

## CHURCH GUIDE FOR REPORTING 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.

**CHANGES FOR 2013:** This year, some of the line numbers on the tables have changed and the questions asked have been slightly altered. Please read through these changes before you enter data. The complete list of changes can be found [here](#).

### 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: questions 15-19 ask 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 2013 (Jan. 1 through Dec. 31, 2013).** 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, January 31, 2014.**
- 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 this page of instructions.** You will need these throughout the process.
- 4. Print a copy of the "Church Table Descriptions"** (help text) found [here](#). This gives you a detailed explanation of how to answer the questions in the year-end report.

#### **I. FIRST LOG IN** (*\*If you have already logged in you can skip to Number 14*)

- 5. [Click here](#)** to go to your Church Dashboard Login on the Conference website, or you can access your Church Dashboard Login by going to the Florida Conference Web site ([www.flumc2.org](http://www.flumc2.org)) and clicking on **Church Login** in the top right corner. Use your DASHBOARD login, not the new Statistical Login information. (That's used later.)
- 6. Once logged in to your Church Dashboard,** to access the year-end statistical report system, click the **Statistics** link. Click the top link: "Click here to Log in to the UMC GCFA Statistical Input System."

When you log in to the Statistical Input System for the first time, enter the Username, which is your church's GCFA number, and your Current Password, which is the word "**methodist**" (password is case sensitive; use all lower case).

7. (Step 1 of 4)

You should now be on a page that says, Welcome to the **EZRA Data Management System**. This is your first time logging in so please take a minute and set up your account.

8. (Step 2 of 4)

When you click on the Next button you will be directed to a User Information page where you will be asked to fill in your contact information.

**a. The First Name, Last Name, and E-mail fields are required.** These will be used in several locations for identification purposes and to provide password information.

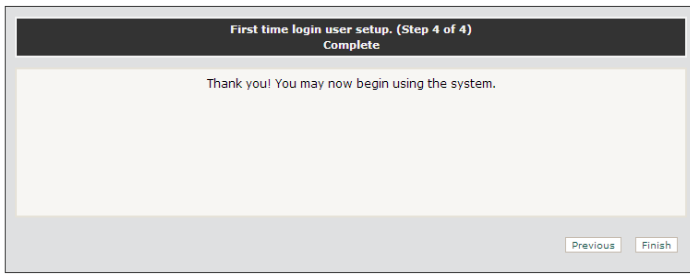
**b.** Please update your Home Phone and Work Phone fields. These fields are helpful to the district or conference if they need to contact you.

**c.** Click next to go to the username and password step.

9. (Step 3 of 4)

At this step, enter your Current Password, which is the word “**methodist**” (password is case sensitive; use all lower case).

The New Password and Confirm New Password fields will be empty. Enter your chosen password here. A valid password must be at least 6 characters long and should contain letters and numbers only. (This is an added level of security for your church’s year-end statistical report.)

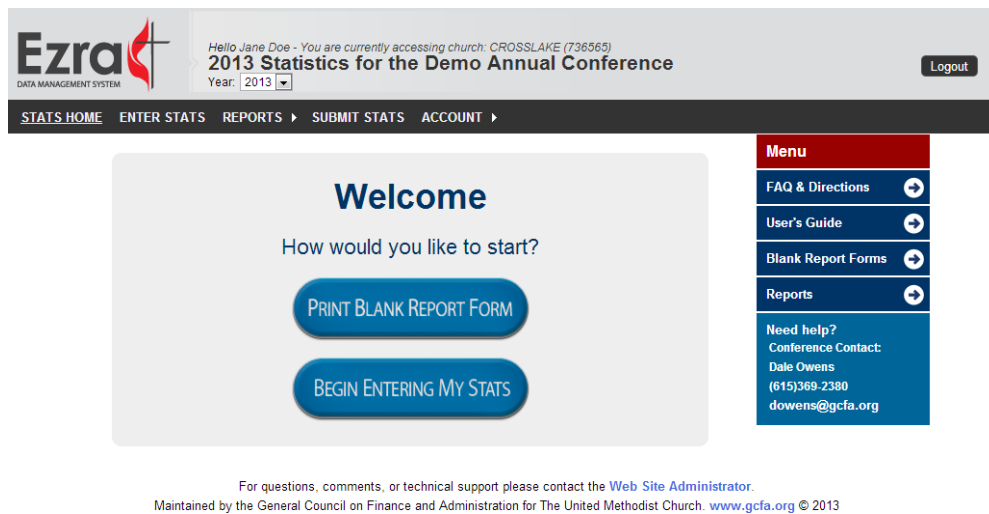


(Step 4 of 4)

10. Click Finish and save your username and new password in a safe place.

## II. EZRA SYSTEM

11. The first time you log in you will see the Welcome screen which invites you to either print a blank report form or begin entering your stats. This screen will show every time you log in until you have saved any changes to the Tables.



12. **Printing a blank report:** Before entering information online, you may want a **Blank Worksheet** of the tables so you can write on the sheet in pencil and confirm the numbers before you enter the data online.
13. Click **Print Blank Report Form** and your report will open in a new tab. **Print** this page for a blank worksheet. You can close the download tab or just return to the main Statistics tab in your browser and click the **STATS HOME** heading to return to the Welcome Page.

**\* Make sure the browser is set to allow Pop-ups.**

14. **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.

**Current Status of Your Tables**

**Date Stats Should Be Submitted**

**Message from the Conference**

Message From The Conference Office:  
Please enter your statistics for this year. If you have any questions, please contact the conference contact on the right of the screen.

For questions, comments, or technical support please contact the [Web Site Administrator](#).  
Maintained by the General Council on Finance and Administration for The United Methodist Church. [www.gcfa.org](http://www.gcfa.org) © 2013

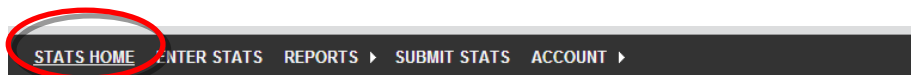
## 15. New Menu:

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 conference 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.**

## 16. 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 go between the different pages. You can also access the main tables through the links found on the Stats Home page.

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

- 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)
- Click **REPORTS** to print reports on your Church Statistical Information.
- Click **SUBMIT STATS** when you are finished entering all data for Table I, II, & III.
- Click **ACCOUNT** to update your contact information or change your password.

### III. BEFORE ENTERING YOUR CHURCH'S STATISTICAL DATA

18. Before you start entering your statistics, it is highly recommended that you print a **Blank Church Input Form**. 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:

- Welcome Screen** When first logging in, click "Print a Blank Form" to go to the form page to run the report.
- Stats Home Page Side Menu** Click the menu link on the right of the screen that says "Blank Report Forms."
- Reports Menu Bar** Click Reports in the top menu bar. Then click "Blank Church Input Form" on the top right.

19. 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 you will need to fill out this year’s statistics. Print this PDF and either close the tab or click on the Stats Home tab to go home.
20. **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.
21. **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 [Church Table Directions](#) (help text) that you printed out earlier (#4).**

If you still have questions, you can call your [District Office](#), 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.

22. We understand that for some questions you may not have a definite answer. In those cases, provide a best guess based on information available and past experience. Wherever possible, however, we expect that the church is providing accurate, factual data.
23. 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.

24. **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 33-34), but you can save your progress and come back later.**

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

25. Prepare a separate report for each organized church on a **charge**.
26. For **missions, daughter churches, multi-site campuses and ministries within a church**, please refer to the chart, “[New Church Development and Year-end Statistical Reports](#)” for instructions.

#### **IV. ENTERING CHURCH STATISTICS**

27. Once you have collected all your stats and you are ready to fill them in online you can click the [Enter Stats](#) 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.**

28. 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.

**Tables:** Table 1 - MEMBERSHIP & PARTICIPATION

Your statistical information was due on 3/15/2013. Please finish with your statistics as soon as possible.

Select A Church: 733048 SHEPHERD Alignment Number: 40101 General Church Number: 733048

Status: Not Submitted  
Not Saved

Federated churches, community churches, etc., report only that part of the membership belonging to The United Methodist Church.

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

Employer (Federal) Id Number:  Please enter your EIN if known. [What is this?](#)

Value loaded from Vital Signs

Line #	Description	2012 Value	2013 Value	Line #
1	Total professing members reported at the close of last year	0	193	1 ?
2.a	Received this year on Profession of Christian Faith	0	5	2.a ?
2.b	Restored by affirmation	0	0	2.b ?
2.c	Correct previous year's reporting errors of total professing membership numbers by addition	0	0	2.c ?
3	Transferred in from other United Methodist churches	0	0	3 ?
4	Transferred in from non-United Methodist churches	0	0	4 ?
5.a	Removed by Charge Conference action	0	0	5.a ?
5.b	Withdrawn from Professing Membership	0	0	5.b ?
5.c	Correct previous year's reporting errors of total professing membership numbers by subtraction	0	0	5.c ?
6	Transferred out to other United Methodist churches	0	0	6 ?
7	Transferred out to non-United Methodist churches	0	0	7 ?
8	Removed by death	0	0	8 ?

29. 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 need to 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.**

30. 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.

31. You can use the “Tab” key to move to the next box.

32. 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?”**

**33. 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.

**34. 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.	<a href="#">Enter</a>

**35.** 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.

**36.** 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 9, NEW ADDITIONS TO THE STATISTICAL REPORT**

**Note: On Table 1, Line 1 will be automatically filled in from last year's Line 9 value.**

**37.** Question #1 on the form (total professing members reported at close of last year) is auto-filled from line 9 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 2c (add) or 5c (subtract) to arrive at the correct membership at the close of the previous year. Adjustments should not be made routinely.

**38.** For Line 9: Add together lines: 1-4; then subtract lines: 5a-8. The system will verify that the numbers you entered in lines 2a-8 total the number you enter into line 9. It will verify the line 9 total against racial/ethnic (9a-9g) and gender (9h-9i) membership numbers. If this is incorrect, you cannot submit your statistics.

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

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

**a. If you haven't addressed previous warnings**, you are now 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.
- 40.** 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.
- 41.** 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.



**\*Year-End Statistical Reports Must Be Submitted By 5 P.M., Friday, Jan. 31, 2014.\***

### PRINTING A COPY OF YOUR TABLES and WARNINGS EXPLANATIONS

- 42.** 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.
- 43.** 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

- 42.** 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 31** (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 35-42** (Apportionments, Advance Specials Giving) and **45-47** (Special Sunday Offerings, Pension Billed, and Health 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 52** (Other cash allowances paid to pastor). NOT ALLOWED by Conference policy. All churches should follow the Conference's Accountable Reimbursement Policy which can be found [here](#).
- **Question 60** (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 48-57 are used to calculate your local church's apportionments. We will also be using Pastor Pension and Pastor health insurance 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](mailto:kelliott@flumc.org).