DIOCESE of SAN BERNARDINO

STATISTICAL REPORTS USER GUIDE
FOR PARISHES AND MISSIONS

Status Animarum &
Official Catholic Directory

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 or email us at **pastoralplanning2@sbdiocese.org**.

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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

2

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.
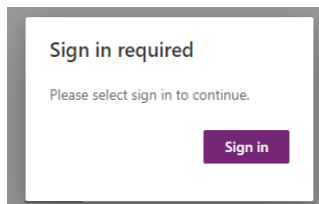
a. Click sign in and use your Diocesan email account credentials. If asked what type of account, use the "School or office" type of account.

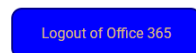4. Once logged in successfully the screen will look like this:

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.
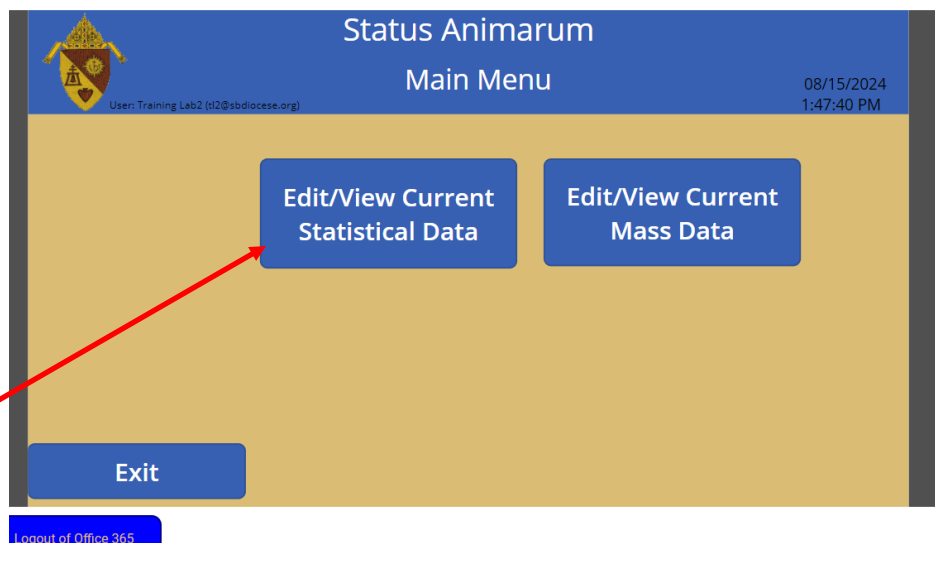
i. Click on the exit button (1) below ➝
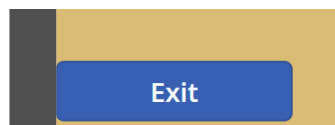
ii. Click on the Logout button (2) below ➝

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.

4. 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

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.

5. 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 contac 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**.
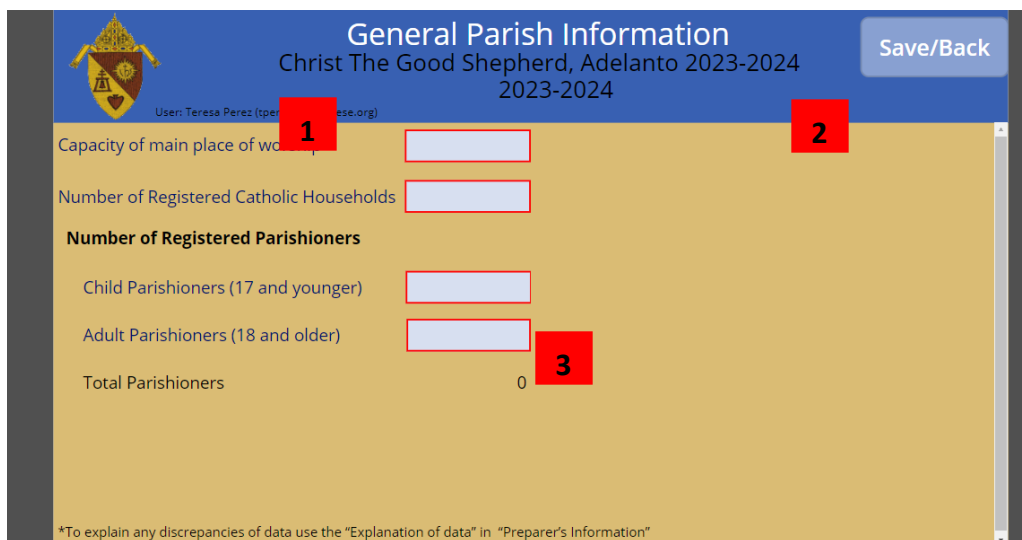
Number of Registered Parishioners

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.

1. 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.

2. Button to save or go back.

3. 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.

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**

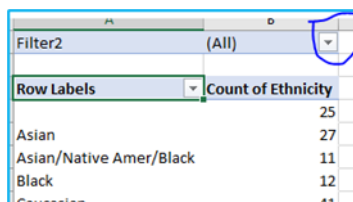Press **Ctrl+D**

Scroll to top to see the results

Select all fields

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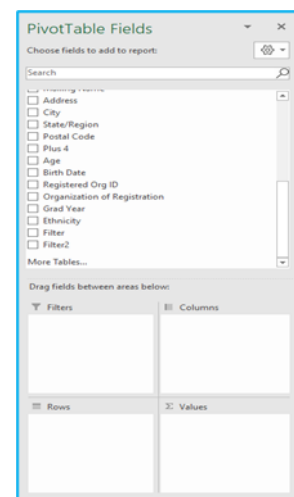
It should give a screen that looks like the following on the right hand side.

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)

RCIA (Rite 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

Marriage between two Catholics

Marriage between one Catholic and one non-Catholic

Individuals who received their sacraments in the "*Received into Full Communion*" Process

Individuals who received their sacraments in the "*Full Initiation*" Process

Sacraments

ALL Baptisms. including those who went through the process of *Full initiation*

ALL 1st Reconciliation. including those who went through the process of *Received into Full Communion*

ALL 1st Com. including those who went through the process of *Full initiation* or *Received into Full Communion*

ALL Confirmations. including those who went through the process of *Full initiation*, or *Received into Full Communion.*

Anointings. including all anointings done by the priest and anointing done at parish.

Reconciliation. including all the hours scheduled weekly.

Adoration. only the regular hours scheduled weekly, times 4 to get the total of hours monthly *(do not include special campaigns like: Eucharistic Revival)*

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

Religious Education

Religious Education
Christ The Good Shepherd, Adelanto 2023-2024
User: Teresa Perez (tperez@sbdiocese.org)

Save/Back

Number of RCIC/RCIA Catechists

	Catechists for Catechumens	Catechists for Candidates
RCIC (Youth)		
RCIA (Adults)		
Total RCIC and RCIA Catechists		0

Religious Education Stats

	Student Count	Catechist Count
Pre-School		
Elementary School (K-5)		
Middle School (6-8)		
High School (9-12)		

*To explain any discrepancies of data use the "Explanation of data" in "Preparer's Information"

The number of **instructors** that actively taught each group

Number of students for each group

NOTE: The Diocese of San Bernardino will commence using **OCIA** on Ash Wednesday 2025.

Find USCCB Decree **here.**

Preparer's Information
Christ The Good Shepherd, Adelanto 2023-2024
2023-2024
User: Teresa Perez (tperez@sbdiocese.org)

Save/Back

Name of Preparer

Title of Preparer

E-mail of Preparer

Explanation of Data (Only if needed to explain discrepancies of data)

Name of person filling out the report

Any notes regarding the report

Annual Stats

Mode: Edit
Annual Stats (Parish)
Christ The Good Shepherd, Adelanto 2023-2024
User: Teresa Perez (tperez@sbdiocese.org)

Save/Back

Number of Paid, Full-Time Professional Ministry Personnel (in addition to priests and deacons)

Paid Ministry Personnel: Includes persons working full-time weekly schedules 35-40 hrs. such as Dir. Of Religious Ed., Youth Minister, RCIA Coordinator, Liturgy Dir., Music Minister, Business Mgr., etc. Please don not include support staff positions such as Secretary, Admin Asst., Bookkeeper, etc.

Brothers

Sisters

Lay

*To explain any discrepancies of data use the "Explanation of data" in "Preparer's Information"

Number of paid fulltime personnel (read description)

Location Information

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

Office of Pastoral Planning.

When finished reviewing click on the slider to mark as reviewed.

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

Appendices

Appendix C

<u>Marriage and Marriage Convalidations</u>

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

1. **Catholic Marriages** - both parties are Catholic.
2. **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

Infant Baptism: Non-baptized people from birth to eleven months of age.

Child Baptism: Non-baptized people between the ages of one year to six years of age.

Baptism Youth: 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.

Baptism Adult: Non-Baptized people, age 18 and older. There must be at least that many adults in RCIA. Baptisms in this age group are only for those in RCIA. 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.

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

First Penance: Catholic Religious Education children who are preparing for First Penance (part of a multi-year program) plus the candidates from RCIA. 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.

Confirmation Youth: Catholic High School Youth who are preparing for Confirmation (usually a multi-year program) plus the youth from RCIA.

Confirmation Adult: 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 RCIA. **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 RCIA, 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 RCIA 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.

RCIC: 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.

RCIA: Rite 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:

Candidates: 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.

Catechumen: All those non baptized people from RCIA 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 RCIA 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 baptized 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

<u>Recognized Baptisms</u>

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	Valid
Amish & Mennonite	Valid
Anglican	Valid
Assembly of God	Valid
Baptist	Valid
Church of the Brethren	Valid
Church of God (COGIC)	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.