

ARCHDIOCESE OF SEATTLE

PARISHIONER
ENGAGEMENT

PDS Database Cleanup

2022

Data Clean up:

The Archdiocese of Seattle is moving to a new parishioner engagement platform. During the period prior to your parish and faith community's migration to this new platform, data must be filtered and organized within PDS.

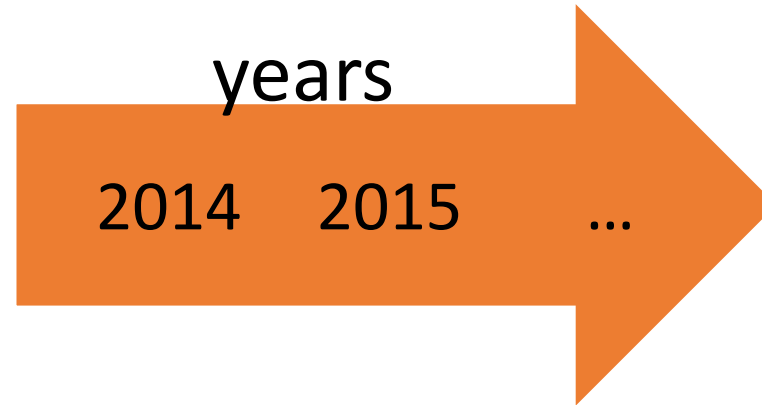
Which data is being brought over?

Is the data that is being migrated in a format that makes a clean migration possible?

Which data is being brought over?



Current System



New System

This video is intended to provide guidance for discerning which data information PDS Church Office to preserve for migration to the new parishioner engagement system. It is not intended to instruct or interpret questions related to the archival policies of the Archdiocese of Seattle.

For Questions or Clarifications on Policy Questions, Please Contact



Director

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Archives Policy

100 ADMINISTRATION MANAGEMENT

The function of administering parish programs, offices, boards, groups, and events.

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS105-10	PARISHIONER REGISTRATIONS	If using paper registration forms for data entry into Parish Data System (PDS), then paper forms are transitory and electronic data is permanent. If paper forms are sole proof of parishioner registration: Permanent	PARISH ARCHIVES

Archives Policy (525 Continued)

525 DEVELOPMENT & FUNDRAISING

The activity of soliciting and gathering contributions of money and/or other resources through capital campaigns, auctions, fundraising events, special collections, and estate planning.

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS525-25	DONATION RECORDS	Calendar year + 6 years <i>(2015 and older can be deleted)</i>	SHRED/DELETE
PS525-30	DONATION SUMMARY REPORTS	Calendar year + 6 years <i>(2015 and older can be deleted)</i>	SHRED/DELETE
PS525-35	DONOR DATABASE RECORDS – Includes: contact information, demographic information, educational and business information, how donators wish to be recognized, donation amount, history of gifts, attendance at activities, as well as other attributes relevant to the donator's relationship with the Archdiocese of Seattle.	Calendar year + 6 years or obsolete or superseded, whichever is longer <i>(2015 and older can be deleted)</i>	DELETE
PS525-40	FUNDRAISING GOAL WORKSHEETS	Calendar year + 6 years <i>(2015 and older can be deleted)</i>	SHRED/DELETE

Archives Policy (525 Continued)

525 DEVELOPMENT & FUNDRAISING

The activity of soliciting and gathering contributions of money and/or other resources through capital campaigns, auctions, fundraising events, special collections, and estate planning.

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS525-45	FUNDRAISING PLEDGE RECORDS – May include, but not limited to: pledge cards, payment forms, credit card or electronic fund transfer forms, batch records, cash receipts journal, pledge status reports, summary reports, ad-hoc reports, donor gifts, and pledge adjustment documentation.	Calendar year + 6 years <i>(2015 and older can be deleted)</i> If using pledge forms for data entry into Parish Data System, then pledge forms are transitory and database is official record.	SHRED/DELETE
PS525-50	PARISH DATA SYSTEM (PDS) – Contains financial and demographic information. <ul style="list-style-type: none"> • For Weekly Contribution Envelopes, see PS525-55. • For Parishioner Registrations, see PS105-10. • For Fundraising Pledge Records, PS525-45. 	Various (see details)	Various (see details)
PS525-55	WEEKLY CONTRIBUTION ENVELOPES	If paper used for data entry: End of fiscal year. And maintain electronic data in parish data system: fiscal year + 6 years. If paper used for sole evidence of contribution: fiscal year + 6 years	SHRED

Archives Policy

300 SACRAMENTAL ADMINISTRATION

The function of coordinating formal sacramental and canonical processes of the Roman Catholic Church.

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS300-10	DEATH REGISTERS	Permanent	PARISH ARCHIVES
PS300-45	SACRAMENTAL REGISTERS – Baptismal, confirmation, first communion, and marriage registers. Includes: supporting documentation (e.g. birth certificate and baptismal certificate) used for significant changes to register (such as name change or adoption).	Permanent	PARISH ARCHIVES

Archives Policy

1400 YOUTH & YOUNG ADULT MINISTRY

The activity of organizing, coordinating, and administering programs, courses, conferences, workshops, Sunday school programs, youth group, field trips, retreats, events, and religious education for parish youth and young adults. For records related to planning or development to youth and young adult events or classes, see event planning records (125) or training course development records (1300) depending on the nature of the service.

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS1400-05	RELIGIOUS EDUCATION REGISTRATIONS – Records include registrations for youth faith formation/religious education at parishes for Sunday school, sacramental preparation and RCIA/C.	Calendar year + 3 years <i>(2018 and older can be deleted)</i>	SHRED/DELETE
PS1400-10	RELIGIOUS EDUCATION SIGN-IN SHEETS – Records include sign-in sheets for religious education at parishes for Sunday school, sacramental preparation and RCIA/C.	Calendar year + 3 years <i>(2018 and older can be deleted)</i>	SHRED

Archives Policy (1400 Continued)

1400 YOUTH & YOUNG ADULT MINISTRY

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS1400-15	<p>YOUTH GROUP REGISTRATIONS – Records produced through the registration for a parish’s Youth Group program(s). Includes: payment information, emergency contact information, medical release forms, and media release forms. Does not include registrations and documentation for off-site field trips, conferences, and events (see PS1400-25 for more information). For religious education program registrations, see PS1400-05.</p>	Calendar year + 3 years	SHRED/DELET
PS1400-25	<p>YOUTH & YOUNG ADULT EVENT REGISTRATION RECORDS – Events, conferences, parish day camps, overnight events, missions, projects, galas, festivals, field trips, retreats, and celebrations, which have been organized or administered by the parish specifically for youth and/or young adults. Records may include but are not limited to:</p> <ul style="list-style-type: none"> • Parent/legal guardian permission slip forms, • Class rosters, • Emergency information, • Sign-up sheets, • Codes of behavior or conduct, • Liability waivers, and • Registration forms. <p>For emergency releases, see emergency treatment release forms (PS125-05) and for transportation records, see Youth Transportation Records (PS1400-30). For religious education and sacramental preparation, use PS1400-05 and PS1400-10.</p>	Registrations of minors: retain until minor is age 18 + 3 years	SHRED/DELETE

Archives Policy (1400 Continued)

1400 YOUTH & YOUNG ADULT MINISTRY

SERIES NO.	SERIES/TITLE DESCRIPTION	RETENTION	DISPOSITION
PS1400-20	<p>YOUTH GROUP SIGN-IN SHEETS – Meeting sign-in sheets of attendees to a parish’s Youth Group program</p>	<p>Calendar year + 3 years <i>(2018 and older can be deleted)</i></p>	SHRED
PS1400-30	<p>YOUTH & YOUNG ADULT TRANSPORTATION RECORDS – Records concerning the transportation of minors by bus or private vehicle for special events such as field trips and retreats. Includes: driver information form.</p> <p>This retention policy applies only to cases where the parish organizes transportation. If participants are responsible for their own transportation, these records do not apply.</p>	<p>End of field trip + 6 years</p> <p>If accident/incident occurs, but no claim is filed, retain for 3 years after individual reaches age 18</p>	SHRED/DELETE

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Inactivate vs. Delete

- When data migration takes place to the new system, you'll have the choice as to which families and members you want to migrate.
- Most vendors charge based upon number of member records
- Consider marking families and members that you know you don't want to move with the 'Archive for Deletion' family status keyword now. This will make it easier when we move the data.
- For your inactive families or members, are there some you will want to migrate? If so, please follow the directions in the videos and instructions located on the Learning and Implementation website?
- How Does Your Parish determine if a family or member is ACTIVE?
 - Giving History?
 - Ministry or Volunteer Involvement?
 - Communicate with those that may be on the margins to be sure they have places to be involved or if they want to be removed from parish

Archival of Information via PDF Document

When you delete a Family or Member, you're given two prompts. The first is a warning that includes any financial data that might be deleted



Confirm

?

This will delete this family and all its members and funds from the Church Office data. Are you sure?

Warning: This family has donations/payments in the following funds:
9-16

Yes No

Then, you are given an opportunity to print their information –



Deleting Family Information

Do You Want to Print Family Information?

Do you want to print the family information before it is deleted?

Also print information about the members.

Also print financial information.

Print detailed financial information.

Print summary of financial information.

Yes No Cancel Delete

You'll want to select YES



*****Please see important note on following slide related to permanent archival storage!**

Archival of Information via PDF Document

Be sure to set the printer to 'Microsoft Print to PDF' or another PDF Writer option:



Please be sure to select a location for the output file that will be backed up consistently and is a permanent location.***

*****The Archdiocese is working on some options for permanent archival storage for the parishes. It would make sense to hold off on this process until those options are established for long-term archival format file storage.**

Print List

Printer: Microsoft Print to PDF (highlighted with a red box) Properties

Print in black and white (conserves colored ink)

Paper: Size: Letter Source: Default Orientation: Portrait Landscape

Margin Style: Style Name: 1/2" Margins Edit Style

Top: 0.500" Left: 0.500" Bottom: 0.500" Right: 0.500"

Page Style: Style Name: Internal Report Style Edit Style

Notes: [Empty text box]

Sample: [Empty preview area]

Preview Print Cancel

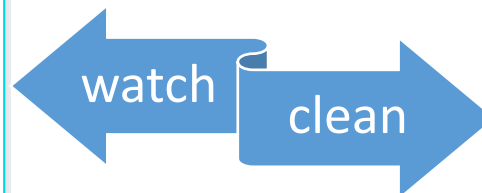
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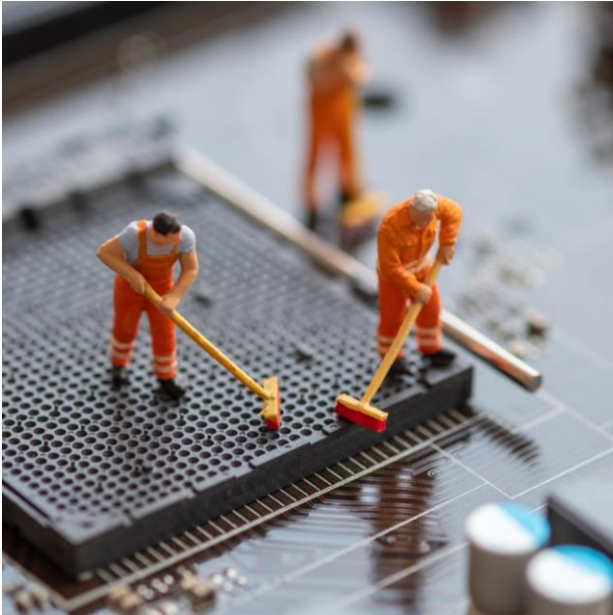


visit

<https://aosparishionerengagement.weebly.com/>

Training>Leaving PDS: videos and written instructions





For More Information on PDS Processes:

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