

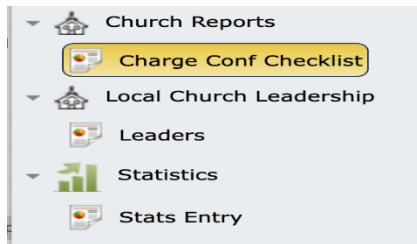
Online Charge Conference Forms & Local Church Leadership Instructions:

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.

2024 Charge Conference Checklist ([Fillable version of Online forms](#))

Below is a listing of all reports due for charge conference. If there needs to be a correction, delete the current uploaded report and upload a corrected version of that report.

Forms listed under Form/Report are **required** for each church, and of these forms, only the Clergy Compensation Form can have multiple uploads, if applicable. Please save the clergy compensation forms under the clergy's name. The second set of forms should be completed only if they are applicable to your church.

 For detailed instructions on how to use this function, click the Help button found in the upper-right corner of this display.

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

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

Form/Report:

[2024 Charge Conference Minutes](#)

[2025 Clergy Compensation Form](#)

[Report of the Finance Committee](#)

[Lay and Alternate Lay Member to 2025 Annual Conference](#)

[Report of the Pastor](#)

[Report of the Trustees](#)

2025 Committees of the Church

To Be Completed By:

Recording Secretary

Each Clergy person

Finance Committee Chair

Committee on Nominations

Senior Pastor

Trustees Chair

Committee on Nominations (Copy, scan, & upload your own Nominations form.)



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

Certified Candidacy Renewal	S/P PRC Chair for each Certified Candidate	
Deacon Annual Report	Each Deacon in Provisional or Full Membership	
Certified Lay Minister Annual Report	Lay Minister (New or Renewing)	
Certified Lay Servant Annual Report	Lay Servant (New or Renewing)	
Certified Lay Speaker Annual Report	Lay Speaker (New or Renewing)	
Retired Clergy Report	Each Retired Clergy person	
2024 Wespeth Contribution form	Clergy person	
2025 Wespeth Contribution form	COMING SOON!	
2025 Youth Leader Contact Info	Youth Leader	
2025 Children Leader Contact Info	Children Leader	

There are two types of forms in this year's forms. Hyperlinked and upload

Hyperlinked forms: For hyperlinked forms, click the hyperlinked name of the form to open it. Most are fillable PDFs which can be completed in your web browser, then saved to your local computer. If not a fillable PDF, then download or send directly to a printer for hand-written completion.



UPLOAD: If completion of the form was hand-written, then the form will first need to be scanned to a file for upload. Once the file is saved onto the computer...

Click the "Upload" button, and a pop-up window will appear.

Click the "Choose File" button and locate and select the file on your computer.

Upload File

Once selected, the "Upload File" button will appear. Click this button to upload the file. If successful, a "paper clip" icon which will appear.

**More detailed instructions on downloading, completing, saving, and uploading forms are below.

Multiple versions of the Form:



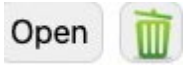
If the Upload button remained, then it is because there is a possibility of multiple copies of this form being uploaded. (ie: Compensation form – where there is more than one pastor serving the

church.) *** Be sure to give EACH FILE a unique name so it can be distinguished from the others of the same form. ***

Example:

File 1) Compensation for Jerry Johnson.pdf

File 2) Compensation for Ralph Smith.pdf



Clicking the paper-clip icon button opens a pop-up listing all the uploaded version of that form. Click the "Open" button to open the form to a browser window, or if a correction needs to be made, then click the trash-can button to delete the form. Then upload another version to replace it.

Single version of the Form:



If the Upload button is replaced with a trash-can button, then only one copy of this form is expected.

Clicking the paper-clip button will immediately open the form for view in a browser window. The trash-can button will delete the form, allowing a replacement to be uploaded.

HTML Forms: Some forms are written as part of the application, and open directly in the application for completion. Data entered into these forms is stored directly into the database upon saving. These forms will show a % of completion in the upper-left corner, and data entered can be cancelled or saved.

Note: Once the form is 100% complete, it cannot be edited further.

Corrections would require deleting the form and completing it again.

Certified Lay Minister Annual Report

The HTML-type Forms are identified by a BUTTON containing the name of the form. Click the form's button to open a NEW copy of the form for completion (if multiple versions allowed), or to continue on the form where you left off if this form requires only one copy to be completed.

Multiple versions of the Form:

If the HTML Form can potentially be completed for more than one person, such as with a Lay Ministry Report, or Retired Pastor's Report, then a pop-up to "Find or Add Person" will appear when the report button is clicked. The names of all persons in the conference database connected to this church will appear in the drop-list for selection. If the person's name does not appear in the drop-list, then click the "Add New Person" button, and complete the pop-up form, and Save. Only "First Name," "Last Name," and Clergy or Laity responses are required.

Find/Add Person

Select the person this form is for:

<No Selection>

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

Cancel

+ Add New Person



The form will then open in Edit mode automatically for completion. The form may be Saved at any point and Closed to be completed later.

Open



To re-open the form, click the "Folder" button to the right of the blue Report button, and a pop-up will open containing a list of all started copies of this form, and the name of the person each is connected to.

To the right of each form listing is an "Open" button, to open that individual's report and a "Trash" button to delete the report, should it need to be corrected and completed again.

11% Complete

The percentage completed will display in the upper-left corner to track your progress through the report. Be sure to check your responses thoroughly before completing the last required field (usually "This form was completed by:...")! Once the form Saves as 100% complete, it will be in "Read-Only" mode, and unable to be edited further.





Upon completing the form, the print option will be available to print a copy of the completed form, or save as a PDF.

****Detailed instructions on downloading, completing, and uploading forms:**

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.

Open on desktop

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


2024 Charge Conference Minutes
2025 Clergy Compensation Form
Lay & Alternate Lay Member to 2025 AC

Certified Candidacy Renewal
2024 Wespeth Contribution Form
2025 Youth Leader Contact Info
2025 Children Leader Contact Info

How to Save

Church Name Charge Conf Min
Last Name, First Name Church Name 2025 Comp
Church Name Lay Member AC

Last Name, FirstName Church Name Candidacy
Last Name, First Name Church Name UMPIP
Church Name Youth Leader
Church Name Children Leader

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.

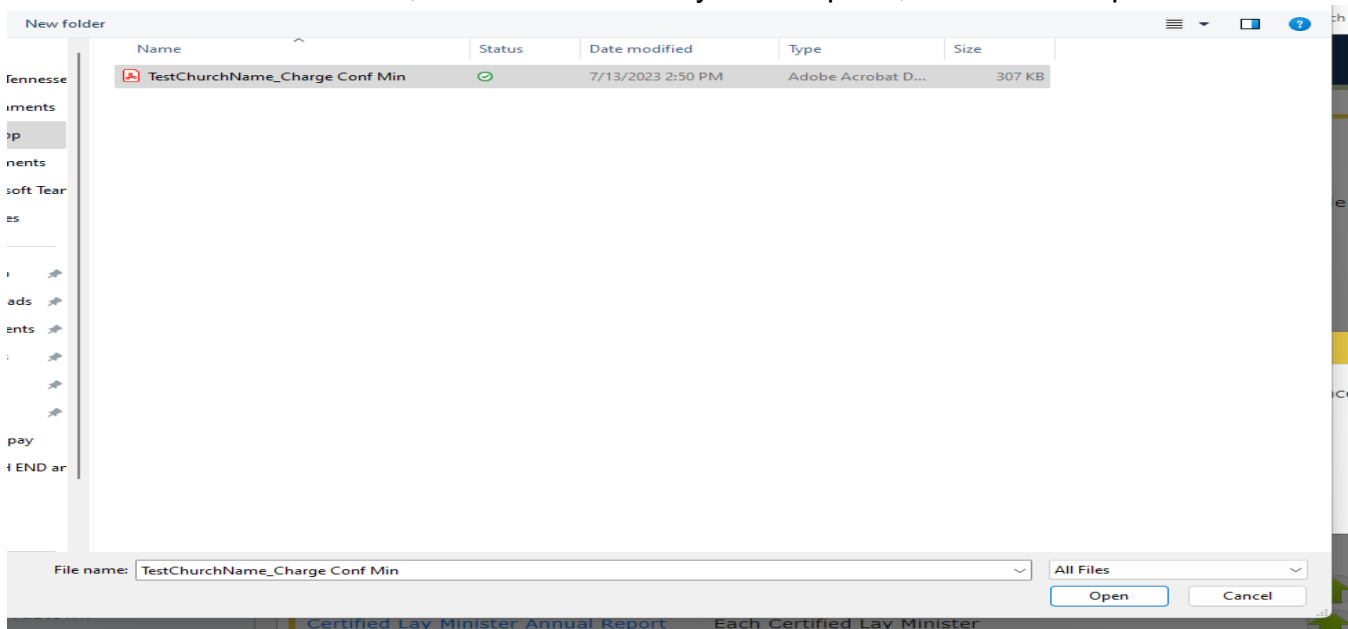
File Uploader

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

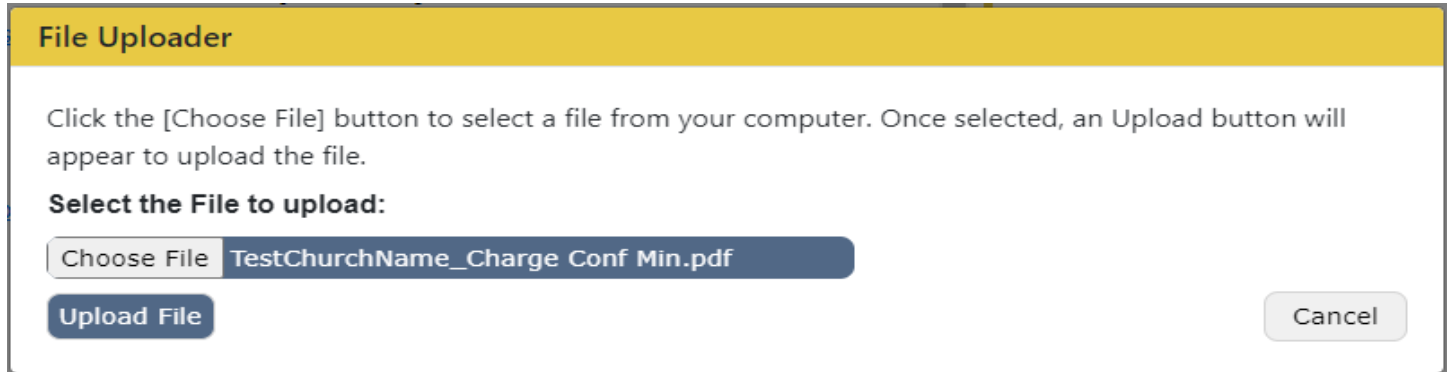
Select the File to upload:

No file chosen

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



Then select upload file.



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 TestChurchName_Charge Conf Min.pdf

Upload File Cancel

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

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.




Find Entity in Tree Clear

- ▶  Church Reports
- ▼  Local Church Leadership
 - ▶  Leaders


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.

▼

Mailing Address: [Home]	Primary Phone:
<input type="text"/>	<input type="text"/>
Email Address: [Home]	Secondary Phone:
<input type="text"/>	<input type="text"/>

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...

Cancel

 Add New Person

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.