



# Online Parish Returns User Guide

Parish User Edition

Issue 1.0

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## Introduction

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Welcome to the new online data capture system for parish returns. The system is set up to receive the annual Parish Finance Return and the Statistics for Mission. The thinking behind the system is that users at parish level input their data directly into a common database and have immediate access to a wealth of data showing how their parish has progressed over the last ten years. As soon as the data is entered at parish level the statistics become available at diocese and national church level to help plan resource allocation without the need to re-key data into a series of systems – replacing a process which currently takes up to 18 months to complete.

Click on <http://parishreturns.churchofengland.org/> or type the address into your browser to access the system.

## Information for system administrators

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Each parish has a unique parish code and authorised users are able to access the forms relating to that parish (which may include more than one set of forms if returns are submitted for separate churches in the parish).

Linked to each parish code is a single Administrator – that person acts as the System Administrator and is able to add other users to the account to allow them to enter data into the online forms and print off reports etc. (but they will not be able to add or delete users). Please ensure therefore that you only give user access to properly authorised people.

As a System Administrator, you may also be responsible for the administration of, or entering data for, other parishes. You can enter those onto your account at the same time, allowing you to access all the church records for which you are responsible without the need to keep logging in as a different user.

To add additional parishes to your account, go to the <Users Menu> tab, click [Add Parishes to Your Account](#) then entering the respective [Parish Code](#) and [Password](#) issued to you before finally clicking [Submit](#).

## Accessing the system for the first time

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When accessing the system for the first time you need to [Create an account](#). When you click this option (see Fig. 1) a new page will appear and you need to insert the parish code and password issued to you (see Fig. 2). The Parish Code and Password is used only once to authenticate your credentials as System Administrator. This then takes you to a screen where you need to enter your

own details including a new user name and password that is memorable to you and a link to your email account (see Fig. 3). Please note that the system does not allow more than one user to use the same email address for security reasons. Once you have completed all the fields you can 'Register' and your login will become active. If you want to go ahead at this stage and access the system you need to re-enter your new user name and password and this will take you into the system.

If there is more than one church registered in the parish you should be given access to all the churches when you have logged on – you do not need to add the churches individually.

If you have login rights to more than one parish, you can add additional parishes by going to the <Users Menu> tab and clicking [Add Parishes to Your Account](#) then enter the additional [Parish Code](#) and [Password](#) for the other parish(es) sent to you.

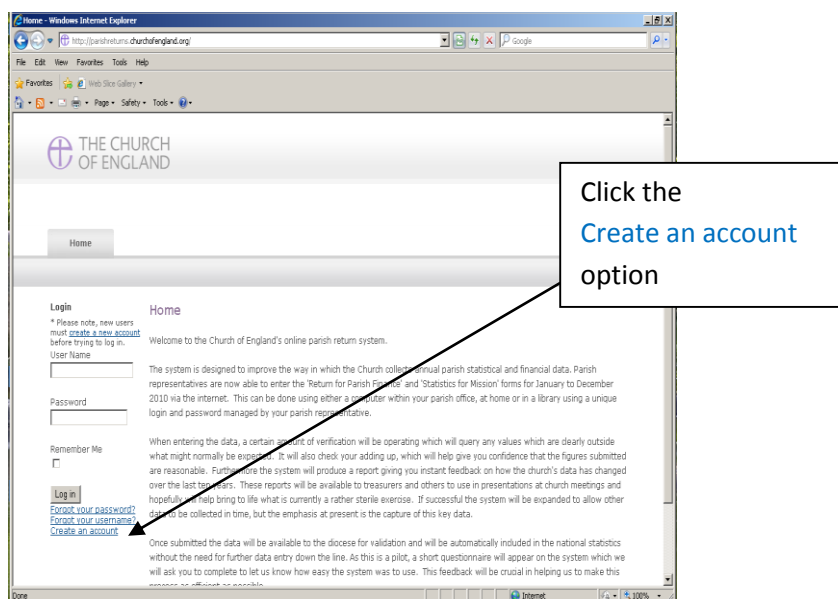


Fig. 1 – selecting the 'Create an account' option – when entering the system for the first time

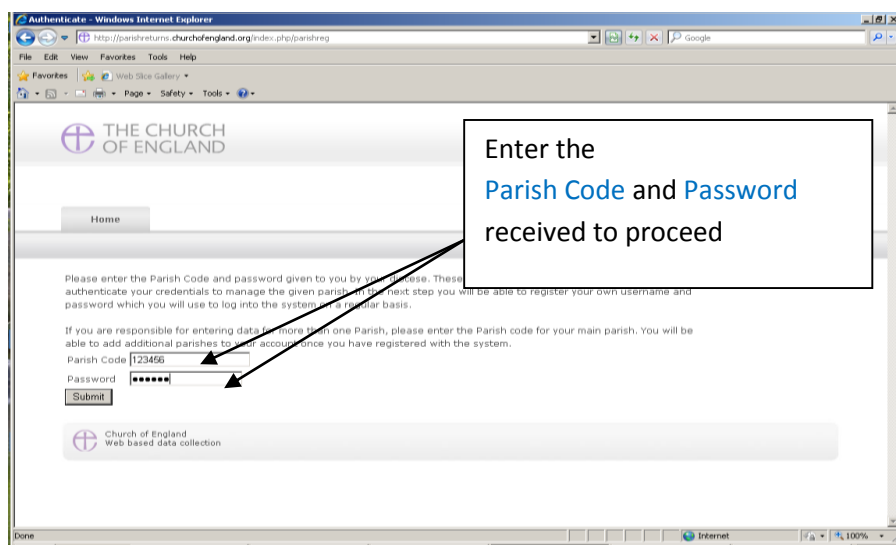


Fig. 2 – enter the parish code and password received; authenticating the process of creating an account

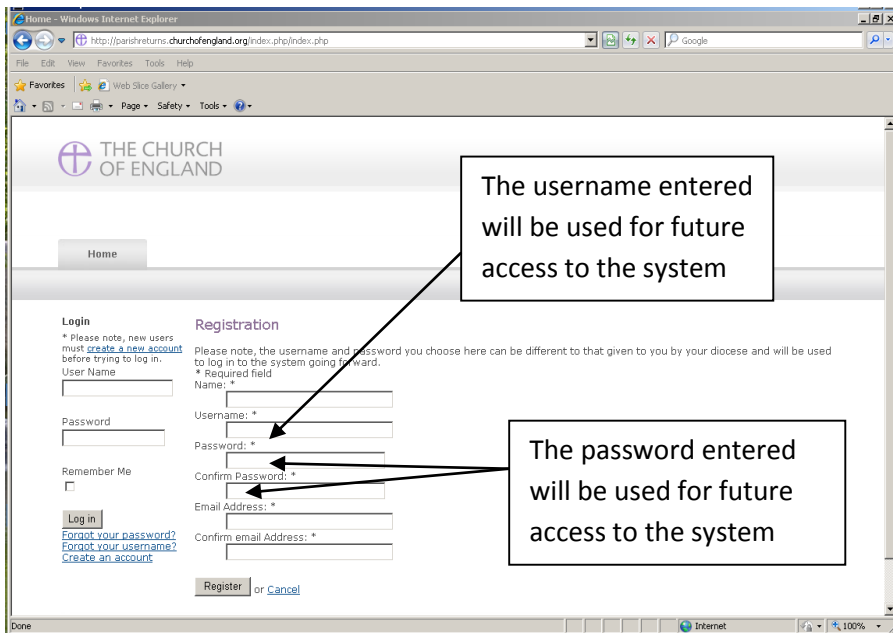


Fig. 3 – creating an account, by registering a few details on the system

## Setting up other users on the system (system administrators only)

As a System Administrator, you can set up other people to have access to the forms too (e.g. the treasurer, stewardship secretary etc). You can do this from the [Users Menu](#) tab by clicking on [Manage Sub Accounts](#) and then clicking [Add a new user](#).

Please note that if you have access to more than one church's data you can restrict which churches the additional users have access to by ticking the boxes at the bottom of the login section. You can also delete users too.

You will need to know the individual's email address to complete the process and assign a user name and password to them that they will use (although they will be able to change that once they log in in their own right). Once they have been set up by the Systems Administrator as a user they will not need to go through the 'Create an Account' routine but can log in directly.

## Finding your way around

Having created your account, you are now ready to explore the system. Here is a description of each tab that you will see in grey across the top of the page.

<Home>	Gives general information about the system
<Access Forms>	Takes you to the main part of the system where you enter your details (see below in the section on <i>Entering information online</i> ).
<Reports>	Gives you access to six separate reports showing how your parish statistics have changed over the past ten years (and will be updated once you enter the current year data). These reports can also be downloaded for use in presentations etc. There are six different reports in total (see the <i>Reports</i> section below).
<Select Church>	This is only useful if you are responsible for more than one church's data. It takes you back to the first screen, allowing you to select a different church.
<Users Menu>	Allows you to amend your login details ( <a href="#">Edit Your Details</a> ) – for example, if you change your email account. If you are an Administrator, it also allows you to add other parishes to your account ( <a href="#">Add Parishes to Your Account</a> ) and set up sub accounts for others to access the system ( <a href="#">Manage Sub Accounts</a> ).
<Logout>	Logs you out of the system.



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## Entering information onto the online forms

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Now you are ready to start entering information.

### Some helpful tips:

- Throughout the forms you will find  symbols. If you click your pointer on the  symbol a 'help box' will appear to guide you. Look out for these as you go through the forms.
- At any time, if you find a problem with the system or have a thought about how we can do things better please click on the [Report Problems/Give Feedback](#) at the bottom right of the page and let us know what your issue is.

Click the [Access Forms](#) tab (and if relevant identify which church/parish return you wish to complete). A number of parishes that have more than one church submit individual returns and this system allows separate submission of data. It also allows a combined submission (see below).

Having clicked on a church/parish you then need to choose whether to enter finance or mission statistics (membership) data. *Please note, the data being collected is identical to that which is collected at present in paper form. You are not required to have any other information to hand in order to complete this process.*

**If you want to submit combined church data (for the financial return) you need to select the main parish church and, having got to page one of the**

relevant form you can tick, by way of the 'Churches Included' section, to include one or more other churches in the parish within the one return. If you don't tick the box you (or someone else) will need to do a subsequent return for the churches excluded. If you subsequently realise that the data from one or more churches should be separate then simply un-tick the box and the data you enter will be treated as only relating to those churches still ticked.

**When entering forms please ensure you complete every box – nil returns should be indicated by entering '0'.** This is very important as the system records the extent to which the form has been completed and blanks will show as incomplete forms. When you have entered a page click [Next](#) to move on. If there are blanks on the page the system will challenge you. If it is your intention to return at a later date simply click [Next](#) to override the challenge.

You may also at this stage get a second challenge. The system is designed to perform simple error checking. If the numbers you have entered are out of line with the figures entered in previous years it will ask you to make sure you haven't accidentally entered a wrong figure. **Please be aware** that the system stores data at *parish* rather than *individual church* level therefore if there are a number of churches that make up your total parish, figures you enter may get challenged rather more often than others with just a single church. This is because the figures you enter will be less than the total activity for the parish and may therefore look a bit odd to the computer.

There are some other checks built into the system. These are all designed to improve the quality and consistency of the data being submitted, so please bear with us.


At *any time* you can save the data you have entered and return to the main menu (useful if you find you need to take a break or you don't have all the information to hand). Everything you have done will be saved. The data you have entered onto a page is also saved every time you click [Next](#), so you can flick between pages without losing your changes.

When you have completed all the pages of the form, you will be presented with the following options: [<Submit Data to Diocese>](#), [<Save and Return to Menu>](#) or [<Download report as PDF>](#). The final option allows you to scroll down the page and visually review the data you have entered.

**Please note that once you press [<Submit Data to Diocese>](#) you will not be able to make further adjustments to your entry;** therefore it is recommended that you take a copy of the report first and satisfy yourself that the form has been properly completed. If you select the [<Save and Return to Menu>](#) option you will see an indicator that tells you whether the form is complete and also reminds you of its status. When the indicator light goes green you know you have completed the form.

Once the data has been submitted to the diocese, a green tick will appear against the record. The data is now available for the diocese to look at and, once they are satisfied that the figures are as expected, they will 'Verify' the data. You can therefore check the progress of your return.

Complete the process for each of the forms you need to submit. If this is a job being shared with others, you need to set them up as separate users (see *Setting up other users* above) and let them know when it is their turn to complete the information that they are responsible for.

The job will be complete when every church for which you are responsible has a **100%** against each return and a  in the 'submitted' column.

## Reports

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An important feature of the system is the ability to see a graphical representation of how the parish has developed over the last ten years. When you click on [<Reports>](#) you will be taken to a menu of six different reports that you can access and that you can download for use in presentations etc.


There are some **important things to understand** about these reports:

1. They show *combined parish data*, not individual church data. Therefore, if you are submitting more than one set of returns per parish, the chart for the current year will not be fully populated until you have completed all the returns.
2. The charts are *updated as you enter data*, so they are a good way of checking whether your figures look reasonable compared to previous years **before** you press the submit button and send your returns to the diocese.
3. The charts will highlight whether some of the historic data was not presented properly. At parish level it is not possible to correct previous years' figures, but if you spot an anomaly which is clearly a result of poor data having been entered in previous years, and you are able to supply the corrected figures, please contact the Parish Support Office. The request will then be forwarded to the national team, who will endeavour to correct the error during the next year's data input. There may be a significant amount of data clean up to complete, so please be patient.

## Finding help

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If you get stuck you can find help in the following ways:

- If it relates to how to fill in the forms click on the  symbols you will find throughout the forms.
- If it relates to accessing the system for the first time, please contact the Parish Support Office.
- If you think the system is not doing what it should be then use the [Report Problem](#) facility at the bottom of each page.

Please note that it may take a few days to get back to you as we don't have a dedicated helpline facility operating. If we discover that typical problems keep occurring we will try to get general information out to all users as soon as possible.

## Frequently asked questions

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**I tried to login using the Parish Code and Password supplied by the diocesan office, but I get the following response: "Username and password do not match or you do not have an account yet".**

The error message you are seeing is displayed where there has been an attempt to login with a username and password that does not match any record held in the system. This can occur when either the username and/or password have been typed incorrectly or an account does not yet exist.

Experience has shown that this initially occurs where an attempt to login has been made using the Parish Code and Password supplied by the diocesan office, rather than after an account has been created. See *Accessing the system for the first time* where you will note that you initially need to create an account for yourself, using the Parish Code and Password supplied by your diocesan office.

**I wanted to put in the financial numbers and leave someone else to put in the other information. Is this possible?**

Yes – see *Entering information*. However, if the other person does not currently have access to the system, see also *Setting up other users*.

**How do I register with an additional parish?**

See *Information for system administrators*. By way of the <Users Menu> tab by click on [Add Parishes to Your Account](#) and then enter the [Parish Code](#) and [Password](#) supplied by your diocesan office, before clicking [Submit](#).



**Where can I find out more regarding fresh expressions?**

Refer to the fresh expressions website at <http://www.freshexpressions.org.uk/>, or contact the Diocesan Fresh Expressions Officer, Michael Mitton, on 01332 388687.

**Where or how do I indicate if any of my attendance figures are unusual for any reason?**

Indicate any unusual figures by using the free text box at the bottom of page 3 of the Statistics for Mission (Membership) form, headed [Please use the box below to note whether there are any reasons for an unusual attendance on any of the Sundays in October, such as half term or Harvest](#).

**Where can I find the Help text?**

See *Entering information onto the online forms*. Throughout the forms you will find  symbols. If you click your pointer on the  symbol a 'help box' will appear to guide you.



## Additional information

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### *System/Church Structure*

