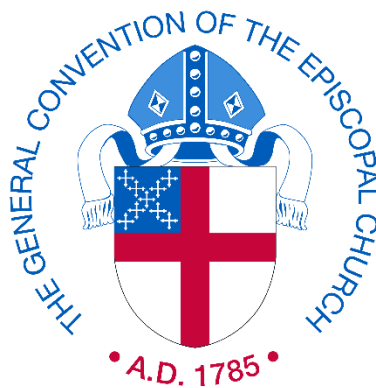


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# Annual Diocesan Report

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*You can now file on line at:*  
<https://dr.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:

Changing your password and updating your Diocese's Profile

### Login

The screenshot shows the login page of the Diocesan Report Filing Site. At the top, there is a blue header with the text "DIOCESAN REPORT FILING SITE" on the left and "THE Episcopal CHURCH" with a logo on the right. Below the header, a pink banner states: "Filing for the 2018 Diocesan Report is currently closed. Filing is open from April 15 to September 1, 2019." The main content area has a blue sidebar on the left. The central area is titled "Welcome" and contains a login form with fields for "Login name" and "Password", and a "Login" button. Below the form, there is a "Help" section with the text "Need login information? Contact the Office of the General Convention at [dr@episcopalchurch.org](mailto:dr@episcopalchurch.org)." and a "Canons" section with two paragraphs of text regarding the reporting mandate and deadline.

Log in using the Login name and Password provided by the General Convention office. Your login information was sent to you by email on Tuesday, April 9, 2019.

If you have not received it, check your spam folder first. Otherwise email [dr@episcopalchurch.org](mailto:dr@episcopalchurch.org) for login information.

### Change Password

- On your first login, you will be prompted to change your password.
- After changing your password, the site will move to the next step of completing your profile.

The screenshot shows the "Change Password" page of the Diocesan Report Filing Site. It features the same blue header and pink banner as the login page. The main content area has a blue sidebar on the left with a menu including "ADMIN", "DIOCESE", "PART 1: CONGREGATIONS", "PART 2: OPERATING INCOME", "REPORTS", and "CANONICAL REQUIREMENTS". The "Change password" link is highlighted. The central area is titled "Change Password" and contains a password change form with fields for "Current password", "New password", and "Confirm new password", and a "Change password" button. A note above the form states: "Your new password must be between 8 and 50 characters long, and must contain at least one capital letter, one lowercase letter, and one digit."

## Diocese Profile

- The information here is blank because this is the first time reports are being collected electronically. You will only need to enter this information once. It will be stored for future years.

DIOCESAN REPORT FILING SITETHE *Episcopal* CHURCH

**Mandate (CANON 1.4.6.1-3):** Each Diocese shall annually report to the Executive Council such financial and other information pertaining to the state of the Church in the Diocese as may be required in a form authorized by Executive Council. **Canonical Deadline (CANON 1.6.4):** All 2018 Diocesan Reports must be completed by the Dioceses and submitted to the Office of the General Convention by **September 1, 2019** [144 days].

**Diocese Name**

DIOCESE  
Diocese profile  
PART 1: CONGREGATIONS  
PART 2: OPERATING INCOME  
REPORTS  
CANONICAL REQUIREMENTS  
  
Change password  
Log out

### 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

- 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, please email [dr@episcopalchurch.org](mailto:dr@episcopalchurch.org).
- Once you have completed the fields 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.

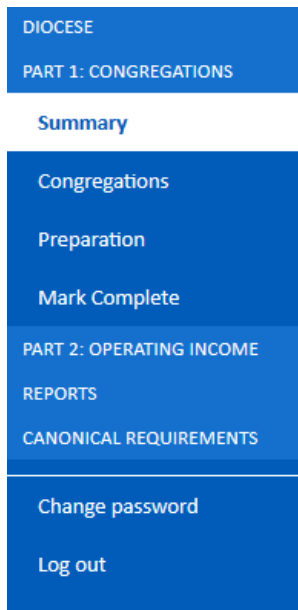
## Step 2.

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. 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.

➤ Here you will also report how many new and closed congregations occurred 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, 2018)" will be automatically calculated based on the figures you entered. A sample preview is below.

## Congregations

Number of Congregations at <b>beginning</b> of year (January 1, 2018)	<b>A</b>	<input type="text" value="100"/>
Number of New Congregations ( <b>new starts</b> ) during 2018	<b>+ B</b>	<input type="text" value="1"/>
Number of Congregations <b>closed</b> during 2018	<b>- C</b>	<input type="text" value="0"/>
<b>Total</b> number of Congregations at year end (December 31, 2018)	<b>= D</b>	<input type="text" value="101"/>

- When the figures are correct and you're ready to move-on, click "Save and Continue" to move to the next menu.

## Congregations

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

### 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.*

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.*

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.*

Name	Address 1	City/State/ZIP	Filing Status	Date	Delete
------	-----------	----------------	---------------	------	--------

- Because we indicated 1 new church start in the "Summary" page, this page will indicate in red **text** that you need to provide their information.
  - To enter information, click "Add new record"

## Add/Modify New Congregation

Name \*

Type \*

Street address

---

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 why it closed. 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 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   
Data entry finished

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				YES
Part I Congregational summary of new starts and closings				YES
CONGREGATIONS	SUMMARY	LISTED	DIFFERENCE	PREREQUISITES MET
New starts	1	1	0	YES
Closings	0	0	0	YES

Current filing status

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

---

#### Report Preparation

Prepared by

Phone

Email

#### 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

Date approved

#### Certified by Treasurer/Financial Officer

Certified by

Date certified

- 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 4/11/2019 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 2018 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 4/11/2019 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

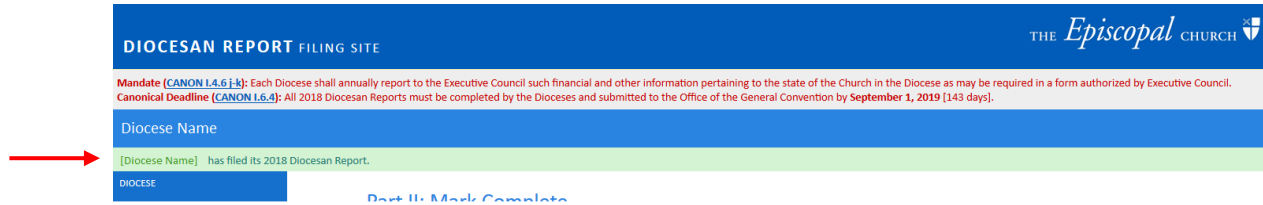
#### Current filing status

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 2018 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 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!