

## **Help Notes for Completing Chancery Forms**

You should receive all necessary forms on this list either through the mail or from Presbyterate days with the exception of the last one. 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.*

- **Official Catholic Directory (OCD) - Blue Form**

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

The Official Catholic Directory office sends these forms to be updated **directly** to your parishes, schools, and other institutions. This form must be completed and turned in on time in order for your parish/school/institution to maintain its tax-exempt status.

**Your completed forms are sent to the Diocesan Chancellor's Office.** The Chancellor's Office transfers the information onto a specific form and sends the information into the Official Catholic Directory office. The forms you fill out are kept in our Diocesan records for future reference.

**First Page:**

- **Parish Code:** This is a code that their office has assigned for their use
- **Please return by:** This is the date by which this completed form needs to be sent to the Chancellor's Office. See the address below the date.
- **Your present listing:** This is the information that is currently published in the OCD. If there are any changes make them in the right hand column.
- **Person ID** a number assigned by their office for their use.
- **In Residence:** this is to be checked yes ONLY if a retired priest is in residence.

**Next Page(s):**

- Make corrections and additions for the clergy currently present at your parish.
- **Catechesis/Religious Info - Enrollments:** This is the number of students in your parish Religious Education program – NOT THE CATHOLIC SCHOOL. If you have a Catholic School, there will be A SEPARATE SECTION for this information.
  - These numbers should include only the participants. **Please report the numbers according to the formula below.** Pre-school is one year before Kindergarten.
  - If your program has not started for the new school year do your best to approximate from last year's participating numbers.
    - Elementary = Pre-8*
    - High school = 9-12*
  - **IF parish clusters share a Religious Education program....**the numbers must be separated for each individual parish.
    - Missions: NA (Each individual parish in a cluster has a separate form to fill out.)
  - Additional Addresses: NA
  - Sales: NA

## Last Page: Fill out separately FOR EACH PARISH

- **Statistical Overview:** These numbers **must** be completed in order for the form to be accepted.
- **Paid Ministry Personnel** - READ the descriptions for this section! Many have not been reporting their Full-Time staff properly.
- **Vital Statistics** – *This is based on a 12 month period from October to October.*
  - Infant and Minor Baptisms – count only those baptisms that are registered in your parish sacramental register for the 12 month period asked for.
  - Adult Baptisms (RCIA Catechumens): specific number (do not count these in other sacramental numbers below)
  - Received into Full Communion (RCIA Candidates): specific number (do not count these in other sacramental numbers below)
  - Total First Communions: specific number for EACH Parish (the word *TOTAL* is confusing. Do not count RCIA)
  - Total Confirmations: specific for EACH Parish (the word *TOTAL* is confusing. Do not count RCIA)
  - Number of REGISTERED households
  - Estimated number of individual CATHOLICS
  - Deaths: Parish specific = Number of Registered Parishioner deaths
    - While there are many unique situations that happen when it comes to funerals, for this particular form, please stick to the number of registered parishioner's deaths. If you have questions feel free to call the Chancellor's office.
  - Be sure to **Sign and date** the bottom before sending the form to the Chancellor's Office.

- **Status Animarum - Brown Form**

Numbers should be taken from October 1<sup>st</sup> of last year to October 1<sup>st</sup> 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 your % number)
- Mass times are used on the Web Site. If you have a strange rotating schedule, do your best.
- 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.

- **Parish Necrology List – Purple Form**

**Names should be taken from October 1<sup>st</sup> of last year to October 1<sup>st</sup> 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 21<sup>st</sup>**. This is how the names are gathered for inclusion 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.

- **EMHC Renewals – Turquoise Form**

**SIMPLY** check 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 REQUEST form. DO NOT WRITE new names on this form.

- **Parish Board – Yellow Form**

Complete according to the new guidelines from 2007:

***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.

- **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.)

- **Parish Financial Reports – *New Process***

All parishes have now been required to be on the *ParishSoft ConnectNow* accounting system for at least one complete year. 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*** (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 [scott.hoselton@fargodiocese.org](mailto:scott.hoselton@fargodiocese.org) (*preferred method*)
- b. Mail a hard copy to the attention of the Finance 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 the two PDF's to the Finance Office ( [scott.hoselton@fargodiocese.org](mailto:scott.hoselton@fargodiocese.org) )

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

- **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 31<sup>st</sup>. **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.

- **Annual Civil Corporation Reporting Form**

If you are wondering where this is, this is a good thing. Your parish should **NOT** receive this form at all. 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**.