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# Diocesan Report

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*You can now file online at:*  
<https://reports.dfms.org>

## Online Filing Instructions

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Canon I.5.4 and Canon I.4.6(j)-(k) ask each diocese to file a report to help provide

*“An Accurate View of the State of the Church”*

Thank you for helping with this important work!

## Step 1:

Begin by logging into the DFMS Filing Site

### Login

The screenshot shows the login page of the DFMS Reports Filing Site. The header includes "DFMS REPORTS FILING SITE" and "THE Episcopal CHURCH". The page is titled "Welcome" and features a login form with fields for "Login name" and "Password", a "Login" button, and a link for "I forgot my password". Below the form, there are instructions for users who need login information or are still having trouble, with contact information for the Diocesan Office and the General Convention Office.

If you already have access to the DFMS filing site, you may begin logging in by using your email address as the login name and the password you created.

If you require access, but do not have access, someone in your diocese who already has access can also create a profile for you. If you do not know who that person might be, email the General Convention Office at [dr@episcopalchurch.org](mailto:dr@episcopalchurch.org)

### First-time users

- Once access has been granted, you will begin by entering your email address as the login name and the temporary password provided. You will then be prompted to change your password.
- After changing your password, the site will move to the next step, Diocese Profile where you can view and edit the information listed.

The screenshot shows the "Change Password" page of the DFMS Reports Filing Site. The header includes "DFMS REPORTS FILING SITE" and "THE Episcopal CHURCH". A yellow banner at the top states "This is a non-production site using the UAT database." Below this, there are navigation links for "SELECT REPORT" and "Login Profile". The main form has fields for "Login Name" (pre-filled with "TestMcTester@email.com"), "Current password/PIN", "New password", and "Confirm new password", along with a "Change Password" button.

## Diocese Profile

- If the information here is blank, it's because we did not receive this information last year. Please be sure to complete the fields requested.

**\* Please note:** The information you provide here is important for future communications from the General Convention Office, please make sure to update it accordingly. This section is available for updating at anytime, even after your report has been filed.

The screenshot shows the 'DFMS REPORTS FILING SITE' interface. The header includes 'THE Episcopal CHURCH' logo and 'Diocesan Report Filing Site (Instructions)'. The main content area is titled 'The Episcopal Diocese of'. It contains several sections: 'Street address' and 'Mailing address' (both empty text boxes); 'General' information including 'Phone', 'Email address', 'Web address', 'Tax ID', and 'LRFID'; and 'Primary Contacts' which is a table with columns for 'Name' and 'Email'. The table lists roles such as 'Diocesan Bishop', 'Secretary of Conversion', 'Diocesan Administrator', 'President of Standing Committee', 'Ecumenical Authority', 'Diocesan Report, Part I', and 'Diocesan Report, Part II'. At the bottom left of the form, there is an 'Edit' button and a 'Continue' button.

- To make changes to the Diocese Profile, click the “Edit” button in the lower left of your screen.

### The Episcopal Diocese of

Street address \_\_\_\_\_ Mailing address \_\_\_\_\_

#### General

Phone  
Email address  
Web address  
Tax ID

#### Primary Contacts

Diocesan Bishop	Name	Email
Diocesan Contact (Part I)	Name	Email
Diocesan Contact (Part II)	Name	Email



- Please double check the information you enter here for any typos, as it will be the contact information the Executive Office of the General Convention will use for correspondence.

- It's important to note here who will be the primary contact for each part of the Diocesan Report. If that is the same person, simply copy and paste the information into each field. This helps us to know that we are not waiting on or missing someone's information.
- Currently we're only asking for one contact for each. If it's necessary to add an additional contact for any field, please email [dr@episcopalchurch.org](mailto:dr@episcopalchurch.org).
- Once you have completed the fields, please click the "Save" button at the bottom left of the page. You will be taken back to the full Diocese Profile page. If all looks good, click the "continue" button at the bottom of the screen to proceed to the next step.

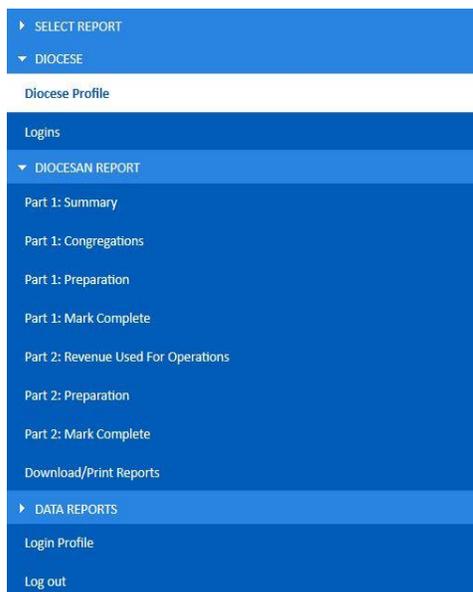
## Step 2.

Recording all new and closed congregations during the year.

### **PART I: Congregations**

#### **Summary**

- This is the start of Part I of the Diocesan Report.



- If you're not ready for Part I just yet, click another tab using the menu bar to navigate you to another page. Please note, we have set requirements for each page, so even if you skip and forget to provide information, it will not allow you to mark your report as complete until all required information is provided.

- Clicking the Title (Text in CAPS) on the menu bar, will drop-down or collapse the menu option in that section. This is to narrow or expand your view. This allows you to see as few or as many sections as you would like.

- If you're ready to begin entering the information for Part I, begin by entering the total number of congregations in your diocese in the "Summary" page.

**DFMS REPORTS FILING SITE** THE *Episcopal* CHURCH

All 2019 Diocesan Reports must be completed by the Dioceses and submitted to the Office of the General Convention by September 1, 2020 (189 days) (CANON 1.6.4)  
This is a non-production site using the SystemTest database.

**SELECT REPORT**  
 ▶ DIOCESE  
 ▼ DIOCESAN REPORT

**Part 1: Summary**  
 Part 1: Congregations  
 Part 1: Preparation  
 Part 1: Mark Complete  
 Part 2: Revenue Used For Operations  
 Part 2: Preparation  
 Part 2: Mark Complete  
 Download/Print Reports

**DATA REPORTS**  
 Login Profile  
 Log out.

**Congregations (Summary)**

**New this year:** The righthand column shows totals from the [Part I Congregations](#) page, and may include closings and/or status changes reported to the General Convention Office earlier this year to facilitate filing of parochial reports. These totals must match the totals entered on this page to report accurately for Part 1 of the current filing year's diocesan report.

		<a href="#">PART I CONGREGATIONS</a>
Number of Congregations at <b>beginning</b> of year (January 1, 2019)	A	0
Number of New Congregations ( <b>new starts</b> ) during 2019	+ B	0
Number of Congregations <b>closed</b> during 2019	- C	0
<b>Total</b> number of Congregations at year end (December 31, 2019)	= D	0

Save and Continue

ENGLISH | Español

- Here you will also report how many congregations opened or closed during the current filing year.
- Once you have entered the number of new and closed congregations, the "Total number of Congregations at year end (December 31, 2019)" will be automatically calculated based on the figures you entered.

**New this year:**

Please make note that a figure in the column on the far right of the screen, labeled as, 'Part 1: Congregation:' [red pointed arrow above] represents any new or closed congregations indicated in the detailed next section as well as any that were reported earlier this year in order to have those congregations file a Parochial Report.

- The total in 'Part 1: Congregation' will need to match your total on this page to report accurately for Part 1 of the current filing year's diocesan report.
- When the figures are correct and you're ready to move-on, click "Save and Continue" to move to the next menu page.

## Congregations

In this section we ask that you provide more details regarding the information you entered in the “Summary” page.

### New this year:

- Some dioceses might notice that a congregation has already been added for you. This means that a new or closed congregation(s) has already been reported to the General Convention Office earlier this year.
- If you forgot to include this number in your total in the previous page “Summary”, a number will automatically be added to the previous page under “Part 1: Congregations:”.
- The figure reported under “Part 1: Congregations” will need to be the same as what you enter on the left column (screenshot above). The column represents what has been reported automatically, but it needs to be verified by the user.

### New Congregations

*You have indicated 1 New Congregations (new starts) on the Summary page and 0 on this page.  
Add records here for all congregations you have reported as New Congregations (new starts) on the Summary page.*

<input type="button" value="Add new record"/>						
Name	Type	Address 1	Address 2	City/State/ZIP	Country	Delete

### Closed Congregations

*You have indicated 0 Congregations closed on the Summary page and 0 on this page.  
Add records here for all congregations you have reported as Congregations closed on the Summary page.*

<input type="button" value="Add new record"/>						
Name	Address 1	Address 2	City/State/ZIP	Country	Closed	Delete

### Congregations with a Change in Filing Status

*Add records here for all congregations whose status has changed from Filing to Non-Filing, or from Non-Filing to Filing.*

<input type="button" value="Add new record"/>					
Name	Address 1	City/State/ZIP	Filing Status	Date	Delete

The screenshot above shows in example of how your reported numbers in the “Summary” page reflects on this page “Congregation”.

- The example above shows one new church start in the “Summary” page, which is then reflected in **red text**. Because the reported number has been reflected from the “Summary” page, detailed information for that congregation needs to be provided.
  - To enter information, click “Add new record”

## Add/Modify New Congregation

Name \*

Type \*

Street address

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Line 1 \*

Line 2

Country

CITY \*  STATE \*  ZIP CODE \*

- The same applies to any closed congregations you reported in the “Summary” page. Example, if you reported two closed congregations, please indicate their details by clicking on the drop-down menu and selecting from the list of open congregations in your diocese.
- Please be sure to provide the date it closed and the reason. This helps us to keep good records and have accurate information going forward.
- If your reason for closure is not available in the drop-down menu, you may provide the reason and any necessary additional information in the “notes” section.

## Add/Modify Closed Congregation

Congregation \*  ←

Date closed \*  ←

Reason for closure \*  ←

Notes

- We have also added a section for congregations who have changed in status. To simplify things, we have provided a drop-down menu of those listed as non-filing in our records. Select the congregation that is moving to filing status. Once your diocesan report is filed, that congregation will be able and expected to file a parochial report for the upcoming filing year.
- If a congregation is becoming a non-filing congregation then you may select from a list of all filing congregations. This will then let us know they will not be filing a Parochial Report for the future years. The parish will maintain “non-filing” status until otherwise indicated by the diocese.
- Once you have reported all changes to congregations you may click the “Continue” button at the bottom of the “Congregations” page. Doing so will move you to the next section.

## Preparation

- In preparation of the report all fields are required, and you will not be able to mark Part I complete until all the information has been entered.

### Part I: Preparation

Prepared by	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text" value="someone@example.com"/>
Bishop	<input type="text"/>
Date approved	<input type="text" value="mm/dd/yyyy"/>

- After entering the information click the “Save” button below to move to the next menu.

## Mark Complete

- When you get to this page and you have entered all the information needed in the previous pages, a “Mark Complete” button will be available.

### Part I: Mark Complete

Marking Part I complete is one of two final steps in submitting a **complete** Diocesan Report.

If you see a timestamp below of the date and time you marked the report complete, the Office of the General Convention has received your information.

Data entry started	<input type="text" value="4/11/2019 12:12 PM"/>
Data entry finished	<input type="text" value="(in progress)"/>

#### Mark Part I Complete



- No changes can be made once your report has been marked complete.
- To reopen your report for edits, contact the Office of the General Convention at [dr@episcopalchurch.org](mailto:dr@episcopalchurch.org) before September 1st.

#### Prerequisites for Part I

Prerequisites for filing Part I **HAVE** been met:

PART I CONGREGATIONS				PREREQUISITES MET
Part I Preparation				<b>YES</b>
Part I Congregational summary of new starts and closings				<b>YES</b>
CONGREGATIONS	SUMMARY	LISTED	DIFFERENCE	PREREQUISITES MET
New starts	1	1	0	<b>YES</b>
Closings	0	0	0	<b>YES</b>

#### Current filing status

Part I	<b>As of today:</b> New York <b>HAS</b> completed the minimum data entry for filing Part I of the Diocesan Report.
Diocesan Report	A completed 2018 Diocesan Report <b>HAS NOT</b> been filed.

- If you have skipped any information, this page will tell you what is required to mark Part I complete. See example below where the details of a new parish are missing.

## Part I: Mark Complete

Marking Part I complete is one of two final steps in submitting a **complete** Diocesan Report.

If you see a timestamp below of the date and time you marked the report complete, the Office of the General Convention has received your information.

Data entry started   
 Data entry finished

Mark Part I Complete

**Part I cannot be marked complete until all prerequisites have been met.** ←

Prerequisites for Part I

Prerequisites for filing Part I **HAVE NOT** been met:

PART I CONGREGATIONS			PREREQUISITES MET
Part I Preparation			YES
Part I Congregational summary of new starts and closings			YES
CONGREGATIONS	SUMMARY	LISTED	DIFFERENCE
New starts	1	0	1
Closings	0	0	0
			PREREQUISITES MET
			NO
			YES

Current filing status

Part I **As of today:** New York **HAS NOT** completed the minimum data entry for filing Part I of the Diocesan Report.  
 Diocesan Report A completed 2018 Diocesan Report **HAS NOT** been filed.

## Step 3.

Recording Revenues used for Operation for Operating Income

### **PART II: OPERATING INCOME**

#### **Revenue used for Operation**

- Please report the all figures necessary to reflect a complete picture of diocesan finances.
- Please note that the totals will automatically calculate.
- You may enter cents, although it will automatically round up to the nearest dollar.
- Additional line-by-line instructions are available on the Research and Statistics page on the Episcopal Church website at:

<https://www.episcopalchurch.org/research/forms-and-instructions>

## Preparation

- In preparation of the report all fields are required, and you will not be able to mark Part II complete until all the information has been entered.

### Part II: Preparation

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#### Report Preparation

Prepared by	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text" value="someone@example.com"/>

#### Audited Financial Statement

An Audited Financial Statement is part of a complete Diocesan Report.  Our Audit Report is complete.  
 Our Audit Report is not complete.

#### Adopted Budget

An Adopted Budget is part of a complete Diocesan Report.  Our Adopted Budget is complete.  
 Our Adopted Budget is not complete.

#### Bishop

Name	<input type="text"/>
Date approved	<input type="text" value="mm / dd / yyyy"/>

#### Certified by Treasurer/Financial Officer

Certified by	<input type="text"/>
Date certified	<input type="text" value="mm / dd / yyyy"/>

<input type="button" value="Save and Continue"/>	<input type="button" value="Save"/>
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- After entering the information click the “Save” button below to move to the next menu.

## Mark Complete

- This page should help you understand what we require from you to be able to mark Part II of your report as complete. As you can see below, the button to mark complete will not appear until all prerequisites are met. In the example, a parish has not yet provided revenue information.

### Part II: Mark Complete

Marking Part II complete is one of two final steps in submitting a **complete** Diocesan Report.

If you see a timestamp below of the date and time you marked the report complete, the Office of the General Convention has received your information.

Data entry started 4/11/20 12:19 PM

Data entry finished (in progress)

#### Mark Part II Complete

**Part II cannot be marked complete until all prerequisites have been met.** ←

#### Prerequisites for Part II

Prerequisites for filing Part II **HAVE NOT** been met:

PART II OPERATING INCOME	PREREQUISITES MET
Part II Preparation	YES
Part II Revenue Used For Operations	NO

#### Current filing status

Part II **As of today:** New York **HAS NOT** completed the minimum data entry for filing Part II of the Diocesan Report.

Diocesan Report A completed 20 Diocesan Report **HAS NOT** been filed.

- Once you have entered all required fields, this page will then show you a “mark complete” button.

### Part II: Mark Complete

Marking Part II complete is one of two final steps in submitting a **complete** Diocesan Report.

If you see a timestamp below of the date and time you marked the report complete, the Office of the General Convention has received your information.

Data entry started 4/11/20 12:19 PM

Data entry finished (in progress)

#### Mark Part II Complete

Mark Part II Complete ←

- No changes can be made once your report has been marked complete.
- To reopen your report for edits, contact the Office of the General Convention at [dr@episcopalchurch.org](mailto:dr@episcopalchurch.org) before September 1st.

#### Prerequisites for Part II

Prerequisites for filing Part II **HAVE** been met:

PART II OPERATING INCOME	PREREQUISITES MET
Part II Preparation	YES
Part II Revenue Used For Operations	YES

#### Current filing status

Part II **As of today:** New York **HAS** completed the minimum data entry for filing Part II of the Diocesan Report.

Diocesan Report A completed 20 Diocesan Report **HAS NOT** been filed.

A banner message (below in green) will appear when you have successfully completed both Part I and Part II of the Diocesan Report.

- Once your report is completed and submitted, you may login in to view information, but you will no longer be able to make edits. If you need to make edits after having filed your report, please email [dr@episcopalchurch.org](mailto:dr@episcopalchurch.org)



**This completes the instructions for online filing for the Diocesan Report.**

We hope you have found this guide helpful and the online process easy to use. Thank you for helping us to have good and accurate information regarding our common life as The Episcopal Church. We appreciate your time and effort!