2019 CHARGE CONFERENCE INSTRUCTIONS

****

NTC CLERGY COMPENSATION REPORT FORM / LEADERSHIP ROSTERS

You can directly access the forms online by either clicking or entering this url into your browser's address bar: https://ntcumc.org/connectional-resources/charge-conference. You can also access the forms online by going to www.northtexasumc.org. On the right side of the "About Our Conference" section just under the slide show, find and click the box titled "Connectional Resources." On the right side of the screen is a section for forms. Please select "Charge Conference Materials" from the list on the right-hand side of the screen. This will bring up a list of all forms required for charge conference including the Cokesbury forms, compensation report, and leadership roster. To access the online Compensation Report form and Leadership Roster you will need to log-in using the following steps:

- Your User Name is the church's permanent GCFA number. It is the 6-digit number beginning with either a "7" or a "9" that you also use to obtain your monthly apportionment report. If you need your GCFA number, please call the District Office (or Shirley Miller at the Conference Office) and we can give it to you.
- The password will also be the GCFA number. Even if you changed it last year, all passwords have been re-set back to the GCFA number for 2020.
- The default year is 2020, although you can choose a prior year from the drop-down box to look at previous year's reports.
- After you login, you will be taken to the "home" page. Near the bottom you should see a prompt to change the password. You should do this so as to prevent unauthorized access.

BEFORE COMPLETING ANY FORMS, ENTER THE CLERGYPERSON'S NAME IN THE MINISTERIAL COMPENSATION REPORT AND ENTER NAMES or "X" IN THE SIGNATURE LINES. THIS WAY THE PASTOR'S NAME APPEARS ON THE UMPIP LIST.

2020 UMPIP WORKSHEET - THIS SHOULD BE COMPLETED FIRST

This worksheet should be completed unless you are less than full time and waiving pension benefits. This form is used to help you determine the personal UMPIP contribution required for the additional 1% church matching contribution to CRSP. You must complete lines 7-9 in order to save the form. **These figures will not automatically transfer to the Compensation Report**.

- Select "Add New" and then enter the name of the pastor in the appropriate box.
- Enter on "Line 2 Compensation" your total salary prior to any salary reductions. This is Line 4 on the Compensation Report. Again, this is your total salary **BEFORE** you take any deductions.
- Enter the appropriate housing exclusion and/or allowance amounts OR select parsonage in the drop down box. Lines 5 and/or 6 only.
- You must complete lines 7-9 in order to save the UMPIP form.
- The UMPIP contribution amount you plan to make will be entered on Line 10 of the Compensation Report if it is before-tax, Line 17 if is Roth and Line 18 if it is after-tax.
- The UMPIP worksheet must be completed in order for the conference office to accurately report to Wespath whether you are making a before-tax, after-tax, or Roth contribution.

2020 MINISTERIAL COMPENSATION REPORT - Totals are calculated automatically.

- Back at the Home Page, select Comp Rpt and then choose the preferred clergy name which will open up the Compensation Report. If a UMPIP worksheet was not needed earlier, select "Add New" and then enter the name of the pastor in the appropriate box.

- Manually enter all the appropriate figures. **See "2020 Clergy Compensation Package Instructions" for detailed instructions on each line item.**
- Use the "tab" button to move through the page.
- Select the appropriate box for parsonage or housing. This automatically calculates your housing portion of the CRSP Defined Contribution.
- In Part 3, be sure to select the correct appointment percentage, retired, or TBS. If you are waiving pension, first click on the percentage of appointment, then click waive pension.
- Part 4 is a single amount. See instructions.
- Part 5 is optional.
- **Entry of the names of the clergy person, the SPRC Chair and the treasurer at the bottom of the report is required in order to save the report.**
- After you have finished, select Print and then select Save. Be sure your information is correct. **Please be aware that once the District Superintendent has signed the report, ONLY the district office can make changes.**

Line "X" Total Pastoral Cost to Church is the total of all the compensation plus benefits the church will pay on behalf of their clergy.

For those churches that are a part of a multi-point charge, the District Office will compile the individual church reports to create a combined report.

2020 LOCAL CHURCH LEADERSHIP ROSTER

- From the home page, select Roster and you will be taken directly to the form.
- The leadership positions will appear with the most recent entered data. Clicking on UPDATE in each position will allow changes/corrections to the data. When complete, select the SAVE button and an updated date will appear by that position.
- **Even if there is no change to the data, you should select UPDATE for each position so that the current date appears.** As changes to these positions occur throughout the year, the data can be entered and a new date will be visible.
- If your church does not have a person for every position that is fine – just complete the positions which you use.
- **It is very important that you include email addresses** (where available)!!

2020 APPORTIONMENTS REPORT (for use in preparing your 2020 budget)

- This information is available https://ntcumc.org/connectional-resources/apportionments. This is the same place you already go to get your monthly apportionment reports.
- The username is the permanent 6-digit GCFA number. The password is the old church alignment number that you had before the districts changed. Please contact the district office if you need assistance with usernames or passwords.

OTHER IMPORTANT INFORMATION

- The compensation report and leadership roster forms that you complete online are stored electronically and will be accessed by the District and Conference office personnel.
- **These forms should be submitted TWO WEEKS BEFORE YOUR CHARGE CONFERENCE.**
- If you change your password, but then forget it you can contact the District Office (940/767-6621 or 800/497-8163). We will have access to a master list of passwords and can assist you.

OFFICIAL UMC CHARGE CONFERENCE REPORTS

The Cokesbury and other required reports, are also available online at www.northtexasumc.org under the Charge Conference Materials Link on the "Church Forms" page.

- All the Cokesbury forms are listed, as well as the Lay Servant Report, Continuing Formation Report, Clergy Housing Report, and a sample Reimbursement Policy (if applicable).
- These forms may be completed electronically, saved on your computer, and **emailed or mailed to the District Office TWO WEEKS BEFORE YOUR CHARGE CONFERENCE**. They will not be saved in the online system where the compensation report and roster are stored.
- Print and use the Checklist sent with the cover email to be sure you complete all the needed forms.