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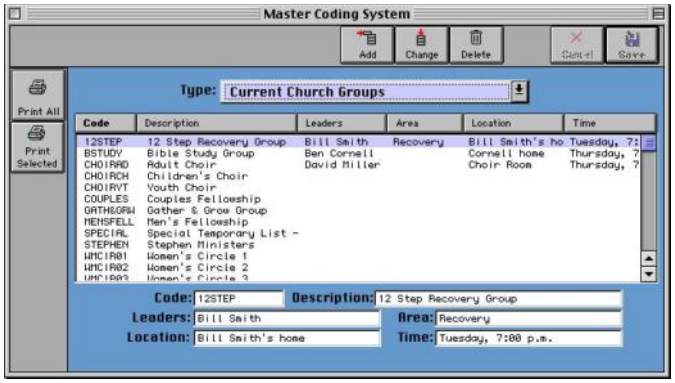
Appendix A

Master Coding System

Creating codes in the Master Coding System

1- Under **File** select **Setup**, then **Master Coding System**.

2- Locate the type for which you want to create codes using the pull-down **Type** on the **Master Coding System** window.



3- Click the **Add** button.

4- The Multiple add function message appears. Press **Return/Enter** or click **OK**.

5- Type in the code of your choice for this particular item in the **Code** field (i.e.—PROP for Property Committee).

6- Press the **Tab** key.

7- Type in a description of the code in the **Description** field (e.g.—Property Committee)

8- **Tab** through the next 4 fields filling in any pertinent information. This is especially helpful in the area of small groups in the church.

9- Once the information is complete press **Return/Enter** or click **OK**.

10- Repeat steps 5 - 9 until all codes you wish to enter at this time are entered and appear in the window.

11- Click **Cancel**.

Additional codes may be entered at any time by following the above instructions.
Consult the Master Coding System Tips below as you develop your coding system.

Master Coding System Tip 1

Deciding on the mailing codes to be used on Family Address Records

Mailing codes are used for grouping families to generate mailing labels for church mailings and to print church directories. This ranges from simple to extensive depending on the breakdown needed for mailings. Here are some examples of mailing code breakdowns.

CODE DESCRIPTION

Simple breakdown:

1 - Those who receive church mail and are in the church directory
2 - Those who receive church mail and are not in the church directory

Extensive breakdown:

1 - Local church members who receive mail
2 - Local non-members who receive mail
(Non-members who are active in the life of the church)
3 - Out-of-town members who receive mail
4 - Out-of-town non-members who receive mail

5 - Local churches (same denomination)
6 - Local churches (other denominations)
7 - News release addresses
This would include radio stations, T.V. stations, and newspapers who would receive news releases about events at the church.
8 - College student address
ARCHIVE - Family Address Records to be archived out at the end of the year
(Those to be removed from address records at the end of the year due to death or transfer of membership)
DCR -Directory cross-reference. To be used with couples who have different last names.

NOTE 8.1: Mailing codes can be numbers or letters or a combination of both (e.g.—Codes 1-8 and the word ARCHIVE or DCR can be codes)

NOTE 8.2: In the case of death, use the mailing code to mark a record for archiving only if the person who died is the only one living at that address. When one member of a family dies, their individual record is marked for archiving in the membership status field, usually with a "D" for deceased. Also mark the **Do Not Print** checkbox on their first individual record screen.

Master Coding System Tip 2

Deciding on the Geographical Codes to be used for grouping families

Geographical codes are for grouping families on the Family Address Record. They may be used to indicate the geographical area of the town in which they live, a prayer group the family participates in, or the shepherding group this family is a part of. If shepherding groups are used, the shepherd group code should be 8 characters long and be the first entered in the **Geographical Codes** field. Attendance Missing Reports can then be generated by a shepherding group and each shepherd can get a report of which shepherd group members have missed church lately.

Sample Geographical Codes:

Shepherding Groups:

SHPHRD01	or	DEACON01
SHPHRD02		DEACON02
SHPHRD03		DEACON03
SHPHRD04		DEACON04
SHPHRD05		DEACON05
SHPHRD06		DEACON06

NOTE 8.3: If used, the shepherding group code should be the first one listed in the Geographical Codes field on the Famlily Address Record for the purpose of printing Attendance missing reports sorted by geographical code.

Geographical areas:

NORTH1	or	SECTOR01
NORTH2		SECTOR02
SOUTH1		SECTOR03
SOUTH2		SECTOR04
EAST1		SECTOR05
EAST2		SECTOR06
WEST1		SECTOR07
WEST2		SECTOR08

Prayer groups:

PRAYER01
PRAYER02
PRAYER03
PRAYER04

Master Coding System Tip 3

Deciding on the membership and status codes to be used on individual records

There are many codes used in individual records including, committees, groups, offices, hobbies, interests, community groups, occupation, Church or Sunday School class, etc. For the purpose of getting started, it is important to establish the membership and status codes because these are most often used in sorting the individuals for reports and mailings. Membership status codes are also used to determine who appears on the attendance checklists.

Membership codes are used to describe the type of church membership a person has and the status is used to describe the status of that membership. Here are some examples of membership and status codes.

Membership Codes:

B - Joined by Baptism
C - Child, not a member yet
M - Member, but type unknown
N - Non-member
T - Joined by transfer

Status Codes:

A - Active
D - Deceased
I - Inactive
P - Prospective
S - Shut-in or Homebound
T - Transferred out

NOTE 8.4: In the case of death, use the mailing code to mark a record for archiving if the person who died is the only one living at that address. When one member of a family dies, their individual record is marked for archiving in the membership status field, usually with a "D" for deceased. Also mark the **Do Not Print** checkbox on their first individual record screen.

Master Coding System Tip 4

Deciding on the Service/Event Codes to be used for the services for which attendance is to be tracked

Service/Event Codes are used to indicate what service or event certain people attended so attendance as well as missing reports may be generated for these services or events.

Sample Service/Event Codes:

SUNDAYAM - Sunday Morning Worship
SUNDAYPM - Sunday Evening Worship
WEDPM - Wednesday Evening Service

Any number of Service/Event Codes may be established through the Master Coding Sytem.

Master Coding System Tip 5

Deciding on the Church School Class Codes to be used for the church school classes for which attendance is to be tracked

Church School Class Codes are used to indicate what class certain people attended so attendance as well as missing reports may be generated for these classes.

Sample Church School Class Codes:

NURSERY	-	Nursery Class
PRESCHL	-	Preschool (age 3-4)
PRIMRY1	-	Primary 1 (grades K-1)
PRIMRY2	-	Primary 2 (grades 2-3)
PRIMRY3	-	Primary 3 (grades 4-5)
MIDDLES	-	Middle School (grades 6-8)
HIGHSCH	-	High School (grades 9-12)
WMNBIB	-	Women's Bible Class
MENSBIB	-	Men's Bible Class
SEEKERS	-	Seekers (adults 25-40)
ELECTIVE	-	Adult Elective Class

Any number of Church School Codes may be established through the Master Coding Sytem.

Master Coding System Tip 6

Deciding on the Visitation Calls and Staff codes to be used Visitation under Membership

Staff codes are used in Visitation records to indicate who made the call and Visitation Calls codes are used to indicate what type of call was made. Following are some examples of each.

Staff Codes:

ASSOCM - Associate Minister
CEDIR -Director of Christian Education
EVANMIN - Minister of Evangelism
LAYVIS1 - Lay visitor 1 - Bill Smith
LAYVIS2 - Lay visitor 2 - Tom Jennings
SENIORM- Senior Minister

Visitation Calls Codes:

CONTACT- Contact - brief
FUNERAL - Death of a loved one
HOSP - Hospital call
NURSEHM - Nursing Home call
PASTOR - General pastoral call
PHONE- Phone call
PROSPECT - Prospective call
SHUTIN - Shut-in call
SICKNESS- Sickness call

Any number of Visitation Calls and Staff Codes may be established through the Master Coding Sytem.

Appendix B

Sample Chart of Accounts

The Sample Chart of Accounts is based on the following range recommendations:

Assets	1000-1999
Liabilities	2000-2999
Funds	3000-3999
Income	4000-4999
Expense	5000-8999

NOTE 8.5: Account numbers can be numbers, letters, or a combination of both. For example, the tax liabilities could be as follows instead of numbers in the 2000 range:

FEDL	Federal Tax Liability
FICA	FICA Tax Liability
MEDI	Medicare Tax Liability
STAT	State Tax Liability
LOCL	Local Tax Liability

Chart of Accounts

Type	Cat/Sub-Cat	Acct.#	Description	Fund
Asset				
	A - Cash Accounts			
		1000	Checking	
		1100	Savings	
		1200	Investments	
	B - Fixed Assets			
		1500	Bus	
		1520	Church Building	
		1540	Furnishings	
Liability				
	C - Current Liabilities			
		2000	Federal Tax Payables	
		2010	FICA/Medicare Payables	
		2020	State Tax Payables	
		2030	Local Tax Payables	
		2500	Accounts Payable	
	D - Long Term Liabilities			
		2600	Mortgage	

Type	Cat/Sub-Cat	Acct.#	Description	Fund
Fund				
	E- Undesignated Funds			
		3000	General Fund	
	T- Designated			
		3100	Building Fund	
		3110	Missions Fund	
		3120	Memorial Fund	
		3200	Special Fund (In & Out) Fund	
	W- Equity Funds			
		3500	Bus Equity Fund	
		3520	Building Equity Fund	
		3540	Furnishings Equity Fund	
Income				
	F - Regular Income			
		4000	Sunday Worship Offering	3000
		4010	Loose Offering	3000
		4020	Sunday School Offering	3000
		4090	Miscellaneous Income	3000
	T - Designated			
		4100	Building Fund Income	3100
		4110	Missions Fund Offering	3110
		4120	Memorial Fund Income	3120
		4200	Special Fund Income	3200
		4210	Easter Offering	3200
		4220	Pentecost Offering	3200
		4230	Thanksgiving Offering	3200
		4240	Christmas Offering	3200
Expense				
	H - Personnel			
		5000	Senior Minister Salary	3000
		5010	Associate Minister Salary	3000
		5020	Secretary Salary	3000
		5030	Custodian Salary	3000
		5040	Travel Expenses	3000
		5050	Convention Expense	3000
		5060	Continuing Education	3000
		5070	Health Insurance	3000
		5080	Pension	3000
		5090	Church FICA/Medicare match	3000
		5100	Misc. Salary	3000
	I - Administrative			
		5110	Office Supplies	3000
		5120	Office Equipment	3000
		5130	Telephone	3000

Type	Cat/Sub-Cat	Acct.#	Description	Fund
	J - Christian Education			
		5140	Sunday School Materials	3000
		5150	Vacation Bible School	3000
		5160	Resource Material	3000
		5170	Children's Ministries	3000
		5180	Youth Ministries	3000
	K - Property			
	K1 - General Property			
		5190	General Maintenance	3000
		5200	Insurance	3000
		5210	Custodial Supplies	3000
		5220	Gas for Van	3000
		5230	Mortgage Principal	3000
		5240	Mortgage Interest	3000
	K2 - Utilities			
		5230	Gas - Heat	3000
		5240	Electricity	3000
		5250	Water and Sewer	3000
	L - Worship			
		5260	Communion Supplies	3000
		5270	Bulletins	3000
		5280	Special Guest Speakers	3000
		5290	Special Services	3000
	M - Outreach			
		5300	Denominational Support	3000
		5310	World Hunger Project	3000
		5320	Local Outreach Ministries	3000
	N - Miscellaneous			
		5340	Miscellaneous Expenses	3000
	T - Designated			
		7100	Building Fund Expenses	3100
		7110	Missions Fund Expenses	3110
		7120	Memorial Fund Expenses	3120
		7200	Special Fund Expenses	3200
		7210	Easter Offering Expenses	3200
		7220	Pentecost Offering Expenses	3200
		7230	Thanksgiving Offering Exp.	3200
		7240	Christmas Offering Expenses	3200

Appendix C

Sample Category/Sub-Category Codes

Type	Code	Categories	Sub-Categories
Asset	A -	Cash Accounts	
	B -	Fixed Assets	
Liability	C -	Current Liabilities	
	D -	Long Term Liabilities	
Fund	E -	Undesignated Funds	
	T-	Designated	
	W-	Equity Funds	
Income	F -	Regular Income	
	T -	Designated	
Expense	H -	Personnel	
	I -	Administrative	
	J -	Christian Education	
	K -	Property	
			K1 - General Property
			K2 - Utilities
	L -	Worship	
	M -	Outreach	
	N -	Miscellaneous	
	T -	Designated	

NOTE 8.6: Category/Sub-Category codes can be up to 4 characters long. For example, if codes needed to be inserted between H and I, you could use HA, HB, HC, etc. You could even insert HAA between HA and HB. Also, the same Category can be used in several categories (e.g.—T for Designated Funds, Designated Income, and Designated Expenses).

Appendix D

Sample Visitation Record Form

CDM Plus Visitation Records Report Form

Date _____ Staff Member _____

Number of Persons Present During Visit _____

Names of Person(s) Visited _____ _____

_____ _____

_____ _____

Type of Visit: ❑ Pastoral ❑ Hospital ❑ Sickness ❑ Nursing Home

❑ Shut-in ❑ Prospective ❑ Death ❑ Contact-brief

❑ Phone ❑ Other: _____

Miles Driven: _____

Comments: _____

_____

_____

_____

Date of Follow-up Call Reminder: _____

Reminder Memo: _____

_____

_____

_____