

Church Records

**A database designed to make
record-keeping easier in the
Epsicopal Church**

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INTRODUCTION

Church Records does not replace your Church Register. It is intended to simplify the use of your membership data in tasks performed throughout the year: voter lists, membership lists for Parochial Reports each year, phone lists, mailing labels, recording pledges and contributions, contribution statements, etc.

Once the data is loaded, it must be maintained by adding new members, recording when a family moves away or someone dies, etc. It will also be necessary to update an individual's status, for example when they become an adult or join a group that you want to print labels for (e.g. Vestry, or the Search Committee), when they move, change email or phone numbers, etc. As is always the case, the accuracy of the data will be reflected in the quality of the reports.

The data is structured by the family (which is also the giving unit) and individual members within a family (baptism, confirmation, phone, birthday, email, activities, ...). More information is available in the section on loading the database and Membership – Managing Data.

This database was created about 20 years ago to make my work easier doing all the tasks already mentioned at my church in Walpole, NH, and now at the church I attend in Lockport, NY. It is now available to others so that we can focus on more important activities than manipulating member information. I do my best to help resolve issues as quickly as possible. I would also like to make the database more useful, so I accept requests for additional functionality.

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Note on the Manual Layout:

Each section starts with the menu selections in red to get to the described functionality. Especially when starting to use a new database, it can be difficult to find the needed functionality so the intent is to minimize that issue.

If databases are new technology for you, review the Glossary at the end of this document for definitions of database terms used repeatedly.

Hold the Ctrl key and click on an item in the Contents to go directly to that section.

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MEMBERSHIP – MANAGING THE DATA

Managing the membership data is mostly accomplished with two forms: Families and Members. The family is the basic unit in Church Records. All members are connected to their family. A family can be one person or multi-generational or anything between. When a new family or person arrives at Church start with the Family record, then add Member records for each member of the family. Think of the family as the giving unit, the basic unit of the Church Records database. *Note:* a single person will have both a family and a member record.

Warning: do not ever remove/delete families or members. Simply mark either the family or member Inactive. If appropriate also enter the year the member died. If you remove families or members your database may become unusable because you will have information that cannot be accessed.

Families

Parishioner Data >> Families

In the Family form Add New Family or click on Family Name field >> Find

Note: Create a Family with the first and last names both Anonymous. Check the Regular Giver and Inactive check boxes. No other data is needed. This will be used for contributions only.

Enter the family name, typically the last name of the husband, father or adult. Think of how you will refer to the family when they have become an active part of your church family and use that. Searching for the family name is the most common way to access their data.

The salutation is typically the first name(s) of the adult(s) – it should reflect how they would be referred to in a letter or on the phone list. *Hint:* if the family has different last names, e.g. Sally Brown and Jim Smith, try using Smith as the family name and for the salutation enter Sally Brown and Jim. The Mail To field will be automatically populated with the first plus last names, in this case Sally Brown and Jim Smith. The same will be put in the Anniversary Prayers field. At that point go back and change the Salutation to Sally and Jim so it is ready for use in letters. If this family is a married couple, enter the date they were married and check the Include in List? box to include the anniversary in anniversary prayer lists.

Enter the home phone if there is one. Also enter the Address. If the family has a second home enter the address in Alternate Address. This is particularly helpful for people who go away for the summer or winter down south. When the family will be at their second home check Use Alternate Address to send mail to that address. Be sure to uncheck it when they come back. If Use Alternate Address is checked, mailings will be prepared with the alternate address. The primary address will always be used in phone lists.

For the check boxes:

- Newsletter is used to generate mailing labels for paper newsletters. In general, churches now use email to send most newsletters, do not check Newsletter for email, just check it for those who need a paper copy.
- Most people in the parish will have Stewardship (mailing labels for the stewardship campaign), Regular Giver (name appears on the contributions form – only check this if they are regular givers) and Midyear Statements (typically most regular givers). Everyone who contributes gets a year-end statement in January for their taxes. You can send statements as needed during the year.
- Phone List should be checked if the family is not active but you want them on the phone list anyway. In general, all families who are not inactive, deceased or moved away will be on the phone list.
- Inactive, Deceased and Moved Away apply to the whole family. Use the similar check boxes on the member form if just one person changes status.

Emergency Contacts are important. In an emergency, the church is often contacted – the neighbors know if someone goes to church and which church. It is a terrible feeling to not know who a member is related to when they may be in need of help, and sometimes there isn't much time. Enter as many emergency contacts as the family wishes – if there is only one, they might not be available when needed. Enter the primary contact first and then the others. Make whatever notes are helpful for each contact.

While we are on the Family Record, notice the three buttons:

- Add New Family: opens an empty Family record.
- Add Family Member: opens a new member record. Once a member record is saved, the name will be displayed in the Family Members list. Double click on a name in the Family Members list to open the Member record for that person.
- Find: to find a family, click on the field you want to search (Family Name is most common, but you might be looking for members living in a specific town or street, etc.), then click the Find button. A window will pop up – type the search string. If you don't get the results you expect, check the settings at the bottom of the Find window you may have better luck if you don't use the default settings. The Match setting "Any Part of Field" will find the most data but will take longer.

Members

Parishioner Data >> Families >> Find the right family or Add New Family
In the Family form Add Family Member or double click Member's Name in Family Members List

You will need to complete a member form for each person in each family. This form has all the information you will likely need on your members. Be as complete as possible – it will save time in the future.

Do not change the family name – it is key to grouping the family.

Enter the individual's name including their last name which may be different than the family name. Enter their salutation, birthday, gender, and contact information. If the person gave permission, check Email Notices. Everyone will probably be included in the Birthday List (which shows month and day, but not year), but if someone requests they not be included, uncheck the box.

If the person is an adult by your church definition, the definition in your Diocesan constitution and canons, and the civil law for your state, check the Adult Box. Your voter requirements are shown in the box on the right side of the form. If this individual meets your criteria, also check Voter. There are three columns of typical church activities – check those that are appropriate for this individual.

Make Notes as appropriate – it can be anything that is useful. This field is not visible except to those using the database. It may be useful to note where someone transferred from, or a spouse or child that has passed, etc.

Under Church Records, the check boxes are used in preparing the membership information for the Parochial Report. All the check boxes should be used as defined by the Parochial Report with the exception of Friend. Friend is here as a way to include people who will probably never join the church, are not included in the Parochial Report in any category, but you want to include (e.g. a spouse who is active in another church, but attends your activities or someone you wish to include on the birthday and/or anniversary list). *Note:* the information in the database must be the same as what appears in the Parish Register, the official record for the Church.

Record as much info as possible (i.e. date and location) for Baptized, Confirmed, Received, Transfer, Married, Removed (date they are removed from your Parish Register, e.g. when they request a letter of transfer to a new church), and Buried. Also enter the year of death. Do not change the year Last Reported in Parochial Report.

Data Verification

[Parishioner Data >> Data Verification](#)

Data Verification will print a report for each family containing the family data plus all the membership information. Use this to ask each family to verify their information for completeness and accuracy. This is appropriate after loading a lot of new information such as when converting to Church Records or when it seems the data is incomplete or inaccurate. It is not something you will want to have everyone do often.

Data Verification – Select Families

[Parishioner Data >> Data Verification – Select Families](#)

To print verification data for one or a few families, use Data Verification – Select Families. Select the families you wish to print forms for and click the Print Selected Verification button. To clear all selections, i.e. to uncheck all families, click Clear Selection.

New Family Form

[Parishioner Data >> New Family Form](#)

To collect data on a new family, print this form. If there are more than five people in the family, use additional copies of the form. This is basically the empty version of Data Verification and will request all the necessary data on the family.

MEMBERSHIP – UTILIZING THE DATA

Annual Meeting – Voter List

Parishioner Reports >> Voters

Background Information

The guidelines for voting are based on The Episcopal Church (TEC) constitution and canons, but each Diocese has a slightly different constitution and canons which also need to be followed, and each church has their own bylaws which govern elections and voting.

Every baptized person whose name and baptism are recorded in the Parish Register is a **member of the congregation**. A member 16 years of age or older is an adult member of the congregation. *TEC I.17.1(a) and (b)*

Every adult communicant member of the congregation shall have the right to vote. The clerk shall keep a list of qualified voters, and only those members listed shall be allowed to vote. *NH 4.2.7*

Qualification to Vote. Persons twenty-one years of age or more belonging to the parish who have been baptized and regular attendants at its worship and contributors to its support for at least twelve months shall be qualified voters; and also persons of less than twenty-one years of age but of the age of eighteen years or more having the like qualifications may vote in any parish, whenever that parish shall so determine in the manner provided by Article 3 of the New York Religious Corporations Law.

NOTE: The organization of a parish and of the vestry, annual elections and parish meetings, etc., are subject to the provisions of Article 3 of the Religious Corporations Law of the State of New York. *WNY 13.1.2*

Note: Whatever the church governance, please also consider the civil laws of your state. While TEC recommends 16 years of age, the civil laws of most states specify 18 years of age to exercise voting power or to act as a legal representative (e.g. approving or signing for the church). We are required to follow civil law as well as our church regulations.

Data

The database is flexible to support the rules of each church and applicable civil law, but that means the person maintaining the data must know and follow these rules. To appear on the Voter List, a person in the database must be:

- a member (in the parish register and Church Records on the member form)
- baptized
- an adult
- be designated a Voter on the member record

The first three requirements are from TEC and the fourth one lets you customize for your specific situation. In that way each church determines when a person becomes an adult and when they meet your church's specific requirements to be a voter (Do you require being a member at least a year? Regular attendance at church? Contributing to the church?...).

When you set up the database, your specific requirements were entered and are displayed on the right side of the Member form. They will be displayed on the member page to make it easier to remember your requirements and determine who should be marked a voter.

Creating the Voter List

From the main menu select Parishioner Reports then Voters. The list shows all voters in alphabetical order with the total number of voters in the upper right corner. The list makes it easy to determine whether a quorum is present.

Parochial Report – Member List

Parishioner Reports >> Parochial Report Preparation – Members

Update the member data >> Record Data

Parishioner Reports >> Parochial Report – Members

Print the report

To create the member list for the Parochial Report, there are two steps:

1. You need to prepare the data, and once it is accurate and complete, you need to record the data.
2. After the data has been saved, you need to generate the report.

Data Preparation

At least once a year before preparing the Parochial Report, the member data must be updated. Use Parochial Report Member – Preparation. This form lists all members, but not those marked Friend, and includes those who died during the year because in most cases they count as active members since the Parochial Report is for the previous year.

Detailed instructions are at the top of the form. As you scroll through the list of members, update any information that needs to be cleaned up, paying particular attention to whether members received communion three times during the year and verify that all the other boxes are checked or unchecked as appropriate. This data is critical – it produces the member data needed for the Parochial Report. Once you are sure the data is correct for all members, be sure the year is entered and click Record Data. This records the Reported (Last Parochial Report) on the Member form. As you updated the member data, it also updates the Church Records section of the Member form.

Create the Report

To generate and print the Parochial Report – Members report, select it from the Parishioner Reports section of the menu. The report will list and count Active Members (the total active baptized, adults in good standing and youth in good standing), Active Non-Members (adults and youth), and Inactive Members (the total and youth). These are numbers you need to prepare the Member section of the Parochial Report. Save the report – you may need to refer to it next year.

Preparing the Voter List for Annual Meeting and the Member data for the Parochial Report happen only once a year typically, but require care to ensure all the data is updated before the reports are generated. However, there are lots of other uses for the membership data throughout the year, and this is where the database really saves time and work.

Anniversary and Birthday Reports

[Parishioner Reports >> Anniversary Report](#)

[Parishioner Reports >> Birthday Report](#)

These are self-explanatory and are created from the Parishioner Reports menu. One click and you have your report.

If an anniversary is not included in the report check the Family form. Be sure you have the Date Married, Anniversary Prayers (enter names as you want them to appear on the list), and check Include in List?

If a birthday is not included, check the Member form for the person. Enter the Birth Date and check Include in Birthday List?

Birthdays to Celebrate Report

[Parishioner Reports >> Birthdays to Celebrate](#)

Birthdays to Celebrate is a handy way to prepare a list of the oldest members – the birthdays we often celebrate. Enter the most recent year to include in the report. The births in that year and before will be included in the report. There are two report formats:

- Birthdays to Celebrate by Age – is a chronological listing starting with the earliest birthday, i.e. the oldest member.
- Birthdays to Celebrate by Month – is a list sorted by month and day. This report is handy when sending birthday cards.

Prepare Mailing Labels

[Parishioner Reports >> Mailings and Labels](#)

All labels are formatted for standard mailing labels that are thirty per page and each label is 1" high x 2.63" wide, e.g. Avery 5260, 8160, 8660, etc.

Family Labels

[Parishioner Reports >> Mailings and Labels >> Family](#)

This creates a label for every active family in your database.

Member Labels

[Parishioner Reports >> Mailings and Labels >> Member](#)

Church Records

This report includes a label for every active member in the database.

Select for Mailing – Family

Parishioner Reports >> Mailings and Labels >> Select for Mailing – Family

A list of all the families in the database will be displayed. Click Clear Selection before doing anything else. If the last user forgot to clear their selections, this will provide a clear slate to start with. Check the boxes to the left of the families you wish to include in your mailing. When all the families are checked, click Print Selected Labels. When your labels are printed, click Clear Selection.

Select for Mailing (or Emailing) – Member

Parishioner Reports >> Mailings and Labels >> Select for Mailing – Member

This option lets you create mailing labels or export a list of email addresses. As with the families, a list of all members with USPS addresses and email addresses will be displayed – select the ones to be included.

Start by clicking Clear Selection in case some items are checked from the last use. Check all the members to be included. For mailing labels, click Print Selected Labels. If you are creating an email list, click Export Selected Emails. A file named “selected emails.xlsb” will be created in your default location (usually your local Documents folder, but the default location on each computer can be customized).

Newsletter

Parishioner Reports >> Mailings and Labels >> Newsletter

This report will generate labels for all the families who have the Newsletter box checked.

Vestry

Parishioner Reports >> Mailings and Labels >> Vestry

This report will generate labels for all those members who have the Vestry box checked.

Search Committee

Parishioner Reports >> Mailings and Labels >> Search Committee

This report will generate labels for all members who have the Search Committee box checked.

Vestry/Search Committee

Parishioner Reports >> Mailings and Labels >> Vestry/Search Committee

This report will generate labels for all members who have the either the Vestry or Search Committee box checked, but will eliminate redundancy, so there will be only one label for those Vestry members who are also on the Search Committee.

Stewardship Labels

[Parishioner Reports](#) >> [Mailings and Labels](#) >> [Stewardship Labels](#)

This report will generate labels for all families who have the Stewardship box checked on the Family form.

Phone Lists

[Parishioner Reports](#) >> [Phone Lists](#)

Standard Format

[Parishioner Reports](#) >> [Phone Lists](#) >> [Standard Format](#)

The standard format includes names, home phone and address. This was the initial format when the database was created, but is not terribly helpful now unless your parishioners do not use cell phones and email. The Detailed Phone List is recommended. *Note:* use this report if you want to limit information shared, e.g. if your church is doing a photo directory and the company wants to mail everyone to set up photo appointments.

Detailed Phone List

[Parishioner Reports](#) >> [Phone Lists](#) >> [Detailed Phone List](#)

This is the recommended format. It includes names, address, and home phone for the family plus cell or work phone numbers and email for each member of the family.

Inactive List

[Parishioner Reports](#) >> [Phone Lists](#) >> [Inactive List](#)

The inactive list includes address and home phone for families who no longer attend. It can be useful when striving to reactivate lapsed members.

CONTRIBUTIONS

Contributions

The Contributions form collects the data on your contributions and prepares a deposit slip. The information is entered, verified, saved, reports generated and then cleared from the form. There are several steps, and they must be performed in order.

Contribution Date

The first step is to enter the contribution date. The current date is the default but can be modified if necessary.

Select the two Counters. The drop-down lists are populated with the names of all the people who are identified as Counters. If someone is missing from these lists, open their Member record and verify that the Counter box is checked.

Note: two Counters are required. This is standard practice and protects an individual from questions about the accuracy and completeness of the recording of all contributions.

At the bottom of the page are fields for up to two email addresses. These fields are locked and were set up when the database was first set up. If a window pops up asking permission to send email, please agree.

Click OK

Contributions

The Contributions form is a table with fields to gather all the contribution data. See a sample below in this section. Down the left side is a list of the regular givers and their envelope number if they have envelopes. *Note:* If someone is missing from this list check Regular Giver on their Family form.

Note: if the names are repeated on the Contributions form and there is data in the form, do not try to erase the data and keep going – it will not work right. It just means that the last users closed the window without clicking the Close Contributions button. Click Close Contributions (lower right) and start over.

At the top of the form are ten drop-down fields. *Note:* the accounts were set up to match your accounting system, and the names are unique for your parish. Select the accounts for which there are contributions. In general, your pledge/contribution account will be selected almost every time you process contributions. The other accounts will change throughout the year. In the example shown below, the accounts are Pledge, UTO and Outreach. A maximum of ten accounts can be used in any one contribution. If additional accounts are needed, just process another contribution – that will rarely happen.

Under each of the accounts is a pair of columns labelled Cash and Check where the contribution amounts will be entered. For each contribution:

1. Find the donor's name on the left

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- a. If the contributor is unknown (e.g. an envelope marked Outreach containing cash) enter the contribution under Anonymous, Anonymous to ensure the correct amount is allocated to the correct account. See the first row in the example below.
 - b. If the contributor is not listed on the left, click the To Add a Contributor Not Currently Listed Click Here button at the top of the window.
 - i. In the Add Contributor form, check the drop-down list in Select and click on the person if they are listed. Click OK. The person will be added alphabetically to the list of names on the left of the Contributions form.
 - ii. If the person is not listed in the Select list, enter the first and last names then click OK. The person will be added alphabetically to the list of names.
Note: if the person was not in the Select list, it might be a better process to hold the check for the database manager so all the person's data (name, address and phone) can be entered in a Family form so you have the information for the contribution report at year end. Alternately, the counters could record the information or copy the check.
2. If it is a check enter the check number in the first column (optional but helpful resolving issues).
 3. Under the appropriate account, enter the amount in either the cash or check column as appropriate.
 - a. If this contribution is a check and is for more than one account, enter the next amount under the next account. You will be asked to confirm it is all one check. Repeat this step as needed. In the example below, see the 6th contribution, check # 436. *Note:* a contribution could be part check and part cash – just enter the appropriate amounts in the correct columns.
 - b. If there is more than one check from the same person, click on the person's name (on the left) and at the top of the window click To Add Another Check, Select a Contributor then Click Here. In the example below see the 4th and 5th contributions, check numbers 196 and 198.

Repeat the above steps for each contribution and your Contributions form will look something like this.
Note: names removed to respect the privacy of our members.

Hint: many counters prefer to alphabetize the contributions to save scrolling up and down through the list. It is up to each team of counters to decide what works best for them.

Note: There may be additional times when it is better to credit contributions to Anonymous, Anonymous. For example, when a member passes away, there may be a lot of one-time memorial contributions from non-members. My memorial process is to keep a detailed spreadsheet of all memorial gifts (name, address, date, check number, and amount) and to immediately send an acknowledgement card to the donor (for tax purposes) and another card to the family so they can write thank you notes. When preparing a deposit, all memorial contributions are credited to Anonymous, Anonymous rather than add all the one-time donors to the database.

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Enter contributions - one check per row:

[To Add Another Check, Select a Contributor then Click Here](#)
[To Add a Contributor Not Currently Listed Click Here](#)

Name	Envelope Number	Check Number	Pledge		UTO		Outreach		Cash		Check		Cash		Check		
			Cash	Check	Cash	Check	Cash	Check	Cash	Check	Cash	Check	Cash	Check			
Anonymous, Anonymous																\$25.00	
Raker, Laura																	
		2371		\$50.00													
		1															
		2		\$35.00													
		196		\$10.00													
		198		\$10.00													
		436		\$100.00												\$25.00	
		3															
		4															
		5															
		6															
		25															
		art															
		7															

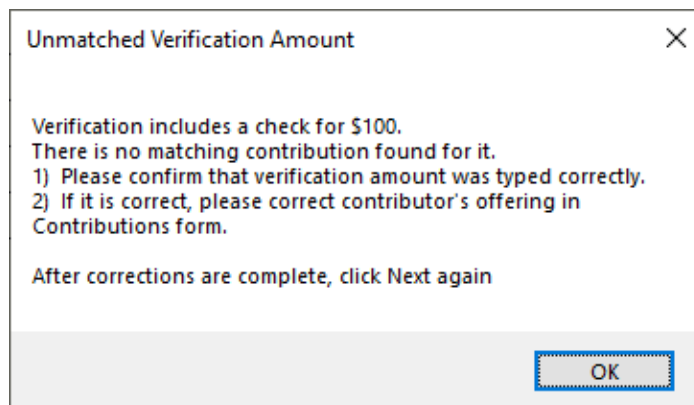
2. Verify Contributions and Save Data 3. Print Reports 4. Close Contributions

Open Plate (Cash).

Enter the lose cash from the plate. Do not include the cash contributions.

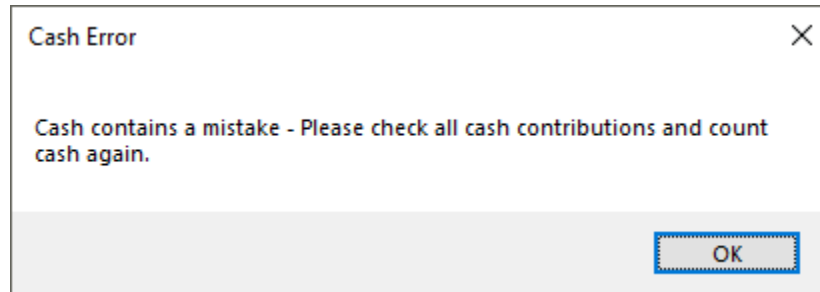
Verify Contributions and Save Data

Enter the amounts of all the checks, one check per line. Click Next at the bottom of the screen. If there is an error, a window will open (see below) displaying the problem and how to resolve it. For example, check #436 was for \$125, not \$100 (as entered in the verification). Click OK. Correct the verification amount and click Next to move on.



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When all issues with the checks are corrected, click Next. Count all the cash (open plate plus cash contributions) and enter it. If there is an error you will be notified (see below). Click OK to close the error message. Make the necessary corrections and click OK.



When everything is correct, Church Records will display a message stating the data has been saved and reminding you to print the reports.

Print Reports

Click the Print Reports button. Two reports are generated:

- The first is a Deposit Slip with your bank account number, a list of the checks, the total cash, total checks, total deposit, and the number of checks. Some banks accept the report. Some banks want their deposit slip in addition to the report. If a bank deposit slip is requested, enter the date, the total deposit and a note to see the attached report.
- The second is the Contributions report the Treasurer will need to record the deposit, allocating the amounts to each account. Keep this report for your annual audit also. If your church has set the database up to email the Contributions report, it will be prepared automatically at this point. The counters must click Send to actually email the report.

Note: The envelopes should be saved. It is also very helpful to have a copy of the checks to resolve issues that arise from the contribution reports sent to members.

Close Contributions

Once the reports are printed, click Close Contributions. This step clears the form so it is ready for the next time a deposit will be made.

Note: if Close Contributions is clicked before the reports are printed, there is a report the Pledge Treasurer can create – see Contribution Reports.

PLEDGE TREASURER – PLEDGES

The Pledge Treasurer (the title at your church may be different or it may be combined with other responsibilities) is responsible for maintaining pledge information and generating contribution reports for the members.

Pledges

[Pledge Treasurer >> Pledges](#)

Pledge data is recorded by calendar year and account (from the list of accounts available for Contributions). For each year create New Pledges *only once* for each account (e.g. once for pledges and a second time for a capital campaign currently in progress). After that Edit Existing Pledges to add pledge amounts and envelope numbers, or to add new pledges.

At the top of the Pledge form, enter the Pledge Year. The current year is the default, change it as necessary. Select the Pledge Account from the drop-down list. *Note:* if the account is not listed, you will need to set it up to use with pledges – see the section on [account set-up](#).

Create New Pledges

[Pledge Treasurer >> Pledges >> Create New Pledges](#)

Create New Pledges will be used *only once* for each account and year. It will generate a table that includes all the Regular Givers (those checked on the Family data form) and has room to enter envelope numbers, pledges, prepaid amounts, and notes as they come in.

Edit Existing Pledges

[Pledge Treasurer >> Pledges >> Edit Existing Pledges](#)

Once the pledge form (by account and year) has been populated with the Create New Pledges, Edit Existing Pledges will be used to update and maintain the pledge information. See the example below (names are hidden to protect the privacy of our members).

On the left are all the names – the families that are checked as Regular Givers on the Family form. In the next column, Envelope, enter the envelope number assigned to the donor. Envelopes are optional and can be assigned at any time. The envelope number will be displayed in the Contributions form to help the counters identify cash contributions and assign them to the appropriate people.

Note: If a new family pledges after Create New Pledges was used, or if someone was missed, click the Add New Pledge button in the upper right corner of the Update Pledges form. If it is a new family, enter the family and member data. Be sure to check Regular Giver on the Family form. If it is an existing member update their family record and be sure Regular Giver is checked.

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Note: If you add a new pledge but they are not shown in the Edit Existing Pledges form, confirm that Regular Giver is checked on the Family Form. Close and reopen the Edit Existing Pledges form.

	Envelope	\$/Week	\$/Month	\$/Quarter	\$/Year	\$/Multi-Yr	Pre-Paid	Notes	Account
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		40001
		\$40.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
1		\$110.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
2		\$20.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
3		\$0.00	\$30.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$100.00	\$0.00	\$0.00	\$0.00			40001
4		\$25.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
5		\$20.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
6		\$0.00	\$140.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
25		\$20.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
n		\$0.00	\$50.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			40001
		\$0.00	\$0.00	\$0.00	\$300.00	\$0.00			40001
		\$679.00	\$4,406.00	\$0.00	\$14,800.00	\$0.00		Pledge	
		\$35,308.00	\$52,872.00	\$0.00	\$14,800.00	\$0.00		Total Pledge	
Total Number of Pledges:		48		Total		\$102,980.00			

Pledges – One Year

For each family (i.e. each row in the table), there are places to enter the pledge. Enter the amount in the \$/Week, \$/Month, \$/Quarter, or \$/Year field. Also enter the Pre-Paid amount and any notes.

As you enter pledges, they will be totaled at the bottom of the form. The Pledge row shows the pledge per time for that column. In the example, there are weekly pledges of \$679; monthly pledges of \$4,406 and annual pledges of \$14,800. The Total Pledge row displays the annual total for the column. For example, \$679 per week is \$35,308 for the year (52 weeks) and \$4,406 per month is \$52,872 for the year (12 months). At the bottom of the form is the number of pledges for the year and the total amount pledged.

Pledges – Multi-year

The \$/Multi-Yr field is for capital campaigns, etc. that typically extend for multiple years. They also may not start at the beginning of the year as stewardship pledges typically do.

There are a number of things to consider when setting up multi-year pledges including:

Church Records

- Will donors have the opportunity to specify when they will make payments, or will payments be spread over the length of the campaign?
- A multi-year campaign that starts mid-year will continue into an additional year. For example, a three-year campaign that starts at the beginning of 2024 will extend through 2025 and 2026. However, a three-year campaign that starts in mid-2024 will continue through mid-2027, so there will be pledges in four years.

When setting up the pledges for a new multi-year campaign, it is likely there will be a new account to set up in the accounting software. That account will need to be added to Church Records and it will need to be set-up as a pledge account and accepting contributions. See the section on the [initial setup](#).

Using the example of a 3-year campaign starting in mid-2024, it would be necessary to Create New Pledge four times, all with the new account, for 2024, 2025, 2026, and 2027. On the Pledges form use the Pledge Year and Account to enter the pledge amounts for each year.

If a total pledge is specified for the entire three years, prorate the pledge for the first and last years. For the three-year (36 months) example above, if the campaign starts in June of 2024, that would be seven months and it would go five months in 2027. For this example, the pledge would be prorated (assume a \$5,000 pledge) this way:

Years	Months of Pledge	Fraction of Pledge	Multiplier by Year	Pledge Amount by Year
2024	7	7/36	0.1944444	\$ 972.22
2025	12	12/36	0.3333333	1666.67
2026	12	12/36	0.3333333	1666.67
2027	5	5/36	0.1388889	694.44
Total Months	36		Total Pledge:	\$ 5,000.00

[Appendix A](#) is a worksheet to assist with prorating pledges over multiple years.

Pledge Report

[Pledge Treasurer](#) >> [Pledges](#) >> [Pledge Report](#)

The Pledge Report shows all pledges for the selected pledge year and account. The amounts are totalled.

Pledge Confirmation Letters

[Pledge Treasurer](#) >> [Pledges](#) >> [Pledge Confirmation Letters](#) >> [Prepare Letters](#)

The Confirmation Letters contain the Church's name and address, the family's name and address, the pledge amount and frequency, the total pledge, and a custom message.

Creating the letters is a two-step process. Click on Pledge Confirmation Letters to display the Pledge Confirmation Letters form. Enter your message to all pledgers – typically the message would express appreciation for their pledge, ask them to verify the pledge data as recorded in the database and let them know how to make corrections if necessary.

Once the message has been entered, click Prepare Letters. The Pledge Confirmation contains a letter for each pledge. They are formatted for double window size 10 envelopes. Print and mail or distribute to members at church.

Pledge Analysis (Historical)

[Pledge Treasurer](#) >> [Pledges](#) >> [Pledge Analysis \(Historical\)](#)

The Pledge Analysis report shows each person who has pledged and the history of their pledges year by year. It is particularly useful as a sign of a family who might be interested in becoming more active (if their pledge increases) or a family who should have an opportunity to talk to someone (if their pledge decreases) to determine if they are unhappy with the church, have personal or financial issues, etc. so that issues can be addressed or the proper support offered. This is another tool to help identify members who may need attention.

PLEDGE TREASURER – CONTRIBUTION REPORTS

There are several reports available in Church Records – some to make your job easier and some for your donors. Before generating reports select a report date, the Pledge Year and the account you want reports for.

Contribution Summary by Year

[Pledge Treasurer](#) >> [Contribution Reports](#) >> [Contribution Summary by Year](#)

The report lists everyone who contributed during the specified year, their pledge, what was pre-paid, their total contributions to the account specified, the percentage of their pledge paid and the total of other contributions.

This report is particularly helpful as a tool to find who might be more active (they gave very generously or increased their support) and those who probably need to be contacted to understand why they are not giving or have reduced their contributions. It could be that there is an issue with the church, or perhaps there is a personal issue and the people would love the support of their church (listening, prayers,...).

Run this report regularly during the year. There is an estimate of how much of the year has already passed. Use this number to compare to the % Pledge Paid to quickly see where people stand on their pledge.

Contribution Pledge Performance

[Pledge Treasurer](#) >> [Contribution Reports](#) >> [Contribution Pledge Performance](#)

This report was developed for clergy who do not wish to know who gives what. All the people on the list have pledged or contributed this year. If the percentage is zero, they pledged but have not contributed yet this year. If there is no percentage, the person contributed but did not pledge. The percentage of the year that has already passed is just above the names and percentages. This is another tool to determine who may need attention.

Contribution Statements - YearEnd

[Pledge Treasurer](#) >> [Contribution Reports](#) >> [Contribution Statements - YearEnd](#)

The IRS requires that contribution statements be sent to all who donate to the church by January 31st following the year the contribution was made. The required IRS statement about any goods or services provided by the church is at the bottom of the page. These reports are also a nice thank you and a good way to remind your visitors you are thinking of them.

Note: you will need to run the report for each account you have pledges for. So run the report for your pledges and general contributions (it will also show special contributions such as Easter, Christmas,

Outreach,...). Then run it again but this time specify the special account for your multi-year campaign on the Contributions Report form.

Note: your multi-year or special pledge will not be included on your regular statement – create a second statement for the second pledge account.

The Contribution Statements – earEnd are formatted for use with a double window size 10 envelope.

Contribution Statements - MidYear

[Pledge Treasurer >> Contribution Reports >> Contribution Statements - MidYear](#)

Mid-year contribution reports are often helpful to let people know how they are doing on their pledge. Use this MidYear form – looks the same as the year end report but is created only for those who have MidYear Statement checked on the Family form. Timing will depend on your congregation. Perhaps before Memorial Day when people will be away for the summer or after they are settled back into their normal routines in the fall to catch up on missed summer contributions or around the beginning of October before snowbirds leave. *Note:* if someone is missing, be sure MidYear Statements is checked on the Family form.

The Contribution Statements – MidYear are formatted for use with a double window size 10 envelope.

Contribution Statements – Select

[Pledge Treasurer >> Contribution Reports >> Contribution Statements – Select](#)

At times you will need to print a single or a few contribution reports, e.g. when a member asks for their current status. This form is a list of all contributors. Select the one(s) you wish to print by checking the box to the left of the family. Click Print Contribution Statements to preview the statements. Print statement(s).

Contributions for Selected Date

[Pledge Treasurer >> Contribution Reports >> Contributions for Selected Date](#)

Occasionally we all make mistakes, and if the Counters close the Contributions (and therefore clear all the data), they probably do not need to re-enter all of it. If they completed the verification and received the message that the data is saved, use this report. It will have all the information that would normally be in the Contribution Report, but does not include the deposit slip, and it is not emailed to the addresses your church sends it to.

Enter the date of the deposit and click Contributions for Selected Date.

CONTROL DATA SETUP

The control data will need to be set up once when you start using Church Records database. You may need to modify it occasionally, but it would be good to have one or two people working together on this to avoid changing what another has set up. This information is important and must be entered accurately as it will affect many of your reports.

Accounts

Control Data Setup >> Accounts

The Accounts must be set up first, at least your default income account, which is typically your pledge or contribution account. The default income account is also entered on the Church Information form. *Note:* To avoid future errors and confusion, please be consistent with the account names and numbers used in your accounting software.

Warning: once accounts are set up, do not erase or delete the accounts. Also do not change the account numbers. Doing any of these things may make your database unusable because you will have data that is no longer accessible.

The Account form is in two parts: the top is used to enter data, and the bottom shows a list of existing accounts. Enter all the accounts your church uses when preparing to deposit contributions. There is no need to enter other income accounts because only contributions will be processed in this database other income will be processed in your accounting system.

Enter the Account Number and Description – same account number and description used in your accounting system. If you will be using this account in the Contributions form (probably true for every account), check the Use for Contributions? box. If you accept pledges to this account, check the box. Typically pledges are only accepted for the pledges/contributions account and special fundraisers such as capital campaigns or similar special projects, but do what will work with your account.

To edit an existing account, click the account in the list at the bottom of the form. In the fields at the top of the form change the Description or checkboxes. Do not change the Account Number and do not erase the information in the fields. If it is an account that is no longer used, clear both checkboxes, but leave the Account Number and Description as they are.

At the very bottom of the form is: Record: | ◀ ◀ 5 of 14 ▶ ▶ | ▶*. This shows information about your records displayed in the form.

| ◀ click to move to the first record

◀ click to move back (up) to the previous record

5 of 14 shows the current record is number 5 and there are a total of 14 records

▶ click to move forward (down) to the next record

Church Records

- ▶ | click to move to the last record
- ▶ * click to move to a new record; use this to add a new account

Hint: There needs to be an open plate account for the lose cash in the plate. Do not check Use for Contributions? or Accept Pledges?

Church Information

Control Data Setup >> Church Information

The Church Information is unique to each church. It is used in many reports and forms to customize the data to each church. It needs to be entered before moving forward with use of the Church Records database. It will always be accessible here should you need it, but the data will rarely change.

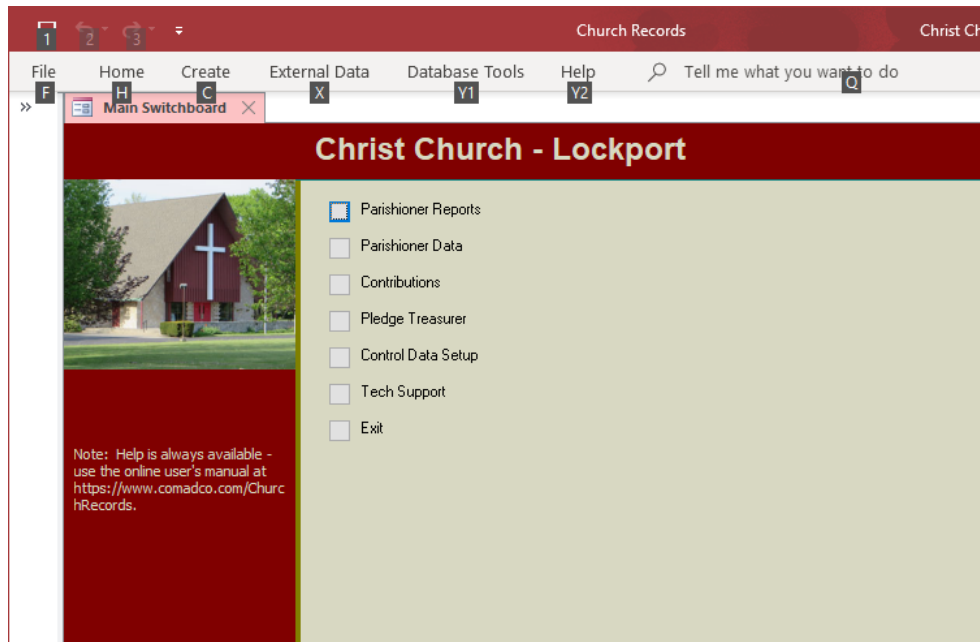
The menus display a picture of your church. Please use a picture that will represent your church to everyone who sees it – it might be a picture of the outside, the red doors, or perhaps the altar or a stained glass window. Whatever is a particularly loved feature of your church. The picture must be in OneDrive\ChurchRecords Database and must be a .jpg formatted file named Church Picture.jpg. It must be 135 pixels wide x 110 pixels high.

Complete the information – most of it is self-explanatory. If you wish to have the Contributions Report emailed to someone, enter one or two email addresses. This feature is particularly handy if the bookkeeping is done offsite. These fields can be left empty. There is a space at the top of the Contribution report for a message. Mine says, “Thank you for your generosity.” Put whatever you wish in the next to last field. Be sure it fits in the box so it will fit on the form. *Note:* the font shown is the one used on the Contribution Statements. The last field is for a brief description of the requirements to vote in your church. It varies by parish and diocese – see the section on the [Voter List](#), especially the background information, for additional important considerations.

GLOSSARY OF DATABASE TERMS

Some of the database terms used in this document are confusing if you are a normal user, not a database geek. The terms are in the order you will likely run into them.

Menu – a list of options used to access all the functionality in the database. The main menu is shown below. Some of the menu items will lead to another menu. Click Parishioner Reports then Mailings and Labels to see how one menu may lead to another. Click Main Menu to get back to the menu below.



Form – the way to enter data and perform the various tasks. Forms often have fields for data entry and buttons that do a specific task (they are labelled). See the Family form below

Fields – the place to enter data. In this database they will be white. Some may be formatted to allow only certain types of information, e.g. a phone number or date must be numbers only. The "/" in dates will be added automatically as will the "(,)" and "-" in phone numbers. Click on a check box to check or uncheck it. See the fields on the Family form below. Other databases will be formatted differently and the forms and fields may look quite different but they will collect data the same way they do here.

Buttons – are labeled rectangles and perform a specific task. For example the Find button will search the Family form for data. Click in the Family Name field, click Find, enter the name to be searched for in the pop-up Find and Replace window, then click Find Next. Finding Family Names is the most common search in the Family form, but you could also search for the town, state, etc.

Church Records

The screenshot shows the 'Church Records' application window. The main form is titled 'Family' and contains the following fields and sections:

- Family Name:** Anonymous
- Situation:** Anonymous
- Mail To:** Anonymous
- Address:** (Three lines of text input)
- Alternate Address:** (Two lines of text input)
- Family Members:** A large empty box for listing family members.
- Emergency Contacts:** A section for listing emergency contacts with fields for Name and Address, Home Phone, Work Phone, Cell Phone, and Email.
- Buttons:** Find, Add New Family, Add Family Member.
- Checkboxes:** Newsletter, Stewardship, Phone List, Regular Giver, Mid-year Statements, Moved Away, Inactive, Deceased, Anniversary Prayer, Include in List?
- Form State:** Record 1 of 1, No Filter, Search.

Reports – are output from the database formatted for printing (usually). There is no data entry on reports. See the sample Family Data report below – this report is meant to be completed with a pen.

The screenshot shows the 'Church Records' application window in 'Print Preview' mode. The report is titled 'Christ Episcopal Church - Family Data' and includes the following content:

- Header:** Christ Episcopal Church - Family Data
- Welcome Message:** Welcome! We're glad you're here. Please tell us about your family. All the data is for the use of our church exclusively. We email The Harvest, our monthly newsletter, and other notices, and we have a phone list we would like to add you to. We will also pray for you on birthdays and anniversaries.
- Contact Information:** Christ Episcopal Church, 7145 Faldress Drive, Lockport, NY 14094, (716) 433-9229, office@ChristEpLockport.info
- Form Instructions:** Please print the form enter your data and return the form to: (Address and phone number)
- Form Fields:**
 - Name and Address: (Three lines)
 - Alternate Address (if you have another home or camp): (Two lines)
 - Date: (Two lines)
 - Family Name: (Two lines)
 - First Names: (Two lines)
 - Home Phone: (Two lines)
 - HomePhone2: (Two lines)
 - Date Married: (Two lines)
- Emergency Contacts:** List additional contacts on another sheet of paper. (Three sets of fields for Name, Address, Email, Home Phone, Work Phone, CellPhone)
- Footer:** Over Please
- Page Info:** Page 1 of 1, No Filter, Search.

APPENDIX A. PRORATING MULTI-YEAR PLEDGES

Determining how a multi-year pledge will be spread over several years is not difficult – just follow these steps:

1. **Years:** List all the years of the pledge, including those that are partial years.
2. **Months of Pledge:** For each year enter the number of months in which the campaign will be in progress.
3. **Total Months:** Add up all the months in the **Months of Pledge** column. *Hint:* the number should be: the number of years x 12. If it isn't check the number of months listed for each year.
4. **Fraction of Pledge:** for each year, the fraction of the pledge is the **Months of Pledge** for that year divided by the **Total Months**.
5. **Multiplier by Year:** is the decimal equivalent of the **Fraction of Pledge**. To calculate it, divide the top number of the **Fraction of Pledge** by the lower number.
6. **Pledge Amount by Year:** is the **Multiplier by Year** times the pledge amount. All of the pledge amounts (i.e. for all the years) will be the same as the total pledge.

Hint: see [sample multi-year pledge](#)

Years	Months of Pledge	Fraction of Pledge	Multiplier by Year	Pledge Amount by Year
Total Months			Total Pledge:	

APPENDIX B. SYSTEM REQUIREMENTS

Church Records is an Access database. It is a Windows application. I believe Access is not available in the Office applications for Apple's iOS. It will run with existing Access licenses. If you do not have Access installed on your system, free Access Runtime licenses are available from Microsoft. I will help you figure out which version of the Runtime you need to install.

This is a relatively small database application so it works well with 8 MB of RAM or more. I would not recommend less than that because it would probably feel slow and frustrating.

There is no cost for the Church Records database. It was created to make life easier for the people in Episcopal Churches. I have used it in the two churches starting fifteen or twenty years ago. Other denominations are welcome to use it also, but it was designed to simplify the record keeping for the Episcopal Church – I am not familiar with the requirements of other denominations.

To try Church Records with a small sample database, simply email churchrecords@comadco.com to get the link to download it. There will be four files, which need to be placed in a folder named ChurchRecords Database on OneDrive. OneDrive is used so that you have a cloud backup of your important data. You will not want to lose all your important information should something happen to your computer. You will also get detailed instructions for installing Access Runtime should you need it.