

## 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 not send this worksheet to ParishSOFT. We recommend you print and complete this form so you can fill out the online form easily.

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

If you need assistance, please reply to the welcome email you received from ParishSOFT Implementations or contact us at 866.930.4774 x3

Organization Name: \_\_\_\_\_

City/State Zip Code: \_\_\_\_\_

Primary Contact Name: \_\_\_\_\_

Primary Contact Email: \_\_\_\_\_

Is Data Conversion Contact Same as Primary Contact? \_\_\_\_\_ *If no, fill out below:*

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 the agreement in the online form.*

## Data Conversion Checklist Worksheet

### Family Census Information

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

**Number of Families in Current Program:** \_\_\_\_\_

- *This would be ALL families.*

**How Many families are currently registered?** \_\_\_\_\_

- *Unregistered status is assumed if not registered.*

**How was this number obtained from the data?**

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- *This is an important question. 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?** \_\_\_\_\_

**How was this number obtained from the data?**

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- *This is an important question. During the conversion process we match these numbers and it helps us to know how you arrived at this number for validation purposes.*

**What other family status fields have you been using?** Please list below any other family status fields you have been using.

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- **NOTE:** *These may be brought in as Family Groups.*

## Data Conversion Checklist Worksheet

### Member Census Information

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

**Total number of individuals in the current program:** \_\_\_\_\_

**Does your Organization track the following member data? (Yes or No)**

\_\_\_\_\_ Role in Family

➤ *This is a critical field to make your conversion successful*

\_\_\_\_\_ Occupation

\_\_\_\_\_ Gender

➤ *This is a critical field to make your conversion successful*

\_\_\_\_\_ Religion

\_\_\_\_\_ Date of Birth

\_\_\_\_\_ Date of Death

\_\_\_\_\_ School Grade

➤ *This will **NOT** convert into ParishSOFT Family Suite, It will be changed to Grad Year*

**Does your database have a member status field?** \_\_\_\_\_

➤ *More on this a few questions later*

*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?**

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**How many members are inactive:** \_\_\_\_\_

**What criteria did you use to get the Inactive Member Count?**

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## Data Conversion Checklist Worksheet

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How many members are deceased? \_\_\_\_\_

What criteria did you use to get the Deceased Member Count?

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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 on the next page 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.



## Data Conversion Checklist Worksheet

### 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.*

**How many individual family members have envelopes numbers?** \_\_\_\_\_

**How many individuals are sent envelopes?** \_\_\_\_\_

**How do you designate who should NOT be sent envelopes?**

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## Data Conversion Checklist Worksheet

### 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

Mr. and Mrs. John Smith (244880)

Family Details
Member Details (2) ▾

Family Information



Change Delete

Church of Registration: Cathedral of San Demos, Ann Arbor

Details Modified On: Wednesday, February 04, 2015 4:01 PM

Family Group: Active ▾

Registration Status:

Registration Date: 6/22/2011

Unregistered Date:

Last Name\*:

First Name(s)\*:

Formal Mailing Name:

Informal Name:  } Auto Fill

Formal Salutation:

Informal Salutation:

Email Address:

Primary Phone:

Emergency Phone:

Emer. Ph. Desc.:

Primary Address: Home Address ▾

Home Mailing Other

Country: United States

Postal Code:

Address Line 1:

Address Line 2:

City: Ypsilanti

State/Region: Michigan

Phone Number:

Edit Details
Close

## Data Conversion Checklist Worksheet

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)

### 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.*

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? \_\_\_\_\_

Would you like your pledge data to be converted? \_\_\_\_\_

*If yes please list the names of each of you pledge funds below*

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



## Data Conversion Checklist Worksheet

### 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 for data validation purposes when your conversion is done. To complete your online checklist, please use the link you were emailed. You will be emailed a copy of the form after you submit it.***

***After this form is submitted you will be sent information on how to upload your data backup so your conversion can begin. Please reply to your most recent email from us if you need assistance in this process.***