

ParishStaq Reference sheet for Diocese of Madison Parish Statistic Report

Please use the following references from ParishStaq to compile information for the following **Parishioner Counts** needed for the Diocesan Parish Statistic Report. This document will assist in finding data for the areas below,

Parishioner Counts

All fields required

Number of households...

Married couples where both are Catholics

Mixed religion couples

Widowed or single persons

Total number of households 0

Number of adult individuals...

These are estimates. ☐

Adults ages 18 through 40

Adults ages 41 through 64

Adults ages 65 and above

Total number of adults 0

and also the following children's counts:

Number of children in the parish...

These are estimates. ☐

	Girls	Boys	Total
Children ages birth through 5	<input type="text"/>	<input type="text"/>	0
Children ages 6 through 13	<input type="text"/>	<input type="text"/>	0
Children ages 14 through 17	<input type="text"/>	<input type="text"/>	0
Other children (unknown and not accounted for above)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total number of children	0	0	0
Total number of parishioners in the parish:	0	0	0

- 1) First login on the ChMS tool and set your Campus in the upper left corner to the campus you wish to report on.
- 2) Verify the overall Registered family count by going to **People < People Search**. Click the **Reset** button, indicated below, so the search is ONLY for the Campus in which statistics will be run and that it alone shows on the **Campus Filter**.

St. Thomas Aquinas - Madison

Home

People Search

SAVED SEARCHES

< 3 FILTERS 6 COLUMNS

SAVE SEARCH

CAMPUS FILTER

St. Thomas Aquinas...

RESET HIDE

APPLY

- 3) Verify the **Overall Registered Household count**. (Married, Single, etc) by setting the **Display in Results** to only show the **Primary Contact in their family** and on the **Refine by** list to **ONLY** show the **Active Profiles**.

Next, apply a filter below this selection area by clicking the **Choose** area. Search for and select **Membership Type** and set to **IS Registered**:

Next, above all the search settings and filters click the **Apply** button to generate the search. Each search will need to be applied and this area can be referenced throughout this document.

In essence, this first search is a list of Primary Individuals that are Active where the status is Registered and the “family/household” is on your campus. There is only one member/family listed per this search, in essence giving us a total household count.

Search results for a Registered total household count for this campus will display on the upper right side of the screen, as seen below. Please record this total number for this parish/campus as you will reference it in later steps.

(If the overall Registered count is off, please troubleshoot this with Parish Technology at: parishtech@madisondiocese.org)

- 4) In order to accurately collect and count married or single members, we must check first for any Primary or Spouses in a family listing that is missing a **Marital Status** otherwise they won't be included on this count. To find these individuals, under the **Display in Results** area, select **ONLY** the **People matched in the Search**.

Next, under the apply filters area, click the **+ Filter** to add in a second filter. Search and select **Family Position IS** and then select both **Primary** and **Spouse**.

Click **+ Filter** again and add in **Marital Status** and that it **IS NOT SET**. The filters should appear similar to what is shown to the right.

Click again at the top of the searching area to **Apply** the search and check for the overall count of members matching this criteria.

From the list, edit every individual from within their record and fill in their Marital Status, which is located under the **About** tab and then under the Birthdate area.

If you have a large number of individuals showing in your search then first change all that are married (perhaps seen by changing your results to see the Family Mailing Name column) and then contact the Diocese about applying a bulk change to all the rest of the members, who are single.

Members must have a Marital Status in order to have accurate household numbers for the following searches.

- 5) To search for **Widowed or Single Person households** in your **Display in Results** area select only the **Primary contact in their family** field.

Next, set your filter to:

Membership Type IS Registered
Family Position IS Primary
Marital Status IS
Divorced, Separated, Single and Widowed

Click **Apply** to search and verify the overall count of Widowed/Single households.

The screenshot shows a search filter interface. At the top, there is a 'CAMPUS FILTER' section with a dropdown menu set to 'St. Thomas Aquinas...' and buttons for 'RESET' and 'HIDE'. Below this is the 'DISPLAY IN RESULTS' section, which has a 'REFINE BY' dropdown set to 'Name'. The 'DISPLAY IN RESULTS' section contains several checkboxes: 'People matched in the search' (checked), 'Primary contact in their family' (checked), 'Spouse in their family', 'Children in their family', 'Others in their family', 'Include active profiles' (checked), 'Include inactive profiles', 'Include deceased individuals', 'Include unlisted individuals', and 'Include "Child Protected" individuals'. Below the 'DISPLAY IN RESULTS' section is the 'Apply filters below:' section, which contains a 'Match All' dropdown and three filter rows: 'Membership Type' (dropdown) 'Is' (dropdown) 'Registered' (dropdown), 'Family Position' (dropdown) 'Is' (dropdown) 'Primary' (dropdown), and 'Marital Status' (dropdown) 'Is' (dropdown) 'Divorced, Separate...' (dropdown). A 'CLEAR FILTERS' button is located at the top right of the 'Apply filters below:' section.

- 6) To find the Overall Married Household count, take your Overall Households count found in step 3) and subtract the Widowed/Single household count from step 5. Write down this total to be used later.

- 7) To search for Married families and apply their religion, we first need to clean up any individuals who do NOT have a Religion listed and which are heads of household. Back in our **Display in Results** area, click **ONLY** to display **People matched in the search**.

Adjust the Filters to reflect:

Membership Type IS Registered
Family Position IS Primary, Spouse
Marital Status IS Married
And **Religion IS NOT SET** as seen here.

Click again to **Apply** your search and see your resulting members. Open and edit the Religion field on each member found in the **About** tab, under the **Demographics**

The screenshot shows a search filter interface. At the top, there is a 'CAMPUS FILTER' section with a dropdown menu set to 'St. Thomas Aquinas...' and buttons for 'RESET' and 'HIDE'. Below this is the 'DISPLAY IN RESULTS' section, which has a 'REFINE BY' dropdown set to 'Name'. The 'DISPLAY IN RESULTS' section contains several checkboxes: 'People matched in the search' (checked), 'Primary contact in their family', 'Spouse in their family', 'Children in their family', 'Others in their family', 'Include active profiles' (checked), 'Include inactive profiles', 'Include deceased individuals', 'Include unlisted individuals', and 'Include "Child Protected" individuals'. Below the 'DISPLAY IN RESULTS' section is the 'Apply filters below:' section, which contains a 'Match All' dropdown and four filter rows: 'Membership Type' (dropdown) 'Is' (dropdown) 'Registered' (dropdown), 'Family Position' (dropdown) 'Is' (dropdown) 'Primary, Spouse' (dropdown), 'Marital Status' (dropdown) 'Is' (dropdown) 'Married' (dropdown), and 'Religion' (dropdown) 'Is Not Set' (dropdown). A 'CLEAR FILTERS' button is located at the top right of the 'Apply filters below:' section.

area.

<input type="text" value="Search name, phone, or email"/>						41 Results	ACTIONS	<	>
First / Last	Giving ID	Family/Household Mailing Name	Religion	Mailing Street	Mailing City				
JB Jonathan	3999			1112 Red Rock Lane	Middleton				
FS Frederica				1209 Shorewood Blvd	Madison				

*If you have a large number of members without a religion, check with the Diocese about doing a bulk update at this point. You would first want to add in the column of Religion to your results area to double check you have the search the set correctly. After that from the **Actions** area (to the right of the Results) you would select to **Edit Profiles** in bulk, select the **Religion** area and set it to **Catholic**. Please do this with extreme caution.*

- 8) Next, to find out how many Primary Household Members are NOT Catholic, double check your **Display in Results** still shows **People matched in Search** as we're looking for a member count.

Set your filters to:

Membership Type IS Registered

Family Position IS Primary

Marital Status IS Married

And **Religion IS NOT Catholic**

Click to **Apply** and write down this number which is the count of Primary members in a household that aren't Catholic.

DISPLAY IN RESULTS

☒ People matched in the search

☐ Primary contact in their family

☐ Spouse in their family

☐ Children in their family

☐ Others in their family

REFINE BY

☒ Include active profiles

☐ Include inactive profiles

☐ Include deceased individuals

☐ Include unlisted individuals

☐ Include "Child Protected" individuals

Match All

Membership Type

Is

Registered

Family Position

Is

Primary

Refine By: Name

Marital Status

Is

Married

Religion

Is Not

Catholic

Next, keep all the filters and ONLY switch just the filter:

Family Position IS Spouse

To get a count of the Spouses that are NOT Catholic.

Add the Primary and Spouse counts above to get the overall count of the **Mixed Religion Couples**.

9) Calculate the total **Married Couples where both are Catholic** by taking the Overall Married households listed in step 6) subtracting the **Mixed Religion Couples**.

10) Next, verify your **Display in Results** is still set for **People matched in the search** for all the following searches which involve Adult and Youth counts by ages & genders.

In the filter area, to find adults that do not have an age or date of birth, set your filter to the preferences here:

Membership Type is Registered
Family Position is NOT Child
Birthday by Date IS NOT SET

Click to **Apply** and write down the total for Adults with no Age.

At the end, we'll add in these counts into both the overall adult and children breakdown found below.

Next, switch the filter to:

Family Position IS Child
To find the children with no Age.

Click **Apply**, and write down the count to add to the overall children's counts at the end.

11) To find "adult children" still listed in their parent's records, which may need to be inactivated as they are no longer living with their parents, set the filters to:
Membership Type IS Registered
Family Position IS Child
Age (In Years) is between 26 and 120

DISPLAY IN RESULTS ⓘ

☒ People matched in the search

☐ Primary contact in their family

☐ Spouse in their family

☐ Children in their family

☐ Others in their family

REFINE BY

☒ Include active profiles

☐ Include inactive profiles

☐ Include deceased individuals

☐ Include unlisted individuals ⓘ

☒ Include "Child Protected" individuals

Apply filters below: [CLEAR FILTERS](#)

Match All ▼

Membership Type ▼ Is ▼ Registered ▼

Family Position ▼ Is Not ▼ Child ▼

Refine By: [Name](#)

Birthday ▼ By Date ▼ Is Not Set ▼

Match All ▼

Membership Type ▼ Is ▼ Registered ▼

Family Position ▼ Is ▼ Child ▼

Refine By: [Name](#)

Birthday ▼ By Date ▼ Is Not Set ▼

Match All ▼

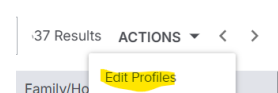
Membership Type ▼ Is ▼ Registered ▼

Family Position ▼ Is ▼ Child ▼

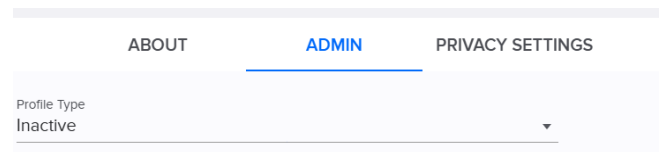
Refine By: [Name](#)

Age (In Years) ▼ Is Between ▼ 26 and 120

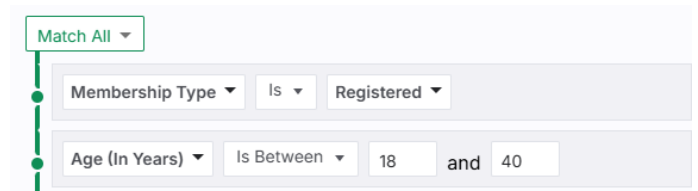
Next, open up and double check multiple members to verify your search and double check that these members need to be Inactivated. To bulk change these adult children, and change their status, click **Actions < Edit Profiles**. You will be adjusting their Profiles to Inactive as seen below.



The bulk Editing of Profiles is a powerful process, please double check your data and only adjust if you're 100% confident in the change. Please contact the Diocese if you wish for assistance on this step.



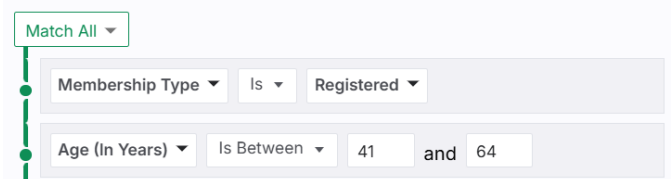
- 12) For the rest of the member counts, adjust the filters to search for adult members between different ages by setting:
- Membership Type is Registered**
Age (In Years) IS Between 18 and 40



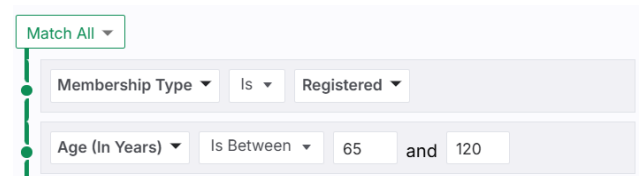
Click **Apply** to review and record your results.

Please note: The "is between" classification in Age filter will include the age listed in the results.

- 13) Change the filter to show:
- Age (In Years) IS Between 41 and 64**
Click **Apply** for the results



- 14) And adjust the filter again to show:
- Age (In Years) IS Between 65 and 120**
Click **Apply** for the results



**At this point, if possible, add in the Age column to see any obvious members that should be Deceased or any data discrepancies.*

15) When running searches with the results to list a minor, we need to adjust our main Search parameters to allow it to show minors and their information. Under the **Refine By** area, check the **Include “Child Protected” individuals** for the following youth searches.

DISPLAY IN RESULTS ?	REFINE BY
<input checked="" type="checkbox"/> People matched in the search	<input checked="" type="checkbox"/> Include active profiles
<input type="checkbox"/> Primary contact in their family	<input type="checkbox"/> Include inactive profiles
<input type="checkbox"/> Spouse in their family	<input type="checkbox"/> Include deceased individuals
<input type="checkbox"/> Children in their family	<input type="checkbox"/> Include unlisted individuals ?
<input type="checkbox"/> Others in their family	<input checked="" type="checkbox"/> Include "Child Protected" individuals

First, look for any family without a adult head of household. This will be a scenario where a child is listed as a Primary or Spouse instead of Child. This could be showing up due to incomplete or missing data. Set your Filters to:

Membership Type IS Registered
Age (In Years) IS Between 0 and 17
Family Position IS Primary, Spouse

The screenshot shows a search filter interface with a 'Match All' dropdown at the top. Below it are three filter rows, each with a green dot on the left side. The first row is 'Membership Type' with a dropdown arrow, followed by 'Is' and a dropdown arrow, and then 'Registered' with a dropdown arrow. The second row is 'Age (In Years)' with a dropdown arrow, followed by 'Is Between', then '0' and '17' in input boxes, and 'and'. The third row is 'Family Position' with a dropdown arrow, followed by 'Is' and a dropdown arrow, and then 'Primary, Spouse' with a dropdown arrow.

Edit the results and add in at least one Primary Active member and switch the minor to being marked as Child or Other if they are a grandchild, etc. Look for any other inconsistencies by adjusting your filter:

Family Position IS Other

Most of these results should be grandkids or other special scenarios staff usually are aware of.

16) Adjust the Filter to find the age of Youth along with their gender, as seen below:

Membership Type IS Registered
Age (In Years) is Between 0 and 6
Gender is Male

The screenshot shows a search filter interface with a 'Match All' dropdown at the top. Below it are three filter rows, each with a green dot on the left side. The first row is 'Membership Type' with a dropdown arrow, followed by 'Is' and a dropdown arrow, and then 'Registered' with a dropdown arrow. The second row is 'Age (In Years)' with a dropdown arrow, followed by 'Is Between', then '0' and '6' in input boxes, and 'and'. The third row is 'Gender' with a dropdown arrow, followed by 'Is' and a dropdown arrow, and then 'Male' with a dropdown arrow.

Click **Apply** to get an overall count.

Keep adjusting and switching the Gender

and Age range, clicking **Apply** between each count, until your statistical numbers are all collected.

17) Finally, go back to the total number of adults and children that did NOT have birthdates and add them into your overall statistic numbers in both the adult categories and the youth areas.