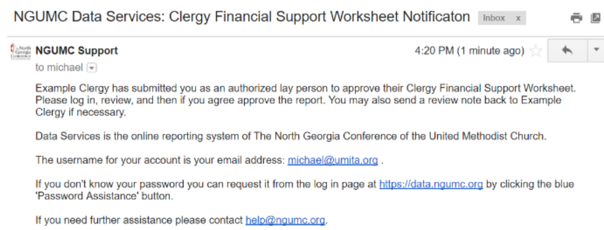
Lay Directions for the paperless Clergy Financial Support Process

Clergy Financial Support Worksheets are to be submitted and approved online through **Data Services** https:\\data.ngumc.org.

Forms are to be approved by an **authorized** lay person (Chair: SPRC or Finance Committee, or Equivalent) after it is submitted and approved by the clergy person. Both approvals are required.

The designated **authorized** lay person will receive an email indicating they need to log in, review, and approve the report.


NGUMC Data Services: Clergy Financial Support Worksheet Notificaton Inbox x

NGUMC Support 4:20 PM (1 minute ago)
to michael

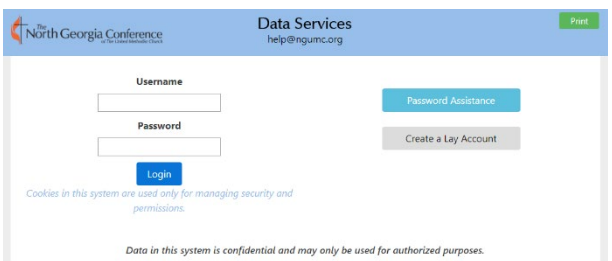
Example Clergy has submitted you as an authorized lay person to approve their Clergy Financial Support Worksheet. Please log in, review, and then if you agree approve the report. You may also send a review note back to Example Clergy if necessary.

Data Services is the online reporting system of The North Georgia Conference of the United Methodist Church.

The username for your account is your email address: michael@umita.org .

If you don't know your password you can request it from the log in page at https://data.ngumc.org by clicking the blue 'Password Assistance' button.

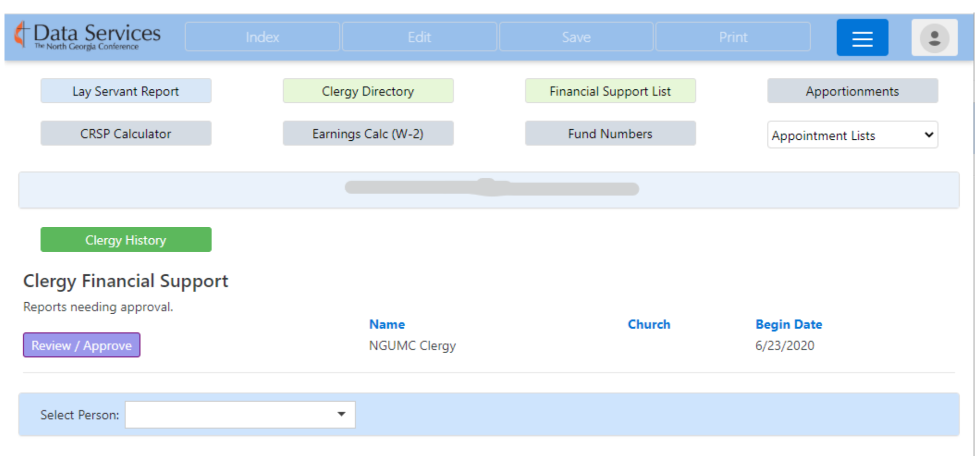
If you need further assistance please contact help@ngumc.org.

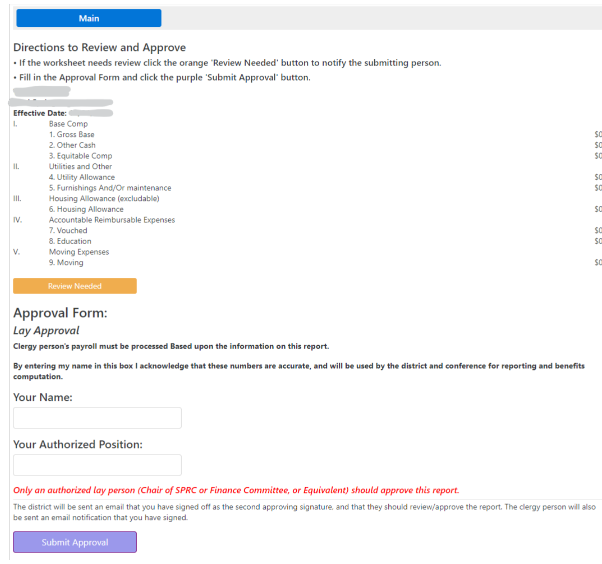


If the notification email expires, or the lay person does not know their password they can click on the blue Password Assistance button. Please note: they must log in using the same email address submitted by the clergy person as the email of the authorizing lay person.

On the main menu there will be a list of reports that need to be approved.

To get started click the purple **Review/Approve** button.



• If the worksheet needs review click the orange 'Review Needed' button to notify the submitting person. • Fill in the Approval Form and click the purple 'Submit Approval' button.	
	The District Office is sent an automated notification email once both approvals are submitted.
The District Office (**DS or AA**) approves the report, or indicates the report needs review. If review is needed the clergy and lay person are both sent a notification email.	 ***or*** 
	If 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.