numbers, and it helps us to know how you arrived at this number for validation purposes.***	
How many families are Active:	
Explain how Active number was obtained from the data. ***During the conversion process we match these numbers, and it helps us to know how you arrived at this number for validation purposes.***	
Please list below any other family status fields you have been using. **NOTE: *They may be brought in as Family Groups.***	

Member Census Information

Please provide information based on the software you are converting from. These are questions about the member records in your data.

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Total number of individuals in the current program:	

Does your organization track the following member data? (Circle Yes or No below):

Role in Family:	Yes or No? *Note: This is a critical filed to make your conversion successful*
Occupation:	Yes or No?
Gender:	Yes or No? *Note: This is a critical field to make your conversion successful*
Religion:	Yes or No?
Date of Birth:	Yes or No?
Date of Death:	Yes or No?
School Grade:	Yes or No? *Note: This will **NOT** convert into ParishSOFT Family Suite, It will be changed to Grad Year.*
Does your database have a member status field?	Yes or No?

The following questions are important. During the conversion process we match these numbers, and it helps us to know how you arrived at this number for validation purposes.

How many members are active?	
What criteria did you use to get the Active Member Count?	
How many members are inactive:	
What criteria did you use to get Inactive Member Count?	
How many members are deceased?	

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What criteria did you use to get deceased Member Count?	
Are you using any other member status fields?	

Member Details

Please provide information based on the software you are converting from.
These are questions about Member status.

The **Member Status** lookup field in ParishSOFT is static.
The *options available are: Active, ActOther, Inactive, Deceased

There are three options for converting your member statuses that are **not available** in ParishSOFT:

1. Convert to an existing ParishSOFT **Member Status**
2. Convert to a ParishSOFT **Member Workgroup**
3. Convert to both a ParishSOFT **Member Status** & a ParishSOFT **Member Workgroup**.

Please indicate below how you would like your statuses, not available in ParishSOFT, to be converted.
   ➢ You may upload a file to the online form with your statuses if you prefer.

For each of your member statuses you will be asked the following:
(Extra lines have been added so you may use this as a Worksheet)

Original Member Status	PS Member Status (*drop down options)	Member Workgroup (Yes or No)

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Envelope Numbers

Please provide information based on the software you are converting from.
These are questions about the envelope numbers.

Do you have envelope numbers assigned to families? *We can convert both family and individual envelope numbers, BUT the individuals in a family cannot have the same envelope number as the family.*	
How many families have envelope numbers?	
How many families are sent envelopes?	
Do you have envelope numbers assigned to individuals within a family? *We can convert both family and individual envelope numbers, BUT the individuals in a family cannot have the same envelope number as the family.*	

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How many individual family members have envelopes numbers?	
How many individuals are sent envelopes?	
How do you designate who should **NOT** be sent envelopes?	

Information Regarding Family Salutations

ParishSOFT Family Salutations

Described below is the standard conversion process for family salutations. This is for information only. No information or choices are required by you.

When the **Roles** (Head, Husband and Wife), **Gender** and **Marital Status** are properly identified, the family salutation fields will be populated as shown in the example below:

John & Mary Jane Smith
John Smith (**Role**: Husband, **Gender**: Male, **Marital Status**: Married)
Mary Smith (**Role**: Wife, **Gender**: Female, **Marital Status**: Married)

Formal Mailing Name: Mr. and Mrs. John Smith
Informal Name: Jim and MJ Smith
Formal Salutation: Mr. and Mrs. Smith
Informal Salutation: Jim and MJ

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Please note: If you do **not** have family salutations in your current database, the **Family Last Name** and Head or Husband and Wife will be used to create **Family First Names**. This field is located under the **Family Information** tab, visible in the screenshot above.

Example: John & Mary Jane Smith

When the **Roles** (Head, Husband and Wife), **Gender** and **Marital Status** are properly identified, the **Family First Name(s)** field will be populated as shown in the following example:

John Smith (**Role**: Husband, **Gender**: Male, **Marital Status**: Married)
Mary Smith (**Role**: Wife, **Gender**: Female, **Marital Status**: Married)

Family First Names: John and Mary Jane

Other Data Types

Does your organization track sacramental information?	(Yes or No)

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Offering & Pledges

Does your organization track contributions/giving information in your current software? *If you respond no, no further questions will be asked regarding Offering & Pledges in the online form.*	Yes or No?
What is the earliest contribution date in the program, if known?	
What is the most recent contribution posting date in the program, if known?	
Does your organization track pledges in your current software?	Yes or No?
Would you like your pledge data to be converted? *If yes please list the names of each of your pledge funds below*	Yes or No?

Pledge Fund Names:

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You may upload a file to the online form with pledge funds if you prefer.

Ministry Scheduler

Does your organization track ministry or volunteer data in your current software?	
Would you like ministry and volunteer data converted?	

Religious Education Information

Does your organization track Religious Education/ Faith Formation data in your current software?	
Would you like Religious Education / Faith Formation data converted?	

Great work! Remember to keep a copy of this checklist when your conversion is done, it will come in handy for data validation purposes.

After this form is submitted you will be sent information on how to upload your data backup so your conversion can begin.