PATHWAY TO HOLY ORDERS

FORMS

THE EPISCOPAL DIOCESE OF DALLAS



Forms for the Pathway to Holy Orders

PATH TO NOMINATION

Form A Report of the PCOV to the Vestry of the Sponsoring Parish

Form B Nomination of an Aspirant by Sponsoring Parish's Vestry and Statement of Financial Commitment

Form C Rector's Recommendation

Form D Sample Letter of Acceptance of Nomination

PATH TO POSTULANCY

Form E Application

Form F Release of Information to the Diocese

Form G Release of Information to the Applicant Only

Form H Financial Statement

Form I Nominee Agreement

Form J Predictive Index Survey

Form K Background Check

Form L Life History Questionnaire (LHQ)

Form M Behavior Screening Questionnaire (BSQ)

Form N Medical Examination

PATH TO CANDIDACY

Form O Vestry Reaffirmation for Candidacy for Holy Orders

Form P Sample Letter of Application for Candidacy

PATH TO ORDINATION TO THE DIACONATE

Form Q Vestry Endorsement for Ordination to the Diaconate

Form R Sample Letter Requesting Ordination to the Diaconate

PATH TO ORDINATION TO THE PRIESTHOOD

Form S Vestry Endorsement for Ordination to the Priesthood

Form T Sample Letter Requesting Ordination to the Priesthood

PATH TO NOMINATION

EPISCOPAL DIOCESE OF DALLAS

COMMISSION ON MINISTRY

FORM A: REPORT OF THE PARISH COMMITTEE ON VOCATIONS (PCOV) TO THE VESTRY

| NAME OF ASPIRANT | | |
|-------------------------|-------------|--|
| REPORT DATE | | |
| | ENDING DATE | |
| SPONSORING CONGREGATION | CITY | |
| CONVENOR'S NAME | | |
| | OTHER | |
| CONVENER'S EMAIL | | |
| rector/vicar's name | | |
| RECTOR/VICAR'S CELL | OFFICE | |
| RECTOR/VICARS'S EMAIL | | |

The evaluation of the Aspirant by the Parish Committee on Vocations is summed up in the questions below, and in any other thoughts the group may wish to provide. (Please provide answers on a separate sheet)

- 1. Does this person strike you as one who is grounded and growing in the Christian faith? In what ways has he/she exhibited spiritual depth?
- 2. What is this person's understanding of Christian ministry? Do you sense a vocation to Holy Orders, or a vocation that can be fulfilled as a member of the laity?
- 3. What qualities about this person's sense of vocation leads you to believe he/she is called to the priesthood and/or diaconate?
- 4. Describe this person's capacity for leadership. How has this person displayed his/her leadership in the past, and in the parish and/or Diocese? What are the aspirant's strengths and weaknesses in your judgment?
- 5. How would you characterize this person's sense of the Christian life and habits of prayer?
- 6. Does this person strike you as emotionally stable and capable, and capable of healthy ministry and leadership? Were there any notable concerns or reservations expressed by a member of the group?
- 7. What standards/boundaries has this person established to guide ethical behavior, generally? Regarding money and stewardship? Regarding substance abuse or sexual behavior?

| We, the undersigned, as memb Parish Name) | ers of the Parish Committee on Vocations, rec | ommend to the vestry of be nominated to |
|---|---|---|
| continue to discern his/her call Ministry. | that (Name of Aspirant) to Holy Orders in the Diocese of Dallas unde | r the Commission on |
| | PARISH COMMITTEE ON VOCATIONS | |
| | | |
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| | | |
| | | |
| | | |
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| | | |
| LIBARTED DV | | |
| SUBMITTED BY: | | |
| : Incovel : | n: . IN Coccust | |
| ignature of PCOV Chair | Printed Name of PCOV Chair | Date |
| | | |
| APPROVED BY: | | |
| | | |
| ignature of Rector/Vicar | Printed Name of Rector/Vicar | Date |
| | | |

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM B: VESTRY NOMINATION OF AN ASPIRANT FOR HOLY ORDERS AND VESTRY FINANCIAL COMMITMENT

To the Rt. Rev. Dr. George R. Sumner, Bishop and to the Commission on Ministry of the Diocese of Dallas

| DATE | | | |
|------|--|--|--|
| | | | |

NOMINATION OF AN ASPIRANT FOR HOLY ORDERS

| W E, wh | ose names are hereunder written as duly elected members of the Vestry of (Print Name of |
|----------------|--|
| Congrega | ntion), testify to our belief that (Print Name of |
| Aspirant) | has lived a sober, honest, |
| and god | dly life, and that he/she is a communicant of this congregation in good standing of this parish. |
| We do | furthermore declare that, in our opinion, he/she possesses such qualifications befitting |
| admissi | on into the discernment process in accordance with the Constitution and Canons of the |
| Episcop | al Church and the standards put forth in the Pathway to Holy Orders under the Commission on |
| Ministry | y of the Diocese of Dallas. |
| WE dec | lare that our judgment is based upon: |
| | Personal knowledge of the Aspirant on the part of the Vestry |
| | Evidence concerning the Aspirant presented to the Vestry |
| | A combination of personal knowledge of the Aspirant and other evidence |
| | |

WE commit our congregation to support this person for three or four years of Theological Education in the following ways:

- Payment of one-third (1/3) of the cost of the psychological exam
- Payment of the cost of Diocesan Discernment Retreat (typically \$100.00 to \$150.00)
- Payment of the cost of the Diocesan Ordination Exam (if any)
- We further commit to involve our congregation in the preparation of the Aspirant for Holy Orders.

VESTRY SIGNATURES

| | (Must be signe | ed by a two-third | s majorit | y of the Members | of the Vestry) | |
|-------------------|-----------------------|-------------------|-----------|---------------------|------------------|------------------|
| | | | | | | |
| | | | | | | |
| igned | (Rector/Vicar of th | ne Congregation t | o which | the Asnirant helo | nas) | |
| | (Nector, Vicar or til | e congregation t | o winer | ire rispirarie sero | 637 | |
| | | | | | | |
| | | | | | | |
| | ATTESTAT | ION OF TH | E FORE | GOING CEI | RTIFICATE | |
| HEREBY cer | tify that the foregoi | ng certificate | was sig | ned at a meet | ing of the Vestr | y of (Print Name |
| f Congregation) | | | | | | |
| uly convene | d in the City of (Cit | | | | | |
| | , | | | | | e signatures |
| | ose of a two-thirds | | | | | |
| | | , | | | | |
| ianad | | | | | | |
| igned | (Clerk of the Vestry | y) | | | | |
| | | | | | | |
| | Cor | mpleted forms sl | nould be | submitted to: | | |

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM C: RECTOR'S RECOMMENDATION OF NOMINEE

OVERVIEW

As the Rector or Vicar most familiar with the individual requesting discernment for Holy Orders, your input is vital. The Commission on Ministry (COM) recognizes that the recommendation we request of you is detailed and time consuming. The COM appreciates very much your willingness to meet our request, confident that your efforts will yield fruit in the individual's discernment.

Your recommendation is confidential to the COM and the Bishop's office. Consequently, please be direct in your comments and observations. As always, the Canon for Vocations and the COM are available to answer any questions you might have in the preparation of this recommendation.

Please title your recommendation document using "FORM C" and the Nominee's name.

RECTOR RECOMMENDATION OUTLINE

Please tells us how long you've known the nominee, and the nature of your relationship with him/her (parishioner, employee, etc). In addition to any other comments you would like to add, please comment on the following questions, which are also the questions asked of your vestry:

- 1. Does this person strike you as one who is grounded and growing in the Christian faith? In what ways has he/she exhibited spiritual depth?
- 2. What is this person's understanding of Christian ministry? Do you sense a vocation to Holy Orders, or a vocation that can be fulfilled as a member of the laity?
- 3. What qualities about this person's sense of vocation leads you to believe he/she is called to the priesthood and/or diaconate?
- 4. Describe this person's capacity for leadership. How has this person displayed his/her leadership in the past, and in the parish and/or Diocese? What are the aspirant's strengths and weaknesses in your judgment?
- 5. How would you characterize this person's sense of the Christian life and habits of prayer?
- 6. Does this person strike you as emotionally stable and capable, and capable of healthy ministry and leadership? Do you know of any notable concerns or reservations expressed by a member of your congregation?
- 7. What standards/boundaries has this person established to guide ethical behavior, generally? Regarding money and stewardship? Regarding substance abuse or sexual behavior?

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM D: LETTER OF ACCEPTANCE OF NOMINATION FOR DISCERNMENT OF HOLY ORDERS BY ASPIRANT

Date

Your name Address Email Phone number

The Rt. Rev. Dr. George R. Sumner, Bishop Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

Dear Bishop Sumner:

In accordance with the Canons of the Episcopal Church [**pick one**: Title III, Canon 6, Section 2 (2015) for Ordination to the Diaconate **or** Title III, Canon 8, Section 2 (2015) for Ordination to the Priesthood], I hereby accept my parish's nomination for Holy Orders, and I humbly request that I be considered for postulancy.

I am providing you with the following information as required under the above canon:

| • | Full Name |
|---|--|
| • | Date of Birth |
| • | I have been a confirmed member in good standing of a congregation in the Diocese of Dallas since |
| | |
| • | Baptismal Date |
| • | Confirmation Date |
| | (Evidence of my baptism and confirmation is enclosed.) |

In your letter, type the phrase that applies:

- I have not previously applied as a postulant in any other diocese.
- I have previously applied as a postulant in another diocese. I am attaching a letter describing those circumstances.

Briefly describe your reasons for seeking Holy Orders, stating whether your seek ordination to the permanent or vocational diaconate or to the priesthood, and describe your process of discernment by which you have been identified for ordination.

Describe the level of education you have attained, your degrees earned, and your areas of specialization, together with copies of official transcripts; and enclose a copy of your resume.

Sincerely yours,

Your name printed

c: The Rev. Mark Wright, Chair of the Commission on Ministry The Rev. Dr. Jeremy Bergstrom, Canon for Vocations your Rector/Vicar

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

PATH TO POSTULANCY

FORM E: APPLICATION FOR DISCERNMENT OF HOLY ORDERS

| DATE OF APPLICATION | | |
|---------------------------------------|--|-------------------------------|
| full name (including maiden) | | |
| CLERGY ORDER THAT APPLICANT IS SEEKIN | ng Permanent Deacon | PRIEST |
| HAVE YOU PREVIOUSLY APPLIED FOR ADM | mission as a nominee for holy orders? | |
| IF SO, WHEN/WHERE | | |
| AND TO WHOM | | |
| APPLICANT'S ADDRESS | | |
| CITY | STATE | ZIP |
| EMAIL | | |
| CELL | HOME | |
| SOCIAL SECURITY NUMBER | | |
| DATE OF BIRTH | | |
| MARITAL STATUS | NUMBER OF MARRIAGES | EVER DIVORCED? |
| SPOUSE'S NAME | SPOUSE'S PHONE | |
| NAME(S) AND AGE(S) OF CHILD(REN) | | |
| | | |
| | | |
| | | |
| CHURCH MEMBERSHIP | | |
| SPONSORING CONGREGATION | CITY | |
| RECTOR/VICAR'S NAME | | |
| RECTOR/VICAR'S CELL | OFFICE_ | |
| RECTOR/VICAR'S EMAIL | | |
| HOW LONG HAVE YOU BEEN A CONFIRM | med member in good standing at a congr | egation within the diocese of |
| DALLAS? | | |

| BAPTISM (Please pro | ovide documentation, if you ha | aven't already) | | |
|---|--------------------------------|--------------------------------|--------------------------------|--------------------|
| CHURCH NAME | | _CITY | | |
| DATE | | DENOMINATION | | |
| OFFICIANT'S NAME | | | | |
| | | | | |
| | (Please provide documentat | | | |
| CHURCH NAME | | | _CITY | |
| DATE | | | DENOMINATION | |
| OFFICIANT'S NAME | | | | |
| | | | | |
| EDUCATION | | | | |
| HIGH SCHOOL | NAME OF SCHOOL | LOCATION | MAJOR AND DEGREE | DATES YOU ATTENDED |
| HIGH SCHOOL | | | | |
| COLLEGE* | | | | |
| BUSINESS OR | | | | |
| TRADE SCHOOL* | | | | |
| SEMINARY AND/OR POST-GRADUATE WORK* | | | | |
| * Please request official | transcripts to be sent to th | e Diocese of Dallas, add | ress below. | |
| | | | | |
| WORK EXPERIEN | ICE (List the last two paid po | ositions you have held, or the | two most relevant to ministry) | |
| EMPLOYER | | | | |
| ADDRESS | | | | |
| SUPERVISOR'S NAME_ | | | | |
| PHONE | | | | |
| email address | | | | |
| DATES EMPLOYED | | | | |
| | | | | |
| | | | | |
| | | | | |

| employer | | | |
|------------------------------|--|----------------------------------|--|
| | | | |
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| | | | |
| | | | |
| DATES EMPLOYED | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| REFERENCES (Please provide t | hree references not your Rector or Vicar | who can speak to your character) | |
| NAME | | | |
| relationship | | | |
| ADDRESS | | | |
| Phone (Home) | (WORK) | (CELL) | |
| email address | | | |
| | | | |
| NAME | | | |
| relationship | | | |
| ADDRESS | | | |
| PHONE (HOME) | (WORK) | (CELL) | |
| email address | | | |
| | | | |
| NAME | | | |
| relationship | | | |
| ADDRESS | | | |
| PHONE (HOME) | (WORK) | (CELL) | |
| email address | | | |

SHORT ESSAYS

Please provide typed responses for each of the subjects below. Each essay should be no more than five pages, single spaced, and 12-point font. Label each essay with the essay's title and your name.

I. **Autobiography**

Your autobiography should cover the most important aspects of your spiritual, emotional, and professional development. While this essay gives you great latitude, it should include the following elements: the facts of your life that inform your calling to ordained ministry, the circumstances around you becoming a Christian, consideration of times of growth and change (including, if applicable, details of any counseling you have undertaken), any experience you have had participating in religions other than Christianity, and an honest discussion of your personal strengths and weaknesses.

II. **Spousal Autobiography**

If you are married, your spouse will write an autobiography, using the description above but of no more than three pages.

III. Marriage (a) one essay from you and (b) one essay from your spouse (if applicable) If you are single, write on your understanding of the sacrament of marriage, reflecting as well on your own hopes for marriage, whether to marry or remain celibate. If you are married, you and your spouse write separate essays on your understanding of marriage and how that understanding is reflected in your current relationship. Both statements should include a frank evaluation of the anticipated impact of ordained ministry on your relationship. If you are divorced, include information on the circumstances of your marriage, divorce, ecclesiastical judgment, and remarriage (if any). You should also include a statement on what you have learned from the experience of your divorce.

Livelihood and Occupational History IV.

Describe your current job or other working situation, including a description of your economic base. You need not give income figures, but do mention how you support yourself and your family. List in reverse chronological order all the jobs you have held since college or in the last ten years (whichever is less), your duties on these jobs with particular attention to leadership roles, and your reasons for taking and leaving them. Please note that a resume does not adequately fulfill this requirement.

Parish Ministry

Describe your current involvement in ministry at your parish. Describe other ministries in which you have been involved, both within a parish setting and otherwise, over the last ten years or since graduation from high school, whichever is less. With each description, note particular leadership roles you've had, key lessons learned in ministry, and what you took away from times of conflict.

VI. **Vocational Identity**

Summarize your understanding of the diaconate and priesthood, noting the differences between them, and your own reasons for feeling called to the particular order sought.

VII. Prospects for Theological Education

The Commission on Ministry has found that many nominees for Holy Orders have made some tentative plans for theological education or have already begun or even completed the same before applying for the ordination process. Applicants should understand that the Bishop's approval of your educational course is required if you do become a Postulant. If you have already completed a seminary program, do note that you will be asked to complete additional formation in the Anglican tradition if you haven't already. Applicants who have not done any other graduate study should understand that seminary is indeed graduate-level work. In the light of these facts please describe any theological education you may have had, your thoughts about it if you have not had any yet, and your assessment of your own capacity for serious, graduate study. Also, importantly, describe the way you plan to pay for this education.

SHORT RESPONSES (each response should be no more than three paragraphs)

- I. What does it mean to find salvation in Jesus Christ?
- II. What does it mean to be under authority?
- III. What is the Gospel?
- IV. How do you share your faith?
- V. What is your rule of life?
- VI. Define stewardship and describe how you meet this definition.

| 5 | U | B | M | H | H | ΕL |) B | Y | : |
|---|---|---|---|---|---|----|-----|---|---|
| | | | | | | | | | |

| Signature of Applicant | Printed Name of Applicant | Date | |
|---------------------------|------------------------------|----------|--|
| APPROVED BY: | | | |
| | | | |
| Signature of Rector/Vicar | Printed Name of Rector/Vicar | Date | |

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM F: FOR RELEASE OF INFORMATION TO THE DIOCESE

AUTHORIZATION TO RELEASE INFORMATION, RELEASE OF CLAIMS AND INDEMNITY AND HOLD HARMLESS AGREEMENT

(referred to herein as "Authorization and Release")

| NAME OF APPLICANT | | | |
|--|--|---|--|
| DATE | | | |
| SOCIAL SECURITY NUMBER | | | |
| PERMANENT ADDRESS OF APPLICANT | | | |
| CITY | STATE | ZIP | |
| CURRENT ADDRESS OF APPLICANT, IF DIFFERENT | | | |
| CITY | STATE | ZIP | |
| APPLICANT'S CELL | OTHER | | |
| APPLICANT'S EMAIL | | | |
| I am voluntarily seeking to become or am presently a candid ministry position (referred to herein as my "application") in conducted by the Diocese of [fill in nar as a part of the Diocese's decision making process about my psychiatric and/or psychological assessment ("Assessment") by the Diocese. I understand that the Assessment is only one part of the Diocinformation provided to the Diocese about the Assessment ravailable to the Diocese in deciding whether or not to accept application for postulancy, ordination and/or other ministry understand that information from the Assessment may be determined. I voluntarily consent to participate in the Assessment and I as I understand that the Assessment may include one or more apsychiatric tests, and/or clinical interviews. I understand that information about myself which may include but not be lim medical history, psychological and psychiatric history, crim | The Episcopal Come of diocese] (and paperson or position in the Episcope or paperson or pa | Church through a process "Diocese"). I understand that m required to undergo a persons selected or approved making process and that red with other information inue considering my Diocese. Nonetheless, I the Diocese's decision. Inte fully with the Assessment. Innaires, psychological tests, I to provide various types of tion about my family, | |

FORM F AUTHORIZATION TO RELEASE

drug and alcohol use, relationships, education, and employment. I agree that all the information I provide for the Assessment will be true, correct, and complete, to the best of my knowledge. I understand that false or misleading statements made by me or significant omissions of any kind in the Assessment process are sufficient cause for dismissal from the application process or denial of my application for a ministry position in the Diocese.

- 4. I authorize all mental health professionals involved in the Assessment to disclose to each other, both orally and in writing, all records and information, including opinions, pertaining to the Assessment, including but not limited to my responses to any questionnaires, tests and interview questions.
- 5. I understand that at the conclusion of the Assessment a written report may be prepared which will contain conclusions, opinions, observations, recommendations for follow-up and the like. I authorize the mental health professionals involved in the Assessment to disclose the written Assessment report to the Bishop or Ecclesiastical Authority of the Diocese. I authorize the Bishop or Ecclesiastical Authority to disclose to and discuss the written Assessment report with those involved in the application process. I authorize the mental health professionals involved in the Assessment to discuss the written Assessment report with the Bishop or Ecclesiastical Authority and those involved in the application process.
- 6. I understand and agree that whether or not I have paid for the Assessment or any part thereof, all of the records and documents related to the Assessment do not belong to me and I do not have the right to see them, have them reviewed by or sent to anyone else, or to receive a copy of them at any time. I further understand and agree that I am not entitled to discuss the Assessment with the personnel involved in the Assessment process nor am I entitled to have anyone else discuss the Assessment with them on my behalf. I agree that I will not request or seek to obtain from the Bishop or Ecclesiastical Authority or Diocese or from any of the personnel involved in the Assessment or from any other person or entity the originals or any copies of any records or documents related to the Assessment nor will I authorize anyone to do so on my behalf.
- 7. I understand that after the Assessment described herein, the Diocese may determine that further assessment is necessary before a decision is made on my application. If I elect to participate in such further assessment, all the terms of this Authorization and Release shall apply to any further assessment.
- I understand and agree that the Diocese will have the right to control the use and disclosure of information regarding the Assessment both during consideration of my application and after consideration of my application has terminated, regardless of the action taken on my application, and that the Diocese does not have to obtain any further authorization from me to disclose any information regarding the Assessment or the written Assessment report.
- 9. I consent to the use of information that I provide or that is developed from the Assessment for research purposes, including but not limited to publication and presentation to the scientific or religious communities and/or other audiences, provided that if so used, the information will be presented in a disguised format to preclude identification of my individual identify.
- 10. As consideration for having my application considered by the Diocese, I hereby waive, release and discharge the Diocese and its officers, directors, employees, volunteers, agents and legal representatives, and all personnel and entities involved in conducting the Assessment and their officers, directors,

employees, volunteers, agents, heirs, administrators, successors, assigns and legal representatives ("the Released Parties") from liability of all kinds including but not limited to personal injury, defamation, slander, libel, negligence, invasion of privacy, breach of contract, or otherwise, in law or in equity, arising out of my participation in the Assessment, use or disclosure of information regarding the Assessment, or arising in any other way as a result of the Assessment. I do not release the Released

11. I also agree not to sue or make a claim against the Released Parties for injury, damage, or loss of any kind sustained as a result of my participation in Assessment, the use or disclosure of information regarding the Assessment, or relating in any way to the Assessment. I will indemnify and hold harmless the Released Parties from all claims, judgments, and costs, including attorneys' fees, incurred in connection with any such action.

Parties from liability for willful or intentional acts or punitive damages.

- 12. I agree that if any portion of this Authorization and Release is found by a court to be unenforceable for any reason, the remainder of this Authorization and Release shall remain valid and in full force and effect.
- 13. I have carefully read this authorization and release and fully understand its contents. I sign it of my own free will. I understand that I may consult with an attorney of my choice before signing this document. I acknowledge that I have had the opportunity to ask questions concerning the contents of Authorization and Release and any such questions have been answered to my satisfaction. Nonetheless, in agreeing to sign this Authorization and Release, I have not relied upon any statements or explanations made by any of the Released Parties or by any attorney of any of the Released Parties. I have initialed each page of this Authorization and Release indicating that I have read and understand each paragraph.

| SUBMITTED BY: | | |
|------------------------|--|----------|
| Signature of Applicant | Printed Name of Applicant | Date |
| WITNESSED BY: | | |
| Signature of Witness | Printed Name of Witness | |
| | Completed forms should be submitted to: The Chair of the Commission on Ministry | |
| | c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206 | |
| F | hone: 214-826-8310 / fax: 214-826-5968 | |

Initialed by Applicant

FORM G: FOR RELEASE OF INFORMATION TO APPLICANT ONLY

AUTHORIZATION TO RELEASE INFORMATION, RELEASE OF CLAIMS AND INDEMNITY AND HOLD HARMLESS AGREEMENT

(referred to herein as "Authorization and Release")

| NAME OF APPLICANT | | | |
|--|-------|-----|--|
| DATE | | | |
| social security number | | | |
| PERMANENT ADDRESS OF APPLICANT | | | |
| CITY | STATE | ZIP | |
| CURRENT ADDRESS OF APPLICANT, IF DIFFERENT | | | |
| CITY | | ZIP | |
| APPLICANT'S CELL_ | | | |
| APPLICANT'S EMAIL | | | |

- 1. I am voluntarily seeking to become or am presently a candidate for postulancy, ordination, and/or other ministry position (referred to herein as my "application") in The Episcopal Church through a process conducted by the Diocese of Dallas. I understand that as a part of the Diocese's decision making process about my application I am required to undergo a psychiatric and/or psychological assessment ("Assessment") by a person or persons selected or approved by the Diocese.
- 2. I understand that the Assessment is only one part of the Diocese's decision making process and that information provided to the Diocese about the Assessment may be considered with other information available to the Diocese in deciding whether or not to accept me or to continue considering my application for postulancy, ordination and/or other ministry position in the Diocese. Nonetheless, I understand that information from the Assessment may be determinative of the Diocese's decision.
- 3. I voluntarily consent to participate in the Assessment and I agree to cooperate fully with the Assessment. I understand that the Assessment may include one or more attitude questionnaires, psychological tests, psychiatric tests, and/or clinical interviews. I understand that I will be asked to provide various types of information about myself which may include but not be limited to, information about my family, medical history, psychological and psychiatric history, criminal history, sexual behavior and attitudes, drug and alcohol use, relationships, education, and employment. I agree that all the information I provide for the Assessment will be true, correct, and complete, to the best of my knowledge. I understand that false or misleading statements made by me or significant omissions of any kind in the

| | | |
|-----------|------|----------|
| Initialed | by A | pplicant |

- Assessment process are sufficient cause for dismissal from the application process or denial of my application for a ministry position in the Diocese.
- 4. I authorize all mental health professionals involved in the Assessment to disclose to each other, both orally and in writing, all records and information, including opinions, pertaining to the Assessment, including but not limited to my responses to any questionnaires, tests and interview questions. If deemed necessary by a mental health professional, I agree to document my authorization in a form that satisfies the requirements of applicable law.
- 5. I understand that at the conclusion of the Assessment a written report may be prepared which will contain conclusions, opinions, observations, recommendations for follow-up and the like. I authorize the mental health professionals involved in the Assessment to disclose the written Assessment report to me. I understand that I may choose whether or not to provide a copy of the written Assessment report to the Diocese. If I provide a copy to the Diocese, I authorize the mental health professionals involved in the Assessment to discuss the written Assessment report with a person or persons designated by the Diocese, and I agree to execute the written authorization form attached hereto as Appendix A (or a similar written authorization form approved by the mental health professional(s)) to approve this discussion. I agree that I will not disclose the written Assessment report to anyone other than the Diocese.
- 6. Except for my right to receive a copy of the written Assessment report as specifically provided in paragraph 5 above, I understand and agree that whether or not I have paid for the Assessment or any part thereof, all of the records and documents related to the Assessment do not belong to me and, except to the extent that my rights with respect to records head by the mental health professional(s) are preserved by applicable law, I do not have the right to see any records or documents related to the Assessment, to have them reviewed by or sent to anyone else, or to receive a copy of them at any time. I further understand and agree that I am not entitled to discuss the Assessment with the personnel involved in the Assessment process nor am I entitled to have anyone else discuss the Assessment with them on my behalf. I agree that I will not request or seek to obtain from the Diocese or from any of the personnel involved in the Assessment or, except to the extent that my rights with respect to records held by the mental health professional(s) are preserved by applicable law, from any other person or entity the originals or any copies of any records or documents related to the Assessment nor will I authorize anyone to do so on my behalf.
- 7. I understand that after the Assessment described herein, the Diocese may determine that further assessment is necessary before a decision is made on my application. If I elect to participate in such further assessment, all the terms of this Authorization and Release shall apply to any further assessment.
- I understand and agree that if I choose to provide a copy of the written Assessment report to the Diocese pursuant to paragraph 5 above, the Diocese will have the right to control the use and disclosure of information regarding the Assessment both during consideration of my application and after consideration of my application has terminated, regardless of the action taken on my application, and that the Diocese does not have to obtain any further authorization from me to disclose any information regarding the Assessment or the written Assessment report.
- 9. I consent to the use of information that I provide or that is developed from the Assessment for research purposes, including but not limited to publication and presentation to the scientific or religious communities and/or other audiences, provided that if so used, the information will be presented in a disguised and deidentified format to preclude identification of my individual identity.

| | | | | |
|-----------|----|-----|-------|----|
| Initialed | bv | Apr | olica | nt |

- 10. As consideration for having my application considered by the Diocese, I hereby waive, release and discharge the Diocese and its officers, directors, employees, volunteers, agents and legal representatives, and all personnel and entities involved in conducting the Assessment and their officers, directors, employees, volunteers, agents, heirs, administrators, successors, assigns and legal representatives ("the Released Parties") from liability of all kinds including but not limited to personal injury, defamation, slander, libel, negligence, invasion or breach of privacy, breach of contract, or otherwise, in law or in equity, arising out of my participation in the Assessment, use or disclosure of information regarding the Assessment, or arising in any other way as a result of the Assessment. I do not release the Released Parties from liability for willful or intentional acts or punitive damages.
- 11. I also agree not to sue or make a claim against the Released Parties for injury, damage, or loss of any kind sustained as a result of my participation in Assessment, the use or disclosure of information regarding the Assessment, or relating in any way to the Assessment. I will indemnify and hold harmless the Released Parties from all claims, judgments, and costs, including attorneys' fees, incurred in connection with any such action.
- 12. I agree that if any portion of this Authorization and Release is found by a court to be unenforceable for any reason, the remainder of this Authorization and Release shall remain valid and in full force and effect.
- 13. I have carefully read this authorization and release and fully understand its contents. I sign it of my own free will. I understand that I may consult with an attorney of my choice before signing this document. I acknowledge that I have had the opportunity to ask questions concerning the contents of Authorization and Release and any such questions have been answered to my satisfaction. Nonetheless, in agreeing to sign this Authorization and Release, I have not relied upon any statements or explanations made by any of the Released Parties or by any attorney of any of the Released Parties. I have initialed each page of this Authorization and Release indicating that I have read and understand each paragraph.

| SUBMITTED BY: | | |
|------------------------|---|----------|
| Signature of Applicant | Printed Name of Applicant | Date |
| WITNESSED BY: | | |
| Signature of Witness | Printed Name of Witness | |
| | Completed forms should be submitted to: | |
| | The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206 | |

Phone: 214-826-8310 / fax: 214-826-5968

Initialed by Applicant

FORM H: FINANCIAL STATEMENT

| DATE OF APPLICATION | | |
|--|--------------------------------|-----|
| FULL NAME (INCLUDING MAIDEN) | | |
| APPLICANT'S ADDRESS | | |
| CITY | STATE | ZIP |
| EMAIL | | |
| | HOME | |
| DEPENDENTS (Please list by name and give | ages of children): | |
| SPONSORING CONGREGATION | CITY | |
| RECTOR/VICAR'S NAME | | |
| | | |
| School (tuition, books supplies, fees, etc.) | Earnings | |
| Living (housing, food, insurance, transportation, etc) | Personal Savings & Investments | |
| Other (specify) | Spouse's Employment | |
| Other (specify) | Parents/Relatives | |
| Other (specify) | Scholarships | |
| Other (specify) | Sponsoring Congregation | |
| Other (specify) | Other (specify) | |
| ANNUAL TOTAL: | ANNUAL TOTAL: | |
| TOTAL for THREE YEARS: | TOTAL for THREE YEARS: | |
| Signature of Applicant | Printed Name of Applicant | |

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM I: NOMINEE AGREEMENT

DEFINITION OF TERMS

I. Ordination process: the whole series of steps provided by the Constitution and Canons of the Episcopal Church as defined and applied by the Diocese of Dallas which, all requirements being satisfied, may lead to the ordination of an individual to the Sacred Orders of Priest and/or Deacon. In summary, these steps may be grouped under four headings:

- a. *Aspirancy* is the period between being given permission by the bishop to discern, up until acceptance of nomination by one's home parish. During this time the discerner is called an Aspirant.
- b. *Nomination* covers the period of time beginning with a letter from the individual to the Bishop accepting his/her nomination by the congregation, continuing up until the time that the individual is admitted to Postulancy by the Bishop. During this stage the discerner is called a Nominee.
- c. *Postulancy* covers the period from admission to Postulancy up until the time the individual is admitted to Candidacy by the Bishop, upon the favorable recommendation of the Commission on Ministry and approval of the Standing Committee. One is called a Postulant.
- d. Candidacy covers the period from admission to Candidacy to Ordination by the Bishop upon the favorable recommendation of the Commission on Ministry and approval of the Standing Committee. One is called a Candidate.

II. *Ordination*: The sacramental conferral of authority on an individual by the bishop, under the Book of Common Prayer, to carry out the ministry of the Church consistent with this Church's understanding of the specific Order to which he or she is ordained.

III. Cure: The ecclesiastical position to which an ordained person is called, and for which the ordained person is authorized by the Bishop to carry out the ministry belonging to his or her Order.

FAITH AND DISCIPLINE

Anyone wishing to pursue ordination in the Episcopal Diocese of Dallas must agree with and abide by the historic faith and practice of the Anglican/Episcopal tradition as found in the Book of Common Prayer (1979), especially the orders for The Holy Eucharist (Rite 1, pp 323f), Holy Baptism (pp 299f), The Celebration and Blessing of a Marriage (pp 423f), The Burial of the Dead (pp 469f), and The Catechism (pp 845f).

Diocesan Canon 23 Section 3 states: "All members of the clergy of this Diocese, having subscribed to the Declaration required by Article VIII of the Constitution of the Episcopal Church, and all persons seeking Holy Orders in this Diocese, shall be under obligation to model in their own lives, as wholesome examples, the received teaching of the Church that all of its members are to abstain from sexual relations outside of marriage."

AGREEMENT

I, the undersigned, do hereby acknowledge the foregoing definitions and agree to the following:

- 1. That I understand that permission to enter the Ordination Process in the Diocese of Dallas does not carry with it any assurance that I will in fact be ordained, or that I have any claim to be appointed to a Cure.
- 2. That, as a condition of being admitted to the Ordination Process, should I be ordained by the Bishop of Dallas, I agree to serve in any position to which the Bishop of Dallas appoints and/or authorizes me to serve; and that in any case, I shall be bound to serve within the Diocese of Dallas for a period of at least two years unless given a waiver of this pledge by the Bishop of Dallas.
- 3. That I acknowledge and understand that, in the event I become a Candidate for Holy Orders, I will not in fact be ordained without a Cure. Further,
- 4. I have read, understood, and acceded to the policy of the Diocese of Dallas with respect to sexual misconduct.
- 5. I pledge that, if married, I will live within the bonds of marriage, and if unmarried I will live chastely as a single person.
- 6. I understand that failure to live by these standards will result in my removal from the Ordination Process.

| SUBMITTED BY: | | | |
|----------------------|---------------------------|----------|--|
| Signature of Nominee | Printed Name of Applicant | Date | |
| WITNESSED BY: | | | |
| Signature of Witness | Printed Name of Witness | | |

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM J: PREDICTIVE INDEX

OVERVIEW

The Predictive Index evaluation is an online assessment tool required of Nominees in the discernment process. It seeks to identify behavioral habits of a person.

HOW TO TAKE THE TEST

Contact the administrator of the Commission on Ministry in the Diocesan Office. She will ask the Canon in charge of the Predictive Index to email you with a link to the website and a password.

The test should take less than twenty minutes to complete.

THE RESULTS

The results of the assessment will be sent to the Canon for evaluation and shared with the Chair of the Commission on Ministry. The raw results are kept in the discernment file and labeled as "FORM J".

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM K: BACKGROUND CHECK

OVERVIEW

The Background Check is conducted by Oxford Documents company. You will receive a packet in the mail from their representative, and you should complete the information and return it as instructed.

THE RESULTS

The results of the check will be sent to the Canon for Vocations for evaluation and shared with the Bishop. The results are kept in the discernment file and labeled as "CONFIDENTIAL".

PAYMENT

The cost of approximately \$300.00 is borne by the discerner. It is your responsibility to ask your parish for financial assistance, if you so wish. You will be invoiced by the diocese after the bill is received.

ACKNOWLEDGEMENT

I understand the requirements of the background check and agree to participate by fully disclosing the information that will be requested of me and to reimburse the diocese for the full cost.

| NAME | | | |
|-----------|--|--|--|
| signature | | | |
| DATE | | | |

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206



LIFE HISTORY QUESTIONNAIRE*

Applicants for Holy Orders receive this questionnaire for self-examination and preparation for the mental health evaluation required by the Canons of the Episcopal Church. This completed, confidential document is conveyed by the applicant directly to the mental health professional(s) conducting the clinical examination in whose custody it exclusively remains.

The examiner's conclusions following clinical examination are based upon a wide variety of test and interview responses. No individual question in this document determines the outcome of the clinical interview. Rather, the LHQ serves as a comprehensive foundation for the structured clinical interview. The examiner's final impressions, based in part upon this document and the clinical interview, form the basis of the Required Mental Health Evaluation Report Summary.

^{*} Like other parts of the discernment process, this evaluation addresses the impact of previous and current life issues upon one's readiness for ordained ministry. This document, combined with the clinical interview, provides the applicant with an opportunity to discuss personal life and vocational goals in context with one's life history. This document, once completed, remains a part of the clinician's file and is not delivered to the diocese.

DIRECTIONS:

This questionnaire contains a series of items regarding your background, experiences, and beliefs. Please read each question carefully. For each question, type a response. For some items, you will be asked to type your answer in the space following each question. Other confidential questions will require you to check a response option for your answer.

DO NOT skip items.

This questionnaire contains a series of items regarding your background, experiences, and beliefs. Please read each question carefully. For each question, type a response of items regarding your background, experiences, and beliefs. Please read each question carefully. For each question, type a response option for your answer.

If a question does not apply to you, type "Does Not Apply" or "N/A."

If you opt to handwrite this questionnaire, please use an INK PEN.

If you need additional space for an answer, please use the blank pages at the end of this questionnaire.

| IDENTIFYING INFORMATI | ION |
|-------------------------|---------------|
| Name (Last, First, MI): | Today's Date: |
| Current Address: | Birthdate: |
| City, State, Zip: | Age: |
| Telephone Number(s): | SSN: |
| Sponsoring Diocese: | |

| | CURRENT LIFE STATUS |
|--------|--|
| Social | What is your current marital status? (If separated or divorced, please complete all that apply.) Single Married Date: Remarried Divorced Divorced Date: Separated Other (describe): |
| 2. | With whom do you live at present? (Enter the names of all person(s) currently living with you, ages, and relationships.) Name Age Relationship |
| 3. | Do you currently own or rent a home or condominium? |
| 4. | Length of time at present address: Do you or anyone in your family/household have any learning, medical, or emotional problems? Yes No If "YES," what are your/their needs? |
| 5. | Describe your current social support system indicating who the most important people in your life are. |
| 6. | Generally speaking, how is your physical health RIGHT NOW ? Mark your response using the list below: |
| | ☐Failing ☐Average ☐Excellent ☐Very Poor ☐Above Average ☐Poor ☐Good ☐Below Average ☐Very good |

| 7. | Are you currently under the care of a physician for any medical co If "YES," please describe the condition(s) briefly: | ondition(s)? | ☐ Yes ☐ No |
|-----|--|--|----------------------------------|
| 8. | Generally speaking, how is your mental health RIGHT NOW ? Ma Failing | ark your response using the list below:] Excellent | |
| 9. | Describe any present day life circumstances causing you distress | including stressful life events and/or stre | essful roles. |
| 10. | Are you currently under the care of a mental health provider for an If "YES," please describe briefly: | ny reason? | □Yes □No |
| 11. | Review the following list of problems. Mark any problems that material Past Present Past Past Present Past Past Past Present Past Past Past Pears Past Past Past Past Past Past Past Pas | t Present Depression Headaches Tiredness Separation Drug Use Alcohol Use Extreme Fatigue Sleep Making Decisions Inhibited Sexual Desires Suicidal Thoughts Concentration Stress Temper Career Choices Relaxation Health Problems Marriage School Stomach Trouble Sadness Legal Matters My Thoughts Energy (Increased or De Appetite (Increased or De Intrusive or Unwanted Ti Dizziness/Fainting Decreased/Increased Se | creased) ecreased) noughts |

| 12. | What is your personal annual income from all sources? Under \$15,000 |
|-----|--|
| | ☐ Employed Full-time ☐ Employed Part-time ☐ Unemployed |
| | If "Employed," please complete the following: |
| | Current Employer: |
| | Position Title: |
| 4.4 | Date Hired: |
| 14. | To whom are you responsible in your current position: |
| | Supervisor's Name: |
| | Title: |
| 15. | Have you encountered any problems in this or prior professional relationships? ☐ Yes ☐ No If "YES," please describe: |
| | |
| | |
| | |
| 16. | How have you asked for help within your present job? |
| | |
| | |
| | |
| 17. | What kinds of people give you the most difficulty in your current position? |
| | |
| | |
| | |
| 18. | Describe the type of work you enjoy the most. |
| | |
| | |
| 19. | Describe the type of work you enjoy the least. |
| | |
| | |
| | |
| | |

| Family/Social/Developmental History | | |
|-------------------------------------|--|--|
| Father: | | |
| 20. | Father's Name: Date of Birth: Age: (If deceased, complete Item 21, otherwise go to Item 22.) Ethnic Background: Nature of Employment/Profession: If your father is not alive, please answer the following questions: a. Year of his death: c. Your age at his death: b. His age at death: d. Cause of death: | |
| 22. | Consider the following to have been true of my father while Home very little, absent Home very l | |

| 23. | What kind of narran was your father? |
|---------|--|
| 23. | What kind of person was your father? |
| | |
| | |
| | |
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| | |
| | |
| | |
| 24. | Describe your relationship with your father: |
| | |
| | |
| | |
| | |
| | |
| | |
| 25. | Describe your earliest memory of your father: |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| 26. | Please describe any substitute paternal influences throughout childhood/adolescence (e.g., stepfather, adopted father, |
| 20. | |
| | "surrogate" father). |
| | |
| | |
| | |
| | |
| | |
| NA - 41 | |
| Mother: | |
| | |
| 27. | Mother's Name: |
| | |
| | Date of Birth: Age: (If deceased, complete Item 28, otherwise go to Item 29.) |
| | Ethnic Background: |
| | |
| | Notice of Family monthly family |
| | Nature of Employment/Profession: |
| | |
| 28. | If your mother is not alive, please answer the following questions: |
| | |
| | |
| | a Voor of har doothy a Vour ago at her doothy |
| | a. Year of her death: c. Your age at her death: |
| | b. Her age at death: d. Cause of death: |
| | |
| | |

| 29. | I consider the following to have been true of my mother w | while I was a child. (Mark all that apply.) |
|-----|---|---|
| | ☐ Home very little, absent | ☐ Home almost always, present |
| | ☐ Powerless, victim, target, helpless | ☐ Powerful, capable, independent |
| | ☐ Sad, blue, pessimistic | ☐ Optimistic, cheerful, hopeful |
| | ☐ Poorly read, uninformed | ☐ Well-read, informed |
| | ☐ Uneducated | ☐ Well-educated |
| | ☐ Thoughtless, shallow, superficial | ☐ Thorough, substantial, thoughtful |
| | ☐ Inconsistent, easily upset, unstable | ☐ Stable, calm, consistent |
| | ☐ Chaotic, unstable, unreliable | ☐ Reliable, stable, orderly |
| | ☐ Closed, controlling | ☐ Trusting, open |
| | ☐ Overly critical | ☐ Esteem building or enhancing |
| | ☐ Rigid rules, restrictive | ☐ Permissive, flexible rules |
| | ☐ Spanked, beat, hit, slapped, whipped | ☐ Rarely disciplined physically |
| | ☐ Criticism, guilt, loss of love, shame | ☐ Rarely disciplined emotionally |
| | Cold, distant, unavailable | ☐ Available, warm, close |
| | ☐ Intrusive, disrespectful | Respectful, considerate |
| | ☐ Critical, conditional | ☐ Supportive, accepting |
| | ☐ Dishonest | ☐ Especially honest |
| | ☐ Difficult for me to confide in | ☐ Easy for me to confide in |
| | ☐ Difficult for me to respect | ☐ Easy for me to respect |
| | ☐ Tense, worried, unsure | ☐ Sure, secure, confident |
| | ☐ Passive, meek, timid | ☐ Assertive, bold |
| | ☐ Self-centered, self-indulgent | ☐ Generous, empathic |
| | ☐ In ill health or injured | ☐ Always in good health |
| | ☐ Mis-used alcohol | ☐ Drank none or very little |
| | ☐ Mis-used street drugs | ☐ Used none or very little street drugs |
| | ☐ Mis-used medications | ☐ Used medications only as prescribed |
| | Legal problems: | |
| | ☐ Employment problems: | |
| | ☐ Financial problems: | |
| | ☐ Fidelity problems: | |
| | Sexual problems: | |
| | ☐ Marital problems: | |
| | Other problems: | |
| | | |
| 30. | What kind of person was your mother? | |
| | | |
| | | |
| | | |
| 21 | Describe your relationship with your method | |
| 31. | Describe your relationship with your mother: | |
| | | |
| | | |
| | | |

| 32. | Describe your earliest memory of your mother: | | |
|-----------|---|-------------|---------------|
| 33. | Please describe any substitute maternal influences throughout childhood/adolescence (e.g., step "surrogate" mother). | pmother, ac | opted mother, |
| Marital S | Status of your Parents: | | |
| | | | |
| 34. | Are your parents married, separated, divorced, or widowed? If they are separated or divorced, parents circumstances, including when they were divorced or how long any separation(s) have been. | olease desc | ribe the |
| | | | |
| | | | |
| 35. | Describe the <i>current</i> nature of your parents' relationship to each other. | | |
| 36. | Describe your parents' relationship to each other while you were growing up. | | |
| 37. | Were you raised by your parents? If not, by whom were you raised? | ☐ Yes | □ No |
| | | | |

| Siblings 38. List all siblings from eldest to youngest (including any who may have died). | | | | | | | |
|---|-----------------------------|-------------------|-------------------------------|-------------------|----------------------|--|--|
| , | Sibling Name | Age/ Deceased | Current Location of Residence | Marital Status | Employment Status | | |
| a. | | | | | | | |
| b. | | | | | | | |
| c. | | | | | | | |
| d. | | | | | | | |
| e. | | | | | | | |
| f. | | | | | | | |
| g. | | | | | | | |
| 39. Bi | iefly describe each sibling | and your relation | nship with him/her: | | | | |
| a. | | | | | | | |
| b. | | | | | | | |
| C. | | | | | | | |
| d. | | | | | | | |
| е. | | | | | | | |
| f. | | | | | | | |
| g. | | | | | | | |

| Answer | the following questions based on your knowledge of your childhood: | | |
|---------|--|-------------|--------|
| 40. | Was your mother's pregnancy and/or delivery of you difficult? | ☐ Yes | □No |
| 41. | Did you have any unusual childhood illnesses? | ☐ Yes | □No |
| 42. | Were you ever hospitalized as a child? | ☐ Yes | □No |
| 43. | Did you have any serious or recurrent accidents as a child? | ☐ Yes | □No |
| 44. | Any history of childhood or adult seizure disorder? | ☐ Yes | □No |
| 45. | Any delays in learning how to walk, talk, or be toilet trained? | ☐ Yes | □No |
| 46. | Did you ever have problems with bedwetting? | ☐ Yes | □No |
| 47. | Any problems with your speech or language development? Stuttering? | ☐ Yes | □No |
| 48. | Any serious difficulties with concentration or with sitting still? | ☐ Yes | □No |
| 49. | Were you involved in fighting as a child? | ☐ Yes | □No |
| 50. | Were you involved in truancy (skipping school)? | ☐ Yes | □ No |
| 51. | Did you experience the death of a sibling? | ☐ Yes | □ No |
| respons | necked "YES" to any of the questions above, please provide a description of the circumstances or a more ie. | e detalled | |
| 52. | Briefly describe your childhood, including what it was like growing up in your family, going to school, and other i | important (| ovents |
| J2. | and activities. | ппропант с | events |
| 53. | What was the best part about your childhood? | | |
| 54. | What was the worst part about your childhood? | | |
| 55. | What ways were you disciplined by your father as a child? (Mark all that apply). Severe physical punishment, including beatings, hitting, etc. Mild physical punishment, such as spanking. Severe verbal punishment, such as yelling and screaming. Mild verbal punishment. Emotional withdrawal or isolation (for example, your father would emotionally withdraw from you, not talk to you, avoid you, etc.). Public or private humiliation. Gentle, but firm discipline (describe): Little or no discipline was provided by my father. Other (describe): | | |

| 56. | What ways were you disciplined by your mother as a child? (Mark all that apply.) Severe physical punishment, including beatings, hitting, etc. Mild physical punishment, such as spanking. Severe verbal punishment, such as yelling and screaming. Mild verbal punishment. Emotional withdrawal or isolation (for example, your mother would emotionally withdraw from you, not talk to you, avoid you, etc.). Public or private humiliation. Gentle, but firm discipline (describe): Little or no discipline was provided by my mother. Other (describe): |
|-----|--|
| 57. | How did you feel about the discipline you received? |
| 58. | Was there any physical, sexual, or emotional abuse in your family? Any parental neglect? If yes, was it of mild, moderate, or severe intensity? Who was or may have been involved? Please describe separately: Physical abuse: |
| 59. | To what extent do you have any significant gaps in your memories of childhood and adolescence? |
| 60. | To what extent have childhood fears or phobias caused you serious distress or interfered with your family life or school performance? Use the list that follows as a guide. Indicate one or more categories that may have applied to you. Fear of the dark |
| 61. | How often did you lie to your teachers or parents? (Select category.) Rarely, if ever Occasionally Regularly Often Almost every day |

| 62. How often did you steal or shoplift things as a child or adolescent? (Select category.) Rarely, if ever Cocasionally Regularly Regularly |
|---|
| 64. Describe your peer group as a pre-adolescent. Mark all categories that apply. Large |
| Large Small Popular Unpopular Unpopular Based on sports Based on academics or other school experiences Mainly girls Mainly boys Mixed, boys and girls |
| Large Small Popular Unpopular Based on sports Based on academics or other school experiences Mainly girls Mixed, boys and girls Mixed, boys and girls How old were you when you first reached puberty? How old were you when you had your first romantic relationship? |
| 67. How old were you when you had your first romantic relationship? |
| |
| 68. To what extent is your present sexual life satisfactory to you? If it is not, please describe: |
| |
| 69. To what extent did you discuss sexual topics with your parents? Please describe: |

| 70. | As a child or teenager, were you ever raped, molested, or subjected to what you or others considered inappropriate sexual behavior by someone? If "YES", please describe: | | | | |
|-----|--|---|------------|--|--|
| | | | | | |
| 71. | As a child or teenager, were you ever involved, sexually or four years older than yourself? If "YES", please explain: | romantically, with someone more than | □ Yes □ No | | |
| 72. | Has your sexual behavior ever caused you or anyone else If 'YES', please explain: | any problems? | ☐ Yes ☐ No | | |
| 73. | consider the following to have been true of me while I was Parent at home very little, absent Adult-like, overly serious Powerless, victim, target, helpless Vain, arrogant, pretentious Sad, blue, pessimistic Poorly read, uninformed Uneducated, undereducated Thoughtless, shallow, superficial Impulsive, inconsistent, distractible Chaotic, unstable, unreliable Closed, controlling Cold, distant, unavailable Intrusive, disrespectful Critical, conditional Dishonest Bully, angry, violent Tense, worried, unsure Passive, meek, timid, frightened Self-centered, self-indulgent In ill health or injured Mis-used alcohol Mis-used street drugs Mis-used medications Legal problems: Employment problems: Financial problems: Sexual problems: Other problems: | a child. (Mark all that apply.) Parents at home almost always, present Playful, child-like, immature Powerful, capable, independent Humble, polite, simple Optimistic, cheerful, hopeful Well-read, informed Well educated, overeducated Thorough, substantial, thoughtful Ordered, consistent, planned Reliable, stable, orderly Trusting, open Available, warm, close Respectful, considerate Supportive, accepting Especially honest Victim, scapegoat, target Sure, secure, stable, calm Confident, assertive, bold Generous, empathic Always in good health Drank none or very little Used medications only as prescribed | | | |

| Relationship/Marital History | | | | | | | |
|---|-----|--|-----------|----------------------|-------------------|-----------------------|--|
| 74. List all marriages, cohabitations, divorces, and/or separations you have had. Include if you have been widowed. Note: In the table below, "Spouse / Partner Age," refers to age at the beginning of the relationship. | | | | | | | |
| Nature of Relations | hip | Date (From/To) | S | Reason Separation | | Spouse/Partner Age | Spouse/Partner Occupation |
| | | 1 | | | | | |
| | | 1 | | | | | |
| | | 1 | | | | | |
| | | 1 | | | | | |
| | | 1 | | | | | |
| | | 1 | | | | | |
| | | 1 | | | | | |
| 75. Do you have If "Yes," com | - | ildren? e following chart; if "No," | skip to t | _ |] Yes □ No em. | | |
| Child's Name | | Relationship | | Age | Reside | nce | If not with you, indicate City and State of child's residence. |
| □ Biological □ Adopted □ Step child □ Foster child □ Other (explain): □ Other (explain): | | | | | | | |
| □ Biological □ Adopted □ With me □ Step child □ Foster child □ With former spouse □ Other (explain): □ Other (explain): | | | | | | | |
| ☐ Biological ☐ Adopted ☐ With me ☐ Step child ☐ Foster child ☐ With former spouse ☐ Other (explain): ☐ Other (explain): | | | | | | | |
| ☐ Biological ☐ Adopted ☐ With me ☐ Step child ☐ Foster child ☐ With former spouse ☐ Other (explain): ☐ Other (explain): | | | | | | | |
| □ Biological □ Adopted □ With me □ Step child □ Foster child □ With former spouse □ Other (explain): □ Other (explain): | | | | | | | |
| 76. If you are presently involved with a spouse/partner, please describe two major problem areas you experience. | | | | | | | |
| 77 Do you have any high children that were given up for adoption? | | | | | | | |
| 77. Do you have any birth children that were given up for adoption? | | | | | | | |
| | | | | | | | |
| 79. Has any child of yours ever been placed in foster care? | | | | | | | |

| Educ | Educational History | | | | | | | | |
|------|---|--------------------------|---------------------------------|------------------------------|--|--|--|--|--|
| 80. | 80. Please list all of the schools you have attended: | | | | | | | | |
| | School Attended Location Dates of Attendance Graduation Status Degree(s) Received | | | | | | | | |
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| 81. | Please describe your Grade School: | grades and academic perf | ormance in grade school, j | unior high, and high school. | | | | | |
| | Junior High School: | | | | | | | | |
| | High School: | | | | | | | | |
| 82. | Did any of the following happen to you? Mark all that apply. If "YES," please explain. Expelled from school Suspended from school Held back for a year in school Advanced a grade Placed in a special class Explanation of any of the above: | | | | | | | | |
| 83. | Do you have any learning disabilities? If "YES," please describe: | | | | | | | | |
| 84. | Indicate with a checkmark any special academic interests: Math and science Fine arts History Literature Philosophy Other (please specify): | | | | | | | | |
| 85. | ☐ Math ai ☐ Fine ar ☐ History ☐ Literatu ☐ Philoso | nd science ts ire | are <i>most</i> competent. Make | only ONE selection. | | | | | |

| 86. Indicate the single academic area in which you are <i>least</i> competent. Mark only <u>one</u> selection. Math and science Fine arts History Literature Philosophy Other (please specify): | | | | | | | |
|--|--------|------------------------------|---------------------------|-------|----------------------------|-----------------------|--|
| Occupational Histo | ory | | | | | | |
| 87. List all job position. | s whic | h you have held, both paid a | nd unpaid/voluntary, sinc | e you | u were 18 years old. Begin | with your most recent | |
| Position Title o | | Location | Dates (From/To) | | Reason for Leaving | Supervisor's Name | |
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| 88. Have you ever been fired from a position? | | | | | | | |
| 89. Have you ever prematurely/abruptly resigned from a position? ☐ Yes ☐ No | | | | | | | |
| 90. Have you ever been asked to resign from a position? ☐ Yes ☐ No | | | | | | | |
| 91. If you have ever supervised others as part of a position, have there been any difficulties? ☐ Yes ☐ No | | | | | | | |
| 92. Has tension or anger in a domestic relationship ever flowed into your workplace, affecting your relationships with supervisors or coworkers? Yes No | | | | | | | |
| If you checked "YES" to any of the previous 5 questions, please provide a description of the circumstances or a more detailed response. | | | | | | | |

| 93. | Describe the worst problem you have experienced at a position and how you handled it. |
|-----|---|
| 94. | Describe, as specifically as possible, the characteristics of an ideal "supervisor" that would optimally motivate you? |
| 95. | Describe at least two or three features of a satisfying ministry or work project you have concentrated on recently or in the past (e.g., working with others who are responsive to my ideas, seeing a particular project completed that I began). |
| 96. | Describe the most important feature of a very satisfying work day for yourself. |
| 97. | What personality traits or behaviors in others do you find difficult to accept or like? |
| 98. | What personality traits in yourself do you think may sometimes be a problem for others? |
| 99. | List the important ingredients of a successful career in the ministry. |

| Medical | History | | | | | | | |
|-----------|---|------------------------------|---|-------------------------------|--------------------------|--|--|--|
| 100. | Have you e | ever had any major medical | problems? | | ☐ Yes ☐ No | | | |
| 101. | - | ever been hospitalized for m | | | ☐ Yes ☐ No | | | |
| 102. | - | | heart, lungs, liver, or kidneys? | | _ Yes □ No | | | |
| 103. | | | | | | | | |
| 104. | | | | | | | | |
| 105. | | | | | | | | |
| 106. | - | | out your weight, body size or shape? | | ☐ Yes ☐ No ☐ Yes ☐ No | | | |
| If you cl | hecked "YES | S" to any of the questions | above, please provide a description of | f the circumstances or a more | detailed | | | |
| respons | se. (If you n | eed more space, please u | se the pages provided at the end of thi | s questionnaire.) | | | | |
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| 107. | Do you cur | rantly take prescription mad | ication for any medical problems? | | ☐ Yes ☐ No | | | |
| 107. | - | | ose, duration of use, and reason for use. | | ☐ res ☐ No | | | |
| | п тео, р | odoo not odon modiodion, d | occ, deretion or doc, and reaccinic doc. | | | | | |
| Medic | ation | Dosage & Route | Medical Condition | Date Started | Date D/C | | | |
| a. | | | | | | | | |
| | | | | | | | | |
| b. | | | | | | | | |
| C. | | | | | | | | |
| 108. | Do you cur | rently take any non-prescrin | tion medication of any kind? | | ☐ Yes ☐ No | | | |
| 100. | 108. Do you currently take any non-prescription medication of any kind? (e.g., laxatives, vitamins, food supplements, herbal preparations, over-the-counter sleeping pills) | | | | | | | |
| | | | uration of use, and reason for use. | 3 F - 7 | | | | |
| | | | | | | | | |
| | ication | Dosage & Route | Medical Condition | Date Started | Date D/C | | | |
| a. | | | | | | | | |
| b. | | | | | | | | |
| | | | | | | | | |
| C. | | | | | | | | |
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| 109. | Have you ever received alternative medical care (e.g., hom if "YES," please describe: | eopathy, faith healing, etc.)? | ☐ Yes ☐ No |
|------|--|---|------------------------------|
| 110. | Have you ever used any prescription medications in the pa If "YES," please list each medication, dose, duration of use | | ☐ Yes ☐ No |
| Med | cation Dosage & Route Medica | al Condition Date Started | Date D/C |
| a. | | | |
| b. | | | |
| C. | | | |
| 111. | Have you ever had a major head injury? If "yes," please describe each such occurrence, date of the lost consciousness). | injury, and whether you lost consciousness (and for | ☐ Yes ☐ No r how long you |
| 112. | When was the last time you saw a physician? For what reason? | | |
| 113. | How many times have you seen a physician in the last five | years? | |
| | How many times have you seen a physician in the last yea | r? | |
| 114. | Have you ever disregarded a physician's or other health proof of "YES," please explain. | ovider's advice? | ☐ Yes ☐ No |
| 115. | Do you smoke cigarettes or use other tobacco products? If "YES," How much do you smoke/use daily? How long have you been smoking or using ot Describe any attempts to quit. | her tobacco products? | ☐ Yes ☐ No |
| | | | |

| Psychiatric History | | | | | |
|--|---|-----------------------------------|--|-------------------------------|--|
| 116. Have you ever sought professional help or a self-help program for emotional problems? If "YES," complete the chart below. | | | | | |
| Type of Care | Dates of Care or Duration | Reason for Visit/ Admission | Nature of Treament (psychotherapy, medication) | Your Response to Treatment | |
| Outpatient | | | | | |
| Partial/Day Hospital | | | | | |
| Inpatient/ Residential | | | | | |
| If "YES," c | er been or are you curren omplete the chart below. | tly treated with medication for a | | ☐ Yes ☐ No | |
| Medication | Dosage | Condition Being Treate | ed Date Started | Date Stopped | |
| a. b. c. | | | | | |
| 118. Have you ever seriously thought about taking your own life? 119. Have you ever attempted to kill yourself? 120. Have emotional problems ever significantly interfered with your work and/or academic performance? 121. Have you ever been a party to sexual abuse, child abuse, physical abuse, or sexual exploitation? 122. Have you ever been a party to sexual abuse, child abuse, physical abuse, or sexual exploitation? 123. Have you ever been a party to sexual abuse, physical abuse, or sexual exploitation? 124. Have you ever been a party to sexual abuse, physical abuse, or sexual exploitation? 125. Have you ever been a party to sexual abuse, physical abuse, or sexual exploitation? | | | | | |
| response. | | | | | |
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| 122 Have | you ever engaged in, or been told that you have a diagnosis of any of the following? | ☐ Yes ☐ |
|-------------|---|----------------|
| No | you ever engaged in, or been told that you have a diagnosis of any of the following: | |
| If " | ES," please mark that item and describe the circumstances. | |
| | Exhibitionism (exposure of one's genitals to a stranger) | |
| | Fetishism (use of non-living objects for sexual gratification) | |
| | ☐ Frotteurism (rubbing a non-consenting person) | |
| | ☐ Pedophilia (adult's sexual activity with a prepubescent child or adolescent) ☐ Sexual masochism (obtaining sexual gratification from being humiliated, beaten, bound, or otherwise | made to |
| | Suffer) | made to |
| | ☐ Sexual sadism (inflicting psychological or physical suffering on someone else to obtain sexual satisfa | iction) |
| | ☐ Voyeurism (observing unsuspecting people, usually strangers, who are naked, disrobing, or engaging | |
| | activity) | |
| C | rcumstances: | |
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| 123. T | your knowledge, has any blood relative (grandparents, parents, aunts, uncles, nephews, cousins, siblings, or ch | nildren) ever: |
| | received or sought out professional help for any emotional problem? | ☐ Yes ☐ No |
| | been treated with medication for any emotional problem? | ☐ Yes ☐ No |
| | received or sought out professional help for a drug or alcohol problem? | ☐ Yes ☐ No |
| | had a history of untreated emotional and/or drug or alcohol problem? | ☐ Yes ☐ No |
| If you ched | ked "Yes" to any of the questions above, please provide a description of the circumstances or a more de | tailed |
| response. | | |
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| 124. In the past year, on average: How many alcoholic drinks did you have each week? How many drinks have you had in the past year? | | |
|--|-----------------|------|
| 125. Have you ever used/consumed alcohol on a daily basis? How much did you use daily? Over what period of time? | ☐ Yes | □No |
| 126. Have you ever drank so much that you could not remember what happened by the next morning? If "Yes," describe the circumstances. | ☐ Yes | □No |
| 127. Have you ever tried to cut down on the amount you drink? | ☐ Yes | ☐ No |
| 128. Have you ever become annoyed with others when they discuss your drinking? | ☐ Yes | ☐ No |
| 129. Have others ever raised concerns about your drinking patterns or behavior while drinking? | ☐ Yes | ☐ No |
| 130. Do you ever feel guilty about your drinking? | ☐ Yes | ☐ No |
| 131. Have you ever taken a drink in the morning? | ☐ Yes | ☐ No |
| 132. Has your drinking ever caused you problems at work, school, or at home with your family? | ☐ Yes | ☐ No |
| 133. Have you ever been charged with or convicted for driving while intoxicated or driving under the influence of alcohol? | ☐ Yes | □ No |
| 134. Is it ever hard for you to stop drinking after only one drink? | ☐ Yes | □No |
| 135. Did you ever take a drink before going out to a function where you know there will be no alcohol? | ☐ Yes | □ No |
| If you checked "YES" to any of the questions above, please provide a description of the circumstances or a response. | n more detailed | |

| 136. Place a checkmark beside any of the following drugs that you now use or have ever used: | | | | | | | |
|---|---|---------------------------------|----------|--|-------------------------------|--------------------------------------|---------------------------------|
| Heroin Amphe Barbitt Tranqu Halluci mesca | ☐ Marijuana or hashish ☐ Cocaine ☐ Heroin or other narcotics ☐ Crack ☐ Amphetamines ☐ LSD ☐ Barbiturates or downers ☐ Diet pills* ☐ Tranquilizers of any kind* ☐ Sleeping pills* ☐ Hallucinogens (for example, mescaline, psilocybin) ☐ PCP (angel dust) ☐ Other drug (specify): ☐ Laxatives and/or diuretics * If you used these drugs while under the care of a physician and used them according to the physician's prescription/order, you do not | | | | | rescription/order, you do not | |
| | | | | | | | |
| • | | | - | u used the drug, over stinence from the dru | | t period of time, and average da | ily and weekly amount of the |
| Name of Dru | g | Date Usage B | egan | Date Stopped | | Average Daily/ Weekly Amount Used | Longest Period Of Abstinence |
| | | | | | | | |
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| 138. Have you ever been treated for or sought professional help for a drug, alcohol or eating problem? ☐ Yes ☐ No 139. Have you ever attended Alcoholics Anonymous, Narcotics Anonymous, Narcotics Anonymous or any of the other 12-step programs? ☐ Yes ☐ No | | | | | | | |
| _ | □ No es" to e | | question | ns above, complete t | he c | hart below: | |
| Dates of Care Re Type of Care or Duration | | eason for Visit/ Admission (| | Nature of Treament sychotherapy, medication) | Your Response to Treatment | | |
| Outpatient/ Self-help | | | | | | | |
| Partial/Day Hospital | | | | | | | |
| Inpatient/ Residential | | | | | | | |

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|--|--|--|------------|-----------|--|--|
| Lega | l History | | | | | |
| 140. | Have you ever been charged with a crime of any kind? | | ☐ Yes | □No | | |
| 141. | Have you ever been convicted of any crime? | | ☐ Yes | □No | | |
| 142. | Have you ever been placed on probation? | | ☐ Yes | ☐ No | | |
| 143. | Have you ever been charged with traffic violations, including vedriving while intoxicated? | hicular homicide or | ☐ Yes | □ No | | |
| 144. | Has your drivers license ever been suspended or revoked? | | ☐ Yes | □No | | |
| | Have you ever been incarcerated? | | _ □ Yes | _ □ No | | |
| | If you have been divorced, have you ever fallen behind on court or alimony payments? | t-ordered child support | ☐ Yes | □ No | | |
| 147 | Have you ever initiated a lawsuit? | | ☐ Yes | □ No | | |
| | Have you ever been a defendant in a lawsuit? | | ☐ Yes | □No | | |
| - | u checked "Yes" to any of the questions above, please provi | ide a description of the aircumstances or a more | | | | |
| resp | response. | | | | | |
| Fina | ncial History | | | | | |
| 149. | Select the category which most closely approximates your famil Under \$15,000 \$15,000 \$24,999 \$25,000 \$39,999 \$40,000 \$49,999 \$50,000 \$59,999 | y's annual income bracket during your childhood an \$60,000 \$74,999 \$75,000 \$99,999 \$100,000 \$150,000 Over \$150,000 per year | d adolesce | ence: | | |
| 150. | Select the category which most closely approximates the highes Under \$15,000 \$15,000 \$24,999 \$25,000 \$39,999 \$40,000 \$49,999 \$50,000 \$59,999 What year did you reach this income level: | st annual income you have ever received: \$60,000 \$74,999 \$75,000 \$99,999 \$100,000 \$150,000 Over \$150,000 per year | | | | |
| 151. | Has your family ever experienced any significant financial change | ges? | ☐ Ye | s 🗌 No | | |
| 152. | 152. Are you currently or have you ever experienced serious financial difficulties? | | | s 🗌 No | | |
| 153. | 153. Have you ever declared bankruptcy? ☐ Yes | | | s 🗌 No | | |
| 154. | 154. Do you have any ongoing problems with personal/family financial management? (e.g. credit card debt, foreclosures, problems with debt collectors, compulsive gambling) | | | s 🗌 No | | |
| If you checked "Yes" to any of the questions above, please provide a description of the circumstances or a more detailed response. | | | | | | |
| resp | | ide a description of the circumstances or a more | detailed | | | |

| The following additional space is to be used to complete your answer to any questions. Please write the question number and your answer. |
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| and your answer. |
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| The following additional space is to be used to complete your answer to any questions. Please write the question number and your answer. |
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BEHAVIOR SCREENING QUESTIONNAIRE (BSQ)

Applicants for Holy Orders convey the completed form both to the examining mental health clinician(s) and to the diocese sponsoring the evaluation. This questionnaire remains in the clinician's custody and in the applicant's permanent diocesan file.

The examining clinician(s), diocese or any of its agents reserve the right to verify independently any information provided in this questionnaire.

All questions must be answered.

| DIRECTION Do NOT ski items. | experiences. Please read each carefully. For each question, type a response. |
|-----------------------------------|--|
| | If you opt to handwrite this questionnaire, please use an ink pen . |
| | |
| | |
| 1. | Has disciplinary action of any sort ever been taken against you by a licensing board, professional association, ecclesiastical body, or educational or training institution? Have there been formal complaints against you that did <u>not</u> result in discipline? Are there complaints pending against you before any of the above-named bodies? If yes, please explain in the space below. |
| 2. | Have you ever been asked to resign or been terminated by a training program or employer? If yes, please explain in the space below. |
| 3. | Have you ever had a civil suit brought against you relative to your professional work, or is any such action pending? Have you ever had professional malpractice insurance suspended or revoked for any reason? If yes, please explain in the space below. |

| 4. | Have you ever been charged with any ethics violations, or sexual harassment? Are any such actions pending against you? If yes, please explain in the space below. |
|----|--|
| 5. | Are you now or have you ever had sexual contact or attempted sexual contact (sexual intercourse of any kind, intentional touching, or conversation for the purpose of sexual arousal) with persons that you were/are seeing in any professional context (i.e., a parishioner, a client, a patient, an employee, a student)? If yes, please explain in the space below. |
| 6. | Since the age of 21, are you now or have you ever been engaged in sexual behavior (sexual intercourse of any kind, genital contact, intentional touching, or conversation for the purpose of sexual arousal) with persons under 18 years of age? If yes, please explain in the space below. |

| 7. | Are you now or have you ever been involved in the production, sale, or distribution of pornographic materials? If yes, please explain in the space below. |
|-----|--|
| 8. | Have you ever been charged, arrested, or convicted for any crimes or misdemeanors? Have you ever been charged with moving traffic violations? Has your driver's license ever been revoked or suspended? If yes, please explain in the space below. |
| 9. | Have you ever had a restraining order, injunction, order for protection or the like issued against you as a result of allegations of domestic violence, abuse or the like? Have you ever had your parental rights restricted, suspended or terminated or have any of your children ever been in foster care? If yes, please explain below. |
| 10. | Have you ever misappropriated funds or otherwise breached fiduciary duties in any professional capacity? If yes, please explain below. |

STATEMENT OF THE APPLICANT: (Please read carefully before signing.)

All information submitted by me in this questionnaire is true to the best of my knowledge. I understand that any significant misstatement in, or omission from, this questionnaire may be cause for denial of acceptance for postulancy or cause for dismissal from postulancy or the ministry.

I understand and agree that I will notify the Commission on Ministry of any changes in the status of my licensure, censure, or sanction by professional bodies and of any other information relating to my ability to act as a member of the ordained ministry.

| Name (please type or print) | |
|-----------------------------|--|
| Signature | |
| Sponsoring Diocese | |
| Witness Signature | |

- 5 -



REQUIRED MEDICAL EXAMINATION

This report should be mailed by the examiner directly to the Bishop, and the information should be treated as strictly confidential. By submitting to this examination, the candidate consents to the use of the information herein in connection with his/her candidacy.

MEDICAL EXAMINATION

| Nan | ne | | Date of Birth | | | |
|---|--|----------------------|-------------------------------|-------------------|--------------|--------------|
| | | | | | | |
| You | Your Home Address | | Phone Number/Fax Number | | | |
| | | | | | | |
| | ** 101 1 | | | | | |
| Mar | ital Status | | Children and Age | es | | |
| | | | | | | |
| Notify in Case of Illness | | | Phone Number/F | ax Number | | |
| | | | | | | |
| Par | sonal Physician | Physician's Addr | 966 | Phone Number | /Eav Numb | ı <u>o</u> r |
| 1 01 | onari mysician | 1 Hysician's Addi | C33 | T HONE NUMBER | T ax INGITID | CI |
| | | | | | | |
| | | | | | | |
| | ase answer all questions below | "Yes" or "No;" prov | ide full details n sp | ace at bottom for | any questi | ons |
| ans | wered "Yes." | | | | | |
| | | Have You | | | Yes | No |
| Ever been rejected or paid extra money for insurance? | | | | | | |
| 2. Ever received Workmen's Compensation or other disability benefits? | | | | | | |
| 3. Been rejected for employment on account of any physical or mental condition? | | | | | | |
| 4. Ever received prescription drugs for mental illness or substance abuse? | | | ıse? | | | |
| 5. | Ever been a patient in a hospi | tal? | | | | |
| 6. | Had any accidents, injuries or | operations or cont | emplate any opera | tion? | | |
| 7. | Received disability benefits or condition? | medical leave for | any medical/psychi | atric | | |
| 8. | Had your medical or psychiatr | | or educational stud | ies questioned | | |
| | by a supervisor or a supervisir | _ | JHhO | | | |
| 9. | Ever left school or any position | | | 20002 | | |
| 10. | Lost time from work or school | in the past three ye | ears for medical rea | asons? | | |
| Prov | vide full details here for all ques | tions answered "Ye | es." <i>Full details</i> incl | ude the condition | dates and | 1 |
| | ations. List the question number | | | | | |
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| 2. Vital S | (a) How long have you known applicant | | (b) in what rela | ationship? | |
|---------------|--|--|------------------|--|----------|
| Vital S | (a) height without shoes: Ft | Ins (b |) weight: | lbs | |
| Vital S | | | | | |
| | igns | | | | |
| Те | mperature Pulse Re | spiration | on B | llood Pressure (arm, R ☐ or L ☐position) | |
| Physic | cal Examination: Check for within n | orma | l limits. Note | positive findings in the space below. | |
| Head | | | Lymph Nodes | | |
| Eyes | Vision | | | Enlargement, consistency and/or tenderness of cervical, axillary, epitrochlear, popliteal, and inguinal glands | |
| | Conjunctivae and sclerae | | | | |
| | Pupils size | | | | |
| | Reaction | 40 | _ | | <u> </u> |
| | Equality | | | | |
| _ | Appearance | 井井 | | | |
| Ears | Hearing | 井井 | 011 | | |
| | Air and bone conduction | 井井 | Chest | Appropriate and function of choot well | ┝ |
| N/ | Appearance of tympanic membranes | 井井 | Duranta | Appearance and function of chest wall | ₽₽ |
| Nose | Obstruction to breathing | | Breasts | Appearance, asymmetry, tenderness, masses, nipple discharge | ┕ |
| | Septal deviation and/or perforation | | Lungs | Type of respiration, character of breath sounds; presence of rales, rhonchi, wheezes or rubs | |
| | Discharge | | Heart | | |
| Mouth | Sores | | | Apex location, precordial movements or thrills | L |
| | Dental status | $\perp \! \! \perp \! \! \! \! \! \perp$ | Auscultation | | |
| | Appearance and palpation of mucosa | ΙШ | | Heart sounds: S1, S2, S3, S4 | L |
| | tongue, gums floor of mouth Appearance of tonsils, pharynx | | | Presence of murmurs, clicks, rub, split sounds | |
| | Appearance & movement of uvula, palate gag reflex | | | Radiation of murmurs | Г |
| | palate gag reliex | + | Pulses | | |
| Neck | | | 1 41000 | Cartoids | +- |
| Neck | | $\top \sqcap$ | | | |
| Neck | Palpable masses Thyroid | H | | Brachials | ╠ |
| Neck | Palpable masses | | | Brachials Radials | F |
| Neck | Palpable masses Thyroid | | | | |
| Neck | Palpable masses Thyroid Location of trachea | | | Radials | |

Outline for Physical Examination (continued from previous page)

| | m previous page) | | | | | | | |
|----------------|--|---------|------|-----|---------------------|--|-----|----|
| Spine | | | | | Neurological | | L | |
| | Mobility | | | | | Mental status | [| |
| | Tenderness | | | | | Cranial nerves | [| |
| | Curvature | | | | | Cerebellar function | | |
| Abdomen | | | | | | Muscle strength | [| |
| | Appearance (distended, flat, scaphoid) | | |] | | Reflexes | | |
| | Abnormal movements | | | | | Gait and station | | |
| | Dilated veins | | |] | | Rapid sensory exam including vibratory | [| |
| | Striae | | | | | | | |
| Auscultation | Bowel sounds | | | | Extremities | | | |
| | Bruits | | | Π | | Skin color | | |
| | Rubs | | | | | Temperature | | |
| Percussion | Distention | | T | 1 | | Texture | Ti | |
| | Organ size | | Ŧ | Ħ | | Varicosities | Ti | Ħ |
| Palpation | Resistance | | F | i | | Clubbing | Ιi | Ħ |
| 1 dipution | Tenderness | | F | H | | Edema | H | Ħ |
| | Rebound | -+ | F | ╁ | | Joint motions | | ╡ |
| | Organs (liver, spleen, bladder) | | F | H | | Muscular abnormalities | H | ╡ |
| | Masses | | ┢ | 1 | | Circumference | H | = |
| | Epigastric or incisional hernia | | ┢ | 1 | | Circumerence | Η. | |
| | _ Epigastile of indisional fiernia | | _ | 1 | | | 1 | |
| Genita | II, Prostate or Pelvic Examina | tion | | | Re | ctal Exam and Stool Sample | | |
| | List any abnormal findings: | | | | | List positive findings: | | |
| | | | | | | | | |
| LABORATO | DRY | | | | | | | |
| CBC | | | | | | | | |
| Fast Chem pr | rofile | | | | | | | |
| U/A | | | | | | | | |
| EKG (if indica | ited) | | | | | | | |
| PPD | | | | | | | | |
| him/her unsui | table for the tasks of ordained mini- | stry? (| lf y | ou | have any confide | dition or other impediment that would rerential information that would render the shop by confidential communication.) | ıd∈ | er |
| | | | | | | | | |
| | | | | | | | | |
| | | Ex | cam | ine | r's Signature | M.D. | | |
| | | | | | dress | | | |
| | | Phon | o Ni | umł | / per/Fax Number | | | |

Check the appropriate box for the disorders you have or have had in the past. **Infectious Diseases** Yes No **Respiratory System** Yes No Pneumonia Sinus Infection Frequent sore throats Asthma Dysentery (Chronic) Hay fever Infantile Paralysis (Polio) Bronchitis Syphilis Pleurisy Gonorrhea Tuberculosis Skin diseases or eczema Chronic cough Fevers Chronic hoarseness Recurrent Chills Coughing up blood Lymph node enlargement Tobacco use **Heart and Blood Vessels** Yes No **Nervous System** Yes No High or low blood pressure Epileptic or other fits Heart disease Meningitis 11 Pain in chest Mental or nervous diseases (family) Mental or nervous diseases (self) Rheumatic fever Heart murmur Dizzy spells **Palpitations** Fainting spells Shortness of breath Visual problems Swollen ankles П Deafness П Ringing ears, hearing difficulty Anemia or blood disease Coagulation disorder П **Paralysis** Elevated cholesterol Weakness of limbs Numbness Yes Miscellaneous Digestive System No Yes No Ulcers Cancer Jaundice Lymphoma or Other Blood Disease Hepatitis Diabetes or sugar disease (family) Recurrent diarrhea Diabetes or sugar disease (self) Bloody stools Thyroid disease Marked over or underweight Foot problems Recent weight loss Back pain Gall bladder disease Joint pain Hernia (rupture) Allergy to any food, medicine or injection Blood transfusions **Genitourinary System** Yes No Arthritis Kidney disease Daily use of nicotine (past 5 years) Kidney stones П Prostate disease Have you ever been a habitual user of any habit forming drugs or received treatment for alcoholism or drug abuse? Bladder disease Have you ever had any illnesses (mental or physical) or accidents other than those mentioned? Blood in urine Pain in passing urine

Pain in passing urine
Urinary tract infection

I hereby declare that my answers to the above questions are full and true.

Signed at in my presence, this day of , .

(Physician)

PATH TO CANDIDACY

FORM O: VESTRY REAFFIRMATION FOR CANDIDACY FOR HOLY ORDERS

To the Rt. Rev. Dr. George R. Sumner, Bishop and to the Commission on Ministry of the Diocese of Dallas and to the Standing Committee of the Diocese of Dallas

| DATE | |
|---|---|
| W E, whose names are hereunder written as duly elected n | nembers of the Vestry of (Print Name of |
| Congregation) | , testify to our belief that |
| (Print Name of Postulant) | possesses such |
| qualifications as would fit him/her to be admitted a CAND | DIDATE FOR HOLY ORDERS. |
| W E declare that our judgment is based upon: | |
| Personal knowledge of the Postulant on the | e part of the Vestry |
| Evidence concerning the Postulant present | ed to the Vestry |
| A combination of personal knowledge of the | ne Postulant and other evidence |
| VESTRY SIGNAT | URES |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

(Must be signed by a two-thirds majority of the Vestry Members)

ATTESTATION OF THE FOREGOING CERTIFICATE

| THEREBY certify that the foregoing certificate was si | gned at a meeting of the Vestry of (Print Name of |
|--|---|
| Congregation) | |
| in the City of (City Name) | on (Date) |
| and that the signatures shown are those of a two-thi | rds majority of the members of the Vestry. |
| Signed | |
| Signed(Clerk of the Vestry) | |
| | |
| | |
| | |
| | |
| I HEREBY certify that I am personally acquainted v | vith (Print Name of Postulant) |
| | and that I believe him/her to be well |
| qualified to be made a CANDIDATE in the discernn | nent process. |
| | |
| Signed(Rector/Vicar of the Congregation to which | |
| (Rector/Vicar of the Congregation to which | n the Postulant belongs) |

Note: Should the Congregation be without a Rector/Vicar, it shall suffice that in his/her place the certificate from the Vestry be signed by some Presbyter of the Diocese in good standing to whom the Postulant is personally known, the reason for the substitution being stated in the attesting clause.

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM P: LETTER OF APPLICATION FOR CANDIDACY FOR HOLY ORDERS

Date

Your name Address Email Phone number

The Rt. Rev. Dr. George R. Sumner, Bishop Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

Dear Bishop Sumner:

In accordance with the Canons of the Episcopal Church (**pick one:** Title III, Canon 6, Section 4 [2015] for Ordination to the Diaconate or Title III, **or** Canon 8, Section 4 [2015] for Ordination to the Priesthood), I respectfully submit this application to become a candidate for Holy Orders.

I am providing you with the following information as required under the above canon:

| • | Full Name_ |
|---------|-------------------------|
| | |
| • | Date granted Postulancy |
| Person | al remarks here, if any |
| Sincere | ely yours, |

Your name printed

c: The Rev. Mark Wright, Chair of the Commission on Ministry The Rev. Dr. Jeremy Bergstrom, Canon for Vocations your Rector/Vicar

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

PATH TO ORDINATION TO THE DIACONATE

FORM Q: **VESTRY ENDORSEMENT FOR ORDINATION TO THE DIACONATE**

To the Rt. Rev. Dr. George R. Sumner, Bishop and to the Commission on Ministry of the Diocese of Dallas and to the Standing Committee of the Diocese of Dallas

| DATE | | |
|--|--------------|---|
| WE, whose names are hereunder written as du | ıly elected | I members of the Vestry of (Print Name of |
| Congregation) | | , do certify that, |
| after due inquiry, we are well assured and beli | eve that (F | Print Name of Candidate) |
| , hath lived a so | ber, hones | st, and godly life, and that he/she is loyal to the |
| Doctrine, Discipline, and Worship of this Chur moreover, we think he/she is a person worthy | | , , , |
| VEST | RY SIGNAT | ΓURES |
| | _ | |
| | _ | |
| | | |
| | - | |
| | _ | |
| | _ | |
| | _ | |
| | _ | |

(Must be signed by a two-thirds majority of the Vestry Members)

ATTESTATION OF THE FOREGOING CERTIFICATE

| I HEREBY certify that the foregoing certificate was | signed at a meeting of the Vestry of (Print Name of |
|---|--|
| Congregation) | |
| in the City of (City Name) | on (Date) |
| and that the signatures shown are those of a two-th | airds majority of the members of the Vestry. |
| Signed | |
| Signed(Clerk of the Vestry) | |
| | |
| | |
| | |
| I HEREBY certify that I am personally acquainted w | vith (Print Name of Candidate) |
| and that I be | elieve him/her to be well-qualified to minister in the |
| OFFICE OF DEACON , to the glory of God and the | edification of His Church. |
| | |
| Signed | |
| (Rector/Vicar of the Congregation to whi | ch the Candidate belongs) |
| | |

NOTE: Should the Congregation be without a Rector/Vicar, it shall suffice that in his place the certificate from the Vestry be signed by some Presbyter of the Diocese in good standing to whom the Candidate is personally known, the reason for the substitution being stated in the attesting clause.

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM R: LETTER OF REQUEST FOR ORDINATION TO THE DIACONATE

Date

Your name Address Email Phone number

The Rt. Rev. Dr. George R. Sumner, Bishop Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

Dear Bishop Sumner:

In accordance with the Canons of the Episcopal Church (Title III, Canon 6, Section 6 [2015] for Ordination to the Diaconate or Title III, Canon 8, Section 6 [2015] for Ordination to the Priesthood), I respectfully request ordination as a deacon in Christ's Church.

I am providing you with the following information as required under the above canon:

| | Full Name |
|---------|-------------------------|
| | |
| | Date granted Postulancy |
| | Date granted Candidacy |
| _ | |
| Persona | al remarks here, if any |
| Sincere | ly yours, |
| | |

Your name printed

c: The Rev. Mark Wright, Chair of the Commission on Ministry The Rev. Dr. Jeremy Bergstrom, Canon for Vocations your Rector/Vicar

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

PATH TO ORDINATION TO THE PRIESTHOOD

FORM S: VESTRY ENDORSEMENT FOR ORDINATION TO THE PRIESTHOOD

To the Rt. Rev. Dr. George R. Sumner, Bishop and to the Commission on Ministry of the Diocese of Dallas and to the Standing Committee of the Diocese of Dallas

| | DATE | | - |
|-----------------------|----------------------------------|--|---------------------|
| WE, whose name | es are hereunder written as o | duly elected members of the Vestry o | of (Print Name of |
| Congregation) | | , do | certify and believe |
| that (Print Name of E | Deacon) The REVEREND | | since theday |
| of | in the year | , being the date of his/her | ordination to the |
| Diaconate, hath li | ived a sober, honest, and go | odly life, and hath not written, taugh | t, or held anything |
| contrary to the Do | octrine, Discipline, or Wors | hip of this Church, and, moreover, v | ve think him/her a |
| person worthy to | be admitted to the SACRED | ORDER OF PRIESTS. | |
| | VECT | DV CLCNIATUDEC | |
| | VEST | RY SIGNATURES | |
| | VEST | | |
| | | | |
| | | | |
| | | | |
| | | | |

(Must be signed by a two-thirds majority of the Vestry Members)

| Name) | |
|--|--|
| in the City of (City Name) | on (Date) |
| and that the signatures shown | are those of a two-thirds majority of the members of |
| the Vestry. | |
| Signad | |
| Signed(Clerk of the Vestry) | |
| | |
| | |
| | |
| I HEREBY certify that I am personally acquainted | with (Print Name of Deacon) The REVEREND |
| , 1 , 1 | |
| | o the glory of God and the edification of His Church |
| | |
| Signed | |
| (Rector/Vicar of the Congregation to v | vhich the Deacon belongs) |

ATTESTATION OF THE FOREGOING CERTIFICATE

NOTE: Should the Congregation be without a Rector/Vicar, it shall suffice that in his place the certificate from the Vestry be signed by some Presbyter of the Diocese in good standing to whom the Deacon is personally known, the reason for the substitution being stated in the attesting clause.

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

FORM T: LETTER OF REQUEST FOR ORDINATION TO THE PRIESTHOOD

Date

Your name Address Email Phone number

The Rt. Rev. Dr. George R. Sumner, Bishop Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206

Dear Bishop Sumner:

In accordance with the Canons of the Episcopal Church (Title III, Canon 8, Section 6 [2015] for Ordination to the Priesthood), I respectfully request ordination to the sacred order of priests in Christ's Church.

I am providing you with the following information as required under the above canon:

| Full Name | |
|------------------------------|--|
| | |
| Date granted Postulancy | |
| | |
| Date granted Candidacy | |
| | |
| Date ordained Deacon | |
| | |
| ersonal remarks here, if any | |
| ncerely yours, | |
| | |

Your name printed

cc: The Rev. Mark Wright, Chair of the Commission on Ministry The Rev. Dr. Jeremy Bergstrom, Canon for Vocations your Rector/Vicar

Completed forms should be submitted to:

The Chair of the Commission on Ministry c/o Episcopal Diocese of Dallas 1630 N. Garrett Avenue Dallas, Texas 75206