

Annual Returns Help and Guidance

Contents

- Using the site..... 3**
- Navigation 3
- Contextual Help.....3
- Required Fields3
- Read-Only Fields.....3
- Select Your Role3
- Main Page – Circuit Users.....4
- Sidebar4
- Main Page – District Users4
- Select Your Role4
- Sidebar5
- Church Return 6**
- Outline.....6
- Different Types of Church.....7
- Circuit Return 8**
- District Returns 9**
- Completing the Return 10**
- Paper Copy 10
- Online Copy..... 10
- Property 10
- Quinquennial Inspections..... 10
- Documents 11
- Insurance 11
- Safeguarding..... 11
- Finance..... 11
- General Administration 11
- Sign off 11
- Reports..... 12**
- Church Reports..... 12
- Church Return..... 12
- Property Information Reports 13
- Contacts..... 14**

Using the site

Navigation

Contextual Help

Purple question 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.

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 returns@methodistchurch.org.uk.

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:

Church 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.

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 Quinquennial – 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 Completed? – This identifies which churches have completed their return.

Option – 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 simply the name of the circuit.

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

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

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. The roles are outlined below:

Church Trustee – This role will allow you to view and edit the local church returns for those 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.

Option – This gives you the option of either viewing the circuit return or viewing the list of churches within that circuit (see [Main Page – Circuit Users](#) for more information)

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 church trustee, you will be expected to complete and submit a return against the churches you are responsible for. To help you with this, we have created an online form for you to complete (if you have difficulty accessing the internet, then you can download a paper copy, more info can be found under [Paper Copy](#))

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

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. Incomplete tabs will be amber.



In the above example, you can see that all the tabs except Safeguarding and Sign Off have been completed

Once all the tabs (except Sign Off) have been completed and turned green, you will be able to complete the return. More information can be found under Sign Off.

The sidebar will give you basic information about the return, such as its status (complete or incomplete), the name of the church, circuit and district with links to the relevant profiles on the Statistics for Mission website.



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

Different Types of Church

The annual returns categorises Methodist churches in four broad types:

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

Type 2 – Churches that are part of a Local Ecumenical Partnership (LEP), but do not own any property.

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

The circuit return contains questions relating to the circuit responsibilities, including manse and churches where the circuit are the managing trustees. To access the circuit return, you will need to click on **Circuit Return** in the top left hand corner of the screen.



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** to access the returns.

If you are responsible for more than one circuit, you will need to select which circuit you wish to complete the returns for.

As with the church return, you can print off a copy for completion by hand. This will need to be handed back to someone to copy and submit on to the online system. Further information can be found under [Paper Copy](#).

District Returns

The district return relates to all property where the district are the managing trustees, such as the chair's manse. To access the district return, you will need to click on **District Return** in the top left hand corner of the screen.



> DISTRICT RETURN
(INCOMPLETE)



Show Returns

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.

As with the church return, you can print off a copy for completion by hand. This will need to be handed back to someone to copy and submit on to the online system. Further information can be found under [Paper Copy](#).

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 need to complete it by hand, you will have to hand it back to someone to copy on to the online system for submission.

Paper Copy

To obtain a paper copy, click on **PDF Version** under church return on the Property tab. You can then print this off and complete by hand. This will need to be handed back to someone to submit online as paper submissions are no longer accepted.

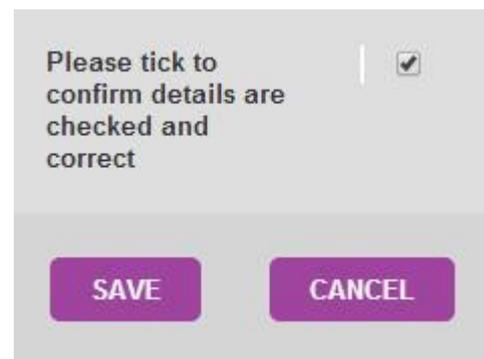
Online Copy

As already mentioned, the online return is split up into separate tabs, each representing a different responsibility.

Property

The Property tab will be the first tab you see and has two main sections to it. One is the associated property details, for example the chapel and caretakers cottage will be listed separately and the other is against the properties as a whole, such as repair budgets for the sites.

The **Checking Property Information** section has its own list of questions, relating to the address and general state of the building. Once all the fields have been completed, you will need to tick the box at the bottom of the page that says **Please tick to confirm details checked and correct.**



Please tick to confirm details are checked and correct

SAVE CANCEL

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.

Quinquennial Inspections

Quinquennial inspection reports are required for all model trust property. Dates of the last quinquennial report will need to be entered under the **Checking Property Information** section.

The date for quinquennial inspections should be entered in mm/yyyy, e.g. 09/2018 for September 2018. We do not need the exact date the quinquennial inspection took place.

Documents

The documents tab is about making sure you have a record of where critical documents are kept. You will need to enter where particular documents are stored.

Insurance

The insurance tab will show you a list of the properties under the managing trusteeship of the church and the latest insurance details that we have. If these are blank or need updating, click **Update Details**.

The other questions relate to any new risk and to ensure that premiums are paid and up to date.

Safeguarding

The safeguarding tab is there to ensure that all churches are following the safeguarding practices in law and standing orders. If you are 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 section will cover 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.

Sign off

Once all the 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 superintendent 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. Any communications with the Connexional Team should be emailed directly to the appropriate person. See the Contacts section below.

Reports

The Reports can be found under circuit/district reports by clicking on **Property Issue Summaries**. This will bring up a menu of different options, relating to each section within the return. It is also possible to select previous years' reports if you wish to see what information was previously entered.



If you want to easily find out which church has particular issues, hover over the purple question mark next to a particular church and it will tell you where the issues lie.

The circuit will also be able to generate a report which groups the issues by church. This will help form a more specific church report of any potential issues. This is located just under circuit reports.



Church Reports

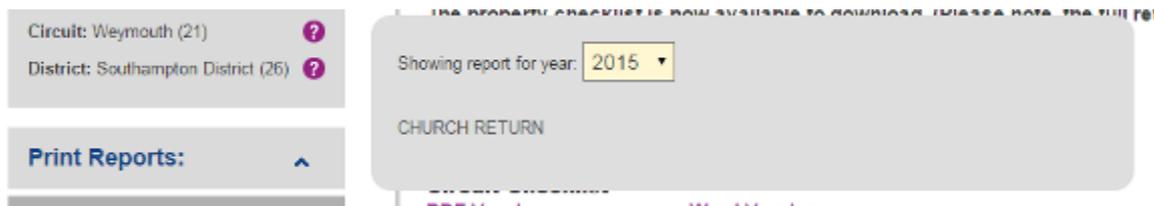
You can print off reports for previous years on the church return page, as well as a report on all property associated with a particular church.

Church Return

You can access previous return submissions going back to 2013. To access these:

1. Go to the church return.
2. Go down to Print Reports
3. Click on **Church Return**

4. Select the year you wish to see the report for



5. Click **Church Return**.
6. A PDF will now start downloading. This will contain the information entered for that year's return.

Property Information Reports

To access a report on the property associated with a particular church, follow these steps:

1. Go to the church return with which the property is associated.
2. On the left hand side, look for **Print Reports**
3. Click on Property Information
4. A PDF document will then start to download. Open this up to see all the property information, such as address, date of last quinquennial and any restrictive covenants against the property.

Contacts

- Web Support Officer: returns@methodistchurch.org.uk
- TMCP Legal Team: legal@tmcp.methodist.org.uk
- Connexional Facilities and Property Coordinator:
fpc@methodistchurch.org.uk
- Methodist Church House Reception: 0207 486 5502