

BEST PRACTICES FOR PARISH ADMINISTRATIVE ASSISTANTS

A Handbook for Clerical Staff and Office Volunteers



**DIOCESE OF ST. PETERSBURG, INC.
OFFICE OF THE CHANCELLOR
2017**



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ACKNOWLEDGEMENTS

Sincere gratitude to the many offices and individuals who helped in the compilation of this handbook:

- The many Parish Administrative Assistants, Office Managers and Receptionists who offered valuable feedback and resources, which have helped to shape this manual.
- The following Pastoral Center departments of the Diocese of St. Petersburg:
 - Office of the Chancellor
 - Human Resources Office
 - Office of Archives and Records Management
 - Internal Services Administration

May the wisdom offered by those of you who experience parish life on a daily basis be of great help to those who will follow in the years to come!

Thank you for the gifts and talents you bring to your parishes and to the Diocese of St. Petersburg. Your tireless service and love for God's people help to make the Church a "light to the world."

"Do not neglect hospitality, for through it some have unknowingly entertained angels." – Hebrews 13:2

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March 2017

Dear Friends in Christ,

As your local bishop, I wish to thank you for your dedication to your parishes and for representing the Church so well as a welcoming presence witnessed by visitors, parish “regulars,” new parishioners and those in need. Your genuine sense of hospitality often makes a difference when a potential new member visits your office to make inquiries about the parish.

In my previous experience as a pastor in the Diocese of Orlando, I can attest to the importance of the work done by administrative assistants and receptionists. You are the ones who are often on the “front line,” as the initial contacts for those who are preparing for joyous occasions, such as baptisms or marriages, and for those mourning the loss of a family member or another loved one.

Although you may rarely hear compliments from those whom you serve, the ministry that you perform contributes greatly to the success and vitality of your parish. We in the Diocese of St. Petersburg are fortunate to have so many committed employees and volunteers like you.

Please be assured of my ongoing prayers for you and for the communities where you serve. With gratitude and best wishes, I am

Sincerely yours in Christ,

Most Reverend Gregory L. Parkes
Bishop of St. Petersburg



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March 2017

Dear Friends,

It has been many years since the Diocese of St. Petersburg has offered a professional day specifically for administrative assistants, office managers and receptionists. As a former parish secretary, I have always appreciated any opportunity for ongoing professional growth and consultation with those working in similar positions.

In the summer of 2016, I received a request from a parish secretary, who asked if the Chancellor's Office would consider sponsoring a workshop for you and your peers, to discuss "best practices" in the many areas of your ministry. After soliciting feedback from administrative professionals throughout the Diocese, our office received dozens of pages of wonderful ideas and practical wisdom, which have helped to fill the pages of this handbook. Your well-organized and detailed responses were nothing less than impressive. This resource is the result of your efforts.

My hope is that this handbook will be an asset to you and to your successors. I am also hopeful that the 2017 workshop presented by the members of our Chancellor's Office, our diocesan Human Resources Office and our Office of Archives and Records will become a regularly-scheduled event, benefitting all those searching for ways to increase their effectiveness in their ministry.

Thank you for the excellent professional work that you do for your pastors, clergy, staff members, parishioners and visitors to your parish. May God continue to bless you in your endeavors.

Your sister in Christ,

Joan G. Morgan
Chancellor

I. Professional Attributes of Administrative Professionals

Those who responded to our request for “best practices” were unanimous in their agreement that the following attributes are indispensable for administrative assistants and receptionists:

- Punctuality: Show true dedication to your job by arriving on time or even a few minutes early.
- Dependability: Be a person of your word, following through on responsibilities entrusted to you.
- Humility: Carry out tasks joyfully, without a desire for recognition.
- Professionalism: Conduct yourself in a way that puts the parish and its pastor in the best possible light.
- Alertness: Pay careful attention to what is happening around you and be prepared to assist others on staff and those who visit the parish office. Also be alert to signs of potential conflict or danger.
- Attire: Dress appropriately, based on parish and diocesan guidelines. Each parish should have an employee handbook. How we dress has a direct impact on our demeanor and whether we take our work seriously.
- Friendliness: Always be mindful that you are representing your parish. Everyone who walks in should be greeted with a smile. If you know the person’s name, use it when greeting him/her.
- Consideration: Be protective of the pastor’s time. Most pastors keep appointment schedules, which might limit their ability to meet with those who simply “drop by.” Please find out in advance how the pastor prefers to handle such situations.
- Organization: Think ahead and plan accordingly. It is helpful to look at the parish calendar and to speak with other staff members in order to determine whether you might be handling more phone calls or mailings than usual.
- Compassion: Be sensitive in time of need. This applies both to other staff members and to those who visit the parish office.
- Gratitude: Staff members should show appreciation whenever possible to volunteers. They are vital to the success of any parish. Solicit feedback from them.
- Charity: Gossip and mean-spirited comments have no place in a church office. Words should be used to build up others, not to destroy them.

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II. Recommended Desk Items for Administrative Professionals

We received a significant number of suggestions concerning which items should be readily available for secretaries and receptionists. Depending on the size of your workspace, you might wish to consider the following:

- Name tags for all employees and volunteers who staff the receptionist's desk. Depending upon the size of your parish and office staff, name tags might be helpful for all employees.
- Information binder containing:
 - Instructions for use of telephone and voice mail.
 - Telephone listings by name and listing order.
 - An updated FAQ (frequently asked questions) list and extensions where callers should be referred.
 - A calendar of events for the current and following months.
 - Copies of last week's and this week's bulletins. The bulletin contains approximately 70% of the answers to commonly asked questions.
 - A resource list with business cards and contact info for those who request financial assistance. Extra copies should be available for visitors.
 - Information from our diocesan Safe Environment Program office and contact information for our diocesan Victim Assistance Minister.
 - A list of 911 call procedures in case of emergencies.
 - Tips for dealing with difficult people.
 - An organizational chart by ministry with names and extensions.
- Schedule of staff, especially those who are out of the office on a particular day.
- Tissues and hand sanitizer
- Sign-in sheet for visitors (if applicable), pad and pens.
- Alcohol wipes for phone and computer keyboard.
- Panic button to be used when assistance is needed.
- Parish Office Procedures Book, if your office has one.

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III. Directions for Completing Various Forms and Books

The following instructions might be helpful for those who are learning how to complete the following parish forms and books. Please be certain that writing on all forms and in parish books is legible:

- Funeral Forms
 - Indicate name of deceased, date of death and date of service.
 - Include name and contact information for family members.
 - Write in name and contact number of the funeral home handling the arrangements.
- Baptism Forms
 - Child's name and date of birth.
 - Parents' names.
 - Godparents' names, religion (At least one must be Catholic. A baptized non-Catholic Christian can be included as a witness to the baptism, provided that a Catholic godparent is present. Also, only one male or one female godparent or one of each).
 - Requested date of baptism.
 - Date of baptism preparation class chosen.
- Mass Stipend Books and Mass Cards
 - Fill in name of person(s) for whom the Mass is intended.
 - Fill in name of person requesting the Mass intention.
 - Indicate whether Mass Stipend has been paid and amount of stipend.
 - Fill in Mass date information and intention on Mass card and give to donor.
 - If someone requests a Mass, first check to see if they prefer a specific date. Then, check to verify whether the date is available. If not, look at other possible dates but do not change any Masses that are already reserved.
 - Pastors may permit more than one request at the same Mass with consent of the families/individuals involved, however this should not be done more than two times per week. Most pastors prefer only one intention (individual or family) per Mass. Changes should only be made by the secretary.
 - Some parishes also offer unannounced Masses. These are usually offered as available but no specific date is provided.
- Sacramental Registers
 - Our diocesan *Sacramental Records Handbook* contains instructions for correctly completing the various sacramental books.

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IV. Tips for Answering the Telephone

How you answer the telephone and your tone of voice can either be inviting or repelling. Below are some best practices for answering the parish phone:

- Answer the phone with a smile and say, “Good morning/afternoon.” Your smile can be detected in the tone of your voice. Then, identify your church and your first name and ask “How may I direct your call?”
- A personal touch is best: Except for after parish hours, phones should always be answered by a live person.
- Long calls: If you are handling a rather lengthy call, let your colleague know that you will be on a call for the next 15 minutes or so. This will allow him/her to pick up other calls.
- Placing calls on hold: If you must place a caller on hold, please do so no more than twice. Also, please avoid placing the caller on hold for more than 60 seconds. If necessary, take their number and call them back.
- Transferring: When transferring calls, make sure you let callers know where you are transferring them. If you are transferring a call to a staff member’s voice mail, let the caller know that you are doing so and inform him/her if the staff member is out of the office.
- Finding answers: If you do not have an answer to a caller’s question, take down his/her name and number and return the call as soon as you have an answer.
- Give only necessary information to incoming callers, such as “She is unavailable right now. Could I take your name and number and have her return your call when she is available?”
- Automated messages: Make sure that your parish office voice message is up to date. Special messages that are specific to holidays should be changed immediately after the holiday.

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V. Appropriate Interaction with Visitors

Visitors are a regular part of ministry in the parish office and visits should be viewed as opportunities for service rather than burdens. The following best practices will help to make visitors' experiences at your parish more positive:

- Greet all visitors as soon as they enter. Let them know that you will be right with them if you are busy.
- Present a welcoming attitude. Some visitors may have been away from the Church for a long time. It is a golden opportunity to evangelize when someone is returning to arrange a baptism, wedding or funeral.
- Speak calmly and avoid raising your voice. It is more calming to an upset visitor if you speak gently. Let them know you are sorry about their situation and will do your best to assist.
- Follow up with staff if a visitor is waiting more than 10 minutes for a meeting.
- Be willing to listen but know how to carefully draw a long conversation to a close.
- Create a welcoming environment: Make sure that the waiting area in the parish office is hospitable. A well-kept area is more inviting than one that has been neglected.
- Non-English speakers: Unless you can communicate with those who speak Spanish or other non-English languages, have access to a staff member or a parish volunteer whom you can contact when a non-English-speaker requests assistance.

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VI. Confidentiality and Other Office Protocols

In the Church, we often find ourselves dealing with confidential matters. People may trust us with very personal information. We act professionally and respectfully when we honor the confidentiality of the matters entrusted to us. Below is a series of protocols regarding confidentiality and the handling of other common office tasks:

- Discretion must be exercised when visitors are in the waiting area and you are discussing confidential matters.
- Show patience and flexibility, particularly if a visitor needs you to listen even though you are working on a project.
- Handling multiple calls should be done calmly and without showing frustration or annoyance. “May I place you on hold?” “Thank you so much for holding. How may I help you?”
- Papers and forms: Treat all papers, folders and forms as confidential material.
- Be the face of Christ. You are the first face of the Church many people will see.
- Parish bulletins: Have a system in place where at least two people proofread the bulletin before it is transmitted to the publishing company.
- Baptism requests: Have contact information for baptism preparation readily available.
- Exercise careful security, making sure that office doors which need to be locked are secured and access is limited to authorized personnel.
- Professional environment: The office area is not a gathering place. People should be kindly encouraged to take care of business and move on.
- Introducing visitors: Be sure to tell employees when a visitor has arrived and offer to bring him/her to the employee, if needed.
- Requests for financial assistance: If a visitor has come for assistance from the St. Vincent de Paul Society, ask kindly if they were referred by an SVDP volunteer. If not, give them a business card with contact number and ask them to call.
- Referrals: Have a listing of referrals, including mental health counselors, professionals and charitable organizations, which you can give to individuals who might require assistance.

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VII. Best Methods for Handling Distraught or Difficult Individuals

- Speak calmly to angry visitors. Listen to understand the reason for their anger.
- Utilize support persons: If possible, have one or more staff members available who can speak with distraught individuals, as needed.
- Restricted entry: As a last resort, you might need to discuss with the pastor those visitors who display harassing behavior, to determine whether they should be prohibited from entering the parish office.
- Emergency contacts: Have an emergency contact list ready in the event that an individual becomes out of control.

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VIII. Other Suggestions from Parish Staff Members

- Parish registration: Have dedicated times on the weekend when newcomers can register. This reduces the need to come into the office during the week. Making online registration available is also a great time-saver.
- Messages: Make sure you write down messages correctly on the message pad. Printing shows up more clearly than cursive. Include the date, time and to whom the message is directed.
- Sick Calls: Calls requesting the Anointing of the Sick are the most important calls which require immediate attention. Your job is to let the priest know what has been requested.
- Priest listing: Keep a listing of retired priests and other priests on call, when help is needed.
- Bulletin information: Make sure that your volunteers read the weekly bulletin to know what's happening in the parish.
- Prayers of the Faithful: When listing names of individuals for whom Masses are offered, make sure to spell out the names phonetically, if needed, so that they can be more easily pronounced by the deacon or reader.
- Desk coverage: Cover the desk at all times and avoid leaving the desk area unless you have someone who can cover your station.
- Emergency numbers: Make sure that all emergency phone numbers are posted near the phone.
- Helpful information: Act as a resource person, maintaining and providing available literature and contact information for those in need.
- Opening and closing: Assist in the opening and closing of the office, unless another staff member maintains responsibility for this.
- Only authorized persons are permitted behind the desk. Determine who should have access to the receptionist's desk.
- Security: As part of your responsibilities, you also serve a security function, ensuring that visitors are escorted at all times throughout the building.
- Staff meetings: Please be present and on time at all staff meetings when you are required to attend.
- Rumors: Avoid being part of the "rumor mill." Your job is to provide accurate information. If you are uncertain about information, please do not pass it on.
- Unexpected situations: There will be times when emergency situations will arise while you are working. Calm thinking and quick action are important factors in dealing with such situations.

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- Fire alarms: If you are working at the desk and a fire alarm sounds, do not attempt to determine whether the alarm is real or false. Merely close the office area and leave the building.
- Obscene or threatening phone calls: Contact your supervisor immediately.
- Medical emergencies: All medical emergencies should be reported to your supervisor. In cases of severe medical emergencies, it may be necessary to call 911.
- Handling Mail: If you are given responsibility for sorting incoming mail, please distribute it into the appropriate mail slots. Staff members will pick up their own mail. They are also responsible for their own outgoing mail.

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IX. Training of Volunteers

Well-trained, all-volunteer receptionist staffs are a benefit to the parish, particularly if they are parishioners, since they have an investment in the parish. Also, there can be a significant savings to the parish by recruiting volunteers for this responsibility. The following ideas should be considered when training volunteers:

- Application forms with time slots should be available so that potential volunteers can indicate their availability.
- Welcome letter: Have a welcome letter to new volunteers, along with a packet of instructional materials.
- Prayer: A simple prayer for patience and kindness should be visible so that the volunteers can be reminded to pray before beginning their work.
- Guidelines/Mission Statement: Include a listing of guidelines which all volunteers are expected to follow. A very simple to remember Mission Statement would also be beneficial (Example: “Christ is present in every visitor”).
- Promptness: Volunteers should be prompt in arriving for their assigned hours. When unable to work, they should make arrangements to have their shifts covered.
- Hospitality: Training your volunteers to show hospitality and a caring presence toward visitors and others will help to create a warm office environment.
- Training: Regularly-scheduled training sessions, arranged at various times of the year would be preferable. This would reduce the time demand on staff members.
- Absences/substitutes: Train the volunteers to arrange for their substitutes whenever they are unable to show up for their shifts.
- Phones: Volunteers should be thoroughly trained on the parish’s phone system.
- Mass requests: Proper handling of Mass stipends and requests is important.
- Security details: Outline security measures for those times when the receptionist or secretary will be alone in the office.
- Answering system reminder: Keep handy a reminder to set the phone system to “after hours” mode (if applicable).
- Breaks: Procedures for lunch breaks and other breaks during the day will help to alleviate any gaps in front desk coverage.

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- Copying: Making copying procedures available will prove helpful for volunteers. If possible, it is best that ministry volunteers submit materials to be copied in advance, especially since other copying jobs might already be in progress.
- Flower donations: If your parish accepts offerings for sanctuary flowers, a sheet with information on the donor, the intention and the amount paid should be available at the front desk.
- Funeral requests: Either the parish secretary or another staff member is typically contacted to handle funeral requests. A contact number in the event of his/her absence should be available to receptionists.
- Contact information: Unless an employee or ministry leader has given permission, do not give his/her number out to those inquiring about events or ministries.
- **Most importantly, staff members should show appreciation toward volunteers whenever possible!**

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X. Helpful Articles for Office Staff Members

From the Holy Father

Pope Francis [...] used a more modern example by describing an encounter of a young couple with a parish secretary. “Good morning, the two of us - boyfriend and girlfriend - we want to get married,” the couple says.

“And instead of saying, ‘That’s great!’ They say, ‘Oh, well, have a seat. If you want the Mass, it costs a lot’ This, instead of receiving a good welcome – ‘It is a good thing to get married!’ – But instead they get this response: ‘Do you have the certificate of baptism, all right’ And they find a closed door,” the Pope said.

He described the situation as one where a “Christian has the ability to open a door, thanking God for this fact of a new marriage” but instead the secretary controlled the faith when it was possible to have facilitated the couples’ faith.

“There is always a temptation,” he said, “to try and take possession of the Lord.”

“Think about a single mother who goes to church, in the parish and to the secretary she says: ‘I want my child baptized.’ “And then this Christian, this Christian says: ‘No, you cannot because you’re not married!’

“But look, this girl who had the courage to carry her pregnancy and not to return her son to the sender, what is it? A closed door! This is not zeal! It is far from the Lord! It does not open doors!

“And so when we are on this street, we have this attitude, we do not do good to people, the people, the People of God. But Jesus instituted the seven sacraments, (and) with this attitude and we are establishing the eighth: the sacrament of pastoral customs!” he warned.

Source: Catholic News Agency, May 25, 2013, <http://www.catholicnewsagency.com/news/dont-create-sacrament-of-pastoral-customs-pope-preaches/>

Important Characteristics of Administrative Assistants

Secretarial tasks typically involve producing documents, writing, proofreading, record keeping, communicating, and assisting others. But today’s church secretary does much *more* than answer the phone and produce the bulletin. There are scores of administrative tasks that when managed well make the office more helpful to members—record keeping, data entry, website updates, reports, document filing, communications, and yes, *more*.

As the secretary becomes familiar with the work of the church she sees what needs to be done and does it. Furthermore, she does it with excellent skills and a Christian spirit. She is a major asset to any church. Unless one has been there, it is hard to appreciate how diverse and demanding this job can be. The effective secretary must be a good time manager, be able to work well with people, be able to focus on priorities. She must be caring without taking on the role of a counselor; she must be committed to tasks but be able to put them aside for the unexpected.

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For the qualified secretary who loves the Lord, the church office is a marvelous place to serve.

Source: Gayle Hilligoss, Effective Church Communications, August 31, 2016, <http://www.effectivechurchcom.com/church-secretaries-office-administrators-history-and-importance/>

Confidentiality and Compassion

The church secretary is responsible for dealing with frequently sensitive personal information about church and community members. Empathy and discretion are key qualities for a church secretary, since she is often privy to congregation members' marital, financial or health concerns. She handles requests from people both within and outside the church for financial, counseling and emergency support, and must therefore remain current about locally available resources.

Source: Molly Thompson, "Duties of a Church Secretary," <http://oureverydaylife.com/duties-church-secretary-19741.html>

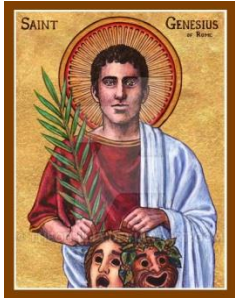
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XI. Prayers for Administrative Professionals

St. Genesius of Rome (Arles), martyred ca. 303

Feast Day – August 25

Patron of secretaries, notaries, actors, comedians, clowns, dancers, musicians, attorneys and printers



Prayer to St. Genesius for Secretaries

St. Genesius, faithful to sound doctrine and fearless defender of the Faith, you were a careful historian and preserver of documents. Imbue secretaries with a sense of your exactitude and genuine concern for detail. In carrying out their appointed tasks, may they also attend to their spiritual duties and give glory to God in all things. Amen.

The Secretary's Prayer (Published by Ann Landers)

Dear Lord, help me to do my work well, to have the memory of an elephant and by some miracle to be able to do five things at once:

answer four telephones while typing a letter that `must go out today.'

When the letter doesn't get signed until tomorrow, please give me the strength to keep my mouth shut.

Never let me lose my patience, even when the boss has me searching files for hours for the report that later is discovered on his desk.

Help me to read his mind and his handwriting and carry out all instructions without explanation.

Let me always know exactly where my boss is and when he'll be back, even though he never tells me these things.

And Lord, when the year ends, please give me the foresight not to throw out records that will be asked for in a couple of days, even though I was told emphatically,

`Destroy these; they are cluttering up the place.'

I ask these blessings, dear Lord, in the name of secretaries everywhere. Amen.

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XII. Links to Helpful Diocesan Resources

Since your office is frequently expected to function as a “resource directory,” a helpful series of links to professional, pastoral and charitable resources throughout the Diocese of St. Petersburg is included below:

Records Management Resources:

- [Sacramental Records Handbook](#)
- [Listing of Valid and Invalid Baptisms](#)
- [Pastoral Center Records Retention Policy Schedule](#)

[Pastoral Center Directory](#)

Parishes and Missions in the Diocese:

- [Searchable Directory by city, deanery or name](#)
- [Single-volume directory, including parish staff members](#)

[Human Resources – Materials](#)

[Listing of Catholic Charitable Organizations in the Diocese](#)

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APPENDIX A: Properly Written Telephone Messages

1. If you do not have paper and pencil/pen handy when a phone call comes, ask the caller to wait while you get something to write with and on.
2. Include the name of the person for whom the message is intended and the name of the caller.
3. Find out whether the message recipient needs to return the phone call.
4. Ask for and write the caller's phone number even if a return phone call is not requested.
5. Decide whether the message needs to be written word for word or if a summary is acceptable.
6. Ask the caller to repeat any information that you missed when trying to write the message. Ask questions if necessary.
7. Be sure to write legibly and sign your name at the end of the note.
8. Either read the message to the caller or orally summarize what you wrote. The caller can then tell you if your message is written correctly.
9. When you hang up, read over your message one last time to make sure it makes sense and that all facts are included.
10. Make sure that the message is delivered to the recipient or placed where he/she will find it.

Source: Academic Communications Associates, Inc., 2002, <https://www.acadcom.com/pdfweb/49974.pdf>

The image shows a sample telephone message form with handwritten entries and callout boxes explaining each field. The form is titled "MESSAGE" and includes fields for Date, Time, To, From, Telephone #, a status table, Message, and Rec'd By.

MESSAGE

Date 14/09/02

Time 10:45

To Bob Williams

From Janet Cooms

Telephone # (250) 479-1234

Telephoned	<input checked="" type="checkbox"/>	Please call	<input checked="" type="checkbox"/>
Called to see you	<input type="checkbox"/>	Will call again	<input type="checkbox"/>
Wants to see you	<input type="checkbox"/>	Returned your call	<input type="checkbox"/>

Message She wants to know what time you are meeting her at the restaurant.

Rec'd By: Muriel

Callout boxes:

- Write the name of the person the caller wanted to talk to here. (points to To)
- Write the name of the caller here. (points to From)
- Write the details about the call here. (points to Message)
- Write your name here. (points to Rec'd By)

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APPENDIX B: Phonetically-Spelled Names for General Intercessions

Sample:

For the repose of the souls of the faithful departed and especially for (*intention of the Mass*) for whom this Mass is being offered. We pray to the Lord...

4:00 p.m.	+Joanne Estevez (Es-TEV-ez)
7:00 a.m.	The parish community of St. _____
9:00 a.m.	+Robert Outen (OO-ten)
11:00 a.m.	Intentions of Rafael Quintero (Kin-TERR-oh)
6:00 p.m.	+Georgeanne Francesangeli (Francis-AN-juh-lee)

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