For Catholic Schools
Diocese of San Bernardino
July 1, 2018 – June 30, 2019
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General Information

Welcome to the Annual Official Catholic Directory (OCD) Web Form, also known as the “Kenedy” Report. We are asking that the Official Catholic Directory (OCD) form be completed by using the link in the Archives Office website. Please remember that to submit the form, there are two login windows.

The information in the OCD and the SA web forms is used to complete our Annual Official Catholic Directory Report. This is the annual report on the Roman Catholic Church for all of the Dioceses in the United States and their territories. It is used by all dioceses as well as by the United States Catholic Conference of Bishops for a variety of purposes.

The Internal Revenue Services also uses this report to confirm the charitable organization status of those organizations, including parishes and schools that claim tax-exempt status. So the submission of this information is very important to enable you to keep that status.

Introduction

The ParishSOFT Diocesan Catholic Directory Manager (DCM) works seamlessly with the ParishSOFT AIM diocesan suite and church management software to simplify and streamline the process of compiling and submitting data for the Official Catholic Directory (OCD).

The Diocesan Catholic Directory Manager lets you update your OCD listing online and submit your form to the diocese with a click of a button. Once you submit your organization’s OCD report to the diocese, our office reviews the updates on your OCD form and submits the final report for each parish to the Chancellor’s Office. If anything is missing or if there are any questions, we will contact you.

Because this is a Web-based program, no ParishSOFT software is required at the computer level to fill the form. Of course, if your organization is using ParishSOFT software to manage your family and Religious Education data, you can quickly verify student and teacher counts, sacramental statistics, and family census data using the reports provided in your ParishSOFT applications. Also, because it is Web-based, if your parish is not yet “synchronized” with the diocese, it will still work.

About this User Guide

This guidebook documents the tasks that you will complete as you prepare and submit your OCD web form online using ParishSOFT Catholic Directory Manager (CDM). As always, we recommend reading through this manual before opening the site. It will make the task easier.

This symbol will appear when there is something important that we don’t want you to miss.

October 11, 2019 is the deadline to turn in the two reports:
1.) Status Animarum
2.) Official Catholic Directory web form

The data needed is from July 1, 2018 through June 30, 2019.
If you have any questions, we are just a phone call or e-mail away.

PLEASE READ THROUGH THIS USER GUIDE BEFORE WORKING ON THE WEB FORM, ESPECIALLY IF YOU DID NOT ATTEND A DIOCESAN STATISTICS WORKSHOP
Getting Started -

All figures for this year’s report are for Fiscal Year 2018-2019. There are a couple of things that need to be done before you open the form. The first is to be sure that the person that is going to be working on the forms has the necessary Login, password and permissions.

Finding your User Name and Password - Call if don’t have it

You must remember your own password—we do not know it or have a copy at the diocesan pastoral center. If you cannot remember your password, please contact Eric Kuske at ekuske@sbdiocease.org or 909-475-5403 so he can reset your password. He will give you a temporary one that you can change later to something you can remember.

The second thing is if there have been changes to the personnel since last year, to go through your staff names in the Online Staff Management Program (OSMP) and uncheck “Show in Directory” in all the school staff except for the Principal and the Librarian, BEFORE you open the OCD web form.

When you are in the “Edit Staff Record” option, you will see at the bottom the User Preferences section as in the figure below. Please remember to include the proper Prefix (Mr., Mrs., Rev., Dcn., etc.), the middle initial and the proper Suffix. Also, this is where you need to check the “Show in Directory?” option. The “Directory” mentioned here is the Official Catholic Directory. The next option to the right, “If so, Placement in Directory:” would be 20 for a Principal and 21 for a Librarian. (see next page)

Online Staff Management Program

To update the school personnel, you need to go to ParishSOFT Online Staff Management Program (OSMP). If you are not familiar with this program, ParishSOFT has a document located on their website (www.parishsoft.com) click on Resources and then Support, and then the link that says “Visit help.parishsoft.com”. Once you are in the help.parishsoft.com page, click on “Parish Desktop” within the User Guides box, the document is called “Online Staff Manager (version Feb. 2010).” At the end of this User Guide for the OCD you will find a copy of the Online Staff Management Program User guide.

To access the OSMP, you need to do the following:

- Go to the Diocesan home page
- Click on Ministries
- Choose Information Technology Services
- Click on the link to their website within the Contact box
- Once on their website, click on the yellow ParishSOFT button
- Click on the “ParishSOFT Safe Environment Program” link
- Then click on the “Staff Management Login” yellow button
- You will need two login information, the First Login mentioned above and then your user name and password to
ParishSOFT  (NOTE: this second login information is the same you use to login to the Safe Environment Program and to the Official Catholic Directory)

Please keep in mind the following notes as you are using the program:

• When adding a new person to the staff list, search for the person first before adding him/her. By doing this, duplicates will be kept to a minimum.

• If you are adding a new person to the list, add all the needed information, including their home address so that they can be distinguished from other people that may have the same name.

• **We do not keep track of SSN numbers or Driver’s License information.**

• If the person is no longer going to be at your location, click on the Assignment Disabled checkbox and they will no longer show up.

• Under User Preferences the only item that needs to be looked at is the “Show in Directory” checkbox which should only be checked if the person is the Principal or the Librarian. Otherwise, this box needs to be unchecked.

• Check to make sure that Principal or Librarian is added as a position; otherwise they will not show up on the CDM form.

**If there are questions or errors that come up as you are entering in this data, please call ParishSOFT at 1-866-930-4774 and dial 2 for support, or e-mail or call Eric Kuske at the Pastoral Center to resolve the issue before continuing.**

**Opening the Web Form**

To access our Office Website, open your internet browser and copy and paste this link:

https://sites.google.com/site/sbdarchivesoffice/

You could also go to the diocesan website and follow these steps:

1.)  [www.sbdiocese.org](http://www.sbdiocese.org)
2.)  Select the ministries tab – view all offices
3.)  Select the Office of Archives
4.)  On the right hand side click on the website link
5.)  Click on the link to the Official Catholic Directory Web form

**On the left hand side of the website you will find links to the most recent copy of the different user guides.**
Below is an image of our web page. To download the most updated version of this guidebook, click on “Schools Official Catholic Directory User Guide.” Both the User Guides and web forms are available on the website. Click on “Official Catholic Directory Web Form” to open the Web form.

Login Information

The first thing to know is that there are two logins.

First Login: The User Name and password are case sensitive and are as follows:

User Name: sanbernardinouser
Password: SBdio2@!2

Your computer may be part of a domain and the screen that comes up may show something other than “Domain: PARISHSOFT10” Instead it may look something like: SomeDomainName\YourComputerUserName

In this case you will have to click on the option “Use another account” and type the following user name and password:

User Name: aimsync.parishoft.net\sanbernardinouser
Password: SBdio2@!2

The Status Animarum and OCD web forms, as well as the Online Staff Management site require a login before you can access the login page. The login screen may look like the image below, depending on the browser you are using.

We recommend using Google Chrome
First Login window:

Second Login: After the above login is done, the regular login screen will come up where you will type your ParishSOFT User Name and Password. If you cannot remember your user name and/or password, please contact Eric Kuske at ekuske@sbdioce.org or 909-475-5403.

This second login screen looks like the image below. Please notice that it does not have anything to identify it. It looks like a blank screen but it is not. It is the screen to login to the OCD.

https://aimsync.parishsoft.net/sanbernardino/parish/ocdlogon.php

If you have multiple assigned entities that allow you to edit the CDM forms, your browser will display one button for each organization. Click on the button of the form you wish to review.

Once the form is displayed in your browser, you can review and edit your organization’s annual data using the procedures in this user guide.

Please remember that if you are already logged in to the Status Animarum, this screen will not appear for the OCD, it will go straight to the second login screen. If you need assistance, please call Angelica Alba at (909) 475-5143.
HEADER SECTION:

Now that the form is open, notice it has a header and three sections (General Information, Mailing Address and Personnel) plus the Statistics Section. We will go through them one section at a time. The header section is only used when you want to save your work or close the form.

1. First click on “Submit to Diocese” to save your work. Click OK and the form will reappear. It is important to save your work frequently.

Catholic Online Directory Report Manager

This form was produced using ParishSOFT LLC software, and is not affiliated with P.J. Kennedy & Sons or National Register Publishing. The Official Catholic Directory(sm) is published by P.J. Kennedy & Sons in association with National Registry Publishing 121 Chamblin Road, New Providence, NJ 07974

*Kenedy is a trade name of P.J. Kennedy & Sons

September 28:  This is added by the diocese

| Parish Code: SB-0547 | Submit to Diocese | Final Submission to Chancellor |

2. You will get this message window, click OK and the form will then reappear so you can continue working.

3. If you want to stop and continue later, click “Submit to Diocese”, then go to the top of the page and click on the X to close the form in the usual way. Be sure to Log Out if you are going to be away for more than a couple of minutes.

4. When you have entered all of the requested information, review your entries and click on “Submit to Diocese” to save your work. When you are sure the information is correct click on “Final Submission to Chancellor” to close and lock the form. Once you click on this you will not be able to add any additional data to the form. If you after submitting you realize changes need to be made, please call Angelica Alba at 909-475-5143. The next 2 sections are in two columns. Review the information in the left column (last year’s information) and make any corrections in the right column (this year’s information.)

SECTION 1:

In the first section, everything should be correct. “Child of OrgID” only applies to Schools and Missions that are part of a parish. If it is filled in, it is probably correct, we will check it. If it is blank, leave it blank. The “Email Address” is the one from the diocese. The “Diocese Page Number” will be completed at the diocese. If you make any corrections, they will be highlighted in yellow until you save the page.

<table>
<thead>
<tr>
<th>Last Year's Info</th>
<th>Enter/Confirm this Year's Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name: Holy Rosary Academy</td>
<td>Organization Name: Holy Rosary Academy</td>
</tr>
<tr>
<td>Kennedy Organization ID: 162776</td>
<td>Kennedy Organization ID: 162776</td>
</tr>
<tr>
<td>Child of OrgID: 162767</td>
<td>Child of OrgID: 162767 (Use Parent Kennedy Org ID)</td>
</tr>
<tr>
<td>EIN: 95-3298986</td>
<td>EIN: 95-3298986</td>
</tr>
<tr>
<td>Year Founded: 1947</td>
<td>Year Founded: 1947</td>
</tr>
<tr>
<td>Ethnic Affiliation:</td>
<td>Ethnic Affiliation:</td>
</tr>
<tr>
<td>County: San Bernardino</td>
<td>County: San Bernardino</td>
</tr>
<tr>
<td>Email Address: <a href="mailto:holyrosary.oscs@sbdiocece.org">holyrosary.oscs@sbdiocece.org</a></td>
<td>Email Address: <a href="mailto:holyrosary.oscs@sbdiocece.org">holyrosary.oscs@sbdiocece.org</a></td>
</tr>
<tr>
<td>Web Address: <a href="http://www.hracs.org/">http://www.hracs.org/</a></td>
<td>Web Address: <a href="http://www.hracs.org/">http://www.hracs.org/</a></td>
</tr>
<tr>
<td>Cemetery:</td>
<td>Cemetery:</td>
</tr>
<tr>
<td>Diocese Initials: SB</td>
<td>Diocese Page Number:</td>
</tr>
<tr>
<td>Opt out: ✧</td>
<td>Opt out: ✧</td>
</tr>
</tbody>
</table>
SECTION 2:
The second section covers the different Address Types for your school.

Address Types:
If you need to add a new address, click the "Add New Address" button. A new address block will appear and you will need to choose the Address. Choose from the pull-down choices shown below. There are three types of addresses you may use (the other types are for parishes):

1. **Mailing** - not in the choices because it is the default first type shown. It could be the physical address or a PO Box.

2. **School** - the physical location of the school if different from the mailing address.

3. **Office** - If the school office has a different address than either the Mailing Address or the School location.

<table>
<thead>
<tr>
<th>CHOOSE ONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residence</td>
</tr>
<tr>
<td>School</td>
</tr>
<tr>
<td>Department</td>
</tr>
<tr>
<td>Substitution</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

- **Mailing** - is already covered, but may not be correct. If it should be a PO Box, change it and use street or physical address for the office.
- **School** - Select
- **Office** - if located in a separate building from that of the school If Mailing is a PO Box, put Street Address here.
- **Church** - only if it has its own address separate from office address.
- **Convent** - only if parish owns a convent building used as a sisters’ residence.
- **Mission** - only if those that don’t apply should be omitted or read DO NOT USE like the ones below.
- **Chapel** - only if there is a separate chapel building.
- **Station** - do not use.
- **Shrine** - do not use.
- **Department** - do not use. May need to be changed to conform to Substitution / Other below.
SECTION 3:
The third section is for the School’s Personnel. As mentioned earlier, school principals and librarians are the only ones that need to be checked in your Online Staff Management Program (OSMP) so they could be listed on the School web form. Any other names shown on the right column (this year’s information) must be un-checked on the Online Staff Management Program.

Last year’s information is in the left column and any corrections to reflect this year need to be made in the right column. The names included here should reflect the most current personnel changes. This is the only category that is outside of our Fiscal year 2018-2019. Compare both columns and if those on the left column are no longer current, delete or make the necessary changes in the OSMP so the right column has the correct personnel.

If the person you are listing in the right column is new, they will not have a Person ID. Leave it blank, when the Official Catholic Directory comes out next year, they will have been assigned a unique ID.

Looking at the OCD fields to fill the data properly on the OSMP:

Person ID: This should be the person’s ID on the left column. If there is someone new in the school or if it is not filled in on the left column, leave it blank.

Prefix: Rev. (this is the appropriate salutation for priests, please don’t use “Fr.” or any other); Very Rev.; Rev. Msgr.; Dcn.; Sr.; Mr.; Mrs., Ms., etc.

Firstname, M.I. and Lastname: The only time there is a difference is if there is a name that has 2 last names, include both in “Lastname.” Call if you have any questions on this.


Ordination Year: This applies ONLY to priests and deacons. Nobody else should have an Ordination year filled.

Position Held: For a school the only positions that could be listed are the Principal and the Librarian, if there is one.

Home Diocese: Does not apply to Schools.

E-mail: Optional

Please note: This year we won’t be adding or deleting personnel directly in this screen with the buttons below.

Instead, you will be uploading the personnel information from the OSMP with the Reload Personnel Button. Once your school personnel are set up in the OSMP, click in the Reload Personnel button and the principal and librarian (if there is one) will appear. If there is need to edit a person, you can use the “Edit Person” button. Like for example, to add the Person ID that is not showing from the left side screen.
SECTION 4:
The fourth and last section is Parish Statistics. They are the same statistics that we have collected for several years. The Office of Catholic Schools needs a more complete breakdown of students but for this report, just a simple count will do.

The report form says either a calendar or fiscal year are OK, however, for the sake of continuity, we use the fiscal year. It also corresponds more closely with the school year.

**Annual Educational Data:**

The Totals given in this report should cover a TWELVE MONTH PERIOD. You may use statistics projecting to the end of the calendar or fiscal year, whichever is more convenient.

- Total Priests: 0
- Total Scholastics: 0
- Brothers: 0
- Order: 
- Total Sisters: 0
- Order:
- Lay Teachers: 9
- Total Staff: 9
- Consolidated: 
- School Type: Consolidated
- Grade Level: Kindergarten thru 8th
- Number of Elementary School Students: 
- Number of High School Students: 0
- Total Enrollment: 0

**Participating Parishes**

This is referring to other parishes that send students to your school.

**Previous Year's Participating Parishes**

This is referring to other parishes that sent students to your school last year.

For this report, most of our schools are parochial. Use the pull down to select the appropriate school type: Consolidated, Diocesan, Parochial or Private.

For grade level, type the grades that apply to your school.

After checking your figures and information, you are ready for “Final Submission to Chancellor” (See next page). Thank you for your assistance with the Annual Official Catholic Directory School Data.
SUMISSION OF FORM TO THE DIOCESE

Once you have reviewed the accuracy of the information and completed the form(s) you may submit to the diocese. Go to the top of the form, the Header Section, and then follow these steps:

1. Click on “Submit to Diocese” to save your work.

   ! If you do not, you will lose your information

Catholic Online Directory Report Manager

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*Kenedy is a trade name of P.J. Kennedy & Sons

September 1

This is added by the diocese

| Parish Code: SB-0561 | Submit to Diocese | Final Submission to Chancellor |

2. This window appears over the screen. Click OK and it disappears.

3. The last step is to check off “Final Submission to Chancellor.”

4. The following window will open. Click OK.

5. This Window will appear again. Click on OK for it to go away. To close form click on the X.

This completes the Official Catholic Directory web form for your school for this year. Thank you for your assistance and cooperation in submitting this important information by the due date October 11th, 2019.

It is important to meet the deadline because it takes time to collect and check the reports from each school, parish, mission, and institution. When the deadline is met, it gives us time to make corrections. Your submissions are only a part of multiple reports our office must complete prior to sending the final report to the Publishers of the Official Catholic Directory. Your hard work and dedication is very much appreciated.

We hope this guide has been helpful.
Please call us with questions, comments or suggestions for improvements.

Angelica Alba
Statistical Researcher
(909) 475-5143
aalba@sbdiocease.org

V-July 23, 2019