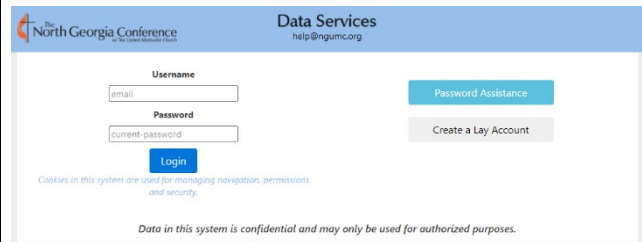


# Paperless Clergy Financial Support Process

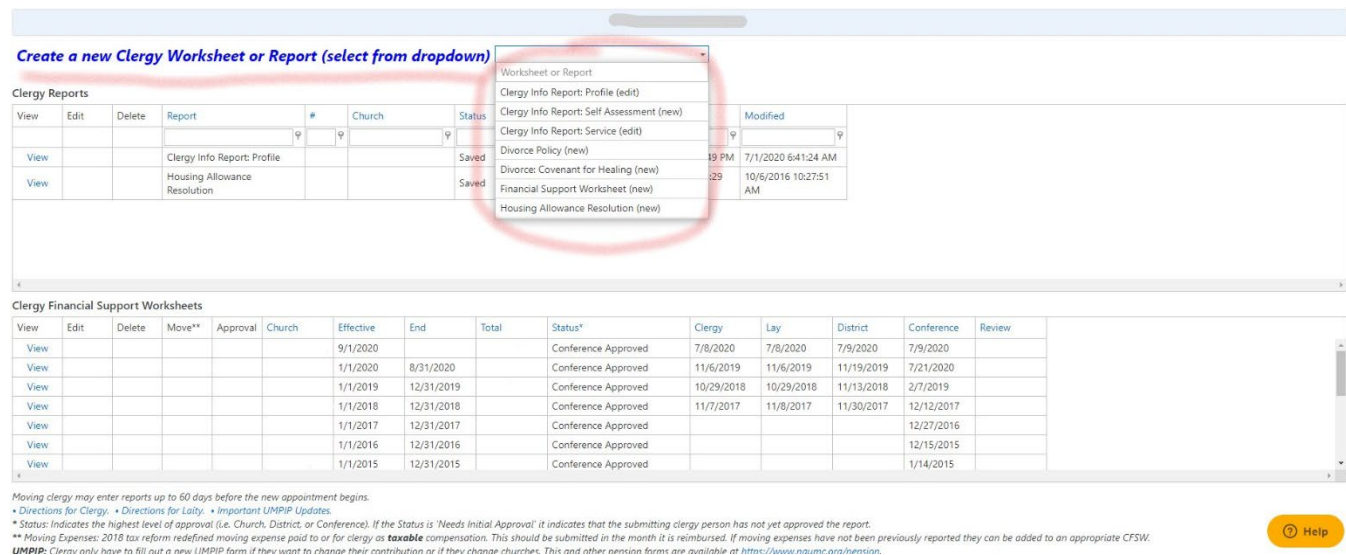
**Clergy Financial Support Worksheets**  
are to be submitted online through  
**Data Services**  
<https://data.ngumc.org>.

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. Then choose Financial Support Worksheet

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



**Clergy Reports**

View	Edit	Delete	Report	#	Church	Status	Modified
View			Clergy Info Report: Profile			Saved	7/1/2020 6:41:24 AM
View			Housing Allowance Resolution			Saved	10/6/2016 10:27:51 AM

**Clergy Financial Support Worksheets**

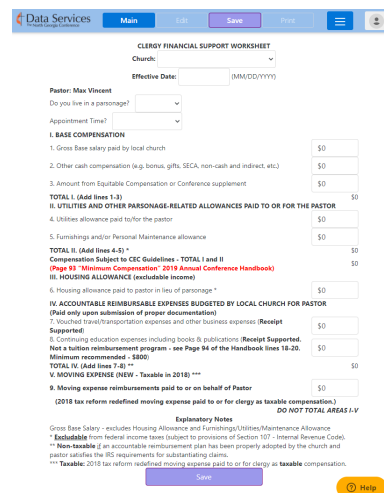
View	Edit	Delete	Move**	Approval	Church	Effective	End	Total	Status*	Clergy	Lay	District	Conference	Review
View						9/1/2020			Conference Approved	7/8/2020	7/9/2020		7/9/2020	
View						1/1/2020	8/31/2020		Conference Approved	11/6/2019	11/6/2019	11/19/2019	7/21/2020	
View						1/1/2019	12/31/2019		Conference Approved	10/29/2018	10/29/2018	11/13/2018	2/7/2019	
View						1/1/2018	12/31/2018		Conference Approved	11/7/2017	11/8/2017	11/30/2017	12/12/2017	
View						1/1/2017	12/31/2017		Conference Approved				12/27/2016	
View						1/1/2016	12/31/2016		Conference Approved				12/15/2015	
View						1/1/2015	12/31/2015		Conference Approved				1/14/2015	

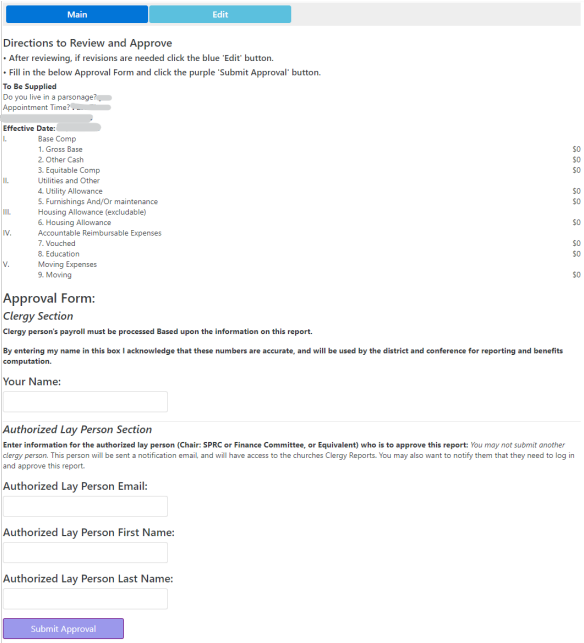
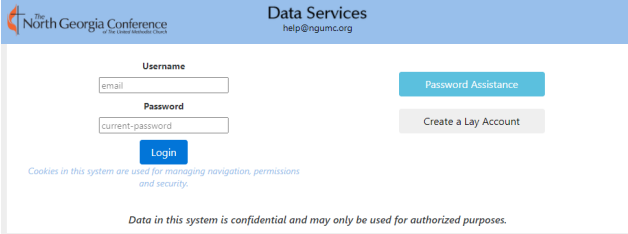
Moving clergy may enter reports up to 60 days before the new appointment begins.  
 \* Status: Indicates the highest level of approval (i.e. Church, District, or Conference). If the Status is 'Needs Initial Approval' it indicates that the submitting clergy person has not yet approved the report.  
 \*\* 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.  
 LUMP: Clergy only have to fill out a new LUMP form if they want to change their contribution or if they change churches. This and other newscast forms are available at <https://www.naumc.org/newscast>.

**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.**



<p><b>Completing the Approval form</b> is required by both the clergy person, and an <b>authorized</b> lay person (Chair: SPRC or Finance Committee, or Equivalent).</p> <ul style="list-style-type: none"> <li>• After reviewing, if revisions are needed click the blue 'Edit' button.</li> <li>• Fill in the Approval Form and click the purple 'Submit Approval' button.</li> </ul> <p>When the clergy person approves the worksheet they will also submit the name and email of the designated <b>authorized</b> lay person.</p>	
	<p>The designated <b>authorized</b> 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 <b>authorized</b> lay person to look for the email.</p>
<p>The <b>authorized</b> 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 (<b>DS or AA</b>) 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>	