

Catawba Valley District

2023 Charge Conference Submission Instructions

All reports must be completely filled out five (5) days before your charge conference. You will Officially Submit your reports 5 days after your charge conference.

There are 4 major components of Charge Conference reports:

1. **Clergy Compensation**
2. **Church Leaders**
3. **Fund Balance Report**
4. **Other Charge Conference reports**

Go to the Church Dashboard for each church in your charge (www.wnccumc.org/dashboard) to find the forms. **See detailed steps for each component below.**

1. CLERGY COMPENSATION

- **Do not begin working on your clergy compensation form until you hear from the CV Office that the forms are ready (mid-late September)**
- Access the clergy compensation form from either the Clergy Dashboard or the Church Dashboard (contact the District Office if you have trouble logging in)
- Look for “2024 Clergy Compensation” and click “Start” to begin a new clergy compensation form for 2024
- Check the first screen to be sure your information is correct, showing the church where you are appointed. If not, go no further and notify Jana at the District Office. If correct, continue.
- Enter the start date by clicking on “Select Date” and then choosing **January 1, 2024**.
- Enter the required information through the rest of the form.
- If you are eligible for pension, you are encouraged (but not required) to enter at least 1% of your “Pension Plan Compensation” (line 6b) into line 3a (Salary Reduction for UM PIP).
- “Household Expense Allowance” and “Housing in lieu of parsonage” are DIFFERENT.
 - **Household Expense Allowance** (3g) = part of the “salary reduction agreement”. This line lowers your taxable wages, and can include household expenses, ie: lawncare, light bulbs, power, gas, water, etc. All clergy can use this salary reduction if desired. The church still pays this amount to you, but it is not included as taxable income. YOU are accountable to the IRS to provide documentation to support this reduction should they ever require it.
 - **Housing in lieu of Parsonage** (5d) = monies paid to you by the church, IN ADDITION to salary (Line 1 Total Amount Compensation), specifically for housing allowance when a parsonage is not provided.
- PAY CLOSE ATTENTION to line 6a (“Does Pastor live in Parsonage?”). This line may affect your pension calculation / contribution from the conference. Be sure to enter it correctly.
- Click the Save button to save your work.
- Click the button to save your work, and click the SUBMIT button to submit your DRAFT 5 days before the CC

- Do not complete the section “Approvals/Submissions” until ***AFTER*** your charge conference and all compensation numbers have been approved

2. CHURCH LEADERS

****From your Church Dashboard, select “Church Leaders” (left column)**

- Select either “Edit Assignment” or “Add New Assignment”
- It is VERY IMPORTANT that you provide **updated, accurate & complete** contact information. **We especially need email addresses** for all church leaders. Please make special efforts to get email addresses. If the chair or leader does not have an email, please use an email address for another person who agrees to receive email on their behalf. It could be another committee member, or church council member, etc.
- The following offices are required:
 - Chair of Governing Body (Ch. Council, etc.)/Contact
 - Church Secretary
 - Church/Charge Lay Leader
 - Finance Chair (Local Church)
 - Finance Secretary
 - S/PPRC (or Contact person if chair does not have email or if there is a Charge PPRC chair for multi-church charge)
 - Treasurer (Local Church)
 - Trustees Chair (Local Church)
- Use the “End Date” to “end” an assignment for someone. Ex. if they are leaving the position on 12/31/2023, be sure to indicate that. They will automatically be removed from the position on that date.
- If a leader is continuing in a position, be sure their End Date is **left blank** (or fill in an end date ONLY if you know for sure what year they will end that position).
- Be sure that none of your leaders have an end date of 2023 unless they are leaving their role at the end of this year. Otherwise, leave the end date blank.
- You can leave all other items blank.

Church Leadership

Save

Brick River ID

People

Assignment Dates ▾

Start

End

Please DO NOT enter an end date, unless you know for sure when this person will finish serving in this position.

Ad-Interim Addition

Church Leader Assignment ▾

Position

Role

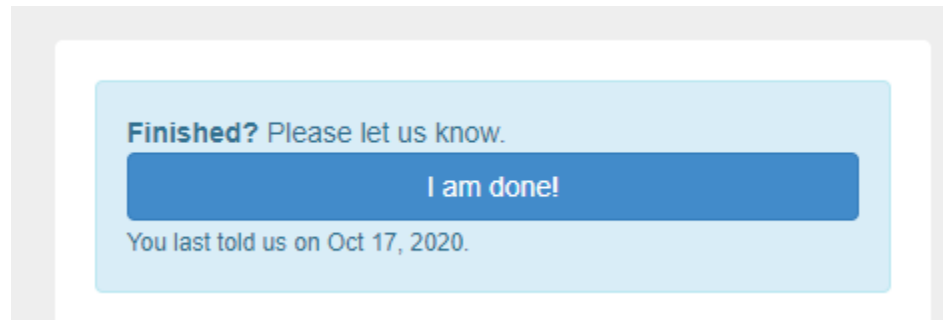
Notes

Save

- To add a new church leader, click the green button “Add New Assignment”. Select the position you are adding. If the person you want to select is already in your church list, click “Pick this Person.” If they are not on your church list, check to see if they are in our entire conference database by typing their name in the box at the bottom of the screen. ****Be careful – if your person shows up in**

this database, be sure it is the right person and not someone else with the same name. If they are not in our entire conference database, click “Add a brand new person to our database”. Enter their contact information and click “Add new contact and create assignment.”

- **Click the blue “I am Done!” button in the right hand corner to indicate that your Church Leaders list is up-to-date.**



3. FUND BALANCE REPORT:

Remember: The Fund Balance Report is ALWAYS for the previous year. (For instance, in 2023, you will complete the report based on 2022 figures!!)

The Fund Balance Report has been updated to a “module” format. Access to this report is no longer through “Submittable Forms” section on your church dashboard, RATHER, it has its own separate link on the Church Dashboard titled “Fund Balance Report”.

For detailed instructions on the Fund Balance module, or to watch a detailed video, click this link:

<https://www.wnccumc.org/detail/fund-balance-2022-16609726>

4. OTHER CHARGE CONFERENCE REPORTS:

Charge Conference reports will be completed directly online. This means that someone from your church will input all the data that is found on each committee report. You can designate one person, or you can have each committee chair input the data for their own committee. **Forms should be completed online 5 days before the Charge Conference is held.**

- From your Church Dashboard, click “Submittable Forms” (notify the district office if you need help logging in)
- Click “2023 Charge Conference Forms” – You can share these forms with other persons in your church for completion via the “Share This” link
- Below is a listing of the reports in this section – click “Start this Form” for each
 - Agenda and Minutes for Charge Conference – this is where you will list the Candidates for Ordained Ministry, Certified Lay Servants, Certified Lay Speakers, and Certified Lay Ministers.

- Charge Conference Checklist
- Complete List of Church Committees/Teams (*This is NOT your “church leaders” form which must be updated / submitted through the Church Dashboard but is a list of all *members* of the committees)
- Report of the Finance Committee
- Report of the Parsonage Committee (if applicable)
- Report of the Pastor
- Report of the Trustees
- Safe Sanctuaries Report
- Creation Care Report
- Click “Edit/Review This Form” for each form to begin working on it. The information from LAST YEAR will appear in the form. Be sure to review and make all needed updates and corrections.
- Click “Save Your Progress” to save.
- **To print a copy of a form** in order to write on it before filling it out online, click “Review and Print” to open the form. Click “Print Full Size” or “Print Condensed” (at the top of the screen). You can enlarge the size of the printout by choosing “advanced options” on the print dialog box.

AFTER YOUR CHARGE CONFERENCE:

- **All required Charge Conference reports, forms, and required minutes must be completely filled out 5 days prior to your charge conference, with the exception of the final submission of the Clergy Compensation form (see below). That should be submitted 5 days after your charge conference.**

Complete & submit your Clergy Compensation form:

- CLICK the red “SUBMIT” button now that all has been approved.
- Enter the names of the clergy, the treasurer, and the PPR chair to indicate their approval, and click “Submit with signatures for final approval” to submit.
- CLICK THE RED “SUBMIT WITH SIGNATURES FOR FINAL APPROVAL” BUTTON
- After you have submitted, the district office will review & approve the clergy comp form. You can open yours back up to see when the DS has approved the form, and then print that for your records if so desired.

Status Draft Submitted

Signatures

Do NOT complete this section until your Charge Conference has voted and approved the draft.
Please enter the names as digital signatures of the people signing the document. By writing their name, each individual has given their consent that the document has been completed to the best of their knowledge. Each person understands that this data at the time of signature will be used by the WNCC benefits administrator.

Clergy Name This field is required

Treasurer Name This field is required

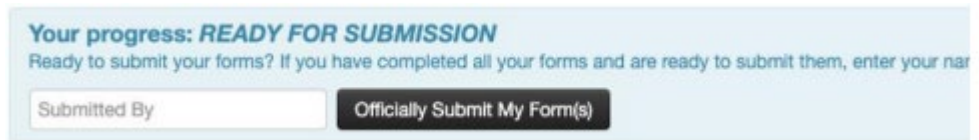
SPPRC Name This field is required

Submit with Signatures for Final Approval

- **Officially Submit your Charge Conference Reports (5 days after your Charge Conference).**

In the event any changes occurred during the charge conference, make those changes on the forms and then Officially Submit your packet.

- On your Church Dashboard go to “Submittable Forms”
- Once all forms have been completed you are ready to submit and you will see the blue button below:
- Enter YOUR NAME in “Submitted By” then click the “Officially Submit My Form(s)” button.



- Once you have submitted your reports, check back in a few days to your Submittable Forms, click on the 2023 Charge Conference Reports, and scroll to the bottom to see this message:

Your progress: *SUBMITTED ON 10/15/2019*
APPROVED ON 10/16/2019 BY JANA ALEXANDER

You are now completely done with charge conference reporting!

As always, don't hesitate to call Jana Alexander at the District office (704-865-3580) if you have any questions!