

Annual Returns Help and Guidance

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Using the site

Navigation

Select Your Role

If you have more than one role, you will be asked to select which one you wish to use for completing the return. You can change roles at any time by clicking on the "Role:" display in the top right hand corner.

The effect of the different roles is outlined below:

Managing Trustee – This role will allow you to view and edit the returns for those churches that you have permission for.

Circuit Trustee – The Circuit Trustee role allows you to view all church returns within the circuit as well as completing the Circuit Return (see [Circuit Return](#) for further information). You can also view reports on any issues that churches may have through the Property Issue Summaries.

District – As a District user, you will be able to see the returns of all the churches and circuits within your district, as well as completing the District Return. You can also view reports on any issues that churches may have through the Property Issue Summaries.

If you find that you cannot edit a return, first make sure you are logged in as the correct role (circuit trustees cannot edit church returns for example) and if that does not resolve the issue, contact your superintendent (for churches) or district property secretary (for circuits) to make sure that **Update** permissions have been set.

Contextual Help

Purple questions marks contain further information that will help you answer the relevant question. This question mark will be visible whenever contextual help is available.



Required Fields

All required fields are denoted by a red asterisk (*) adjacent to the question. Some fields will additionally have an orange background if they are required. Any field that doesn't have an asterisk next to it is not required. **Please see the Appendix for more detailed information on accessibility and the use of colours and icons.**

Read-Only Fields

Some fields are for information purposes only and therefore read-only. Such fields will have a grey background and not be editable. If the information in these fields is wrong, please contact onlinesuitesupport@methodistchurch.org.uk.

Main Page – Circuit Users

This page will give you a list of all the churches within your circuit. The column headings will give you further information about each church.

Church – This is the name of the church.

Overdue/Missing Quinquennials – This identifies whether the church has either an overdue or missing quinquennial report.

Information Issues – These are items that are for information purposes only, such as the location of documents if stated as “Other”.

Alert Issues – These are items that will need some action from the trustees, circuit or district.

Return Status – This identifies which churches have completed their return.

Options – This will allow you to view the return for a particular church. Please note, you will not be able to edit the return.

Sidebar – On the left hand side of the page you will see a sidebar that will assist you in navigating the site, allowing you to filter for particular churches or issues as well as generating reports.

Main Page – District Users

This page lists all the circuits within your district, as well as giving information on how many churches and circuits have completed their returns. The column headings will give you more information about each circuit:

Circuit – This is the name of the circuit.

Church Returns – This tells you how many churches within that circuit have completed their returns.

Circuit Return Status – This lets you know if that circuit has completed their circuit return.

Options – This will allow you to view the returns for a particular circuit or the churches within that circuit. Please note, you will not be able to edit the returns.

Sidebar – The sidebar here acts in the same way as the circuit sidebar, allowing you to filter for particular circuits, churches or issues, as well as generating reports based on the information provided within the returns.

Church Return

As a managing trustee, you will be expected to complete and submit a return against the churches you are responsible for.

If your church has closed, please read the document on [Reporting a change of church status](#) for further instructions.

Outline

The return itself is split up into separate tabs, each one representing a different area of responsibility. When a tab has been completed, it will turn green and display a tick. Incomplete tabs will be amber with an exclamation mark.



In the above example, all the tabs except **Property** and **Sign Off** tabs have been completed.

Once all tabs (except Sign Off) have been completed and turned green, you will be able to sign off the return.

The sidebar will give you basic information about the return, such as its status (**Not Started**, **In Progress** or **Complete**), the name of the church, circuit and district with links to the relevant profiles on the Statistics for Mission website.

Return Details

Status: In Progress

Church: Abbey Meads

Circuit: Upper Thames (23)

District: Bristol District (7)

Annual Return

Go to Church Profile.
Please note this will open in a new tab and requires sufficient permissions to view.

Here you can complete your annual return, download forms

The return needs to be filled via the online annual returns fr

You can also take a print out of the return as it stands by clicking on **Church Return** under **Print Reports**.

Print Reports:

Church Return

Property Information

Different Types of Church

The annual returns categorise Methodist churches in four broad types:

Type 1 – Churches where the place of worship is under Methodist ownership.

Type 2 – Churches that use a property for worship and contribute to its maintenance, but do not own the building. This includes churches that are part of a Local Ecumenical Partnership (LEP) as well as those that have a Sharing Agreement in place.

Type 3 – Churches that do not own any property, but lease property from a non-denominational third party.

Type 4 – Churches that do not own or lease any property.

Depending on the type your church falls under, you will be asked a different number of questions, with Type 1 being asked the greatest number and Type 4 being asked the fewest.

If your church has a mixture of properties that fall under different types, then you will be asked questions relating to the type with the most questions. For example, if you are part of an LEP that has both Methodist owned property and property owned by another denomination, your church will be treated as Type 1.

Circuit Return

You will need to have circuit permissions to complete the return. If you have multiple roles, i.e. district, circuit and church, you will need to make sure you select **Circuit Trustee** to access the returns.

The circuit return contains questions relating to the circuit responsibilities, including manse and churches where the circuit are the managing trustees. If you have access to one circuit only, you should immediately see the Circuit Return as well as all Churches after logging onto the returns site as Circuit Trustee.

> ONLINE PORTAL

Show Returns ^

Circuit: Poole Bay >

Select a Church >

Clear Selection ⊖

Issues Filter: ^

Overdue Quinquennials

Has Issues

Status Filter: ^

Not Started

In Progress

Completed

Clear Filters ⊖

Circuit Reports: ^

Poole Bay Circuit Return

OVERDUE/MISSING QUINQUENNIALS	INFORMATION ISSUES	ALERT ISSUES	RETURN COMPLETED?	OPTIONS
Yes			No	VIEW RETURN

Churches within Poole Bay

CHURCH	OVERDUE/MISSING QUINQUENNIALS	INFORMATION ISSUES	ALERT ISSUES	RETURN COMPLETED?	OPTIONS
Bournemouth	Yes			No	VIEW RETURN
Broadstone	Yes			No	VIEW RETURN
Kinson	Yes			No	VIEW RETURN
Lytchett Matravers				No	VIEW RETURN
Poole				No	VIEW RETURN
Swanage				No	VIEW RETURN
Upton	Yes			No	VIEW RETURN
Wareham	Yes			No	VIEW RETURN
Wool	Yes			No	VIEW RETURN

Displaying returns 1-9 of 9

Show Returns ^

Select a Circuit >

Select a Church >

If you have access to more than one circuit, you will need to choose a circuit from the left-hand menu first before arriving at the view pictured above.

District Return

You will need to have district permissions to complete the return. If you have multiple roles, i.e. district, circuit and church, you will need to make sure you select **District** to access the returns.

The district return contains questions relating to the circuit responsibilities, including properties where the district are the managing trustees, such as the chair’s manse. If you have access to one district only, you should immediately see the District Return as well as a list of all Circuits after logging onto the returns site as District user.

Bedfordshire, Essex and Hertfordshire District Return

OVERDUE/MISSING QUINQUENNIALS	INFORMATION ISSUES	ALERT ISSUES	RETURN COMPLETED?	OPTIONS
			No	VIEW RETURN

Circuits within Bedfordshire, Essex and Hertfordshire District

CIRCUIT	CHURCH RETURNS	CIRCUIT RETURN COMPLETED?	OPTIONS
Bishops Stortford	0 out of 4 complete	No	VIEW CHURCHES VIEW CIRCUIT RETURN
Chelmsford	0 out of 13 complete	No	VIEW CHURCHES VIEW CIRCUIT RETURN
Colchester	0 out of 11 complete	No	VIEW CHURCHES VIEW CIRCUIT RETURN
Herts and Essex Border Ecumenical Area	0 out of 9 complete	No	VIEW CHURCHES VIEW CIRCUIT RETURN
North Bedfordshire	0 out of 27 complete	No	VIEW CHURCHES VIEW CIRCUIT RETURN
North Hertfordshire	0 out of 14 complete	No	VIEW CHURCHES VIEW CIRCUIT RETURN

- Select a District >
- Select a Circuit >
- Select a Church >
- Clear Selection ⊖

If you have access to more than one district, you will need to choose a district from the left-hand menu first before arriving at the view pictured above.

Completing the Return

There are two ways of completing the return; by completing the online form or by printing off a paper copy and completing it by hand.

If you complete it by hand, you will have to hand it back to someone to copy on to the online system for submission. Paper submissions are no longer accepted.

A return is complete if all tabs have turned green.



Welcome

In this tab you can download the annual return paper form and access guidance documents. To download and print off the paper form, click on the **purple ANNUAL RETURN PDF button**. Please be aware that this is a dynamic form which means it is linked to the information currently displayed on the webpage. When you download that form, you will see the information displayed on the various tabs at that moment in time. Because there is no information to fill in, the tab is always green i.e. complete.

Property (including Insurance)

The Property tab has two main sections to it.

Checking Property Information

Here you can check the details of each individual property under the managing trusteeship of the church. This includes the **Quinquennial Inspection** date (required for all Model Trust property) and questions regarding **Asbestos, Conservation, Ownership, Planning**, and (since 2019) **Insurance**.

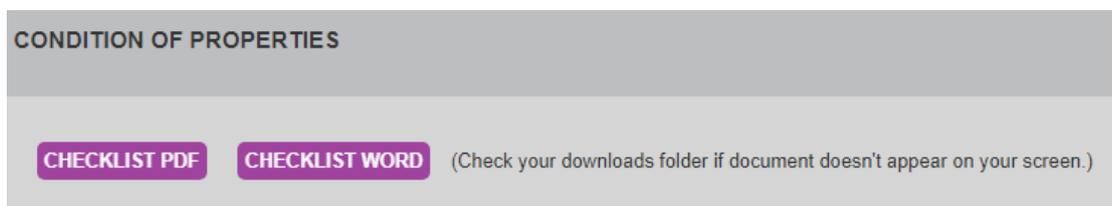
Once all fields have been completed, you will need to tick the box at the bottom of the page (below "Please tick to confirm details checked and correct"), before clicking the **purple SAVE button**.

You will need to do this for each property. Once all the properties listed have a **Y** next to them under **Details Checked** then you will be able to complete the rest of the Property tab.

Church Council / Circuit Meeting / District Synod

Here you will need to answer questions relating to the condition of all properties. Since 2019, this also includes **Insurance Information**.

You can also download the CHECKLISTS here, via the **purple CHECKLIST PDF** and **CHECKLIST WORD buttons** (this is the same document but in different formats).



Documents

This tab is about making sure you have a record of where legal and other important documents are being kept.

Safeguarding

This tab is there to ensure that all churches are following the safeguarding practices in law and Standing Orders. If you are in an LEP, you will need to find out whose Safeguarding policy you are using and complete the form accordingly.

If you are unsure about anything in this section, please contact your circuit or district safeguarding officer.

Finance

This tab is there to compliment the information entered in the [Standard Form of Accounts](#). You will need to have had audited the previous year's accounts as well as have a good idea of the financial situation within your circuit. It is strongly recommended that the treasurer feeds in to this section.

General Administration

This tab covers the miscellaneous bits of the day to day work within a church as well some of the legal aspects such as rights of way and associated leases, or entertainment licenses.

Sign off

Once all other tabs have been completed (indicated by them all being green), you will be able to sign off the return.

If you want to make any additional comments for your circuit or district property secretary to read, you can do so here.

Any comments you enter in to this section will not be seen by the Connexional Team. If you have any comments for the Connexional Team, please send an email to the appropriate officer or team.

In case you need to make any changes after submitting the return, you can do so by pressing the **UNSUBMIT RETURN button** which appears next to the SUBMIT RETURN button.

Filters

Filters can be applied if you have access to more than one church.

The **Issues Filter** allows you to filter by **Overdue Quinquennials** or by **Issues** in general.

The **Status Filter** allows you to filter by **returns status** (Not Started / In Progress / Complete).

Reports

Church Reports

Previous years' returns can be found in the **Print Reports** section located in the left-hand side bar. The **Property Information report** contains general, non-annual property-related information; past reports are available from 2018 onwards. The **Church Return report** contains annually submitted information on property, documents, safeguarding, finance and general administration; past reports are available from 2013 onwards.

Church: Abbey Meads ?

Circuit: Upper Thames ?
(23)

District: Bristol District (7) ?

Print Reports: ^

Church Return >

Property Information >

The annual return has sections on property & insurance, documents, safeguarding, tin
Please use the tabs across the top to navigate through the sections. The annual return
submitted when all of these areas are completed and the associated tabs have turned

Showing report for year:
2019

[CHURCH RETURN](#)

Guidance Manuals

[ANNUAL RETURNS HELP GUIDANCE PDF](#)

Circuit Reports

The Circuit Reports section in the sidebar enables you to view and download reports by year and by subject (**Issue Summaries**) or by Church (**Issues grouped by Church**).

Circuit Reports: ^

Issue Summaries >

Issues grouped by Church >

[CONTACT US](#)

Showing reports for year:
2019

DOCUMENTS	PROPERTY
INSURANCE	GENERAL ADMINISTRATION
SAFEGUARDING	OVERDUE QUINQUENNIALS
FINANCE	MISSING QUINQUENNIALS

District Reports

The District Reports section in the sidebar enables you to view and download reports by year and by subject (**Issue Summaries**).

District Reports: ^

Issue Summaries >

[CONTACT US](#)

Showing reports for year:
2019

DOCUMENTS	GENERAL ADMINISTRATION
INSURANCE	INCOMPLETE CHURCH RETURNS
SAFEGUARDING	OVERDUE QUINQUENNIALS
FINANCE	MISSING QUINQUENNIALS
PROPERTY	

Contacts

- Online Suite Support: onlinesuitesupport@methodistchurch.org.uk
- Property Support: property@methodistchurch.org.uk
- TMCP Legal Team: legal@tmcp.methodist.org.uk
- Methodist Church House contacts: www.methodist.org.uk/contact-us
- Methodist Church House Reception: 0207 486 5502

Useful websites

- Trustees for Methodist Church Purposes
www.tmcp.org.uk
- Online Suite (including annual returns, property consents, statistics for mission)
online.methodist.org.uk
- Online Suite guidance (including annual returns)
www.methodist.org.uk/onlinesuite
- Property pages on the Methodist website
www.methodist.org.uk/ministers-and-office-holders/property
- Managing Trustee guidance
www.methodist.org.uk/for-churches/office-holders/managing-trustees
- Constitutional Practice and Discipline (CPD)
www.methodist.org.uk/for-ministers-and-office-holders/governance/cpd
- Methodist Insurance
www.methodistinsurance.co.uk

Appendix 1

Accessibility & use of icons and colours on the annual returns site

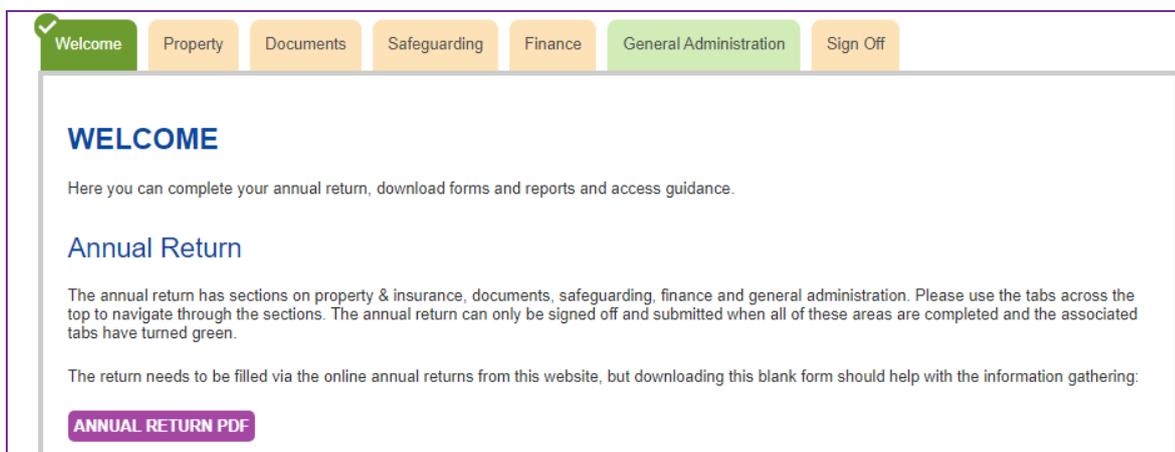
The colours used on the returns site follow a traffic light system (red – amber – green). Since not everyone can clearly distinguish these colours, complete and incomplete fields and tabs are further denoted by an **exclamation mark for incomplete** and a **tick for complete**.

The answer fields for **optional questions** are white without any icons and turn green with a tick when complete.

The answer fields for **mandatory questions** are amber with an exclamation mark when incomplete and turn green with a tick when complete. Mandatory questions also have a (red) asterisk next to them by way of distinguishing them independently of any colour designations.

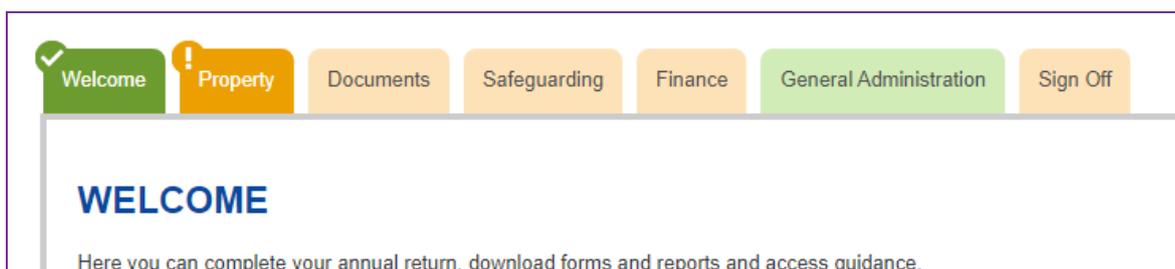
Screenshot 1: Welcome tab

This is how the landing page of a church return looks like. Please note that this is a return in progress; those who can distinguish the amber and green tabs will see that the General Administration tab has already been completed. The Welcome tab is always green and marked as complete because no information needs to be filled in.



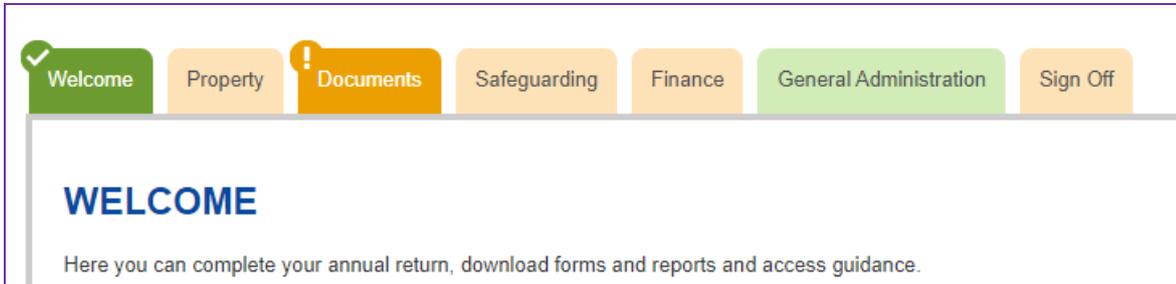
Screenshot 2: Welcome tab / Property tab

Hovering with the mouse or cursor over the Property tab makes it bold, and also brings up an exclamation mark. This means it's **incomplete**.



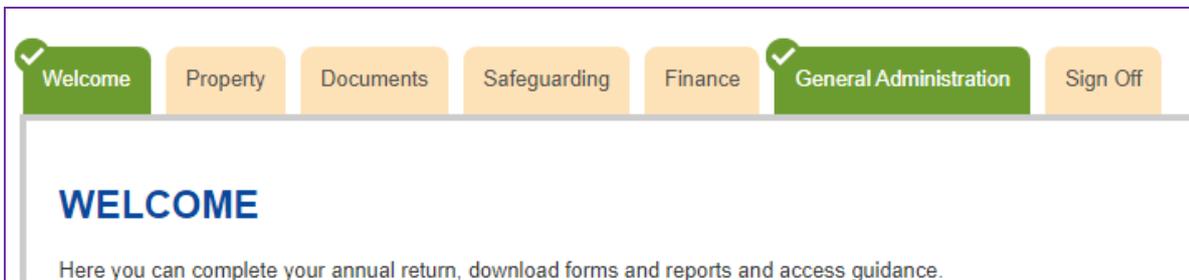
Screenshot 3: Welcome tab / Documents tab

See above, this time hovering over the Documents tab. Please note we're still on the landing page.



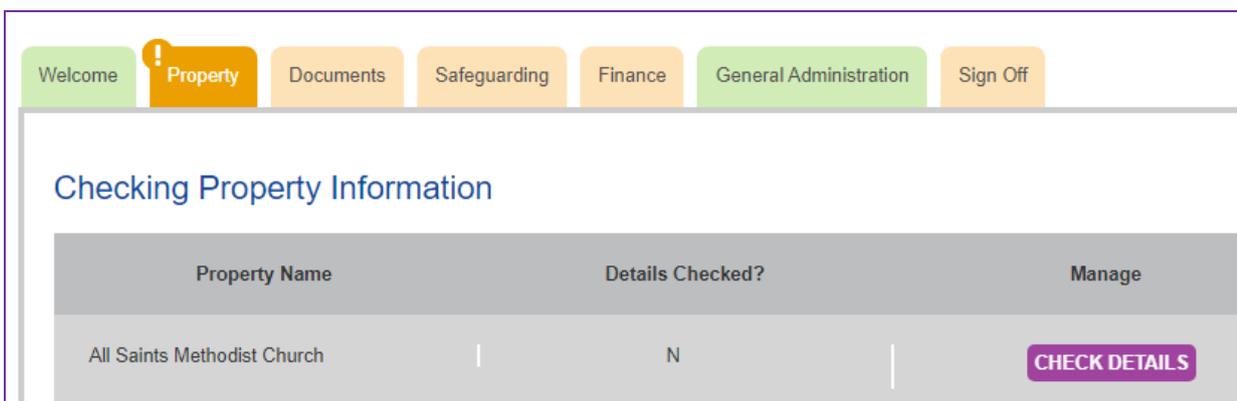
Screenshot 4: Welcome tab / General Administration tab

Still in the Welcome tab, now hovering over the completed General Administration tab.



Screenshot 5: Property tab

Having clicked into the Property tab, it is now bold and displays an exclamation mark, thus showing it as incomplete.



Screenshot 6: Incomplete & complete fields (mandatory questions)

Mandatory questions (*) with incomplete and complete answer fields. In addition to amber and green colours, the answer boxes also display an exclamation mark for incomplete and a tick for complete.

What work has the church undertaken in the last year to reduce its carbon footprint and to reduce energy consumption in line with the Connexional recommendations "Hope in God's Future - Christian Discipleship in the context of Climate Change"? *

incomplete
2990 Characters remaining

What recommendations or proposals are to be recorded in the Church Council Minute Book? *

complete
2992 Characters remaining

Screenshot 7: Incomplete & complete fields (optional questions)

The answer fields for optional questions are white without any icons and turn green with a tick when complete.

When was an Access Audit last carried out? ?

Date of last expert inspection of the gas installation (if you don't have gas, please leave blank)

Date of the last expert inspection of the electrical installation

01/01/2020

Appendix 2

New features from 1 September 2020

- **Reports**
 - Conditional questions, which are not always visible in the online version of the return but always appear in the downloadable return forms, are now clearly recognisable as such, starting with "If Yes" or "If No". Consequently, some fields will remain blank.
 - Property Information reports from previous years (starting in 2018) are now accessible via a dropdown menu, similar to annual returns from previous years.
- **Property tab**
 - In the **General** section, Quinquennial inspections for non model trust properties can be recorded if available (optional). If yes is answered to the new question **Does your site require a quinquennial inspection?**, the QI date field, which automatically appears for model trust properties, will then become visible for non model trust properties as well.
 - The **map display** now only appears for properties recorded as churches or worship sites.
 - In the **Conservation** section, the following question has been added to properties registered as being listed or within a conservation area:
 - Have you applied for listed building approval from the Connexional Conservation Officer for those works of repairs and/or alterations that impact on the significance of the listed building, or the exterior of your unlisted building in a conservation area?
 - In the **Insurance** section, two questions have been added after the question **Is the property used by outside organisations?**:
 - If yes, do you have a rental agreement?
 - If yes or no, has Methodist Insurance been informed of use by outside organisations?
- **Documents tab**
 - The first question in this tab has been reworded for clarification.
 - **Deeds** and **Land Certificates** have been added to the **Where are the following documents deposited?** section.
- **Return status**

On circuit level, the column heading in the churches listing now reads **Return Status** instead of **Return Completed** and displays one out of three returns status options (Not Started, Incomplete, Complete).