

Help Notes for Completing Chancery Forms

You should receive all necessary forms on this list either through the mail or during Presbyterate Days, with the exception of the last one (Annual Civil Corporation Form, which is sent directly to the diocese). If you don't receive your *Official Catholic Directory* forms directly by the end of September, contact the Chancellor's office to get a copy.

Each parish should keep a copy of each year's statistical, financial and corporate forms for its files.

1. Official Catholic Directory (OCD) – (Formerly Blue Form) ONLINE

The publisher of the *Official Catholic Directory* sends these forms to be updated **directly** to your parish, school, and other institution either in paper form or an email. This information must be submitted on time in order for your parish, school or institution to maintain its tax-exempt status.

Numbers should be taken from October 1st of last year to October 1st of the current year. These statistics are collected for EACH INDIVIDUAL PARISH. Clusters sharing programs **NEED TO SEPARATE THE NUMBERS and report the appropriate numbers for **EACH INDIVIDUAL PARISH.****

To begin:

- **Log-in** to www.ocdedits.com
- Enter your **Username** and **Password**
- **Entity Search:** enter your institution's OCD ID number, click Search
 - Parishes on Indian Reservations have two listings: one listing is the parish listing, where all statistics are recorded; the other listing is designated as an "Indian Mission", where no stats are entered.
 - Newman Centers also have two entries: one for the parish, where all statistics are recorded; the other listing is designated as "Campus Ministry / Newman Center", where only the number of students is recorded (and no other stats).
- **Find your Institution** and click on it to open the information pages

Screen #1: Basic Info: verify information and make corrections

- If parishes are clustered, enter that information as a Note.
- For the main parish, enter: "Also serves [name of TOWN]". Separate multiple parishes with a comma.
- For parishes served from another parish, enter: "Served from [name of TOWN]".

Screen #2 : Organization Contact Info

- **Physical Address:**
 - This is the **physical** location of the church. If parishes are clustered, do **not** enter the address of the main parish.
- **Mailing Address:**
 - This is the **mailing** address; in cases of clustered parishes, it may be the address of the main parish.

KEEP THESE NOTES IN YOUR FILES FOR FUTURE REFERENCE

- **Phone Numbers:**
 - At least one phone number must be entered. If the parish is part of a cluster and does not have a phone number of its own, enter the phone number of the main parish.
- **Email Addresses:**
 - At least one e-mail address must be entered. If the parish is part of a cluster and does not have an e-mail address, enter the e-mail address of the main parish.
 - Please complete the following steps if a parish / parish cluster does not have an e-mail address:
 - Enter a fake address, such as “**no-email@no-email.com**” ...
 - ... **AND** in the Notes field indicate that it is not valid, such as “Parish does not have an e-mail address. E-mail address entered is not valid.”
- **Web Address:** (optional)

Screen #3: People/Positions

- At least one person must be entered
 - For parishes, you **MUST** enter the priest canonically appointed to administer the parish.
 - Enter all active priests and deacons assigned to the parish, including those in residence. Do not enter retired clergy (bishop, priests or deacons).
 - Do **not** enter the parish secretary, custodian or any other person who is not ordained.
- Person
 - Search for and select from a list
 - **Contact the Chancellor’s Office of the Diocese of Fargo if a cleric (priest or deacon) is not listed**
- **Necrology:** SKIP

Screen #4: Catechesis/Religious Program/DRE

- This section is for contact information and statistics about your Parish’s Catechesis Religious Programs [CRP]
- **Every parish that has a Religious Education Program must enter a CRP.**
 - Click on the name to open the page
 - Verify information
 - DRE (Director of Religious Education). In some parishes, this is called the “Religious Education Coordinator” or “Faith Formation Coordinator”.
 - If no layperson has this role, enter the pastor’s name.
 - Kindergarten Enrollment (include Pre-K)
 - You must provide values for all enrollment fields. If a required field does not apply to your program, enter “0”. Enter only digits. Do not enter words or any other text.
 - Enrollment is for the current school year.
 - Elementary School (1-8) AND High School (9-12) Enrollment (see notes for “Kindergarten”)
 - Adult Enrollment
 - If there is more than one program, enter the total number of adults in all programs. Include those enrolled in programs held during the spring or summer (that is, new programs since the previous fall).

Screen #5: Mission: SKIP, every parish in the Diocese of Fargo is a Parish.

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Screen #6: Other Sub Orgs: SKIP

- DO NOT add schools, convents or cemeteries here. They are separate entities.

Screen #7: Statistical Overview

- **Statistics are based on a 12 month period, from October to October**
 - Enter values as numbers. Do not use words or include any other text. You may use decimals. For example, to enter a half an hour of Adoration, enter “0.5”.
 - You must provide values for all required statistics. If a required statistic does not apply, enter “0”.
 - To enter a value, click on “Edit”, enter a value, and click “OK”
 - Brothers and Sisters
 - Refers to religious who are staff members, that is, those doing ministerial work in the parish. **Do not include the number of religious vocations from the parish.**
 - Lay Staff
 - **This is the number of full-time, paid staff** (i.e., 40 hours/week)
 - Do not include part-time staff or volunteers.
 - Baptisms – note the ages in parenthesis
 - Received into Full Communion - (RCIA Candidates): specify number
DO NOT count these in other sacramental numbers
 - Deaths: this is parish specific, that is, the number of registered parishioner deaths
 - While there are many unique situations that happen when it comes to funerals, for this particular form, please only report the number of registered parishioner’s deaths. If you have questions feel free to call the Chancellor’s office.

Screen #8: OCD Contact Information

- The “OCD Contact” is the contact person in the parish who can answer issues related to your OCD listing, which the Chancellor’s Office can call if there are questions. This is the pastor or the person completing the form.

Screen #9: USCCB and Diocesan Certification

- One of the boxes on this page **MUST** be clicked in order to complete the form.
- ***If anything other than the first box applies (“has not made any changes”), please contact the Chancellor’s Office.***

Save, Review and Submit

- Click “Save Changes”
- Click “Review Submission”
 - Review entered information and make corrections.
 - For future reference, you should print a copy of the report for your files.
 - Once all the information has been entered and is verified, click “Submit Entity”.
 - Once “Submit Entity” is clicked, you cannot make any changes or additions.
 - You are not done until you have clicked the “Submit Entity” button.
- Order an OCD? This is optional. It costs over \$200 per book.

Logout

2. Parish Necrology List – Purple Form

Names should be taken from October 1st of last year to October 1st of the current year.

SIMPLY check the listed names against your death records for the past year. Make any corrections and/or additions necessary, and return this form **no later than October 21st**. These are the names which are included in the list of faithful departed in the November *New Earth*, so the living faithful can pray for them. Pastorally, IT IS IMPORTANT that you complete and return this form. Your parishioners will be looking for the names of those who have passed.

3. EMHC Renewals – Turquoise Form

SIMPLY check and initial the EMHCs on the list whom you would like to have permission renewed for another 3 years. If you have parishioners who are new to this ministry, they must be submitted for approval with the New EMHC Request Form. **DO NOT WRITE** new names on this form.

4. Parish Board – Yellow Form

Terminology:

Parish Finance Council Secretary = Corporate Lay Secretary

Parish Finance Council Chairperson = Corporate Lay Treasurer.

Send completed form and check, made out to the “Diocese of Fargo,” to the Chancellor’s office.

REMEMBER TO INCLUDE THE \$10.00 FILING FEE
FOR THE NORTH DAKOTA SECRETARY OF STATE.

5. Status Animarum - Brown Form

Numbers should be taken from October 1st of last year to October 1st of the current year.

IN CONJUNCTION WITH THE OFFICIAL CATHOLIC DIRECTORY this report helps to give a more complete statistical picture of EACH parish. It requires some of the same numbers you used in the OCD but **categorized differently**. It is helpful to have a copy of your OCD form handy while completing this form so the total numbers in the end match.

- **Fill out a separate form for EACH parish.**
- **Sacraments:** “Infant Baptisms” category from the OCD is split in two (under 1 and 1-7)
- **School Education:** is a breakdown of all the children and youth registered in **each PARISH**. Take the TOTAL NUMBER of children IN THE PARISH and put them in the education categories listed.
- **Parish Religious Education:** (*Pre-school is one year before Kindergarden*). These numbers should include only the participants and are a break down of the same numbers you reported on the OCD.
 - **Pre-6; 7-8; 9-12**
 - IF parish clusters share a Religious Education program...the numbers must be separated for each individual parish.
 - **% = Religious Education Total ÷ Public School Total** (move point two spaces to the right...this is the % number)
- Mass times are published on the diocesan web site. If you have a rotating schedule, do your best.

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- The Parish organizations section is used to track the efforts of lay groups within the parish. Please list the various names of groups and total number of members involved.

6. October Weekend Mass Census – Pink Form

This form is turned in to the Dean each year, who then passes it along to the Chancellor's office.

- **Number of registered parishioners – ALL (Catholic and Non-Catholic)**
(NOTE: this should be equal to or a larger than your OCD number of individuals)
 - **Count the TOTAL number**
 - **Count the number of males and females** – these two numbers should EQUAL the TOTAL number.
 - **Count or estimate the age breakdown** as closely as possible – these three numbers should EQUAL the TOTAL number (If you are able to actually count all age categories, that is fine also.)

7. Parish Marriage Records – Green Form

Send this form WITH YOUR COMPLETED marriage files. All completed marriage files are archived in the Chancery in this diocese. Since these records are stored by year, we are asking for them by January 31st. **Please be sure to check that all notifications of baptism (Form F) have been received and/or noted** before sending your completed files.

- If any dispensations were granted, but the wedding was cancelled, please return the dispensations with a note.
- If a parish/mission did not have any marriages over the past year, please fill in the Marriage Records form to this effect.

8. Parish Financial Reports

All parishes are required to be on the *ParishSoft ConnectNow* accounting system. We will begin storing these reports electronically from now on, so the preferred method for delivery is PDF via email.

- After closing the books on your calendar year, complete and send in:
 1. **Annual Financial Reporting to the Bishop form (must be signed** by the pastor and parish finance council members.) to the Finance Office by one of the following methods:
 - a. Scan and email it to tamara.splonskowski@fargodiocese.org (*preferred method*)
 - b. Mail a hard copy to the attention of the Chancellor's Office
 2. Financial Reports - Save both the **Statement of Financial Position** and **Statement of Activities** reports from the *ParishSoft ConnectNow* system to a PDF file. These reports must include all parish activity. Email these two PDF's to the Chancellor's Office (tamara.splonskowski@fargodiocese.org)

THESE FORMS ARE **DUE JANUARY 31st** UNLESS YOUR PARISH HAS A JUNE 30th FISCAL YEAR-END, THEN THE DUE DATE IS **JULY 31st**.

9. Annual Civil Corporation Reporting Form

If you are wondering where this is, this is a good thing. Your parish should **NOT** receive this form. It is submitted directly by the Chancellor's office to the state of North Dakota. If the form comes to your parish, please mail it to the Chancery.

We file each year with the North Dakota Secretary of State for your parish's civil corporation. The \$10.00 fee for this is sent along with your **Notification Form** for the **Parish Board**.