Paperless Clergy Financial Support Process

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

Forms 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 form click the New Financial Support Worksheet button. The worksheets are entered, edited, and approved on the Main Index.

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.

Completing a UMPIP form is the next step for most clergy persons. This should be completed before proceeding with the approval process.
**Completing the Approval form** is required by both the clergy person, and an **authorized** lay person (Chair: SPRC or Finance Committee, or Equivalent).

1: Click on the 'REVIEW:' header below to review the submitted worksheet.

2: After reviewing, if correct check the 'Reviewed' box, or to revise click the blue 'Edit' button.

3: After checking the 'Reviewed' box fill in the below Approval Form and click the purple 'Submit Approval' button.

When the clergy person approves the report they will also submit the name and email of the designated **authorized** lay person.

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.

The **authorized** lay person logs in and approves the report. Their username is the authorized email address that was submitted.

Once both people approve the report the District Office is sent an automated notification email.

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.

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.

The District Office approves the reports.