PARISH GUIDE

Sacraments — How It Works

From a parishioner's request to the parish office — in plain language.

A simple, step-by-step guide for parishioners and parish staff · Powered by Nave

The journey at a glance

Every sacrament follows the same simple path. The parishioner starts it online; the parish office guides it the rest of the way. Nobody needs to call the office to know where things stand.

1 · Request online → **2 · Get a case number** → **3 · Pay (if there's a fee)** → **4 · Upload documents** →
5 · Office reviews & approves → **6 · Scheduled** → **7 · Celebrated** → **8 · Recorded & certificate**

Two sides, one process. The parishioner sees a friendly checklist and a status they can track. The parish office sees the very same steps in an editable "case" — so what the family is told and what the office manages are always in sync.

Who does what

👪 The parishioner / family

Submits the request, pays any fee, uploads documents, and tracks progress — all from the parish website, on a phone or computer.

⛪ The parish office (staff)

Reviews requests, checks documents, confirms requirements, sets the date, records the sacrament, and issues the certificate — all from one screen.

Part A · For parishioners

How a family requests and follows a sacrament. No account is required to start — though signing in lets you upload documents and see everything in one place.

USE CASE 1 · REQUEST A SACRAMENT

Who: A parishioner or family. **Goal:** Start a sacrament request (e.g. Baptism, Confirmation, a wedding, or a certificate).

1. Open the parish website and tap **Sacraments**.
2. Choose the sacrament. You'll see a short **"What you'll need"** list (documents, classes, sponsors) so there are no surprises.
3. Fill in the simple form — your details, and a few questions specific to that sacrament (for a Confirmation: the candidate, sponsor, saint name).
4. Tap **Submit request**.

Result: You get a **case number** to keep — your reference for everything that follows.

USE CASE 2 · PAY A FEE ONLINE

Who: A parishioner with a fee-bearing request. **Goal:** Pay securely by card.

1. If the sacrament has a fee, you go straight to a secure **checkout** after submitting.
2. Pay by card. The total — and any small convenience fee — is shown clearly before you pay.
3. Prefer to pay in person? Choose **"Pay later — at the parish office."** (Unless your parish requires payment up front.)

Result: Your fee is marked paid and a receipt is emailed to you.

USE CASE 3 · TRACK YOUR REQUEST

Who: Anyone with a case number. **Goal:** See the status and what's still needed — without calling the office.

1. Go to **Sacraments** → **Track a request** and enter your case number.
2. See your current status and a checklist of **what's still needed** (✓ done, ○ pending).

Result: You always know where things stand.

USE CASE 4 · UPLOAD DOCUMENTS

Who: A signed-in parishioner. **Goal:** Send required papers (baptismal certificate, sponsor letter…).

1. Sign in, then open your request from the tracker.
2. Choose the document type and upload a PDF or a photo from your phone.

Result: The parish office receives it securely and checks it off your list.

USE CASE 5 · GET THE DATE & YOUR CERTIFICATE

Who: A parishioner whose request is approved. **Goal:** Know the celebration date and receive the certificate.

1. Once the office confirms everything, you're **notified of the date** by email.
2. After the celebration, your certificate is recorded and can be issued to you.

Result: A clear date, and an official record of the sacrament.

Part B · For parish staff

Everything the office needs to manage a request lives in one place — **Admin** → **Requests** → **Sacrament Cases**. Open any case to see a guided view that walks you through each step.

USE CASE 6 · FIND & REVIEW REQUESTS

Who: Parish staff. **Goal:** Manage many requests efficiently.

1. Open **Sacrament Cases** to see every request and certificate.
2. **Search** by name, case number, or email; **filter** by sacrament, by status, or by **cohort/year** (e.g. "Confirmation 2025–2026").
3. Page through the list — it stays fast even with hundreds of candidates a year.

Result: The right cases in seconds, however large the parish.

USE CASE 7 · WORK A CASE (THE GUIDED VIEW)

Who: Parish staff. **Goal:** Move a single request from request to scheduled.

1. Open a case. A **progress bar** shows the lifecycle, and a **"Next step"** note tells you exactly what to do now.
2. Tick off each **requirement** (met / waived). Verify uploaded **documents**. Add the **people** on the case (sponsors, godparents).
3. When the required items are met, the case is **"Cleared to schedule."** Set the date — it lands on the parish calendar and the family is notified.

Result: Nothing slips through the cracks; the family's checklist updates automatically.

USE CASE 8 · RUN A FORMATION PROGRAM (COHORT)

Who: Faith formation / staff. **Goal:** Manage a whole class together (Confirmation, First Communion, RCIA).

1. Open **Sacrament Programs** and create a cohort for the year.
2. Enroll candidates and track **attendance**.
3. Tap **"Schedule cohort"** to set the celebration date on **every enrolled candidate at once**.

Result: One action schedules 150 candidates — no one-by-one busywork.

USE CASE 9 · RECORD IT & ISSUE THE CERTIFICATE

Who: Parish staff. **Goal:** Keep the official record and produce a certificate.

1. When a case is celebrated, tap **"Record in registry"** — it pre-fills from the case.
2. In the **Sacrament Registry**, finish the entry (book/page) and **issue a certificate** the family can print.

Result: A permanent parish record and an official certificate.

USE CASE 10 · SET UP PAYMENTS

Who: Pastor / office manager. **Goal:** Accept fees online.

1. Open **Admin** → **Payments**, connect the parish's account (Stripe), and turn on online payments.
2. Optionally add a small **convenience fee** so card costs are covered, or require payment up front.
3. Set each sacrament's fee amount in the **Sacrament Catalog**.

Result: Fees collected online, deposited straight to the parish.

USE CASE 11 · DELEGATE A SACRAMENT TO A COORDINATOR

Who: Pastor / office manager. **Goal:** Let a volunteer coordinator run one sacrament without full office access.

1. In the **Sacrament Catalog**, assign a **Sacrament Lead** — e.g. an RCIA director or baptism coordinator — to a sacrament.
2. They can now work the **cases for that sacrament only** (and appear as its point of contact), without seeing the rest of the office.

Result: The right volunteer owns each sacrament; the office stays focused, and every action is still recorded in the activity log.

Quick reference

Where do parishioners start?	The parish website → **Sacraments**. No account needed to request; signing in adds document upload.
Do they have to call the office?	No. They get a case number and can track status and see what's needed anytime.
Where does staff manage everything?	**Admin** → **Requests** → **Sacrament Cases.** Open a case for the guided, step-by-step view.
How do we handle 150 candidates a year?	Use **cohorts** (Sacrament Programs): enroll the class, track attendance, and schedule everyone at once. The case list has search, filters, and paging.
How are fees paid?	By card at checkout (with an optional convenience fee), or in person at the office.
Where do certificates come from?	The **Sacrament Registry** — the parish's official record. Certificates are issued and can be printed.
Can a volunteer run just one sacrament?	Yes — assign a **Sacrament Lead** in the Catalog. They work that sacrament's cases only, with no access to the rest of the office.
What languages?	The parishioner-facing pages are multilingual (English / Spanish / more), so families are guided in their own language.

The big idea: one simple, guided process. Families always know what's needed and where things stand; the office manages every step from a single screen — fewer phone calls, fewer dropped requests, and a proper record at the end.