ParishSOFT reference sheet for the Madison Diocese

Annual Statistical Report

Prior to filling out the Statistical report, you may wish to print out a copy of what you will need to fill in on the Diocesan Data Hub (at this location). After logging in, select your parish name by clicking the Organization button in the upper left side of the main header (unless it already shows). In the “I want to work with” area in the same main header, select Parish Statistics. Then within the Parish Statistics screen click on the upper right side, where it says: “I want to” and select: View All Sections (Printable). After that screen pulls up, click on the printer icon on the far right to print off this page to enable you to have a reference for what to fill in on the website. **In order to expedite searching for statistical numbers, this reference sheet will not include custom IQ reports.

Prior to Pulling Numbers: Check for Registered Families marked in error

Prior to filling out the Parish Statistical report, first check for any families that are marked in err. Over the years, we have found that occasionally users forget to “un-check” the Registration status in ParishSOFT on their families when they stop being parishioners. Registration indicates a current parish family. When the family moves, stops responding to us, has all their members deceased, they are no longer Registered. Registered/Active should be for your parish families. All other families in the system should be marked as Un-Registered/Inactive, Un-Registered/Contributor only, etc.

Parish Statistics are calculated on the number of Registered families, so we’ll check for any mismarked families through the steps below. First, searching through the filter for any families where the Family Group implies that the family should NOT be “Registered”.

a. Go to the Family Directory < Family List area, as seen below. Click on the Filter, indicated below:

![Family Directory Screen](image)

b. Search for Registered/Fam Deceased: (these families should NOT have the registration checked as the Family Group: Fam Deceased indicates all members of the family are deceased – Therefore, they are no longer Registered.). Then click Apply.
If your parish has families accidentally marked this way, you’ll see them listed now in the Family List, as seen below:

Click on each family, to see their details and UN-CHECK the Registration Status box highlighted below. (Also, review the Send Contrib. Env. box and the Envelope number, so they can correctly reflect the family status)
c. Next, search for any other families that are Registered but do NOT have a family group of Active. These should be the following combinations: Registered/Contributor, Registered/Inactive, Registered/Moved, Registered/Religious Ed Only, Registered/Sacrament Only, Registered/School Only, Registered/Visitor, etc.

d. Check all families that are marked Unregistered/Active to see if they should be changed to Unregistered/Inactive. Families that are Unregistered/Active COULD be ones that have moved from your parish. (you would have received a notification, as seen below, on the main screen when you log in. If you haven’t been reviewing these Notifications, please double check the status of these families)

After filtering on Unregistered/Active, you will may see a listing of families. To double check where the families are registered, scroll over to the right to the Organization of Registration box. If it still list your parish, you are OK. If any of them list another parish, open up the family to verify if you should have them as Active or change them to Inactive.

Pulling Data for the Parish Statistical Report for the Diocese:

Parishioner Counts

Number of households:
After logging into ParishSOFT, click on Family Directory then the Reports area in the blue banner beneath the main tab. Your screen should appear similar to below:
Under the **Report Type** on the left side, click on **Statistics** and under the **Report** area, click on **Parish Statistics**, as seen below:

Next, your screen will be similar to below, on the right side. Add the following numbers to find the correct information for the statistics listed below.

Please note, the screen above shows all Registered families, regardless of their status. Therefore if you do have any families accidentally marked Registered/Contributor, Registered/Fam Deceased, etc. those families will inflate the number of families reported on this screen.

**Married couples where both are Catholic:**
Add up the numbers of **Catholic Couples** under the field **Households without Children** and **Households with Children**. (seen highlighted below) In the example below, it would be: 373 + 157 = 530
Mixed religion couples:
Add up the numbers of **Interfaith Couples** listed under the field **Households without Children** and **Households with Children**. (seen highlighted below) In the example below, it would be: 80 + 51 = 131

<table>
<thead>
<tr>
<th>Parish Statistics</th>
<th>Registered</th>
<th>Un Registered</th>
<th>Not Specified</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Household Summary</strong></td>
<td>1186</td>
<td>2530</td>
<td>0</td>
<td>3775</td>
</tr>
<tr>
<td><strong>Registered Household Statistics</strong></td>
<td></td>
<td></td>
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<tr>
<td><strong>Households Without Children</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>494</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Catholic Couples</td>
<td>373</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Interfaith Couples</td>
<td>80</td>
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<tr>
<td><strong>Households With Children</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>31</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Catholic Couples</td>
<td>157</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interfaith Couples</td>
<td>51</td>
<td></td>
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Widowed or Single persons:
Add up the numbers of **Single** people listed under the field **Households without Children** and **Households with Children**. In the example above, it would be: 494 + 31 = 525

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</tr>
<tr>
<td>Single</td>
<td>526</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Catholic Couples</td>
<td>373</td>
<td></td>
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Number of adult individuals in parish:
Go to the **Family Directory < Member List**. From here, we will use the Filter to find the following counts. (see filter indicated below)
Total number of adults age 18 through 40

After clicking on filter, set it to the following:

Under the Advanced Options, select **Age Range** and then fill in 18-40 for the range, as seen below:

Finally, click **Apply** to see the number of Registered/Active members that are in this age range. Your screen will refresh, similar to below. Look in the bottom left corner to find out the number of members in this age range. In the screen shot below, there are 302 members in the 18 to 40 age range in this parish, within the Registered families.
Total number of adults 41 through 64
Click the Filter icon again, and adjust the age to 41 through 64 and then select Apply.

Total number of adults 65 and above
Click the Filter icon again, and adjust the age to 65 through 130 and then select Apply.

Number of children in the parish:
Children ages birth through 5. Count of Girls, Count of Boys.
On the Member List, again select the Filter and set your filters to the same as what is seen below, for the Girls:

And under the Advanced Options:
Your overall count of Girls, in this age range, will show as seen below, in the bottom left side. 8 in the example below.

For the Boys ages 0-5, click your Filter again and switch the Gender to Male, as seen below:

Filter

Please enter and or select the criteria for searching. Only entered and selected values will be applied to by the filter. NOTE, clear any values from the 'Search' box, or change the 'Quick filter' dropdowns if you do not want these additional constraints.

Children ages 6 through 13 Count of Girls, Count of Boys.

Continue as seen above with the 0-5 age range, filtering for your different age range and gender.
**Children ages 14 through 17 Count of Girls, Count of Boys.**
Continue as seen above with the 0-5 age range, filtering for your different age range and gender.

**Other Children (Unknown Members not counted above- Members without Birthdates)**
Click on the Member Filter icon again and set the filter, so it is similar to the one below:

**Filter**

Please enter and or select the criteria for searching. Only entered and selected values will be applied to by the filter. NOTE, clear any value Search box, or chance the ‘Quick filter’ dropdowns if you do not want these additional constraints:

- **Membership Status:** Registered
- **Family Group:** Any Group
- **Member Status:** Active
- **Member Type:** Any
- **First Language:** Any
- **Ethnicity:** Any

**Other Children (Unknown Members not counted above- Members without Birthdates)**
Click on the Member Filter icon again and set the filter, so it is similar to the one below:

And under the **Advanced Options** in the Filter we have no age range, to select all members:

**Advanced Options**

- **Career Type:** Any
- **Marital Status:** (Any)
- **Religion:** (Any)
- **School:** (Any)
- **Education Level:** (Any)
- **Grad Year:** (Any)
- **Wedding Anniversary:**
- **Wedding Month:**

After clicking **Apply**, you see the overall count of all registered/active members in your parish. Next, go to the column titled: **Birth Date** and click exactly where the words of the column are located. This will sort the column, by the Birth date of the individuals, showing those with no birthdate first, as seen below.
Note how many records are per page, and count how many records, prior to the page where they show up. In the example above, on page 7 we see the records with birthdates start. So, we have 6 full pages (10 records each) plus the records on the 7th page. In the example below, we have 68 member records with no Date of Birth.

Finally, to isolate just the children:
Click again the Member Filter and on the Member Type, select: Son to find all the boys. Record that number and add it to the overall boy count between 0-18. To find just the girls, select the Filter again and select for the Member Type: Daughter. Record that count also, and add the numbers to your overall girl counts between 0-18 also.

The overall Adults with unknown birthdates are: the total overall minus the sons and daughters. In the above example, there were 68 overall members without birthdates, minus 9 Sons without birthdates and 8 daughters without birthdates. That leaves 51 overall adults without birthdates, which we divide up and add to our overall count of adults 18+. Please add the Unknown birthdate members to your overall adult counts above for accuracy.

Sacramental Counts

*If you choose to get the sacramental counts directly from the Sacramental registers, you do not need to follow any of the steps below to look for the information in ParishSOFT.

Number of receptions into the Church: Adults received by profession of faith (previously baptized)
Go to the **Family Directory < Reports** area in the top blue banner. From there select **Statistics** and **Kenedy Directory**. Finally, fill in the date range for the year you wish to report on, as seen below, and click the **Refresh** icon, highlighted in yellow below.

Numbers for the record the count for the Adults received in by Profession of Faith, as seen under the **Received into Full Communion** area, seen below:
Baptisms: Infants under 1, Children 1-6, Minors 7-17 and Adults 18+

In this same screen, click on the number to the left of **Infant Baptisms** as seen below, to see the break down of the ages of the infants.

Your screen will be similar to below: Scroll to the right, till you see the **Age at Baptism** column, then click on the exact words, to sort the report by that column. Next, count the number of baptisms below 1 yr old, and between 1-6.

Baptisms between 7-17 and 18+ are shown back on the main Kenedy Directory report in ParishSOFT, listed as Minor Baptisms, and Adult Baptisms correspondingly, as seen below:
Number of Confirmations: High School and Adults

To find the age of the individual when they were confirmed, go to the Family Directory < Sacraments < Add/Edit Sacrament screen. Select **Confirmation** for the Sacrament, then enter in the **Completed On** date range and click **Search**. Click on the column, where it says Parish Info and sort it by parish name, your parish should be grouped together. Finally, review the Age of the member to decide if they are High School or Adults (18+)

Number of Marriages: Catholic or Mixed

Go back to **Family Directory** tab, then the **Reports** area. Under the reports, we will go to the **Statistics** report, then the **Kenedy Statistics**, fill in the appropriate age range, as seen below. After that, click the “refresh” button, (on right upper side, highlighted below).

Marriages that are **Catholic** and **Mixed/Interfaith** are listed below:
Number of Deaths: Children under 7, Minors 7-17, Adults 18+
Go to the Family Directory then Reports, from there, select Sacrament for the Report Type and Funeral for the Report. Enter in the Date Range, make sure the report is in Condensed format, then click the button: Click Here to View Report

From this report, a duplicate of what should be in the Sacramental Registry you can total up the number of deaths per age range described.
Review the same report for those buried in a Catholic Cemetery, and a Non Catholic Cemetery.

To find those that were Cremations, in ParishSOFT, go to the

**Number of Holy Communions: (including outreach)**

- **Annual Total**: Calculate this by adding the Weekend Average to the 5–day weekday Average, and then multiplying by 52 for the number of weeks in a typical year. Add any other communions that are distributed outside of mass, on average at nursing homes, etc, if they are not already added into your totals below.

- **Weekend Average**: Calculate based off of the October counts in the Diocesan Data Hub. Add up the weekend masses averages, to determine one weekend average.

- **5-day weekday Average**: Calculate based off of the October counts via the Diocesan data hub. Add up all the averages for the weekday mass to calculate the one weekday average.

- **First Communions**: Based off of the number of First Holy Communicants. To find this number, go to the Family Directory < Reports. Then select Statistics < Kenedy Statistics, and fill in the date range and click the recalculate button in the upper right side. The First Communions are highlighted as seen below.
Ministry Counts
The following sections will only be correct if Religious Education information is kept in ParishSOFT.

Number of Children in Religious Education program: Grade Pre-K -5, Girls and Boys

On the main Religious Ed screen in ParishSOFT select the Classes tab, from that main screen, you should see a listing of all students, similar to the screen below. To know that it’s all of the current year, verify that the year is showing, as seen in the indication below:

Make sure to select your correct Term, as seen in the image below, and on the View By area click on Grade to see the classes associated to each grade, as seen below.

Next, in the areas below your Class List selection, you will checkmark to select all your K-5 grades first.
After clicking View, as seen circled above, you will see the listing of students that are in K-5 on the right side. Next, the area that says M/F to group the list according to Male/Female, then click the CSV button as seen below.

This will send the list to Excel, please open it, so you can easily count the different males/females in the classes. As seen below, if you highlight the cells, typically Excel will count them in the bottom right corner. (marked with the arrow to show the count)
Grade 6-8, Girls and Boys
Follow the same process as above, but selecting the grades from 6 to 8 and then exporting to count the girls vs boys.

Grade 9-12, Girls and Boys
Follow the same process as above, but selecting the grades from 9 to 12 and then exporting to count the girls vs boys.

Adults in Faith formation
Follow the same process as above, but selecting the grades from 9 to 12 and then exporting to count the girls vs boys.

Number of Adults in the Faith Formation classes:
Adults Age 18 -40: Use the same spreadsheet as above, but sort the spreadsheet via the age, and then highlight only the 18-40 on the adults. (After clicking on Sort & Filter, select Advanced Sort, then select Age, as seen in the image below and sort from largest to smallest)

Adults Ages 41-64: Same as above but highlighting the 41-64 yr olds.
Adults Ages 65 and above: Same as above while counting the 65 and older adults.
Staff and Volunteer Counts

The following two sections may be stored in ParishSOFT:

Number of religious residing in parish: Priests, Sisters, Brothers and Others

Priests, Religious, and Sisters may be listed in two ways in your parish database.

A. In the Family Group: Clergy/Religious

If they are listed as a family this way, in the main Family Directory module, then the Members List area in blue. On the main member area, click the filter icon, then select the Membership Status: Registered, and FamGroup: Clergy. Click Apply then review your results to see if these members are listed in your parish. Note the records number in the bottom left corner for the count of these members:

B. Through Career Types

If you have entered in clergy by a designation in their member’s Career Type, then find them via the following report.

Click on Family Directory < Members List then click on the Filter icon. When you’re in the filter screen, click on the Advanced Options then click under Career Type and select the Clergy designation. If you know that these members are also listed as “active” then also go up and under the Member Status area and select Active.

You will see the results after clicking Apply.
Number of volunteers in Parish:
   Extraordinary Ministers of Holy Communion
   Pastoral Care
   Religious Ed
   At Liturgies
   Others
   Total Volunteers

This information is typically entered into the Ministry Scheduler area in ParishSOFT. Go to the Ministry Scheduler < Reports tab and under the Select Report area on the left side, select Minister List under the Select Filtering Options, select your ministry Group, then your Ministry. (See example below) Then click the button labeled: Click here to View Reports.

The report will ONLY show one member, per ministry, even if the person signed up for more than one Ministry Event. Compile each of the numbers under your “ministry” first by looking at the last page of the report for the overall number.
**For an overall “total” count of all volunteers (or for a count of volunteers in a specific group) follow the procedure below:

In this same Ministry Reports area seen above, under the Minister list, under the Select Filtering Options seen below, clicking the “all” for the group, ministry, and event. Under the Select Sorting Options, click Last Name. (as seen below)

Generate the report, and your popup will show all volunteers, with one occurrence of them for each ministry:
Note how in the listing above, Patricia Andrews is listed twice. Since we only want a single count of each volunteer, we’ll next take and on the upper right side of the screen, select the CSV from the dropdown where it is listing PDF. Then click the Save icon to the left of that area, seen below:

In the bottom of the ParishSOFT screen, you will see a box asking what you want to do with the file. Click Open.
An Excel document should open with a listing of your ministers, similar to below. Highlight the first three rows on the top, right click and select delete, so you have a spreadsheet similar to the one seen below:

![Spreadsheet Image]

Click on the small grey box between the rows of letters and columns, as seen above to highlight the whole sheet.

![Highlighted Spreadsheet Image]

Click on the Data tab, indicated at the top in the picture above, then the Remove Duplicates icon, seen above. You will see a popup, similar to the one below. Click the checkmark in front of My data has headers.

![Remove Duplicates Popup]

Then click Unselect All to remove all the checkmarks. Next, click on only the boxes in front of Last Name and First Name and Phone.
Next, click **OK** and your spreadsheet will remove any members who are duplicate. You will get a message of how many duplicates removed, as seen below:

Next, in your spreadsheet, scroll down to the bottom and you will see the overall count of volunteers via the “lines” in the report minus one for your header. In the example below, we have 433 volunteers signed up doing all different ministries at the parish. (minus the header at the top)

**Number of Catechists**

If you go to the **Religious Ed < Leaders** area in ParishSOFT, verify the **Term** you are on, then review the total number of Catechists that is seen in the middle section of the screen: