

Track Students by Graduation Year

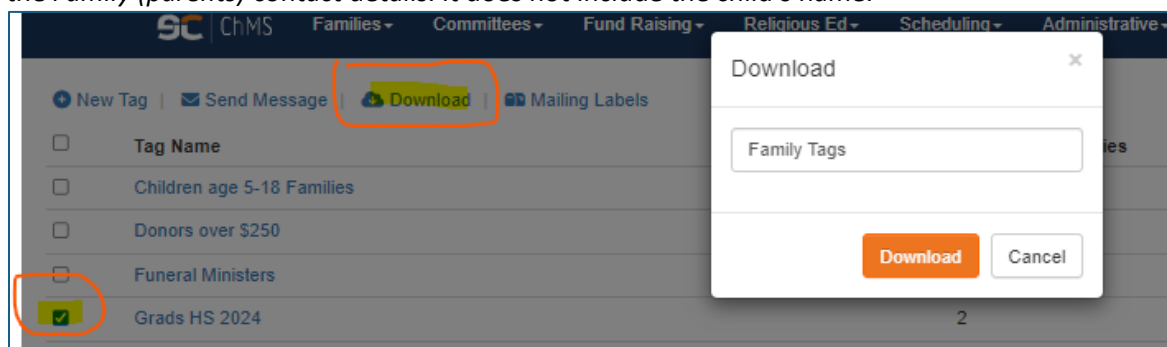
Some parishes have events or provide gives for graduating high school seniors. Some options for tracking these students effectively are outlined here.

There are 3 ways parishes track students in ChMS

1. Family Tags
2. Work Title
3. PRM notes

Family Tags

- Create family tags for Graduation 2024, and Graduation 2025, etc. and put the family with the child graduating in the appropriate tag. This won't indicate the child's name, just the family name.
- This is the only method that currently provides the family contact details (address/email/phone)
- The families in the Family Tag can be downloaded from Family Tag Maintenance into Excel. This download has the *Family (parents)* contact details. It does not include the child's name.



Family Tags													
Tag Name	Family ID	Last Name	First Name	Salutation	Addr1	Addr2	City	State	Zip Code	Budget Number	Has Envelopes	Status Code	Registration Date
Grads HS 2024	234047	Pufnstuf-zyzz	HR	Mr Pufnstuf	833 Magic Flute Ln		Green Bay	WI	54301	**4047	TRUE	ACTIVE	5/8/2023
Grads HS 2024	229408	Zyzzlschmidt	Janice		2771 OAKWOOD DR		GREEN BAY	WI	54304-1618		FALSE	SACRAMENT	8/18/2022

- Or downloaded from the Family Tag Listing Report in the report library

Family Tag Member Listing													
Budget Num	Mail Name	Last Name	First Name	Salutation	addr1	addr2	city	state	zipcode	Family Email	Phone Number	statuscode	Registration Date
	Yvonne Yowzyzzski	Yvonne	Yvonne		311 Market St		Wausau	WI	54403	Yvonne@MovedStatus.com		MOVED	10/12/2021
	Ms Janice Zyzzlschmidt	Janice	Janice		2771 OAKWOOD DR		GREEN BAY	WI	54304-1618			SACRAMENT	8/18/2022
**4047	H.R. Pufnstuf	Pufnstuf-zyzz	HR	Mr Pufnstuf	833 Magic Flute Ln		Green Bay	WI	54301	Pufnstuf@demo.com	920-272-6295	ACTIVE	5/8/2023

Work Title

- This is preferred by most Parishes. *(As of 1/19/24 no reporting method exists to include family contact details)*
- Record the student info for their School in Work Company, and their Graduation Year in Work Title. Using Grad Year is better than entering a grade level which would require updating each time they promote to the next grade.
- Be consistent in the text in Work Title so the info is easy to find in reports or Explorer tools.

Home Address	Work Address	Busy Weeks	Committees	Sacraments	Funeral
Holy Name HS, GB	Work Address Line 1				
Grad 2028	Work Address Line 2				
Work Subtitle	Work City				

- You can find and report on the Student Grad years in a couple of ways.
 - o Use member Explorer,
 - add the columns for Work Title, Work Company. Then Filter Work Title for *contains* "Grad" (just type in Grad in the filter box).
 - The Work Title can be sorted Ascending or Descending.
 - This list can be downloaded by checking the box next to the Last Name column.
 - The Member Explorer download will only show the columns that you've made visible in the Explorer tool. [As of 1/19/24 the Member or Family address is not visible or downloadable from Member Explorer.]

<input type="checkbox"/>	Last Name	First Name	Member S...	Work Title	Work Company	Memb...
<input type="checkbox"/>	Zocunerre	Alexander	ACTIVE	Grad 2040		499678
<input type="checkbox"/>	Perkins	Amelia	ACTIVE	Grad 2037	Holy Family School, GB	499672
<input type="checkbox"/>	Cunninghamz	Anson	ACTIVE	Grad 2033	Holy Rosary, Kewaunee	541555
<input type="checkbox"/>	Zyzlschmidt	Alan	ACTIVE	Grad 2026	Holy Family School, GB	539458
<input type="checkbox"/>	Flagston	Ditto	ACTIVE	Grad 2023	St Mary Catholic School, De Pere	536039

- o Use the Occupation Report in the Report Library under Members,
 - CTRL+click to select the "Grad Years" in the Select Occupation box.
 - This report could be much better to include the Family Name and contact info. I'll request an update to this report.

< Report Library
 Occupation Report
 Select a list of occupations that your members have and run this report to find out who they are.
 Church Id*
 aa-DEMO-St Peregrine-Green E
 Select Occupation*
 Grad 2023
 Grad 2026
 Grad 2033
 Grad 2037
 Grad 2040
 Run

1 of 1
 Member Occupation Report
 aa-DEMO-St Peregrine Green Bay

Occupation	Last Name, First Name	Maiden Name	Sub Title	Member Age	Member Email	Mobile
Grad 2023	Flagston, Ditto Robert			26		
Grad 2026	Zyzlschmidt, Alan			16		
Grad 2033	Cunninghamz, Anson			8		
Grad 2037	Perkins, Amelia			4		

 1 of 1
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PRM Notes

- Add a PRM note to the child's record.
- Choose a note type that's seldom used to find easily in reports (like FAX) and put the Grad year in the note.

Home Address	Work Address	Busy Weeks	Committees	Sacraments	Funeral	RE History	Miscellaneous	PRM
+ New Note								
Contacted On	Contacted Via	Member Name			Notes			
1/19/2012	Fax	Zyzlschmidt, Davis			Grad 2024 View			

- Use the PRM Notes Report or PRM notes for Family to identify the Students– neither reports include contact address/email
- Enter Note Date From and Entry Date From should be about 20 years prior to current date to capture all potential notes.
- (As of 1/19/24, request submitted to update report with contact details)

PRM Notes Report

This report displays Family and Member PRM Notes for a Note date range, entry date range and selected

Select Church(es) for report*

- aa-DEMO-St Peregrine
- All Saints Catholic School
- All Saints Parish
- All Saints School

Enter Note Date From*

01/01/2000

Enter Note Date To*

01/20/2024

Entry Date From*

01/01/2000

Entry Date To*

01/20/2024

Select Note Type(s)*

- FAX
- SMS
- HOMEBOUND
- PHONE
- MISC

PRM Notes

Church	Note Date	Note Type	Family Last/First	Family Email	Family Phone	Note Entered Username	Note Entered Date Time
			Member Last/First	Member Email	Member Phone		
aa-DEMO-St Peregrine		Follow Up Date	Zyzzlschmidt, Janice			pyoung@gbdioc.org	1/19/2024 4:42:55 PM
Green Bay	9/12/2007	FAX	Zyzzlschmidt, Alan				
			Grad 2026				
aa-DEMO-St Peregrine			Perkins, Kathleen & Karl	Perkinsfamily@demo.com	9205552222	pyoung@gbdioc.org	1/19/2024 4:42:31 PM
Green Bay	5/2/2019	FAX	Perkins, Ameilia				
			Grad 2037				

1/19/2024 4:43:41 PM

Created pyoung@gbdioc.org 1/19/24