Priest Record Form (PRF)-Initiated Requests

1.   Purpose

The purpose of this document is to show the steps involved for the handling of requests initiated by PRFs. Some examples of these actions would include On/Off-boarding clergy or various changes to clergy's status (i.e. work status; address changes; assignment or title modifications; termination due to death or otherwise; etc.)

2.   Scope

These procedures will detail two of the most common requests made by the distribution of a PRF – Onboarding and Offboarding. These two operations include many of the requests that fall into the work of the IT Department. Other IT-related requests such as a title change or an assignment location change will also require the IT department to be notified, but many of those changes are within the steps needed to On/Offboard a priest, so many of the specifics will not be included in this document.

Examples of PRFs distributed with requests that would be outside of IT's scope would include such things as a meal allowance update or a salary adjustment. Neither of these types of requests would require a ticket to be submitted to the IT Department.

At the present time, these requests are all initiated by official PRFs generated by the Archbishop's office, distributed by the Finance Department and handled by a select group of personnel who have the clearance to work with the information.

3.   Prerequisites

User initiating the request based on having received notice of a PRF require "read access" to the following directory: **M:\Priest Payroll\Completed**

		SOP #:	PRF Initiated Requests-001
THE ROMAN CATHOLIC ARCHDIOCESE OF ATLANTA	INFORMATION TECHNOLOGY ARCHDIOCESE OF ATLANTA	Revision #:	(Initial)
		Implementation Date:	01/30/2023
Page #:	2 of 8	Last Reviewed/Update Date:	01/30/2023
Direct any comments to:	http://help.archatl.com/		

4.   Responsibilities

It will be the responsibility of AoA's Department of Information Technology to keep these directions updated. Should these procedures require an update, a modification, a correction, etc. – the IT department should be notified by way of the helpdesk ticketing system found at: http://help.archatl.com/

5.   Procedure

(Please refer to the following example of a PRF throughout these steps)

ARCHDIOCESE OF ATLANTA

Priest Record Form

(A)
☑ NEW ASSIGNMENT   ☐ TERMINATION   ☐ SENIOR   ☐ LEAVE   ☐ OTHER CHANGE _____

PERSONAL

Last Name:	First:	Middle:
Matus Castillo	Jose	Guadalupe

Street Address:	City:	State:	Zip Code:
3175 Hathaway Court	Atlanta	GA	30341-0000

Telephone:	SS#:	Email:
(770) 939-3501	▓▓▓▓	jgconv@gmail.com **(C)**

Date of Birth:	Ordination Date:	AOA Incardination Date:	AOA Start Date:	Country of Origin:
▓▓▓	▓▓▓		09/09/2022	Mexico

Please indicate liturgical rite affiliation:

Type of Priest:
☐ DIOCESAN
☑ ORDER
☐ EXTERN

If Order please specify: Franciscan Friar Conventual, OFM

☐ EASTERN RITES _____

If Extern, indicate Diocese of Incardination:

☐ WESTERN RITES ☐ ROMAN RITE
OR SPECIFY HERE: _____

COMMENTS:
Father's assignment began on September 9, 2022. His assignment letter is pending a signature. Please assign an AoA email account.
(B)

ASSIGNMENT

Assignment Location:	Assignment Position:	Effective Date:
Holy Cross Catholic Church	Parochial Vicar	09/09/2022

Living Arrangements:	Housing Allowance Paid To:	Housing Allowance:
Friary		$0.00

| Health / Life Eligible? | Medicare A Primary w/ Hartford | HDHP Effective Date: | Benefits End Date: | COMPLETED BY: |

Onboarding *(New Assignment)*

The creation of an IT helpdesk ticket begins when authorized personnel receive notice of a PRF. If the PRF (see page 2) is marked **(A)** New Assignment and/or **(B)** has instructions in the "Comments" field asking that the priest be assigned an arch-based e-mail account, a new helpdesk ticket should be submitted using the helpdesk option shown below …

Clergy Account (Add/Remove/Change)

When the new ticket is created, perform the following tasks ….

1. Subject line of the ticket should read: **ABO - PRF (New Assignment) "Last Name"** *Ex: Fr. John Doe starting in Arch:* **ABO - PRF (New Assignment) Doe**
2. Begin completing the drop down fields required by copying and pasting the exact data from the PRF into the ticket. The flow of ticketing info required should correspond with the layout of the PRF (starting top left and working down) …

3. Submit the ticket

Provided the ticket has all of the proper information, the IT Department will then perform the following steps:

1. Create the account in MS 365 providing the following attributes:
   a. Office 365 E1
   b. Exchange Online (Plan 1)
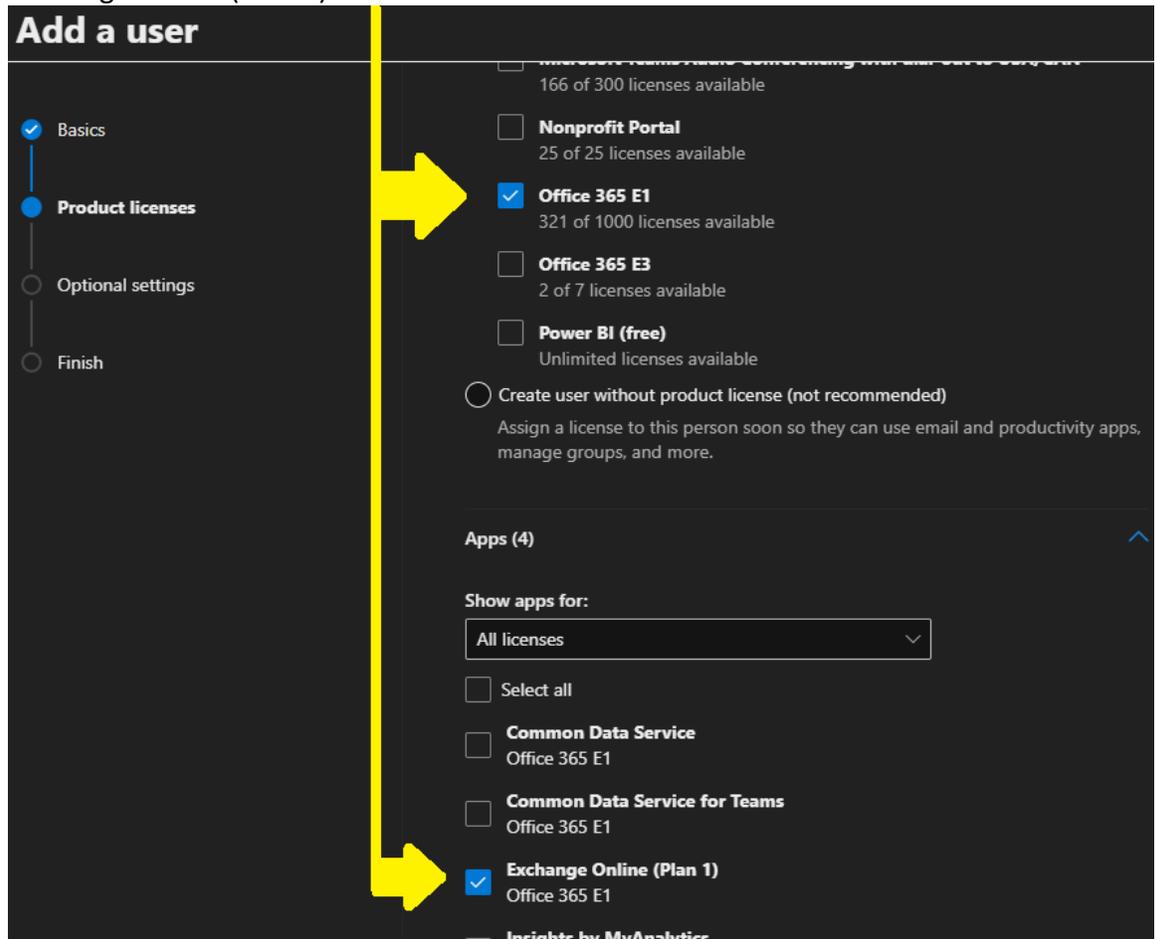
2. When transferring over contact field information, the data should line up as shown below:

PRF FIELD	365 FIELD
Assignment Position	Job Title
Roman Catholic Archdiocese of Atlanta (or Other)	Office
Assignment Location	Department

3. Using the Communications approved "welcome letter" (**see example on the next page**), the IT Dept will send the credentials for accessing the account to the priest via the confirmed personal e-mail address listed on the PRF **(C)**.

(Welcome Letter example)

Memo

Date: January xx, 2023

To: Father John Doe

From: Tom Hardy, Director of IT

Re: Your Archdiocese of Atlanta Email Account

Welcome! I was recently notified that you are to be provided an Archdiocesan e-mail account. This memo contains information on this new account including how to access it and what it will be used for.

The policy of the Archdiocese of Atlanta is that all email communications between the Chancery and the remote priests (i.e. those that do not work at the Chancery) is to **ONLY** be exchanged over our archatl e-mail platform. Remote users are not to use personal or parish e-mail accounts when sending/receiving e-mail to/from members of the Chancery. Lastly, you are asked to check this account **REGULARY** so as to not miss important information being sent from the Chancery offices.

<u>At your earliest convenience</u>, please perform the steps contained in the attached document (Outlook Guide for Remote Users). You need only a device with a browser and internet access - your personal credentials are as follows:

Sign in: jdoe@archatl.com *(your Arch-based e-mail address)*
Password: $Y7a#TvcUngR

> **Please Note:** This is your initial (temporary) password that you may choose to keep or change to something more personal. Should you want to change your password (highly recommended), please follow the steps beginning on page 6 of the document once you've gained initial access into your account. Also, you will have the ability at any time to reset your password (using the steps on pages 6 – 10) and will be forced to change it at least twice a year (every 180 days).

<u>**To confirm you have received this message and have gained access into your account**</u>:

1. Create a new message on the Outlook Web portal.
2. Label the subject line to read: "**Verifying Access to Arch-based E-mail**".
3. Insert my address in the To: field (thardy@archatl.com).
4. Leave the body of the message empty.
5. Click on the Send button

> ***NOTE:** The above steps **must be performed from your archatl.com e-mailbox** – not your personal e-mailbox (to which this message is being sent). Responses coming from a personal account do not verify that you've gained access to your Arch mailbox account.*

A link to instructions for setting up your Arch mail account on a Smartphone or tablet can be found on a knowledgebase article by clicking here. However, please note that you will first need to initialize your account by following these directions to gain access to your account from the portal using a browser.

Should you have any difficulties or require additional assistance from the IT Department on this or any other technically related issues going forward, please note that we have an online helpdesk where you can submit a request for help. It can be found here: http://help.archatl.com . Direct e-mails requesting assistance sent to me or any of our staff are strongly discouraged as they often are overlooked. Submitting a proper ticket to the helpdesk will be acknowledged much more quickly.

For additional information on how to use the IT Helpdesk, please refer to the following knowledgebase article by clicking here. Thank you.

4. Attached to the memo will be an instruction sheet for how to access his e-mail account, reset his temporary password along with be asked to reply back to IT **from the account** to confirm that he has gained access into the account.

5. Once the confirmation is received, the IT Dept will then contact the following groups/people (see example below) to inform them of the new active address so that it can be properly recorded and all future correspondence will be sent to that address.

- Communications Department (Communications@archatl.com)
- The ABO's Office personnel (Veronica Reyes and Kirial DeRozas-Miles)
- Archives and Records (Angelique Richardson)

NOTE: *Often, the progress of the open ticket will remain at this step as IT awaits a reply from the priest. Reminders can be sent but IT has the authority to place the 365 account in "Blocked Sign-In" status if the communication attempts go unanswered.*

RE: "Verifying Arch E-Mail is now setup"

TH Tom Hardy

To ○ Father Juan Carlos Villota Viteri

Cc ● Veronica Reyes (vreyes@archatl.com); ○ Kirial DeRozas-Miles; ○ The Roman Catholic Archdiocese of Atlanta

↩ Reply   ↩ Reply All   → Forward   •••

Thu 6/16/2022 11:41 AM

Fr.,

Thanks so much for verifying your access to your new Arch-based e-mail!!! I have highlighted your arch e-mail address below and have cc'd those folks who will modify their records to begin using this account for their e-mail communication to you going forward. -Tom

From: Father Juan Carlos Villota Viteri <jcvillotaviteri@archatl.com>
Sent: Thursday, June 16, 2022 11:17 AM
To: Tom Hardy <thardy@archatl.com>
Subject: "Verifying Arch E-Mail is now setup"

Thank you

Fr. Juan C. Villota Viteri

Sent from Mail for Windows

Father Juan Carlos Villota Viteri
Roman Catholic Archdiocese of Atlanta
2401 Lake Park Drive, SE • Smyrna, •
o: 404.920.7333
jcvillotaviteri@archatl.com • archatl.com

Upon confirmation from the priest and notification to those dept/personnel listed, the ticket will then be marked complete and closed by the IT Department.

Offboarding *(Termination)*

This scenario is much less-complicated than Onboarding, but needs to be documented with a proper help desk ticket as well. Similarly, the process will begin by submitting a new ticket using the following option …

Clergy Account (Add/Remove/Change)

When the new ticket is created, perform the following tasks ….

1. Label the subject line of the ticket to read: **ABO - PRF (Termination) "Last Name"**
2. Complete the drop down fields required by copying and pasting the exact data from the PRF into the ticket. The information needed is as follows:
   - Last name
   - First name
   - Arch-based e-mail address
   - Effective date of termination (may be a past date)

Provided the ticket has all of the proper information, the IT Department will then perform the following steps:

1. Perform a "Block Sign-In" on the 365 account and reset the password (noting it "internally" within the ticket.
2. Add the Archives Department (Angelique Richardson) as a follower to the ticket so that they can complete their ingestion process.
3. Once ingestion is complete, the account can be deleted.

   ***NOTE**: Often, the ingestion process may be more involved and the ticket will need to remain open in pending state. Archives will direct IT when the account can be deleted.*

4. IT will then mark the ticket complete and close it out.

Other *(Senior Priest Status; Leave of Absence; Other Changes)*

Reminder: Only changes pertaining to an (e-mail) account require a helpdesk ticket. PRFs containing information such as salary changes, meal allowance changes, SSN updates, etc. – do not require a ticket submission to the IT helpdesk.

When submitting tickets based on what may be referred to as "business card info" (i.e. address, title, phone number, location, etc.), document as much of the PRF information into the drop-down area of the ticket being submitted but remember to provide any further instructions or details within the body of the ticket, if necessary.

6.   References

A library of procedures such as this may be found at AOA IT Dept.'s Knowledgebase page at: https://archatl.zendesk.com/hc/en-us/sections/360006554592-Knowledgebase

7.   Definitions

None.