# THE UNITED METHODIST CHURCH
## Baltimore-Washington Conference

# Statistical Reporting Instructions (2017)

# Using EZRA (GCFA's Statistical Reporting System) to Submit Your Conference Statistics



# EZRA OPENS FOR 2017 STATS ON DECEMBER 18TH, 2017

# Step by Step Guide for Entering and Submitting your Statistical Information

**If you have questions, please call your District Administrator or call the BWC Conference Center (410-309-3900) and someone will direct your call. Staff Directory can be found online at**
http://www.bwcumc.org/about/districts-regions/

0. **Login to EZRA**
   a. Go to:  http://ezra.gcfa.org
   b. Enter username and password as follows
   c. **Every church will have two (2) usernames.**
      USERNAME1:     3810****p   (Ending in the letter 'p' for 'primary/pastor')
      USERNAME2:     3810****o   (Ending in the letter 'o' for 'other'.)
      The **** is to be replaced with the <u>last four digits</u> of your church ID #, i.e., 1234)
      PASSWORD:     stats2017 (Same password for each user)
   d. Click on the "Log In" button to advance to Step 1 of 4

1. **Welcome Screen - First Time Login User Setup. (Step 1 of 4)**
   a. Click "Next" to advance to Step 2 of 4 (Contact Information)

2. **Contact Information Screen - First Time Login User Setup. (Step 2 of 4)**
   a. Enter your First Name, Last Name and <u>Email Address</u>. (Required Fields)
   b. Enter Home Phone and Work Phone (Optional Fields)
   c. Click "Next" to advance to Step 3 of 4

3. **Change Password Screen - First Time Login User Setup. (Step 3 of 4)**
   a. Enter your **current** password (stats2017)
   b. Enter a password **of your choosing** (at least 6 digits long)
   c. **Write down your password**
   d. Click "Next" to advance to Step 4 of 4 (Complete)

4. **Complete Screen - First Time Login User Setup. (Step 4 of 4)**
   a. Click "Finish" to complete account setup and proceed to the Stats Home Page

5. **Stats Home**
   a. After your account is setup, every time you log into EZRA, you will 'land' on this home page. If you ever need to return to this page, click on "STATS HOME" in the menu bar.  Please take note of the following important information:.
      i. **Deadline for submitting your 2017 statistics –  Friday, January 26th, 2018 – 12 noon**
      ii. Contact information for your conference.
      iii. A message from your conference office.

## Navigating the System
You will see a dark grey menu bar near the top of the page. This menu bar will be available throughout the system and is how you go between the different pages.

STATS HOME   ENTER STATS   REPORTS ▶   SUBMIT STATS   ACCOUNT ▶

**Entering Your Stats**

**Make sure the Year (located above the menu bar) displays the current stats year.**

**Before you start entering your statistics, it is highly recommended that you print a <u>Blank Church Input Form</u> and <u>2017 Tables & Instructions</u>.** These forms are useful because they provide detailed instructions and allow you to fill in your stats offline. You can also distribute these documents to all those in your church who are contributing to the data entry process

1. Click the <u>Reports</u> link in the menu bar.
2. Under "Baltimore-Washington Conference Worksheets" click on the link **2017 Sample Table & Instructions**.
3. Under "Church Reports", click on **Blank Church Input Form.** Click the **Run Report** button then click on the **Download PDF** link.

**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.** At the top of the page you will see a pop-up menu with the list of tables you need to fill out for your statistics. Looking at these tables you will notice several pieces of information available to you.

1. "**Item #**" is the row number.

2. "**Description**" is an explanation of the field.

3. "**2016 Value**" is the information entered last year.

4. "**2017 Value**" is the area where you will enter this year's information. By default the value is "0". This is the column in which you will enter your statistical information for the year. Just click in the box and enter the number. You can also use the "Tab" key to move between boxes. **Only numbers can be entered into these fields. No symbols or letters will be accepted.**

   The only field that should <u>not</u> contain a "0" is line 1. This is filled in automatically from the value listed in Line 9 from "Previous Year".

Employer (Federal) Id Number: XX-XXXXXXX    Please enter your EIN if known. **What is this?**

| Line # | Description | 2015 Value | 2016 Value | Line # | |
|---|---|---|---|---|---|
| | | | Save | | |
| 1-9 | PROFESSING MEMBERSHIP DATA | | | 1-9 | ? |
| 1 | Total professing members reported at the close of last year | 1,103 | 967 | 1 | ? |
| 2.a | New Members received by Profession of Christian Faith | 18 | 0 | 2.a | ? |
| 2.b | New Members received by Reaffirmation of Christian Faith | 2 | 0 | 2.b | ? |
| 2.c | Correct previous year's reporting errors of total professing membership numbers by ADDITION | 0 | 0 | 2.c | ? |
| 3 | New members received by transferring IN from other United Methodist churches. | 7 | 0 | 3 | ? |
| 4 | New Members received by transferring IN from NON-United Methodist churches | 4 | 0 | 4 | ? |

Table 1

Enter data rounded to the nearest whole number. Fields will not accept symbols ($, %, ., ,, etc). Example: 1999 instead of $1,999.00

| | |
|---|---|
| (green) | From Vital Signs |
| (orange) | From Conference |
| (blue) | From Additional Table |
| (outline) | Apportionment Field |
| (tan) | Auto-Total Line |
| (yellow) | Warning |
| (red) | Error |

## Saving Your Information:

When you are finished entering the information for a table, click on the "**Save**" button at the top or bottom of the screen. You can save your information at any time and come back later to finish. **The system will automatically log you out after 20 minutes of inactivity. IF YOU LEAVE THE PAGE BEFORE YOU CLICK "SAVE", YOUR CHANGES WILL NOT BE SAVED!**

## ERRORS:

During the "save" process, the system will automatically perform error checking.  For example: **Total Male Members** + **Total Female Members** must equal the **Total Professing Members**.  Date entry **ERRORS** must be corrected or you cannot submit your statistics.  Errors will appear in **RED**.

## WARNINGS:

Once you have correctly entered and saved your data, the system evaluates the data entered and also compares it to the previous year's data. After this evaluation, you may see some warning messages. If you receive a warning, your table information **WILL** be saved, but you should review the message(s) carefully, correct any **data entry** errors immediately or make a note to research the warning.

**WARNING EXPLANATIONS - during the final submission process, the system will require explanations for any line that has been flagged with a warning. Please provide a clear, concise explanation. Your explanations become a permanent part of your submission. On screen, the explanations will display above the table. On printed reports, warning explanations print immediately below the line to which they pertain.**

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 |

## SUPPLEMENTAL TABLES (WORKSHEETS) FOR TABLE 2

We have added extra tables that function as worksheets for lines in Table 2. The calculated results of these worksheets will be automatically entered into Table 2 so they must be completed BEFORE starting Table 2.

To view and complete another table, make your selection from the pop-up menu at the top of the screen. Once you have filled in and saved all tables you will be able to submit your data to your conference office. Make sure you submit your statistics when you are done with all three tables.

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 | Alignment Number | General Church Number |
|-----------------|------------------|----------------------|
| 733048 SHEPHERD | 40101 | 733048 |

**Status:** Not Submitted
**Not Saved**

## Submitting Your Information:

When you have successfully saved all data contained in all tables <u>and</u> you have entered explanations for any warnings, you are ready to submit your data.  Once you submit your information, your tables are locked for further editing.  We recommend a **careful** review your statistics <u>prior to</u> submission. If you discover an error after submitting your stats, contact your District Administrator as soon as possible. He/she will "Un-submit" your data so you can make corrections and re-submit before the deadline date.

To submit your information, click "**Submit Stats**", located on the top menu bar or the stats home page. This screen will display the status of all your tables and warnings. You are also given an area to enter any **general** notes regarding your submission (if you wish). Follow the directions carefully and click the <u>Submit Statistics</u> button when you are ready.



## Printing a Copy of Your Tables:
Once your information has been submitted, we strongly recommend printing a copy for your records.

1. Go the **"Reports"** screen and click on **"Individual Church Stats Report".**  Select the table or tables you wish to print. It is usually a good idea to check the box that will print both the current and prior year data for comparison. Click on the "**Run Report**" button to generate the reports.

   a. After couple seconds, three report links appear. Be sure to download/print one of the **PDF** formats. Each of these reports contains the same data, just in different formats.

   b. The **excel** format report provides an additional option if you are interested.

## Reports and Charts Available Any Time:
You can view your church's statistical information any time you wish.  Reports are available back as far at 1998. Prior year "Reports" can be accessed using the **Year** menu in the light grey area at the top of the screen.

**You may also print multi-year charts by exploring the Charts Area (Reports Menu>>Charts). Including:**

- Membership/Attendance
- Average Sunday School Attendance
- Membership Growth
- Received by Profession of Faith
- Apportionment Percentage Paid
- Church Summary Report

**PRELIMINARY APPORTIONMENT LETTER FROM THE CONFERENCE**

- Within 10 days after the **2017** submission deadline, you will receive a very important letter from the conference. It contains an estimate of your **2019** apportionments along with a worksheet showing the statistics YOU entered that were used in the apportionment calculation.
- **PLEASE FOLLOW THE INSTRUCTIONS ON THE LETTER AND RESPOND BY THE DEADLINE PROVIDED.**
    - If you require review/correction of your statistics, and you do not respond before the deadline, we may not be able to modify your apportionment at a later date.
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