

Parish Merger

FAQ's

1. How long will it take ParishSOFT to merge the parish's databases?

A typical parish merger will take 14-16 business days to complete from the time we pull your backup for the stage site, longer if your merge work requires a Conversion and/or Data Integration.

2. What is the merge work timeline?

a) **Basic Merge Timeline:**

- i) Parishes' backups retrieved, and they continue working in their production data.
- ii) ParishSOFT merges data into a staging site (5 business days).
- iii) Parish & Diocese (if required) reviews and approves data in stage site (5-7 business days).
- iv) New Parishes backups retrieved and Parish stops working in production data (1 business day).
- v) ParishSOFT completes merge work in production site (3 business days)

b) **If a Data Conversion, Data Transition or Data Integration is needed** as part of a merge additional fees/time will be required. This additional work will also need to be coordinated, scheduled and completed in advance of the merge work.

- i) Data Conversions take 10-15 business days to complete.
 - (1) 10 days for ParishSOFT to do conversion work.
 - (2) 2-5 business days for parish to review and approve converted data.
- ii) Data Transitions take 3-5 business days to complete.
 - (1) 2-3 days for ParishSOFT to Transition the Data
 - (2) 1-2 days for the Parish to review and approve the transitioned data.
- iii) Data Integration will be needed if the Diocesan database already has data in their database for the converting or transitioning parish(s).
 - (1) Transition/Data Integration takes approximately 15 business days
 - (a) Parish is out of their data for approximately 5 business days.
 - (2) Conversion/Data Integration takes approximately 30 business days.
 - (a) Parish is out of their data for the entire time.

3. What type of data can be merged?

- Family and Member data, including sacraments and workgroups can be merged. New workgroups can also be created during the merge process.
- Contributions and Funds as of the effective date of the merge can be merged. Funds will be pre-fixed with the Parishes POL Numbers.

4. What type of data cannot be merged?

- Ministry Scheduler, Religious Education & Tuition cannot be merged.
 - However, if the merge does not create a new parish and the parish receiving the merged records has existing Religious Education or Ministry Scheduler data that data will be retained.
- Pledges and historical contribution data will not be merged, as the newly merged parish is a new and/or different legal entity.

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- ParishSOFT Accounting data.

5. Will I have access to the historical data that cannot be merged?

- Ministry Scheduler, Religious Education & Tuition historical information will not be accessible following the merge. Therefore, you should run any necessary reports you'll need for historical purposes.
- Pledges and historical contribution data will be viewable in a read only format in the pre-merged parish database for a period of two years. A separate login will be provided.
- ParishSOFT Accounting data can be viewable in a read only format based on your diocesan policies.

6. What happens to the existing envelope numbers?

You have several options regarding envelope numbers.

- You may retain the existing envelope numbers. However, any duplicate envelope numbers will be removed, and a report provided of the removed numbers.
- They may all be zeroed out, so you can assign new envelope numbers after the merge.
- You may prefix the envelope numbers from each parish. For example: 10####, 20####, 30####, etc. Note: Only numbers may be used to prefix the envelope number.
- You may have new envelope numbers assigned to all those marked as registered at the parish.

7. What happens to the existing assignment records in the merging parishes?

- Assignment records for all staff in the merging parishes will be end dated. A Parish Admin record will be created with read-only access to each of the merging parishes for looking up historical contribution data.
- If target organization is an existing organization the staff records will remain the same. If target organization is a new organization the primary merge contact will have a new assignment record created with full access permission.

8. Is there a charge for the merge work?

Yes, a ParishSOFT representative will provide you a merge work estimate based on the scope of your merge work. If all the parishes are using ParishSOFT and/or are synchronizing their Desktop database, the new parish may opt to manually pull in the merging families into the new parish.

9. What if our merger creates a brand-new Parish?

If your merger will create a new Parish, ParishSOFT must issue this parish a new POL Number (Official Customer #) and insert the new organization into the ParishSOFT Database.

10. What will ParishSOFT need to create this new parish record?

You will need to provide ParishSOFT the New Parish's: Name, Address, Phone # and primary contact information.

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11. What does ParishSOFT need if our merger does not create a new Parish?

ParishSOFT will need to know which parish will be receiving the merging data and any changes in the primary contact information.

12. Is there any other information that ParishSOFT needs?

Yes, we will need to know:

- The Name and Email of both a Parish and Diocesan contact for the merge work.
- The POL #'s (Customer #'s) of all the merging parishes.
- The effective date of your merger.
- Specific details about your merge work.
 - A ParishSOFT representative will assist you to gather the specific details.
- If your Arch/Diocese uses ParishSOFT Diocesan Development Manager.

13. Does my Arch/Diocese need to be involved in the merge work details?

If your diocese has a centralized ParishSOFT database, then yes, the diocese will need to be involved in the merge work details and data review process. If your Arch/Diocese is using ParishSOFT Diocesan Development Manager, they will also need to provide information on how to handle the diocesan pledges and contributions associated with the merging parishes.

14. May we add or remove ParishSOFT Modules during the Merge Process?

Yes, just let us know which modules to remove or which additional modules are desired.

15. Are there pre-merge tasks we need to complete?

Yes, ParishSOFT recommends you run do the following:

- **Family Directory** - You should run any statistical reports you will require for historical purposes, as this data will not be available after the merge has been completed.
- **Offerings** - You will only have view access to the historical contribution data, you should run your end-of-year Contribution Statements prior to the merge to verify that you have correctly posted all contribution data.
- **Religious Education/Tuition and Ministry Scheduler** data cannot be merged or moved, you must run any reports needed for statistical or historical purposes prior to the merge. Following the merge work this data will no longer be visible.