

GabrielSoft Parish Operating Policies for Diocese of Green Bay

All Parishes should be using GabrielSoft for the following documentation for Parish Families. Each user at the parish should be set up with the appropriate security and training to perform their function. These responsibilities can be divided up among staff and volunteers.

1. Review families census information
 - Ensure correct name, address, email, phone
 - Review Family Status as appropriate to their relationship with your church
 - Ensure Registration status is updated for the church the family chooses to be registered with
 - Ensure the correct members at the address are listed
 - Review Misc Tab for birthdate, gender, marital status
 - Monitor families for young adults to be moved to a separate single family
 - Member status is updated by the parish of registration.
 - Update Mailing address in Mailing tab when address is updated on maintenance screen
 - Review families for duplicates (the diocese can provide a report) and request to merge duplicates.
2. Enter sacraments into Gabriel to reflect entries in Sacramental Registry
 - Enter Baptisms, First Communion sacraments celebrated at your church
 - When First Communion is done in a mixed church setting, the church who prepared the student in RE should track their students in their book and in Gabriel.
 - Enter Confirmations for all of your parishioners, even if held at another parish
 - Enter Marriages celebrated at your church
 - Pull each spouse out of their parent's family into a new family before recording Matrimony
3. Enter Funerals held at your parish or by your clergy at another non-parish location
 - Enter the Date of Death
 - Enter the Death Registry PRM note to match the data entered in the Death Registry book
 - Make the member deceased
 - If all members of a family are deceased, make the family deceased and unregister them
 - In the case of a remaining spouse, update the marital status to Widow/Widower
4. Enter weekend offertory and loose collection into appropriate funds by family
 - Enter envelope contributions
 - individually,
 - by batch, (including cloned batches)
 - by on-line giving report download
 - or by on-line giving integration
 - Enter Loose Cash collection into family "Loose, Collection" ID 42329 (Budget 99999)
5. Maintain Mass schedule and enter Mass Counts weekly
 - Maintain Mass schedule for active Masses, and inactivate those as appropriate
 - Enter attendance per Mass into the schedules under the "Counts" tab
6. Maintain up to date Standard Committees (**DRAFT**)
 - Enter members of the Pastoral Council (including the Secretary Trustee) into the Standard Committee "Pastoral Council" using the drop-down list for Position. Council Chair and Trustee should have Start and End Dates.
 - Enter members of the Finance Council (including the Treasurer Trustee) into the Standard Committee "Finance Council" using the drop-down list for Position. Council Chair and Trustee should have Start and End Dates
 - For members leaving the committee, enter the end date, save, and then delete the committee person.
 - Check that an automated PRM note is created for the deleted committee person.
 - Enter staff persons into the Parish Staff Standard Committee using the drop-down list for Positions. Start and end dates are useful but optional.
 - Clergy Parish Staff assignments (Deacons/Priests/Pastoral Leaders) are managed by Chancery staff