

Paperless Clergy Financial Support Process

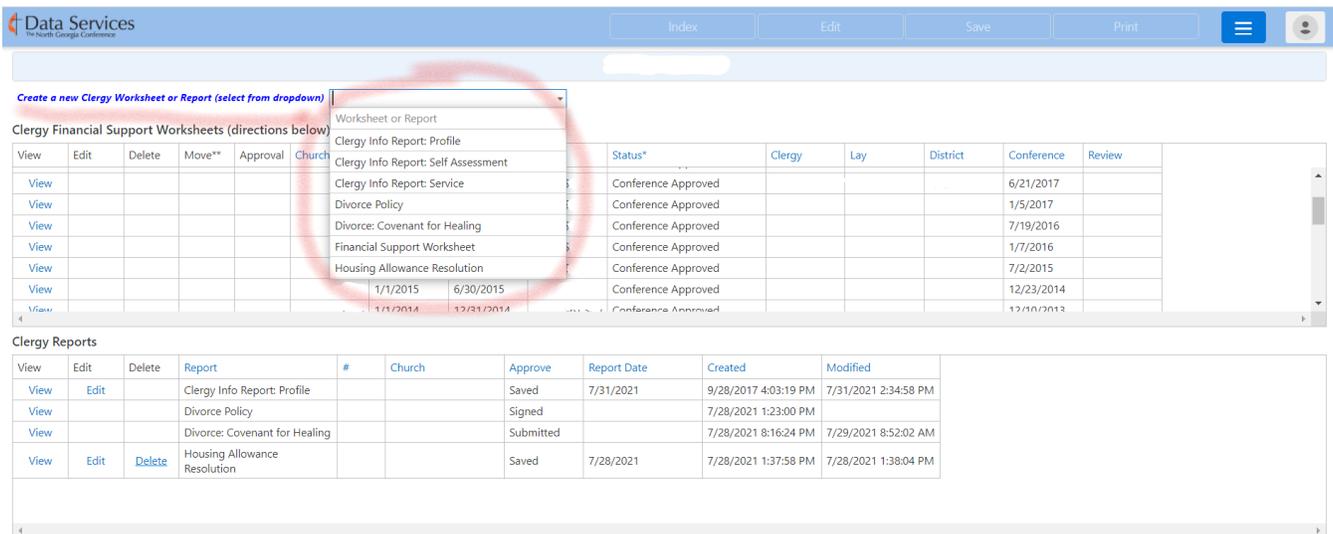
Clergy Financial Support Worksheets are to be submitted online through **Data Services** <https://data.ngumc.org>.

Worksheets are to be submitted by the clergy person. The clergy's ngumc.net email address is their username.



On the Main Index, to submit a new worksheet click the **new Clergy Worksheet or Report** dropdown list. The choose Financial Support Worksheet

The worksheets are edited, and approved in a grid on the Main Index.



Worksheet or Report	Status*	Clergy	Lay	District	Conference	Review
Clergy Info Report: Profile						
Clergy Info Report: Self Assessment						
Clergy Info Report: Service	Conference Approved				6/21/2017	
Divorce Policy	Conference Approved				1/5/2017	
Divorce: Covenant for Healing	Conference Approved				7/19/2016	
Financial Support Worksheet	Conference Approved				1/7/2016	
Housing Allowance Resolution	Conference Approved				7/2/2015	
		1/1/2015	6/30/2015			
		1/1/2014	12/31/2014			
	Conference Approved				12/23/2014	
	Conference Approved				12/10/2013	

View	Edit	Delete	Report	#	Church	Approve	Report Date	Created	Modified
View	Edit		Clergy Info Report: Profile			Saved	7/31/2021	9/28/2017 4:03:19 PM	7/31/2021 2:34:58 PM
View			Divorce Policy			Signed		7/28/2021 1:23:00 PM	
View			Divorce: Covenant for Healing			Submitted		7/28/2021 8:16:24 PM	7/29/2021 8:52:02 AM
View	Edit	Delete	Housing Allowance Resolution			Saved	7/28/2021	7/28/2021 1:37:58 PM	7/28/2021 1:38:04 PM

Moving clergy may enter reports up to 60 days before the new appointment begins.

• Directions for Clergy • Directions for Laity • Important UMPIP Updates

* Status: Indicates the highest level of approval (i.e. Church, District, or Conference). If the Status is 'Needs Initial Approval' it indicates that the submitting clergy person has not yet approved the report.

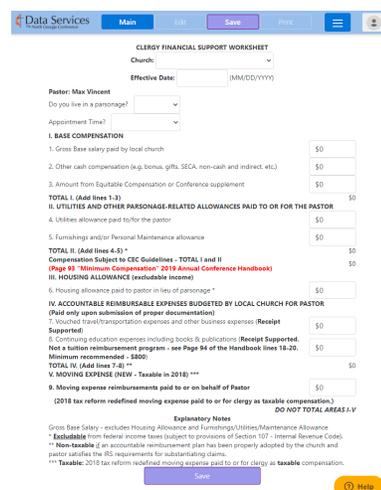
** Moving Expenses: 2018 tax reform redefined moving expense paid to or for clergy as **taxable** compensation. This should be submitted in the month it is reimbursed. If moving expenses have not been previously reported they can be added to an appropriate CFSW.

UMPIP: Clergy only have to fill out a new UMPIP form if they want to change their contribution or if they change churches. This and other pension forms are available at <https://www.ngumc.org/pension>.

Moving clergy may enter reports up to 60 days before the new appointment begins.

Submitting a new Clergy Financial Support Worksheet is the first step.

Moving expenses may be added to an approved report. Any other change requires submitting a new report.



CLERGY FINANCIAL SUPPORT WORKSHEET

Church: [dropdown]
Effective Date: (MM/DD/YYYY)

Pastor/Max Vincent: [dropdown]
Do you live in a parsonage? [dropdown]
Appointment Time: [dropdown]

I. BASE COMPENSATION

1. Gross base salary paid by local church	\$0
2. Other cash compensation (e.g. bonus, gifts, SECA, non-cash and indirect, etc.)	\$0
3. Amount from Equitable Compensation or Conference supplement	\$0
TOTAL I. (Add lines 1-3)	\$0

II. UTILITIES AND OTHER PARSONAGE-RELATED ALLOWANCES PAID TO OR FOR THE PASTOR

4. Utilities allowance paid to/for the pastor	\$0
5. Furnishings and/or Personal Maintenance allowance	\$0
TOTAL II. (Add lines 4-5)	\$0

III. HOUSING ALLOWANCE (see table below)

6. Housing allowance paid to/pastor in lieu of parsonage *	\$0
TOTAL III. (Add line 6)	\$0

IV. ACCOUNTABLE REIMBURSABLE EXPENSES BUDGETED BY LOCAL CHURCH FOR PASTOR
(Paid only upon submission of proper documentation)

7. Reimbursed travel/transportation expenses and other business expenses: Receipt Supported	\$0
8. Continuing education expenses including books & publications: Receipt Supported	\$0
9. Tuition reimbursement program - see Page 94 of the Handbook lines 18-20. Minimum recommended: \$800	\$0
TOTAL IV. (Add lines 7-9)	\$0

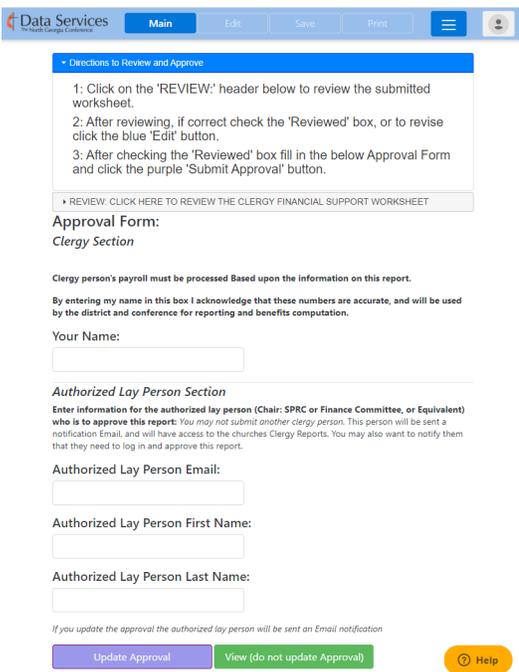
V. MOVING EXPENSE (NEW - Taxable in 2018) ***

10. Moving expense reimbursement paid to or on behalf of Pastor	\$0
11. 2018 tax reform redefined moving expense paid to or for clergy as taxable compensation.)	\$0
DO NOT TOTAL AREAS I-V	

Explanatory Notes

Gross Base Salary - excludes Housing Allowance and Furnishings/Utilities/Maintenance Allowance
* Available from federal income laws (subject to provisions of Section 107 - Internal Revenue Code)
** Non-taxable if an accountable membership plan has been properly adopted by the church and pastor satisfies the IRS requirements for substantiating claims.
*** Taxable: 2018 tax reform redefined moving expense paid to or for clergy as taxable compensation.

Save [button] Help [button]

<p>Completing the Approval form is required by both the clergy person, and an authorized lay person (Chair: SPRC or Finance Committee, or Equivalent).</p> <p>1: Click on the 'REVIEW:' header below to review the submitted worksheet.</p> <p>2: After reviewing, if correct check the 'Reviewed' box, or to revise click the blue 'Edit' button.</p> <p>3: After checking the 'Reviewed' box fill in the below Approval Form and click the purple 'Submit Approval' button.</p> <p>When the clergy person approves the report they will also submit the name and email of the designated authorized lay person.</p>	
	<p>The designated authorized lay person will then be sent an email indicating they need to log in, review, and approve the report. It is recommended that the clergy person also notify the authorized lay person to look for the email.</p>
<p>The authorized lay person logs in and approves the report. Their username is the authorized email address that was submitted.</p>	
	<p>Once both people approve the report the District Office is sent an automated notification email.</p>
<p>The District Office (DS or AA) approves the reports or indicates the report needs review. If a review is needed the clergy and lay person are both sent a notification email.</p>	
	<p>If a review is needed, the clergy person must edit/correct the report and both parties must re-approve the report. The District Office is then notified via email.</p>
<p>The District Office approves the reports.</p>	