



NORTH TEXAS

CONFERENCE OF THE UNITED METHODIST CHURCH

August 26, 2021

CHARGE
CONFERENCE
FORMS
TRAINING

AGENDA

- Online portal: forms and login information
 - Best practices: Ministerial Compensation Form and UMPIP Form
 - Updates to online Church Roster
 - Review of required “printable” forms
 - Marks of Fruitfulness forms
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UMC 2016 *Book of Discipline*

¶ 246. *General Provisions*—1. Within the pastoral charge the basic unit in the connectional system of The United Methodist Church is the charge conference. The charge conference shall therefore be organized from the church or churches in every pastoral charge as set forth in the Constitution (¶ 43). It shall meet annually for the purposes set forth in ¶ 247. It may meet at other times as indicated in § 7 below.

North Texas Online Portal

- [North Texas Annual Conference - CAPS \(ntcumconline.org\)](http://ntcumconline.org)
 - **Your login and password have been reset to the permanent church GCFA number.**
 - It is the unique 6-digit number beginning with a 7 or 9 that is assigned to your church.
 - If you do not know your GCFA number, contact your district office or Shirley Miller at the conference office.
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Ministerial Compensation Report- Part 1

East District
2022 Ministerial Compensation Report

Part 1 - General Information. Please complete a report for each Clergy person under episcopal appointment to the church or charge. All figures should be on an annual basis. Do not report cents - round figures to the nearest dollar.

Church	East District	Charge	TEST CHURCH
Clergy person Receiving Compensation	TEST PASTOR		Senior ▼
Date Compensation Effective	January ▼	District	East District

- Church will be automatically populated.
- Fill in Charge: First Town/Second Town.
- Fill in Clergy person's name.
- Select either Senior or Associate from the dropdown menu.
- Select the "Date Compensation Effective" from the dropdown menu.
- The "District" is automatically populated.

Ministerial Compensation Report- Part 2a-Compensation

Part 2 - Compensation Information (See 2021 Journal for Minimum Compensation)	
A. Clergy Compensation Items	
1. Cash Salary before reductions	<input type="text"/>
2. Salary Support (Equitable compensation, New Church, or other annual conference funds)	<input type="text"/>
3. Non Accountable Business Allowance (IRS Form 2106 for Expenses Pastor declared for travel, continuing education, etc.)	<input type="text"/>
4. Total Base Compensation (Add lines 1-3)	<input type="text" value="0"/>

1. Enter annual cash salary.
2. If there is any support for the salary other than the church, enter that annual amount here.
3. Non-Accountable Business Allowances-amount paid annually to the pastor without a receipt requirement or documentation.
4. Total base compensation – part of the Pension Plan Compensation. **Calculated Field.**

Ministerial Compensation Report- Part 2b-Housing

B. Housing (Not included on Box 1 on W-2. Include on Box 14 of W-2 and note as Clergy Housing.)

5.	Parsonage: <input type="radio"/> Yes <input checked="" type="radio"/> No (If no, enter amount of housing allowance)	<input type="text"/>
6.	Additional Housing Exclusion paid to pastor (Utilities, other allowable housing expenses) UM parsonage or not	<input type="text"/>
7.	Utilities paid directly by local church, UM parsonage only	<input type="text"/>
8.	Total Housing (Add lines 5-7)	<input type="text" value="0"/>
9.	TOTAL COMPENSATION (Total of lines 4 and 8)	<input type="text" value="0"/>

5. Select Parsonage if “yes.” Otherwise, form defaults to “no”. If there is no parsonage and there is a housing allowance, enter that amount in this box.
6. Additional Housing Exclusion-utilities and other allowable housing related expenses paid directly to the pastor. (Part of the complete salary package.)
7. Utilities paid directly by the church. (Part of the complete salary package.)
8. Total housing lines 5-7 combined. If the pastor lives in a parsonage, that “value” is not reflected in this total. **Calculated field.**
9. **TOTAL COMPENSATION.** This total can equal the Pension Plan Compensation IF the pastor is not living in a parsonage. **Calculated field.**

Ministerial Compensation Report- Salary Reductions Before-Tax

Before-Tax Salary Reductions (Not included in Box 1 on W-2)	
10. Wespath UM Personal Investment Plan (UMPIP) before-tax contribution (Include in Box 12 on W-2 code E.) Determine % for before-tax on UMPIP worksheet.	<input type="text"/>
11. Participant HealthFlex premium (includes participant contribution on premium, elective vision and dental)	<input type="text"/>
12. Conference Spouse/Family HealthFlex premiums* *Effective 1/1/2014, reimbursements for insurance plans other than HealthFlex are taxable income and should be included in box 1 of W-2.	<input type="text"/>
13. Health Flexible Spending Accounts (See instructions.)	<input type="text"/>
14. Dependent Care Flexible Spending Account (See instructions.)	<input type="text"/>
15. Health Savings Accounts (See instructions.)	<input type="text"/>
16. Total Before-tax Salary reductions (Add lines 10-15.)	<input type="text" value="0"/>

- All of lines 10-15 are entered as annual amounts and are pre-tax salary reductions.
- Line 10 is related to the UMPIP pension plan and will be discussed when that form is reviewed.
- Lines 11-15 are health insurance salary reductions.
 11. Extra “costs” above the annual \$11,100 benefit. A pastor may have picked a more expensive plan and/or added dental and vision.
 12. A pastor’s family premium
 13. A pastor’s flexible spending account (FSA). This has an annual limit.
 14. Dependent care spending account for child care or dependent adult care.
 15. Health savings account for HSA plans.
 16. Total Before-tax salary reductions: **Calculated field.**

Ministerial Compensation Report- Salary Reductions After-Tax

After-Tax Salary Reductions (Include in Box 1 on W-2)		
17.	Roth Wespath UM Personal Investment Plan (UMPIP) contribution. Determine % Roth on UMPIP worksheet.	<input type="text"/>
18.	After-tax Wespath UM Personal Investment Plan (UMPIP) contribution. Determine % for after-tax on UMPIP worksheet.	<input type="text"/>
19.	Total After-tax Salary reductions (Add lines 17 and 18.)	<input type="text" value="0"/>
20.	CASH SALARY AFTER REDUCTIONS (Line 4 minus line 16 and 19)	<input type="text" value="0"/>

- Lines 17 and 18 are after-tax salary reductions and both are related to the pastor's UMPIP. Lines 17 and 18 are annual amounts.
- Filling out the UMPIP form will help the pastor determine what amount to enter in either or all of lines 10, 17, and 18 of the Compensation Report.
- Line 20 gives the annual cash salary for the pastor less the reductions. It does NOT include housing but is as stated: Line 4 minus lines 16 and 19. **Calculated field.**

Ministerial Compensation Report- Part 3-Required Benefits

Part 3 - Required Benefits

% of Appointment: Full-time 3/4 1/2 1/4 Retired TBS

C1. Defined Benefits (DB)

C2. Defined Contribution (DC) at 3% rate

C. Total Pension (CRSP paid by local church) Waive pension?

D. Appointee's health insurance premium paid by church

Required benefits are benefits billed to and paid by the local church and are not considered part of the salary package. They are benefits.

Select the percentage of appointment.

- 1/4, Retired, and TBS do not qualify for pension or health insurance.
- 3/4 and 1/2 may enroll or waive pension but do not qualify for health insurance.

Pension

- C1 is the defined benefit which will change based on fulltime, 3/4, 1/2, and waiver.
- C2 is the defined contribution based on the pastor's pension plan compensation (Roman Numeral VIII on the Compensation Report).

Health Insurance

- D is the health insurance available for only fulltime pastors. The annual amount in 2022 is \$11,100.

Ministerial Compensation Report-

Part 4-Reimbursable Expenses

Part 4 - Employer Reimbursable Expense Limit

21. Is this plan adopted annually? (Do not include on W-2.) Yes No

(BUDGETED BY LOCAL CHURCH FOR PASTOR and paid only upon submission of proper documentation within 60 days of expense.)

There is no need to designate the categories of how the reimbursements are used. Using one figure gives the pastor and the congregation some flexibility in how the money is used. The total is not to be exceeded without additional approval by the church council, and if there is money left at the end of the year, it is not to be paid to the pastor.

Reimbursable expenses are part of the annual church budget and adopted at charge conference.

- If you select “yes”, you can enter a value. If you choose “no, the field is locked.
- The pastor must submit receipts to the church for these reimbursed expenses within 60 days of incurring the expense.
- These amounts are not included on the W-2 form.
- Any amount not used by the end of the year cannot be paid to the pastor. It can be rolled over into the new year’s church budget, if desired.

Ministerial Compensation Report- Part 5-Optional Church Benefits

Part 5 - Optional Church Benefits

22. Automobile provided by local church including insurance and maintenance

23. Dependents HealthFlex premiums paid by local church

Lines 22 and 23 are totally optional church expenditures for the pastor that are benefits above and beyond the salary and housing.

22. Automobile provided by local church plus incurred expenses.

23. Dependent HealthFlex premiums paid by the local church rather than a salary reduction to the pastor.

Ministerial Compensation Report- Part 6-Signatures

Part 6 - Signatures		
Approved by	<input type="text"/>	Clergyperson <input type="text"/> Date
Approved by	<input type="text"/>	Staff/pastor-parish relations <input type="text"/> Date
Approved by	<input type="text"/>	committee chair <input type="text"/> Date
Approved by	<input type="text"/>	Church Treasurer <input type="text"/> Date
Approved by	<input type="text"/>	District Superintendent <input type="text"/> Date

- The signatures that are typed in the signature boxes assume all these groups/persons as well as the Charge or Church Conference has approved the compensation report.
- Once all the local church responsible parties have signed the form, contact the district office.
- Once the district office has reviewed the Ministerial Compensation Form, the district will sign the form and it is locked.
- The conference reviews and processes the form after the district has signed it.

Ministerial Compensation Report- District and Conference Office Use

For District & Conference Office Use (Local churches may complete those portions needed)	
VI. Conference Relationship	<input type="text"/>
VII. Total Base Compensation	<input type="text" value="0"/>
VIII. Pension Plan Compensation (PPC)/Insurance Supplement Eligibility	<input type="text" value="0"/>
IX. Total Compensation for Appointment Workbook	<input type="text" value="0"/>
X. Total Pastoral Cost to Church (salary plus benefits)	<input type="text"/>

Important to the local church are Roman Numerals VIII and X.

VIII. Pension Plan Compensation- this is the amount that the UMPIP percentage is based on. It includes cash salary total, housing total, and a parsonage value, if there is a parsonage. This is also the amount used to determine eligibility for pension and health insurance supplements.

X. This is the total cost to the church for this pastor. It includes every expense: cash salary, housing, benefits, account reimbursements, and optional benefits.

UMPIP WORKSHEET

(United Methodist Personal Investment Plan)

- DO NOT complete this worksheet if the pastor is ineligible for pension or waiving pension.
 - This worksheet is designed to help the pastor determine the required 1% salary reduction, how much to contribute to the UMPIP pension fund, and whether it will be contributed pre-tax, after-tax, or after-tax Roth.
 - None of the information on this worksheet automatically transfers to the Ministerial Compensation Report.
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UMPIP WORKSHEET

(United Methodist Personal Investment Plan)

Select either “no” parsonage or “yes” parsonage. The worksheet will change to fit the selection. Follow the instructions to enter the appropriate salary and housing package items.

1. Parsonage: <input type="text" value="no"/>	
<input type="text" value="0.00"/>	2. Total Base Compensation (Line 4 of the Compensation Form)
<input type="text"/>	3. Housing Exclusion (Line 6 of the Compensation Form)
<input type="text" value="0.00"/>	4. Housing Allowance (Line 5 of the Compensation Form)
<input type="text" value="0.00"/>	5. Total = PPC
<input type="text" value="0.00"/>	6. PPC × 0.01 This is the minimum UMPIP

1. Parsonage: <input type="text" value="yes"/>	
<input type="text" value="0.00"/>	2. Total Base Compensation (Line 4 of the Compensation Form)
<input type="text"/>	3. Total Housing (Line 8 on the Compensation Form, which is the total of Line 6 and/or Line7)
<input type="text" value="0.00"/>	4. SubTotal
<input type="text" value="0.00"/>	5. Total = SubTotal × 1.25 = PPC
<input type="text" value="0.00"/>	6. PPC × 0.01 This is the minimum UMPIP

UMPIP WORKSHEET

(United Methodist Personal Investment Plan)

UMPIP contributions will be billed to the local church each month by the General Board of Pension (GBOP). The local church should deduct this amount from the clergy paycheck. The GBOP needs to be informed of the monthly amount of UMPIP contribution. If you want the conference office to inform the GBOP please indicate so below.

7. Who do you want to inform GBOP of your UMPIP contributions:

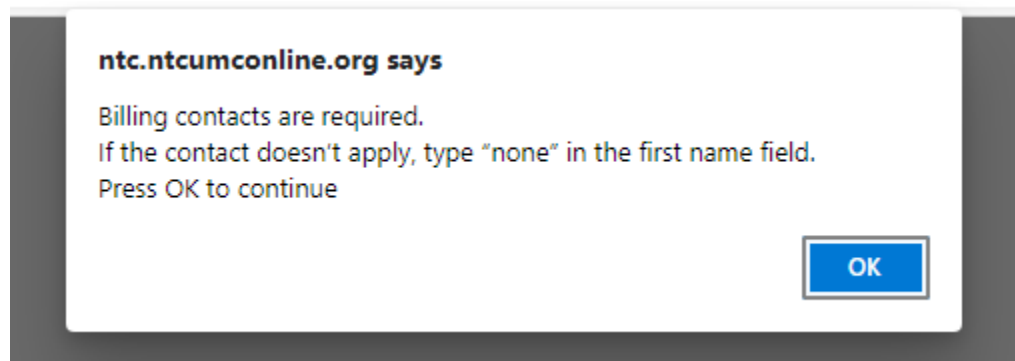
- 7a. I wish to be billed **monthly** for % of my PPC monthly as **before-tax** contribution.
- 7b. I wish to be billed **monthly** for % of my PPC monthly as **after-tax** contribution.
- 7c. I wish to be billed **monthly** for % of my PPC monthly as **after-tax Roth** contribution.

- Select which type of UMPIP contribution the pastor prefers to make.
- Select whether it will be a monthly percentage or dollar amount.
- Clergy can divide up their UMPIP contributions into more than one category.
- Report the choice as an ANNUAL amount on the Ministerial Compensation Report.
 - ❖ Line 10 is pre-tax.
 - ❖ Line 17 is after-tax Roth.
 - ❖ Line 18 is after-tax.

Online Roster

Elected local church officers are entered on the church's online roster.

Newly requested this year are billing contacts.



When the billing contacts are entered, this message will no longer pop-up.

Online Roster

North Texas Conference
The United Methodist Church

HOME | UMPIP WKSHT | COMP RPT | ROSTER | PSWD | LOGOUT

East District

2022 Billing Contacts
Click "Update" to add, edit, delete, or review an assignment.
Billing contacts are required. If the contact doesn't apply, type "none" in the first name field.

Apportionments Billing	Update	Property Insurance Billing	Update	Health Insurance/Pension Billing	Update
Position Unassigned		Position Unassigned		Position Unassigned	

2022 Leadership Roster
Click "Update" to add, edit, delete, or review an assignment.

CSV for Excel | Print

Billing contacts are listed first. If you do not have a health insurance/pension billing contact, type "None" in the first name box and that will be sufficient.

If the person in any position in the Leadership Roster is the same as last year, simply select "Update." Otherwise, fill in the new individual's name and contact information.

Also, the system will require a name in the Lay Leader position.

New this year in the "2022 Leadership Roster" is a Disaster Response Liaison.

Online Roster

2022 Leadership Roster
 Click "Update" to add, edit, delete, or review an assignment.

Lay Leader <input type="button" value="Update"/>	Church Council <input type="button" value="Update"/>	Administrative Council Chair <input type="button" value="Update"/>
Position Unassigned	Position Unassigned	Position Unassigned
Administrative Board Chair <input type="button" value="Update"/>	Council on Ministries Chair <input type="button" value="Update"/>	Pastor Parish Chair <input type="button" value="Update"/>
Position Unassigned	Position Unassigned	Position Unassigned
Trustee Chair <input type="button" value="Update"/>	Finance Chair <input type="button" value="Update"/>	Treasurer <input type="button" value="Update"/>
Position Unassigned	Position Unassigned	Position Unassigned
UMW President <input type="button" value="Update"/>	UMM President <input type="button" value="Update"/>	UMYF President <input type="button" value="Update"/>
Position Unassigned	Position Unassigned	Position Unassigned
Church School Supt. <input type="button" value="Update"/>	Witness & Evangelism <input type="button" value="Update"/>	Nurture & Membership <input type="button" value="Update"/>
Position Unassigned	Position Unassigned	Position Unassigned
Mission & Outreach <input type="button" value="Update"/>	Disaster Response Liaison <input type="button" value="Update"/>	Church and Society <input type="button" value="Update"/>
Position Unassigned	Position Unassigned	Position Unassigned

Decide what matches best your church structure and only fill in Church Council, Administrative Council Chair, Administrative Board Chair, or Council on Ministries Chair once. You don't need to repeat the same name in each of these boxes.

PRINTABLE FORMS

“Printable” forms are found on the NTC website
<https://ntcumc.org/connectional-resources/charge-conference>.

Printable Forms

Accessibility Audit	Fund Balance Report
Accountable Reimbursement Policies Q&As	Lay Minister Annual Report
Accountable Reimbursement Short Form	Lay Servant Annual Report
Accountable Reimbursement Long Form	Minutes of the Charge/Church Conference
Annual Report of the Deacon	Pastor Continuing Education Form
Clergy Housing Report	Pastor's Report
Extension Minister Report	Trustees Report
Finance Committee Report	

QUESTIONS

For questions on filling out forms or for your login and password, contact your district office or the conference office if the district is unavailable.

East District chapman@ntcumc.org

Metro District Lancaster@ntcumc.org

North Central District Holcomb@ntcumc.org

Northwest District Cleveland@ntcumc.org

NTC Office miller@ntcumc.org

