CHURCH GUIDE FOR REPORTING 2018 YEAR-END STATISTICS

Welcome to Year-End Statistics Reporting!
This guide is designed to help you, as a church user, successfully complete your year-end statistics entry.

SOME HELPFUL INFORMATION BEFORE GETTING STARTED

BEFORE YOU BEGIN, DON'T FORGET…
Please read through all the information/instructions before starting the year-end reporting process.
It is especially important to read the Church Table Directions (help texts) that correspond with the questions on the year- end report. These fully explain how to answer each question. (Example: question 11 asks for the number of participants in Christian formation groups. The Church Table Directions (help text) direct you to count a participant only once, even if they participate in more than one group.)

For a better experience: Submit the Year End Report as early as possible. Getting started early ensures you will have plenty of time to address issues and or questions that may arise.

1. **The information collected is for the calendar year 2018 (Jan. 1 through Dec. 31, 2018**). There are three tables of questions that need to be completed: Table I, Table II and Table III. The forms must be completed online and **must be submitted by 5 p.m. Friday, February 8, 2019**.

2. **The report does not have to be completed in one session;**

   However, you cannot submit work if there are any errors (in math) or if the validations have not been met. **Therefore, we recommend you print a blank worksheet for all tables**. Once you have filled in all your information on paper, complete the on-line form. **Remember – If you leave a page before you click "save" your changes will not be saved**. (See numbers 33-34 below for more information on errors and warnings.)

3. **Print these instructions.** You will need them throughout the reporting process.

4. **Print a copy of the "Church Table Descriptions"** (help text) found here. This document gives you a detailed explanation of how to answer the questions in the year-end report.

5. **Either click here** or begin at the Florida Conference website: www.flumc.org.

6. **If you start on the Florida Conference website, click** "Church Dashboard" on the red banner at the top of the page.
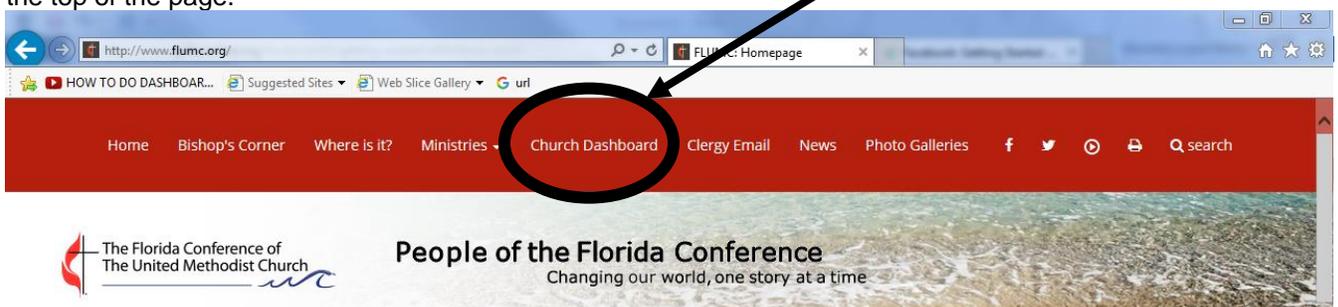

*Churches are now using Ezra for both the church dashboard and EOY Statistics. Once the user logs in to Ezra, the user may select the "Statistics" icon to begin. For more information on the login process, please see the video or guide sheet online here.

7. **On the Ezra Login page,** type in the church GCFA number in the box labeled "User Name." Then, type the password in the box labeled "Password." Click "Login" or press "Enter."
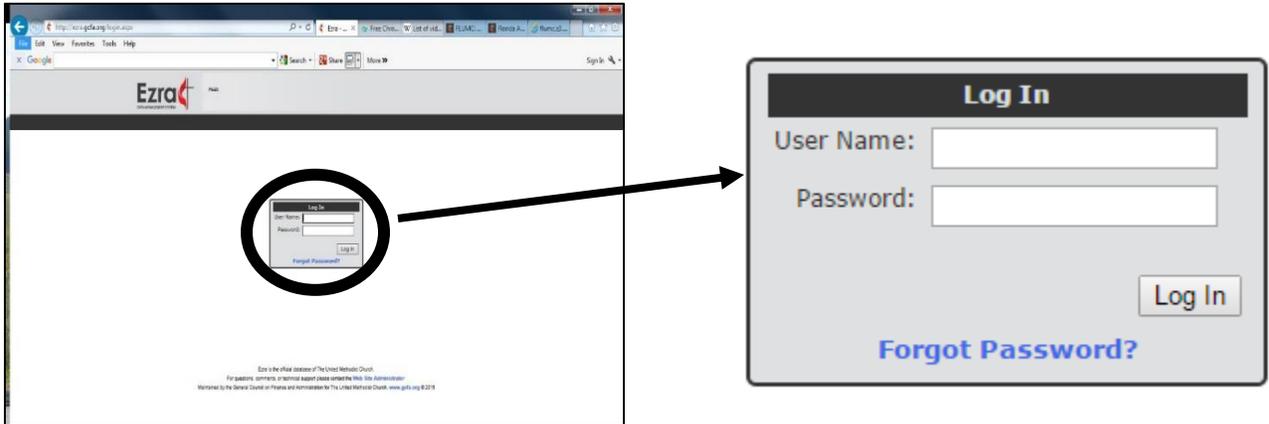
8. **On the Ezra Home Screen, click "Statistics"** to access the End of Year Statistical System.
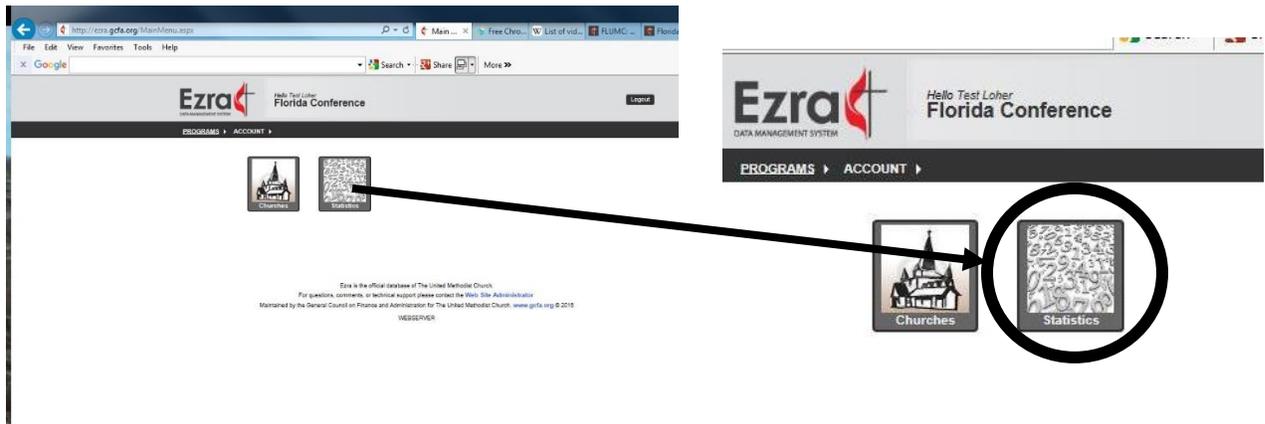
10. **Entering Stats:** Click "Begin Entering My Stats." This is the home page. The Stats Home page has a few important pieces of information:
    a. The date the conference expects your statistics to be submitted.
    b. The current status of the three statistics tables and submission. This feature also displays whether the table has saved with errors, with warnings, or is complete and ready for submission.
    c. A message from the conference office.

11. **New Menu:**

    A menu on the right side of the screen now offers options to find an FAQ, a User's Guide, and links to print various reports, including a blank report form. Your help contact is also listed in this menu.
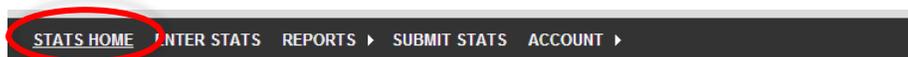
    Make sure that you make note of these things as they will be important to you. If you ever need to go back to the Stats Home page, just click the Stats Home option on the menu bar.

    Note: Once you have saved statistics table information, you will no longer be shown the Welcome screen when you log in. You will be taken straight to the Stats Home page.

12. **Navigating the System**

You will see a dark grey menu bar near the top of the page. It has several options listed there. This menu bar will be available throughout the system and is how you move between the different pages. You can also access the main tables through the links found on the Stats Home page.

13. There are menu headings across the top of the screen. These headings provide access to the following:

    a) Click **ENTER STATS** to enter the statistical information for the year. Each table can be accessed from here or from the other tables. (Note: The "Alignment number" is purely for GCFA recordkeeping)
    b) Click **REPORTS** to print reports on your Church Statistical Information.
    c) Click **SUBMIT STATS** when you are finished entering all data for Table I, II, & III.
    d) Click **ACCOUNT** to update your contact information or change your password.

14. **Before you start entering your statistics, it is highly recommended that you print a <u>Blank Church Input Form</u>.** This form is useful because it allows you to fill in your stats at your leisure without any risk of losing your information due to unexpected issues. It also shows the previous year's data. You can access this form in several ways:

    1. **Welcome Screen** When first logging in, click "Print a Blank Form" to go to the form page to run the report.

    2. **Stats Home Page Side Menu** Click the menu link on the right of the screen that says "Blank Report Forms."

    3. **Reports Menu Bar** Click <u>Reports</u> in the top menu bar. Then click "Blank Church Input Form" on the top right.

15. Once on the blank form page, select "print blank report with no church information only" for a truly blank form, or you can simply click "Run Report" and it will give you a PDF version of the tables with last year's statistics filled in and a blank column for you to write in this year's information. Print this PDF and either close the tab or click on the Stats Home tab to go home.

16. **You may want to distribute copies of the blank worksheet with highlighted sections to other individuals in the church office to have them complete those sections.** For instance, the Treasurer or Finance chair may be the one who fills in financial data; the church administrator may complete lines on membership. You can then enter the information online.

17. **If you are unclear how to answer a question while completing the form, you can click the question mark (?) to the right of the question for an explanation. Or refer to the <u>Church Table Directions</u> (help text) that you printed out earlier (#4).**

    If you still have questions, you can call your <u>District Office</u>, when contacting the District or Conference Office for assistance, include your church's name, GCFA number, your name and a number where you can be reached during the day.

18. We understand that for some questions you may not have a definite answer. In those cases, provide a best answer based on information available and past experience. Wherever possible, however, we expect that the church is providing accurate, factual data.

19. When you have entered the information for each table, click the "**Save**" button. You can save information at any time and come back later to finish. You can move and work between tables; just be sure to save your work before you click to another table.

    CAUTION! – If you leave the page before you click **SAVE,** your changes will not be saved.

20. **The system will not let you submit the report if there are any errors (in math) or the validations (warnings) have not been met (see #s 29-30**), but you can save your progress and come back later.

Charges and Mission/Daughter/Multi-Site Campuses/Ministries within a Church

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21. Prepare a separate report for each organized church on a **charge**.

22. For **missions, daughter churches, multi-site campuses and ministries within a church**, please refer to the chart, "<u>New Church Development and Year-end Statistical Reports</u>" for instructions.

IV. ENTERING CHURCH STATISTICS

23. Once you have collected all your stats and you are ready to fill them in online you can click the <u>Enter Stats</u> option from the menu. This will take you to the page where you enter your statistics.

NOTE: YOU CAN SAVE, BUT NOT SUBMIT WITH ERRORS. ALL ERRORS MUST BE CORRECTED.

24. Click on the table name to enter the table. You may also click on the "Submit Reports" link on this page to be taken to the Submit Stats page.

Once you are on the Enter Stats page, at the top of the page you will see a message that tells you the submission deadline. Below that you should see some of your church information.

Looking further down you will see one of the tables you need to fill out for your statistics.

25. Carefully enter your statistics on this form. Navigating over each line or clicking the **?** at the end of each line will give you an explanation for what is being asked.

When you are done, click the Save button at the top or bottom of the table to save the information you have entered. When you click save your information will be checked to make sure it looks accurate. Review any lines that are reported back to you as errors and save the tables again if you make changes.

> **Make sure you save the table you are currently working on before swapping to another table. Your data will be lost if you change tables without successfully saving first.**

26. The system defaults to zero for each question you are asked to enter. If you do not put in a figure, it defaults to zero.

> **CAUTION!** – Because the system defaults to "0," if you don't enter a number value, it is possible to accidentally submit your report without completing each line number. Please double-check your work before submitting.

27. You can use the "Tab" key to move to the next box.

28. Report finances in whole dollars; **do not report cents**. (Round to nearest dollar.)

Do not use commas, dollar signs or any other non-numerical characters when entering data (even in financials). Fields will not accept symbols ($, %, etc.).   **Example: enter 1999, not $1,999.00.**

V. VALIDATIONS, ERRORS, AND WARNINGS, or "Why can't I submit my work?"

29. ERRORS: During the "save" process, the system will perform validations set up by the conference. For example: the total male members + the total female members must equal the total professing members at close of this year.

If any of these validations do not pass, then your information **CANNOT be submitted**. You will be notified that your information was saved, but with errors. A list will appear on the screen. The validation failures are listed as **Errors**. Please go back and correct these in the tables.

30. WARNINGS: If there are any **warnings** that are initiated based on your answers, they will appear in a grid at the top of the page. Press the "enter" link to enter an explanation and type a detailed explanation for each warning in the box provided. (A valid, helpful explanation should address questions your district may have about this entry.)

There are **2** error(s) and **1** warning(s).
Information was saved but with errors!

Error(s):

Line	Error
9	Error: Total of Ethnic fields does not equal total members. The calculated value is: 0 The entered value is: 198
9	Error: Males + Females does not equal total members. The calculated value is: 0 The entered value is: 198
9	Error: Total of Ethnic fields does not equal total members. The calculated value is: 0 The entered value is: 198
9	Error: Males + Females does not equal total members. The calculated value is: 0 The entered value is: 198

Warning(s):

Line	Warning	Explanation	
10	You are reporting a value for a line that had nothing reported for the prior year.		Enter

31. To help you check for errors before you submit your report, click "**REPORTS**" button. A new page will open, showing you a list of reports. Check these boxes: **Table I, Table II, Table III,** and **Compare to Previous Year.** Then click **Run Report.**

This gives you a quick review of what your increases / decreases / no changes are from the previous year to the current year. If something looks out of line, please go back and double-check your work. Remember, because the system defaults to "0" if you don't enter a number value, it is possible to accidentally submit your report without   completing each line number.

32. Once you have filled in and saved all three tables you will be able to submit your data to your conference office. Make sure to **submit** your church's statistics when you accurately complete all three tables.

VI. **MORE DETAIL ON LINE 4. NEW ADDITIONS TO THE STATISTICAL REPORT**

Note: On Table 1, Line 1 will be automatically filled in from last year's Line 4 value.

33. Question #1 on the form (total professing members reported at close of last year) is auto-filled from line 4 of the   previous year. This number cannot be changed. If your previous year's membership was reported incorrectly, you will   need to make your adjustments in lines 2d (add) or 3e (subtract) to arrive at the correct membership at the close of the previous year. Adjustments should not be made routinely.

34. For Line 4: Add together lines: 1-2f; then subtract lines: 3a-3f. The system will verify that the numbers you entered in lines 2a-3f total the number you enter into line 4. It will verify the line 4 total against racial/ethnic 5 (5a-5g) and gender 6 (6a-6b) membership numbers. If this is incorrect, you cannot submit your statistics.

VII. **SUBMITTING and REVIEWING YOUR CHURCH'S REPORTS**

35. After you have double-checked your work, click **SUBMIT STATS**.

a. If you haven't addressed previous warnings, you are now on a page that asks you to provide an explanation for any warnings that you received when you tried to save in Tables I, II, and III. Read this page carefully and type an   explanation for each warning in the box provided. This will save you the time of explaining it to your district office a   few months from now, when it will be harder to remember the particular circumstances. You must provide a valid and   helpful explanation for each warning before you will be able to submit your statistics.

To do this:

1. Click the table you wish to enter, then for each line,
2. Click 'enter' (or 'edit' to update information) and type your explanation in the pop-up box.
3. Click SAVE.

36. Once you have explained all your warnings for a table, click **Save** at the bottom of the screen. Repeat for each table. Once the data has saved, a "**Submit Stats**" button will appear. Click **Submit Stats**. Once your data has been submitted, your warnings will be grayed out where you can read them, but you cannot change them.

37. **Once you submit your information, you will be locked out of any editing in your tables.** If you see a mistake, contact your District Office to make the correction.

Submit your Statistical Reports

This is where you submit your statistics to the Conference Office. By clicking on the button below, you are submitting the information from Tables 1, 2, and 3. YOU WILL NOT BE ABLE TO CHANGE THIS INFORMATION unless you contact **Dale Owens** at your conference office. Dale Owens can be reached at (615)369-2380 or via email at **dowens@gcfa.org**.

Table 1 - Membership ➡ ⚠ 9/26/2013 - Completed (2 warnings)
Table 2 - Finances ➡ ⚠ 9/26/2013 - Completed (2 warnings)
Table 3 - Income ➡ ✅ 9/26/2013 - Completed

Congratulations! You are ready to submit your stats!

Please enter any comments you wish to share with the Conference regarding these statistics.

Submit Statistics

Year-End Statistical Reports Must Be Submitted By 5 P.M., Friday, Feb. 8, 2019.

PRINTING A COPY OF YOUR TABLES and WARNINGS EXPLANATIONS

38. Once your information has been submitted, print a copy for your records. This can be done two different ways. (Pop- up blockers may prevent these reports from displaying. Please set the browser to allow pop-ups from this site.)

a. To print a copy of Tables I, II and III, click **REPORTS** on the homepage under **MENU**. Go to the **Church Stats Report**. Select the table or tables you wish to print and click on **Run Report**. An Adobe Acrobat page will load and your report will be shown. Just print these pages for a copy of the current statistics.

 b. Click the **ENTER STATS** heading and click **Print Final Report.** A PDF file will load with the table report.

39. To print a copy of the warnings and explanations you provided, click **REPORTS**. Click **Warning Report**. Select **Show All Warnings** and click **Run Report**. You can then click to download the PDF or Excel file of your report.

Reviewing Your Statistical Data

40. You can view your statistical information any time. On the **Reports** menu there are several options. One of the most useful is the **Church Stats Spreadsheet**. Using the selections on this page, you can download your data in a Microsoft Excel spreadsheet. Any changes you make to the spreadsheet will not change it in the system.

Why Aren't All The Question Numbers Showing?

You will notice that some questions do not appear on the form. Below are the questions we do not ask you for on the year-end statistical report why we do not ask for them.

- **Question 24** (replacement values of church owned land, buildings and equipment) will be filled in by the conference office from data you have already provided in the Risk Console insurance database.
- **Questions 28-35** (Apportionments, Advance Specials Giving) and 36-39 (Special Sunday Offerings, Pension and Billed) will be filled in by the conference office from data you have already provided when you submitted your apportionment payments or health and benefits payments.
- **Question 50** (Grand Total) will be calculated by the conference office after all data has been received from all areas since this total includes data provided by the conference office.

A word about apportionment calculations: Questions 40-47 are used to calculate your local church's apportionments. We will also be using Pastor Pension figures supplied by the Conference Office of Financial Services to calculate your local church's apportionments.

If you have questions about local church apportionments and how they are calculated, please contact Kitt Elliott in the Office of Financial Services at kelliott@flumc.org.