

Online Charge Conference Forms & Local Church Leadership Instructions:

This year's charge conference forms will be submitted online. Please follow these instructions, and if you have any questions contact your district administrative assistant or Clare Wilson.

Website: <https://umcdata.net/ChurchReporting>

Please click on the link above. The username is your church's 6-digit GCFA number. The password is the same as the password used for Ministry Financial (online payments) and MC Stats (year end stat report.) If you are not the treasurer, please check with them to see what the current password is as there is only one username and password per church.

Once you have successfully logged in you will select the Church Reports Icon, select the Charge Conf. Checklist, and the charge conference forms will load on the right.



The forms/reports listed in the top section of the website are REQUIRED. The reports in the bottom section of the website are to be completed only if applicable to your church. These reports are due TWO WEEKS prior to your church's scheduled charge conference. If you need to verify that date, please contact your district administrative assistant.

All reports are due two weeks prior to your charge conference.

Form/Report:

[2023 Charge Conference Minutes](#)

[2024 Clergy Compensation Form](#)

[Finance Committee Report](#)

[Lay and Alternate Lay Member to 2024 Annual Conference](#)

[Pastor's Report](#)

[Trustees](#)

To Be Completed By:

Recording Secretary

Each Clergy person

Finance Committee Chair

Committee on Nominations

Senior Pastor

Trustees Chair



The following reports are to be completed only if applicable to your church:

[Certified Candidacy Renewal](#)

[Certified Lay Minister Annual Report](#)

[Deacon Annual Report](#)

[Lay Servant/Lay Speaker Annual Report](#)

[Retired Clergy Annual Report](#)

[2023 Wespeth Contribution form](#)

S/P PRC Chair for each Certified Candidate

Each Certified Lay Minister

Each Deacon in Provisional or Full Membership

Each Lay Servant/Lay Speaker

Each Retired Clergy



Clergy person



To begin completing the report you will click on the name of that report. The system will open the form in a new tab in your web browser. The form is a fillable pdf, and you will be able to type your answers in the provided spaces. A typed name is acceptable on the lines that ask for a signature.

**If the fillable section on your report does not line up with the space you should select the Open on Desktop icon in the upper right-hand corner of the page.



Once you have completed all the required information on the form you will need to save the report in the following format. You can save the form by clicking the printer icon  and print the form as a pdf, or you can click the download icon  and save the file as a pdf:

Form/Report


How to Save

2023 Charge Conference Minutes
2024 Clergy Compensation Form
Finance Committee Report
Lay & Alternate Lay Member to 2023 AC
Pastor's Report
Trustees

Church Name Charge Conf Min
Last Name, First Name Church Name 2024 Comp
Church Name Finance Report
Church Name Lay Member AC
Church Name Pastors Report
Church Name Trustees Report

Certified Candidacy Renewal
Certified Lay Minister Annual Report
Deacon Annual Report
Lay Servant/Speaker Annual Report
Retired Clergy Annual Report
2023 Wespeth Contribution Form

Last Name, FirstName Church Name Candidacy
Church Name Lay Minister Report
Church Name Deacon Report
Church Name Servant Report
Church Name Retiree Report
Last Name, First Name Church Name UMPIP

After you have saved your form, you will go back to the Church Reporting page and select the green up arrow . And the file uploader will open.

File Uploader

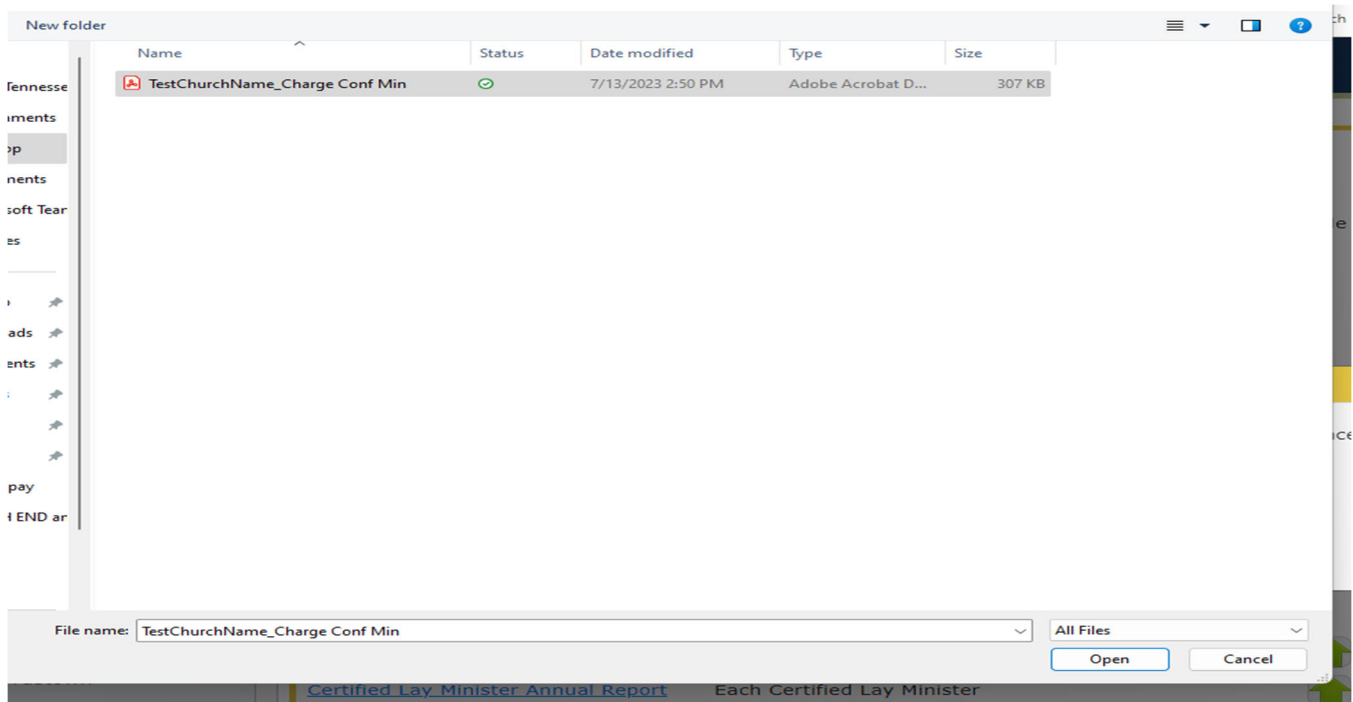
Click the [Choose File] button to select a file from your computer. Once selected, an Upload button will appear to upload the file.

Select the File to upload:

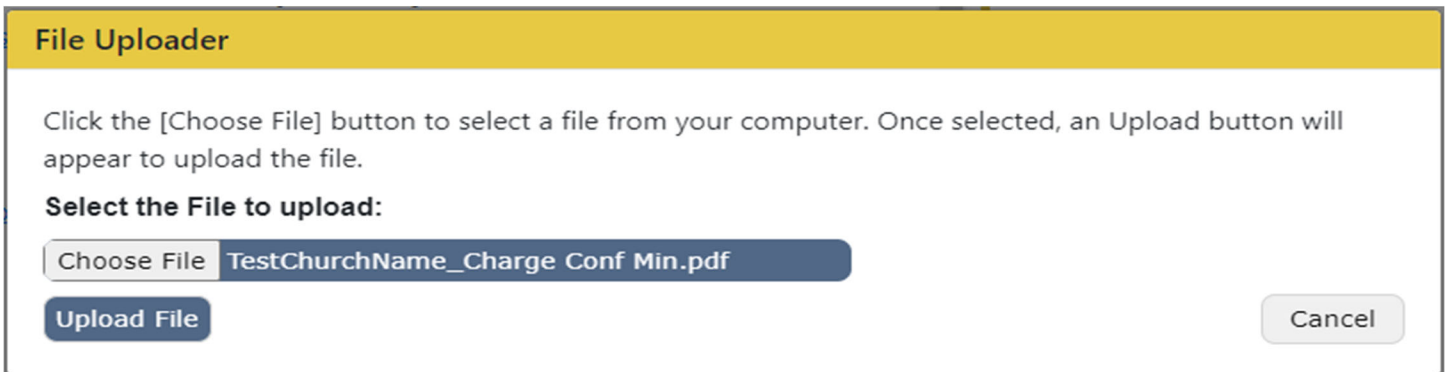
Choose File No file chosen

Cancel

Select the choose file button, select the file from your computer, and click on open.



Then select upload file.



Once the file is successfully uploaded you will see a paper clip and a trash can on the line of that report.

Please contact your District Administrator or Clare Wilson if you have any questions.

All reports are due two weeks prior to your charge conference.

Form/Report:


[2023 Charge Conference Minutes](#)


To Be Completed By:

Recording Secretary



If you made a mistake, you can redo the form and reupload it. You will first need to select the trash

can icon  to remove the incorrect form. And then repeat the steps to upload the correct form. The system will override the previous form with the new one. If you would like to view the form that

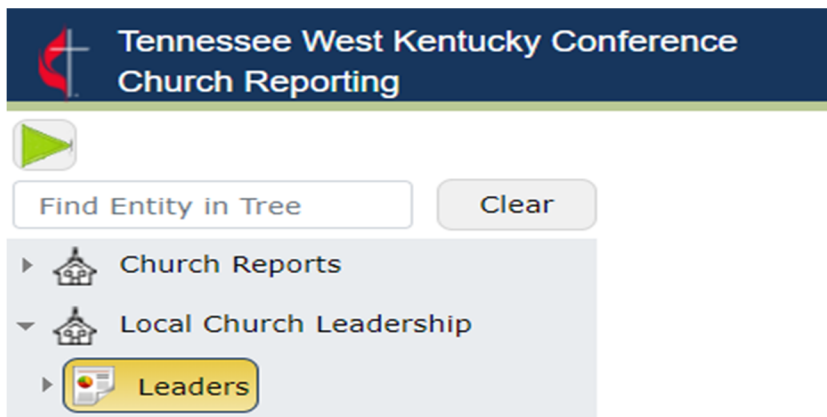
has been uploaded, click on the paper clip icon .

Only the Clergy Compensation Form will allow for multiple uploads. This should **only** be used if your church has **multiple clergy appointed**. For these churches, please do NOT combine the clergy comp forms together in one file. They need to be saved individually in the format listed above. You will upload the forms one at a time.

Local Church Leadership


You may have noticed that there is no leadership form in the charge conference forms, and that is because you can now enter your leadership directly into the system. In order to complete the local church leadership, you will follow these instructions.

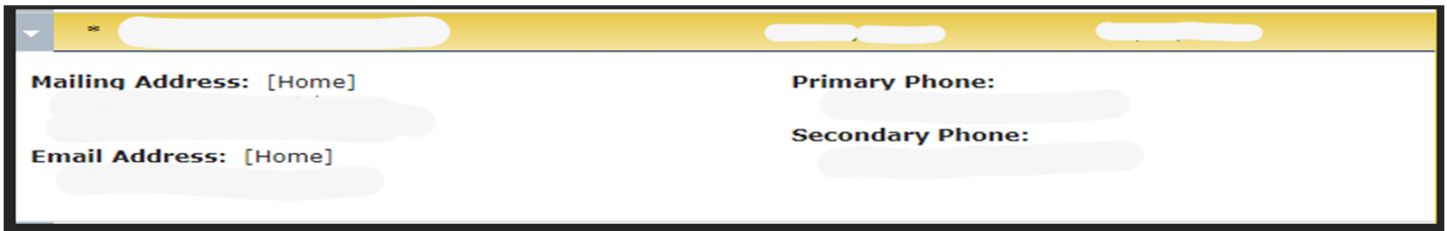
Select Local Church Leadership, then select leaders, and you will see your Leadership will be displayed on the right side of the screen.




The leadership positions with an asterisk (*) beside them are required. The others are optional.


	Position
▶ *	Church Council/Admin Bd Chair
▶ *	Finance Committee Chair
▶ *	Lay Leader
▶ *	Pastor/Staff Parish Relations Chair: Charge
▶ *	Pastor/Staff Parish Relations Chair: Local Church
▶ *	Treasurer: Local Church
▶ *	Trustees Chair
▶	Treasurer: Charge
▶	Office Administrator (Staff)
▶	Church Secretary (Staff)
▶	Dir/Coord Communications/PR/Marketing, etc (Sta...


If there is already a person in the leadership position click the arrow , and it will expand the person's information.



The screenshot shows a form with four fields: "Mailing Address: [Home]", "Email Address: [Home]", "Primary Phone:", and "Secondary Phone:". Each field has a corresponding input area with a blurred placeholder.

If any of the information needs to be edited select the pencil  icon. The selected person's information will be displayed in an editable format. After the necessary edits are made click the save button on the upper right corner.

If you need to end the person in that leadership position, you will enter the date the leadership ended in the stop date field.  If you select the stop icon it will prefill 12/31/2023.

If there is no one in the position, select the arrow  beside that position. The box below will open. If you select the drop box under select leader, you will see names of any individuals that are your church's current leadership or have held leadership positions in the past few years. You are only able to see names of those who are related to or have been related to your church. If the individual is already associated with your church, select their name and it will be added to that position. Please double check the contact information especially if it is someone that hasn't been in leadership in recent years.

If you need to add a new person, select the Add New Person icon. The Select a Person will show for each position. These examples are for the Church Council/Admin Bd Chair only, so please double check you are adding a new person for the correct position.

Select a Person for Church Council/Admin Bd Chair

Select Leader:

If the desired person is not found in the list above, click the "Add New Person" button...

The add NEW Leader page will request contact information. The sections with blue titles are required information. For example, first and last name. The email address and phone number are not required, but it would be greatly appreciated if you would provide that information. And do not forget to add the start date. And click the save icon when you are done.

Add NEW Leader as Church Council/Admin Bd Chair

Cancel

Save

Prefix Name: <No Selection> v

First Name:

Middle Name:

Use Name (Nickname):

Last Name:

Suffix Name:

Gender: Male Female

Clergy/Laity: Clergy Laity

Ethnicity: <No Selection> v

Mailing Address: **Address Type:** <No Selection> v

Address Line 1:

Address Line 2:

City:

State: <No Selection> v

Zip:


Email Address: **Email Type:** <No Selection> v

Email: x

Phones:

Primary Phone: Ext: Phone Type: <No Selection> v x

Secondary Phone: Ext: Phone Type: <No Selection> v x

Start Date: 01/01/2024 

Stop Date:  

Please keep in mind this leadership information will automatically be updated to our conference database, but if you make any mistakes, we can correct them!

If you have more than one person in any of the positions available, please contact your district administrative assistant of Clare Wilson before adding them to the leadership.