





## STATISTICAL REPORTS USER GUIDE FOR PARISHES AND MISSIONS



Status Animarum & Official Catholic Directory



OFFICE OF PASTORAL PLANNING www.planningministry.com

### Introduction

Welcome to the Statistical Report User Guide. This document will provide instructions on completing the Status Animarum and the Official Catholic Directory (OCD) Reports.

#### **Primary Contact for Statistics Reports at Parish Location**

Each Location has a person who is the primary contact for Statistics reports at each parish. This person is typically not the pastor but was designated by the pastor. The reason for this is that it is up to the parish to manage the logins for the online reports and what access a user must have to ParishSOFT and PowerApps. This person also serves as a first response to any issues regarding the data reported to the Diocese.

The primary contact must be a *diocesan employee* in order to have a software license (issue by The Office of IT) to login and complete the yearly reports such as Mass Count, Status Animarum and Official Catholic Directory reports. Login access allows only the person with this privilege to add, delete or modify the parish data.

Please notify the Office of Pastoral Planning of any changes in the designated staff to see if any users should be removed, added or changes should be made to provide login access to complete the reports.

The parish location determines who can have access to the software. Users should have their login, and generic accounts should not be used. Passwords should not be shared. The list of users should be reviewed frequently, and users no longer at the parish should be removed. If a password is forgotten, the staff member must contact our Diocesan IT office for support. The data stored in the software contains information that should not be used for any purpose other than what it is intended for. Professional integrity must be enforced in handling the data, which should only be accessed when the task requires it to be accessed, and data is not to be used for personal purposes.

You may call the Office of Pastoral Planning at **909-475-5145** for assistance <u>or email us at pastoralplanning2@sbdiocese.org.</u>

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## **Due Date**



## To access the reports on the Diocesan website:

- 1. Got to the diocesan website www.sbdiocese.org
- 2. Click on Ministries tab to view all offices
- 3. Select the Office of Pastoral Planning
- 4. On the right hand side under Statistical Ministry:

Statistical Reports User Guide

Guía del Usuario

Catholic Schools User Guide

Status Animarum Web Form

## Instructions to enter data to Status Animarum Web Form.

- 1. Open the "Office of Pastoral Planning" web page from the diocesan website.
- 2. Click on the link "Status Animarum Web Form." This will be found on the right-hand side under the section "STATISTICAL MINISTRY"
- 3. **LOGIN:** You will get the following screen if you have not logged onto office 365 before.



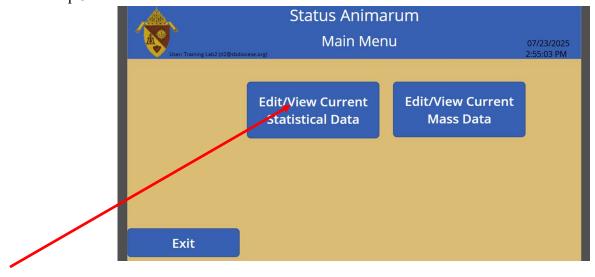
- a. Click sign in and use your Diocesan email account credentials. If asked what type of account, use the "School or office" type of account.
- 4. Once logged in successfully the screen will look like this:



- a. If the user name is not yours, possibly because you share your machine with someone else, then do the following to log out of that account.
- i. Click on the exit button (1) below

  Exit

  ii. Click on the Logout button (2) below
- iii. The screen should then go back "sign in required" screen, if not then close your browser windows and navigate back using steps 1 and 2.
- iv. Then continue from step 3.



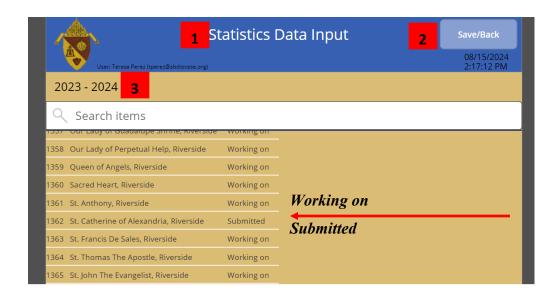
1. This button opens the "Edit/View Current Statistical Data." Where you will be able to input your counts.

## Select a Parish.

From this screen, you can choose which parish to input the data for.

- 1. Title of this screen
- 2. This button takes you back to the Main Menu.
- 3. Year of data to input. There will only be one year to select.

These parishes can be selected to edit or view their current statistics data. Please contact the Office of Pastoral Planning if the list needs to be completed or corrected.



This serves two purposes:

After selecting the parish to work within the list (4), the parish status will be displayed. If the parish statistics data has been completed, it will say "submitted." If not, then it will say "Working on".

Clicking on this record will take you to "Statistics Data."

**Submitted->** data has been completed

Working on-> data has not been completed

User: Teresa Perez (tperez⊕		atistic's Dat St. Joseph, Bars 2023-2024		1	Save/Back 08/15/2024 2:20:08 PM
St. Joseph, Barstow Entity: 1306		Year: 2023-2024 <b>2</b>	Submit wh	en done Working on	Date Completed
General Parish Information	Completed	Annual Stat	s (Parish)	Completed 4	
Demographics	Completed				
Sacraments	Needs Work	Location Inf	ormation	Needs Work	
Religious Education	Needs Work	3			
Preparer's Information	Needs Work				

From this screen, the data information can be viewed or edited.

- 1. Button to save and return to the "Data-Input Select Parish."
- 2. This lets you know if you can work on the data: adding, removing, editing, or viewing:
- 3 Indicates the sections you need to enter data, click on the button to enter your data.
- 4. Indicates that the data has been submitted for this section.

Once all the sections are completed change button (2) to Submitted and click button (1) to save your data.

NOTE: After data has been submitted and changes need to be made, then contact the Office of Pastoral Planning.

#### Number of Registered Catholic Households

Apart from the manual process, we will email the Parish Soft report to the parish primary contact to facilitate the completion of the report, the primary contact should be responsible for ensuring the numbers are accurate.

#### **Number of Registered Catholic Households**

From Family Directory - Family list

Note: make sure all filters are cleared

Click the filter icon

Select the following combinations and write down the number:

Membership Drop-down	Family Group drop-down	Number
Registered	All Groups	#
Not Registered	Active	#
Not Registered	Invalid Address	#
Not Registered	Registered Inactive	#

Total: #

Add the numbers together to find the Number of Registered Households.

#### **Number of Registered Parishioners**

The link below takes you to an Excel spread sheet with instructions on calculating the Number of Registered Parishioners.

Note: While this method counts most members, it does leave out some.

Once the counts are put in for the **orange section**, the yellow section will give the counts that you will use for the Status Animarum Report.

Click here for the spreadsheet.



Enter information in all the boxes. If in the "working on" status, clicking on this record will allow that record to be edited in the "Annual Stats" screen.

- 1. Button to save or go back.
- 2. Indicates how many records need to be fixed before being able to save the data. Once fixed the error, click on the "save/back" button.
- 3. Indicates the data from the previous year's Status Animarum report.

## **Demographics**

#### **Demographics**

The following steps will give you a list of ethnicities with the count of registered parishioners. The Grand Total at the bottom of the list generated will tell you the total number of registered parishioners with an ethnicity listed.

#### From Family Directory à Member List

make sure all filters are cleared, then export list to csv

Open the exported CSV list

The following cells should have the following names, if not please contact Eric Kuske:

E1: Registered

F1: Family Group

H1: Member Status

Cells AB1 and AC1 should have nothing in them

In **AB1** type: **Filter**In **AC1** type: **Filter2**In **AB2** type or paste:

=IF(E2="Yes","include", IF(OR(F2="active",F2 = "invalid Address", F2 = "Registered Inactive"),"include",""))

In AC2 type or paste:

=IF(AND(AB2="include", OR(H2="active", H2="actother", H2="Unknown")), "include","")

Select cell AB2

Press Ctrl+Shift+Down Arrow (This key combo is used to select from top cell to the last row)

Press Ctrl+D (This key combo is used to copy the equation to end of list)

Scroll to top to see the results

Select cell AC2

Press Ctrl+Shift+Down Arrow

Press Ctrl+D

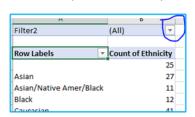
Scroll to top to see the results

Select all fields

From the **Insert** menu select **PivotTable**; it will bring up a window- **click OK**It should give a screen that looks like the following on the right hand side.

Drag Ethnicity to Rows, Ethnicity to Values, and Filter to Filters

Select the drop-down list for Filter2 (Circled in blue) and change it to Include





The Grand Total at the bottom will tell you the total number of Registered Parishioners with ethnicities.

This information can then be used provided enough Parishioners have ethnicities filled in.

Note: This will give you member counts but not percentages as needed by the SA report. Further calculations will be needed.

#### **Sacraments**

The Sacraments reported for the Status Animarum (SA) "Sacraments" include

#### **ALL Sacraments received regardless of the way of formation:**

Religious Education (Ordinary Sacramental Preparation)

OCIA (Order of Christian Initiation of Adults)

RCIC (Rite of Christian Initiation of Adults adapted for Children)

Sacraments administered in an emergency.

#### Important Note:

#### Full Initiation, also known as CATECHUMENS:

COUNTED ON (SA) "Sacraments" FOR 3 SACRAMENTS:

**BAPTISM** 

2. FIRST COMMUNION

3. CONFIRMATION

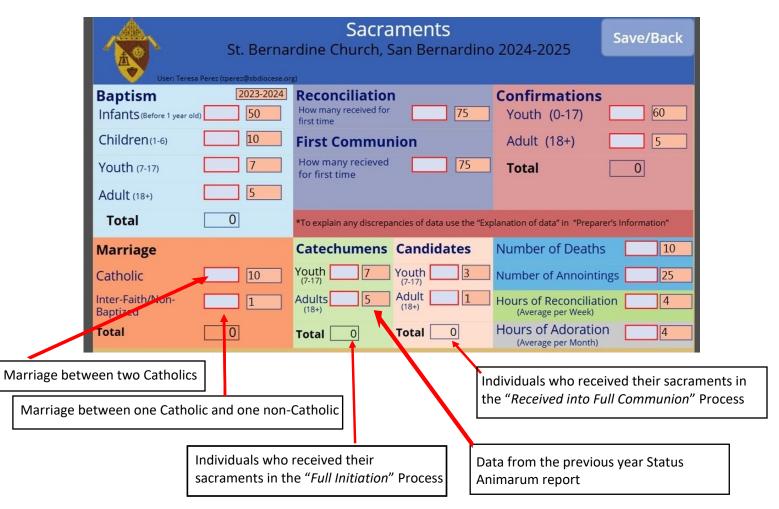
#### Received into Full Communion, also known as CANDIDATES:

COUNTED ON (SA) "Sacraments" FOR 3 SACRAMENTS:

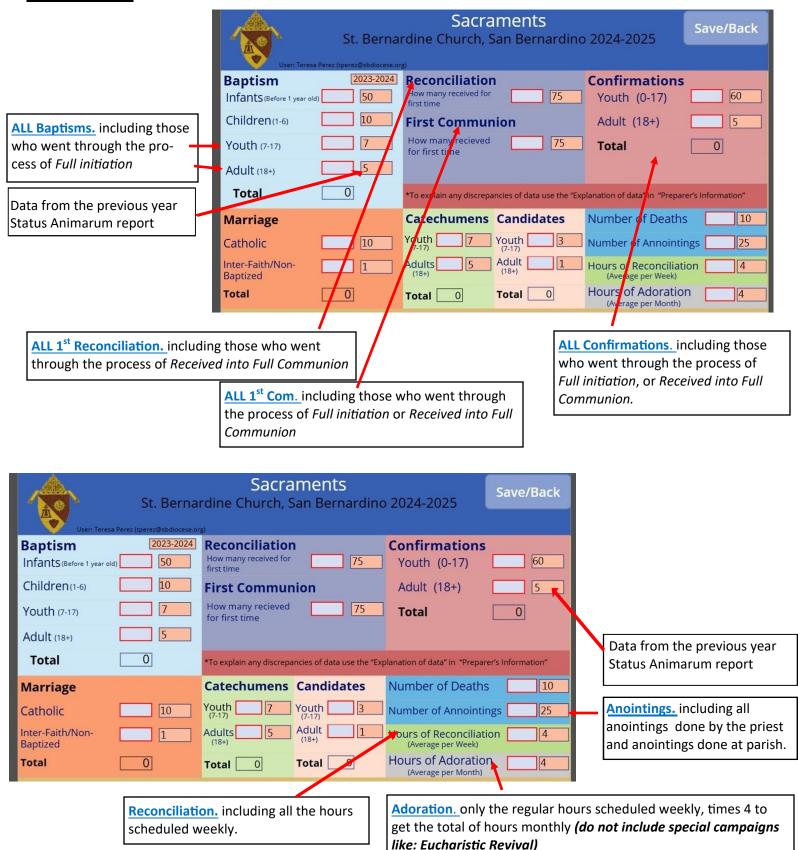
**FIRST COMMUNION** 

2. FIRST RECONCILIATION\*

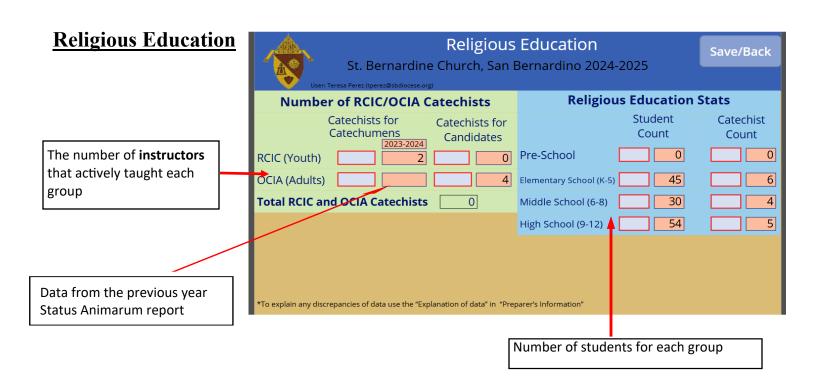
3. CONFIRMATION

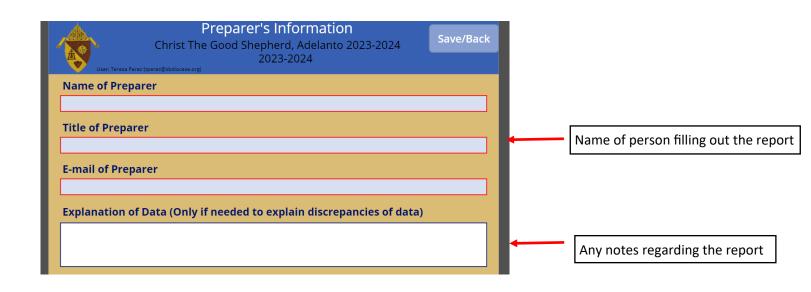


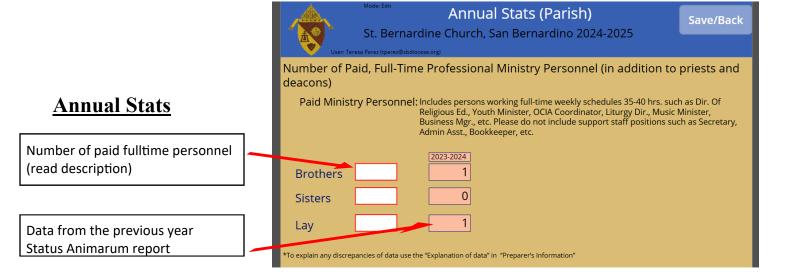
#### **Sacraments**



<u>NOTE:</u> At the end of this user guide you will find Appendices to help you when recording the Sacraments.





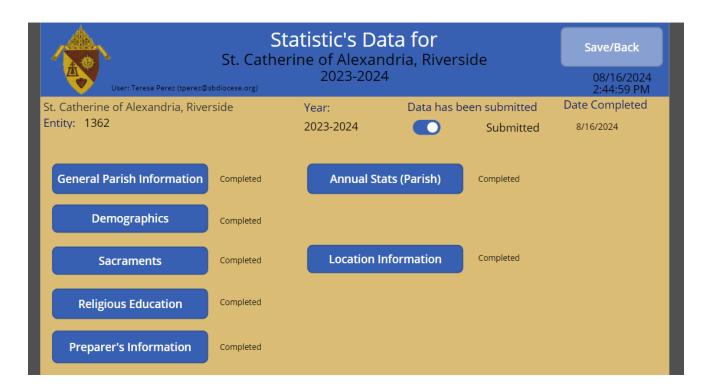


#### **Location Information**

Please review the information below about your location. If there are any questions please contact the Office of Pastoral Planning.

Location Christ The Good Shep 20 User: Teresa Perez (tperez@sbdiocese.org)	:k			
Please review the information below about your location. If questions please contact the Office of Pastoral Planning. With e slider to mark as reviewed.	r tricic are arry	Not Reviewed		
Location Name	County San Bernardino	Institution Code SB-06	652	
Christ The Good Shepherd	Mail Address	EIN 95-329	300	
Child of Location	PO Box 577	KenedyID 1628	826	When finished reviewing
		Year Founded 19	962	click on the slider to mark
E-mail	Adelanto, CA 92301-0577	Cemetery		as reviewed.
christthegoodshepherd@sbdiocese.org	Physical Address			
Web Site	17900 Jonathan St.	Ethnic Affiliation		
http://cgshepherd-adelanto.org	Adelanto, CA 92301-0577			

Once you completed all the sections and submit the data, it should look like the following.



# Appendices

## Appendix C

Marriage and Marriage Convalidations

When recording the Sacrament of Marriage, there are three categories:

- 1. Catholic Marriages both parties are Catholic.
- Interfaith Marriages (Mixed Religion) one party is Catholic and the other is <u>baptized</u> in another faith (requires permission from the Bishop or by the authority of the Bishop.)
- 3. **Disparity of Cult** one party is Catholic and the other is of a non-Christian faith, i.e., Jewish, Hindu, Buddhist, Muslim, or the other party is non-baptized with or without any religious background. (This requires a dispensation from the Bishop or by the authority of the Bishop.)

Note: not all people who say they are Christian have been baptized. See the list of valid baptisms in Appendix E.

Both Interfaith and Disparity of Cult marriages are combined together in the Status Animarum report.

A convalidation of marriage takes place when a Catholic was married outside the Catholic Church, either a civil ceremony or in another church. This ceremony also falls into one of the three categories above and requires the same permissions or dispensations if necessary.

These convalidations are then entered in the sacramental records and they are counted in the annual count of marriages in the corresponding category they belong.

## Appendix D

**<u>Infant Baptism:</u>** Non-baptized people from birth to eleven months of age.

**<u>Child Baptism:</u>** Non-baptized people between the ages of one year to six years of age.

<u>Baptism Youth:</u> Non-Baptized people, ages 7 - 17 yrs. There must be at least that many in RCIC. Baptisms in this age group are only for those in RCIC. Exceptions must be explained in the box titled "Please note reason for any discrepancy in statistics" that is located in the Other Parish Stats page.

<u>Baptism Adult</u>: Non-Baptized people, age 18 and older. There must be at least that many adults in OCIA. Baptisms in this age group are only for those in OCIA. Exceptions must be explained in the box titled "Please note reason for any discrepancy in statistics" that is located in the Other Parish Stats page.

<u>First Communion</u>: Catholic Religious Education children who are preparing for First Communion (part of a multi-year program) plus the children, youth and adults from OCIA. Note: There could also be some catholic youth and adults receiving this sacrament.

<u>First Penance</u>: Catholic Religious Education children who are preparing for First Penance (part of a multi-year program) plus the candidates from OCIA. This sacrament could happen on the first year or on the last year of the program. Count it when it happens in actuality.

Note: There could also be some catholic youth and adults receiving this sacrament.

<u>Confirmation Youth:</u> Catholic High School Youth who are preparing for Confirmation (usually a multi-year program) plus the youth from OCIA.

<u>Confirmation Adult</u>: Catholics 18+ years old who have received Baptism and First Communion, but not Confirmation (usually a one year program but it could be longer) plus the adults from OCIA. **Note: The catholic adults may also need First Communion.** 

Received into Full Communion Youth: All those between 7 and 17 years old previously baptized in another faith that become Catholic by making a Profession of Faith at Easter Vigil (part of a multi-year program.) Also known as candidates, they may be taught in same group as OCIA, however they must be counted separately. The sacraments that need to be recorded for them are First Communion and Confirmation Only as they have been previously baptized. Note: they also need to receive First Reconciliation, although this sacrament is not recorded, it needs to be counted for the report. Also, a notation of their baptism needs to be done in the Baptism Sacramental Register.

Received into Full Communion Adult: All those 18 years old and over previously baptized in another faith that become Catholic by making a Profession of Faith at Easter Vigil (part of a multi-year program.) Also known as candidates, they may be taught with the OCIA group, however they must be counted separately. The sacraments that need to be recorded for them are First Communion and Confirmation only as they have been previously baptized.

Note: they also need to receive First Reconciliation, although this sacrament is not recorded, it needs to be counted for the report. Also, a notation of their baptism needs to be done in the Baptism Sacramental Register.

<u>RCIC:</u> Rite of Christian Initiation of Adults adapted for children - Non-baptized persons 7 to 17 years old wishing to become Catholic (part of a multi-year program.) Commonly known as catechumen although this is the name they receive in only one of the four periods they go through.

<u>OCIA</u>: Order of Christian Initiation of Adults - Non-baptized persons 18 years old and over wishing to become Catholic (part of a multi-year program.) Commonly known as catechumen although this is the name they receive in only one of the four periods they go through.

The terms Catechumen and Candidate refer to two separate groups of people, over the age of 7 years, wishing to become Roman Catholic:

<u>Candidates</u>: All those previously baptized in another faith (for a list of valid and invalid baptisms, who become Catholic by Profession of Faith, please see Appendix E. They can be received at any Sunday Mass during the Easter Season when the Pastor deems they have sufficient knowledge of the Church and are spiritually ready. They are frequently received at the Easter Vigil along with the Catechumen, but making some type of difference between them. It is referred to as being "Received into Full Communion," a term that only refers to Candidates. Candidates receive the sacraments of First Reconciliation, First Communion and Confirmation.

<u>Catechumen</u>: All those non baptized people from OCIA and RCIC who receive their three sacraments of initiation – Baptism, First Communion and Confirmation– at Easter Vigil. They do not need to receive the sacrament of First Reconciliation as their sins will be washed away when they are baptized. They are also called the Elect during the Purification and Enlightenment period.

For the unbaptized who are between the ages of 7 and 17, they are usually included in the process called OCIA adapted for Children (RCIC in ParishSOFT), a more age appropriate process for young people. Those under the age of 7, if not already baptized, are baptized and counted as infant baptisms.

For <u>baptized</u> children/youth in the Roman Catholic Church between the ages of 7 and 17, they may be enrolled in Religious Education programs for First Communion and Confirmation.



Note: Some children from other countries such as Mexico and India may receive Baptism and Confirmation at the same time or receive Confirmation when they are very young and are asking for First Communion only (frequently as adults). They receive preparation for First Communion, generally through the Religious Education Office, and their First Communions are recorded. They are generally not Candidates.

When Catechumen/Elect receive the Sacraments of Initiation we need to include their Baptisms, Confirmations and First Communions in the statistical figures. They should be recorded in the respective Sacramental Register and counted like any other Sacrament.

When a Candidate enters the Church by Profession of Faith, whether it is at Easter Vigil or another time during the Easter Season, their First Communion and Confirmation should be recorded in the respective Sacramental Register and counted like any other Sacrament. Their Frist Reconciliation should also be counted.

## Appendix E

#### Recognized Baptisms

The following is a list of other faiths and the acceptability of their baptisms for recognition by the Roman Catholic Church.

Adventist Valid, NB: they have a dedication service too.

African Episcopal Methodist

Amish & Mennonite

Anglican

Assembly of God

Baptist

Church of the Brethren

Church of God (COGIC)

Valid

Valid

Valid

Valid

Valid

Church of the Nazarene Valid, NB: they have a dedication service too.

Congregationalist Valid
Disciples of Christ Valid
Episcopalians Valid
Evangelicals Valid
Evangelical United Brethren Valid
Liberal Catholic Valid
Lutheran Valid

Methodist Valid, NB: they also have a cradle roll, which is only an inscription

for Sunday school; it is not evidence of baptism

Old Catholics Valid
Polish National Church Valid
Presbyterians Valid
Reformed Church Valid
United Church of Christ Valid

Bohemian Free Thinkers No baptism
Christian Science No baptism
Freemasonry No baptism

Salvation Army

No baptism, NB: they have a cradle roll only

Christadelphians Invalid (Trinitarian issues)

Church of Divine Science Invalid
Church of the People of Chicago Invalid

Jehovah's Witnesses Invalid (Trinitarian issues, plus)
Latter Day Saints Invalid (Trinitarian issues, plus)

Pentecostal Invalid, they do not use a Trinitarian formula

Quakers Invalid, they do not use water

Universalists Invalid Unitarians Invalid

Apostolic Doubtful, must check exact formula used Missionary Christian Alliance Doubtful, must check exact formula used

NB = Nota Bene (Please Note)

If in doubt or if you have any questions, please contact the Office of Canonical Services at (909) 475-5323.