



Entering Sacraments in Ministry Platform



Important note: Entering Sacramental information into MinistryPlatform is not a substitute for recording information in the physical Sacramental Registry.

Important requirements from the Chancery:

Both the USCCB and the Vatican require consistent information from the Diocese. The following guidelines are required to assist us in completing the required annual reporting.

- 1.) **Dates of birth are required** when recording all sacraments performed on or after 1/1/2024
- 2.) **Non-parishioner Sacraments:** Sometimes guests receive sacraments in your parish. Since the USCCB and Vatican require reporting for all sacraments performed in the parish, non-parishioners receiving any sacrament in your parish must be entered into MP as contacts. **This includes non-Catholics married to registered parishioners and guest couples receiving the sacrament at your parish.**
- 3.) **Profession of the faith:** This field pertains to those already baptized as a non-Catholic; Received into full Communion; and then Confirmed. This usually happens at the Easter vigil but not always.
 - Complete the Baptism sacrament record with the information available including date received, place received, sponsors.
 - Answer **Profession of Faith = Yes** and complete the **Profession of Faith date**.
 - **Deaths/Funeral:** You must use the **Deceased Person Tool** when someone is deceased. **Additionally**, if your parish would like to record additional funeral information, you may use the Deaths/Funeral feature of the new sacrament system.

Familiarize yourself with the new Sacraments menu. Click **Sacraments** on the left menu and you will see these additional menu options along with the 7 sacraments.

- **All Sacraments – All:** sacraments entered into MP for all members.
- **All Sponsors:** listing of all sponsors used in sacraments.
- **Reconciliation Prep:** Note: You should be recording the date a child completed training and NOT the date they received First Reconciliation.
- **Death/Funeral Registry:** Allows you to record a parishioners funeral details
- **Dioceses:** Lists all Dioceses loaded into MP for you to select when entering information.
- **Sacramental Places:** Lists all Sacramental Places loaded into MP for you to select when entering information

Unique fields: Some of the fields available to you when recording a sacrament will be unique to that specific sacrament. For example, here are some fields unique to a sacrament.

- Baptism (Parents, God Parents, Profession of Faith,)
- Confirmation (Confirmation Saint)
- Marriage (a link to the spouse's contact)
- Death/Funeral (Date of Burial)

Sacramental Research – three ways to search for sacramental information:

From the Contact record:

1. Click **Contacts**.
2. Search for a specific person and click their name to open their member record.
3. If the Insights toggle is blue, you will get a peek at a person's basic sacrament info.

From the Member record:

4. Click **Members**.
5. Search for a specific person and click their name to open their member record.
6. Click the **Sacraments** tab to see all of the sacraments listed for that individual.

From the sacrament:

1. Click **Sacraments**.
2. Click **All Sacraments** OR click the specific sacrament.
3. Search for the person.
4. Click to open their sacramental record.

Editing sacramental information to add further detail later:

1. Click **Members**.
2. Search for a specific person being careful to select the person with the right parish.
3. Click **Tools** and choose **Add/Edit Sacrament** tool.
4. Choose the sacrament from the **Sacrament Type** dropdown menu.
5. Edit the information as needed and click **Save**.



Entering Sacraments for an Individual



Important note: Entering Sacramental information into MinistryPlatform is not a substitute for recording information in the physical Sacramental Registry.

1. Update contact record where necessary **(required by the USCCB for Kenedy Report)**
 - a. **Baptism** performed after 12/31/2023 – including baptisms of non-members/visitors, you must enter a **date of birth** on the person's contact record. In the case of non-members/visitors, set **Contact Status** = inactive; choose from the **Religion** drop down and on their member record **Member Type** = Non-member.
 - b. RCIA Candidates: Create a Baptism sacrament and fill out the **Profession of the Faith** fields.
 - c. **Marriages** performed after 12/31/2023 INCLUDING – including marriages for non-members/visitors:
 - i. Both husband and wife must be contacts in Ministry Platform – even guests.
 - **For parish members:** If one of the spouses is not Catholic and you do not want their name to appear on labels, letters or CSA reminders, set their contact status to **inactive** and their family position to **Other Adult**.
 - **In the case of non-members/visitors**, set the following for both spouses
 - **Contact Status** = inactive
 - **Member Type** = Non-member;
 - ii. Both husband and wife must have their marital status = married
 - iii. Both husband and wife must have a religion recorded.
 - iv. Click the **Relationship** tab and create a of Married for one of the spouses. This will create a reciprocal relationship for the other.
2. Click **Members**
3. Search for a specific person being careful to select the person with the right parish.
4. Click their name to open their member record.
5. Click **Tools** and select **Add/Edit Sacrament**. (The Select Member field will be populated with person's name.)
6. Click the downward pointing triangle to select a sacrament from the **Select Sacrament Type** drop down menu.
7. Enter pertinent information: Fields needing further instruction are listed below
 Note: The Date Received and Date Received Accuracy fields are now optional to accommodate historical records where dates are not known. However, to maintain accurate record keeping, we recommend setting Date Received Accuracy to Unknown for sacraments without dates.

Date of Sacrament: The data a sacrament was received

Date Accuracy: If you don't know the full date of sacrament, choose the segment you are sure of and then enter the Date of Sacrament as shown below.

- **Full Date known:** Enter the full date. Select **Full Date** for **Date Accuracy**.
- **Day unknown:** Enter 01 for the day and enter the Month and Year you know. Choose **Month and Year** for **Date Accuracy**.
- **Day and Month unknown:** Enter 01 for the month, 01 for the day and enter the Year you know. Choose **Year** for **Date Accuracy**.
- **Full date unknown:** Enter 01/01/1900. Choose **Unknown** for **Date Accuracy**.

Name of Celebrant:

Clergy who are not from DioErie: Place a dot next to **Enter Name Only** and type the name as you would like it to appear on a certificate.

Current clergy in Dio Erie:

1. Place a dot next **Lookup/Create Contact**.
2. Click the magnifying glass button to open the full search
3. Search by Last name. You can click the full screen button to see more columns at the same time. (There is no prefix column which makes finding the right guy harder if there are lay and clergy with the same name. You'll have to evaluate the congregation and address columns to pinpoint the right person to select as celebrant.)
4. Select the correct person and the field will be populated.

Name of Parish where sacrament occurred:

Dio Erie Parish: Place a dot next **Lookup/Create Contact** and search for the parish

Parish outside DioErie: Place a dot next to **Enter Name Only** and type the name of the parish as you would like it to appear on a certificate.

Date of Birth: this will populate from the contact's record.

Place of Birth: Enter the City and State in this format: City, State

Mother's/Father's Name:

If they ARE in MP.: Place a dot next **Lookup/Create Contact** and search for the name

1. Place a dot next **Lookup/Create Contact**.
2. Click the magnifying glass button to open the full search
3. Search by Last name. You can click the full screen button to see more columns at the same time. (There is no prefix column which makes finding the right guy harder if there are lay and clergy with the same name. You'll have to evaluate the congregation and address columns to pinpoint the right person to select as celebrant.)
4. Select the correct person and the field will be populated.

If they are NOT in MP but should be: Place a dot next **Lookup/Create Contact** and search for the name

If they are NOT in MP but you do not wish to add them: Place a dot next to **Enter Name Only** and type the name as you would like it to appear on a certificate.

Mother's Maiden Name: If the mother's maiden name is in MP, it will populate.

8. Scroll down to **Sponsor information** if necessary for this sacrament.

If they ARE in MP.: Place a dot next **Lookup/Create Contact** and search for the name



1. Place a dot next **Lookup/Create Contact**.
2. Click the magnifying glass button to open the full search
3. Search by Last name. You can click the full screen button to see more columns at the same time. (There is no prefix column which makes finding the right guy harder if there are lay and clergy with the same name. You'll have to evaluate the congregation and address columns to pinpoint the right person to select as celebrant.)
4. Select the correct person and the field will be populated.

If they are NOT in MP but should be: Place a dot next **Lookup/Create Contact** and search for the name

If they are NOT in MP but you do not wish to add them: Place a dot next to **Enter Name Only** and type the name as you would like it to appear on a certificate.

9. Repeat step 8 above for the second Sponsor.



10. If you are done, click **Save** and **Close**.



Entering Sacraments for a Class or Family



Important note: Entering Sacramental information into MinistryPlatform is not a substitute for recording information in the physical Sacramental Registry.

1. Clear any sticky selections.
2. Click **Groups** and open the group that completed the sacrament.
3. Click the **Members** tab.
4. Select however many members received the sacrament. You can use the check box to select everyone on the list and then unselect anyone who didn't complete the sacrament.
5. Click the **Transfer** button at the bottom of the screen. 
6. Click on **Members (Member)** and then click the **Transfer** button. 
7. Make sure you rename the selection so you can find it again.
Suggestion: **"Assign Sacraments for Group_Name_Here"**
8. Click on **Members (Member)** page. (When you select this page, this means you are taking the records selection you just saved and moving it to another page in MP. You do this because we can access the Add/Edit Sacrament tool on the Members page but not the Groups page.)
9. Click the **Transfer** button.
10. Click **OK** on the small confirmation pop-up.
11. Click **Tools** in the upper right corner and select **Add/Edit Sacrament**. Because you started from a group, the Select Member field will be populated with the name of the first person in the group.
12. Click the downward pointing triangle to select a sacrament from the **Select Sacrament Type** drop down menu.
13. Click on **Confirmation** (for example) (Note that it says "1 of ___ Sacraments Saved". The Add/Edit Sacrament Tool will allow you to click through multiple records without leaving the tool itself. It will show you which sacramental record you are editing and what number out of the total you are working on.
14. Check mark **Copy The Shared Sacrament Details On The Next Record** which will copy details to every member of the group as a time-savings feature. NOTE: The "Shared Sacrament Details" are the Date Received, Date Accuracy, Sacrament Registry fields (volume and page but NOT entry number), Name of Celebrant and Parish name. Confirmation saint and sponsor information will NOT pull over to the next record since these are typically different for each member.
15. Choose the date the member received the sacrament from the **Date of Sacrament** date picker. If you are recording sacraments for the future, you can always future date this field.

16. Click the **Date Accuracy** drop down and choose whatever option best describes your confidence in the accuracy of the date you have entered in the **Date of Sacrament** field. If you know the exact/full date the sacrament was received choose **Full Date**.
17. Update the **Sacramental Registry** fields with the book/pages into which you have written notations for the sacrament. These fields are meant to help you pinpoint sacrament information quickly.
18. Complete the following fields
 - a. **Name of Celebrant**
 - b. **Name of the Parish Where Sacrament Occurred**
 - c. **Individual Sacrament Details**
 - d. **Sponsor information**
19. Decide how to proceed with data entry for this sacrament.
 - a. If you are done, click on **Save**.
 - b. If you have sacraments to enter for additional contacts, Click **Save & Next** to move to the next record in the selection series.

Note: If you want to review the sacraments you added on the individual's Member Record, you can navigate to the Members tab-->Select Member-->Sacraments subpage.



Printing Sacramental Certificates

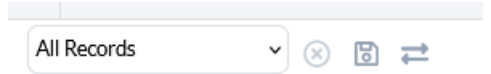


The formatting for MP Sacramental Certificates cannot be customized. If the certificates you are used to printing are highly formatted, you may wish to continue using your current methods for printing certificates.

Printing Sacramental Certificates for an individual

1. Click **Members**
2. Search for a specific person and click their name to open their member record.
3. Click **Reports** and choose **Selected Sacrament Certificates**
4. Pick report options: (Need good description of the usage of options)
 - **Sacrament Type:** Choose the type of
 - **Profession of Faith:**
 - **Show Notations (Baptisms Only):**
 - **Show Logo:** Need to Enter logos for "Sacramental Places"
5. Click **View Report**.
6. If you are satisfied with the layout, click the **Printer** button to get a PDF.
If you would like to customize the certificate, click the diskette button and choose **Word**.

Printing Sacramental Certificates for a group/class.

1. Clear any sticky selections
2. Click **Groups** and open the group that completed the sacrament.
3. Click the **Members** tab
4. Select those members that received the sacrament. You can use the check box to select everyone on the list and then unselect anyone who didn't complete the sacrament.
5. Click the **Transfer** button at the bottom of the screen. (Button with two arrows pointing left and right)
 
6. Click on **Members (Member)** and then click the **Transfer** button.
7. Click **OK** on the small confirmation pop-up.
8. Click Reports and choose Selected Sacrament Certificates
 1. Pick report options: (Need good description of the usage of options)
 - **Sacrament Type:** Choose the type of
 - **Profession of Faith:**

- **Show Notations (Baptisms Only):**
 - **Show Logo:**
2. Click **View Report**.
 3. If you are satisfied with the layout, click the **Printer** button to get a PDF.
If you would like to customize the certificate, click the **diskette** button and choose **Word**.

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Print Notification Letters for the Church of Record/Baptism

