

District UMC



2025 Charge Conference Forms Checklist

Below is a listing of Annual Charge Conference reports. **Note deadlines for most reports are Oct. 1, 2025.** Click [here](#) to download a detailed checklist of all forms due. This is crucial for your record-keeping.

If you have any questions, please send an email to info@unyumc.org and a Superintendency Administrative Assistant will answer your inquiry.

For detailed instructions on how to use this function, click the Help button found here or in the upper-right corner of this display.

Download "Checklist", print or save in your computer.

Make a good use of "Help Document"

Upper New York Annual Conference 2025-2026 ANNUAL REPORT FORM CHECK LIST

Date of Charge Conference: _____
Church: _____ Pastor: _____
Go to: <https://umcdata.net/ChurchReporting> For help logging into forms please contact your District Office
** These are to be filled out on the PLATFORM*
Downloadable forms - save to your computer first, fill out, saved again, then upload to the platform
DUE July 1, 2025
____ Clergy Profile, Supervisory, Appointment Advisory Form*
____ SY/CLM Profile, Supervisory, Appointment Advisory Form*
DUE October 1, 2025 REQUIRED
____ 2026 Active Clergy Compensation Form with excel worksheet
OR
____ 2026 Retired/Lay Supply Clergy Compensation
____ Church Outreach & Volunteers In Mission
____ Report of Pastor*
____ Trustee Election Ballot
____ Imagine No Racism (*complete online*) print you a copy before submitting
____ Local Church Leadership*
____ Nominations/Personnel (your own)
____ Congregational Profile & Appointment Advisory Form*
____ Safe Sanctuary Policy (upload to platform every year)
____ Accessibility Audit (due every year)
DUE October 1, 2025- ONLY If applicable to your Church
____ ARP Resolution (accountable reimbursement) Only New Appointment/Change of Appointment
____ Clergy Housing Exclusion Resolution
____ Parsonage Inspection & Committee
____ Declaration of Candidacy for Licensed/Ordained Ministry
____ Bequest Resolution (if applicable)
____ Retired Clergy in the church (if applicable) ¶ 358
____ Change of Treasurer or Billing Information (ONLY if a change) send to Conference Office
DUE at Church/Charge Conference (Give to DS at Charge Conference)
The Church is to Provide Copy of ____ 2024 Audit & ____ Approve 2024 Charge Conference Minutes
____ Church/Charge Conference Minutes (with any attachments)
____ Church/Charge Conference Sign-In-Sheet (print in landscape layout) Hand in to DS with Minutes
____ Certified Lay Ministers Annual Report-BRING 3 copies with you-if applicable to your church
____ Certified Lay Servant Annual Report-BRING 3 copies with you-if applicable to your church
____ Lay Speaker Annual Report-BRING 3 copies with you-if applicable to your church
DUE by February 15th, 2026: Required by all churches
____ Report of Trustees*
____ Report of Finance Committee*
____ 2025 Year End Financial Report-new on the platform(helpful for ACStats reporting) or your own format
____ 2026 Church Budget- your church format
____ 2025 ACStats-Statistical Reports* (complete at <https://stats.gcfa.org/>)
Due by March 15th, 2026: Required by all churches
____ 2025 Local Church Annual Financial Audit

Charge Conference Checklist

Overview
The Charge Conference Checklist should list all of the reports each year needed for your Church/Charge Conference. Depending on your conference, forms are internally marked as "Required" or to be completed as needed. The display should make it obvious which forms are required, and which are completed as needed, and by whom.

For assistance related to completion of the various forms, please contact your District Administrative Assistant by clicking the MENU button found in the upper-right corner of the application. Select "Need Assistance?" then "Call/Email: SUAR".

For questions/issues related to the application's functionality, please contact the developer using the "Technical Assistance" option.

Charge Conference Forms

Hyperlinked Forms: For hyperlinked forms, click the hyperlinked name of the form to open it. Most are Adobe PDFs which can be completed in your web browser, then saved to your local computer for printing.

UPLOAD: If completion of scanned to a file. Click the "Upload" button. Once selected, the file will be uploaded.

Multiple versions: If the Upload button has a plus sign, it means there are multiple versions of the form. Click the "Open" button to view the most recent version. Example: File 1 | Co File 2 | Co

Open: Clicking the open button of that form. Click a correction new form. Then click the "Open" button.

Single version: If the Upload button has a plus sign, it means there are multiple versions of the form. Click the "Open" button to view the most recent version. Example: File 1 | Co File 2 | Co

HTML Forms: Some forms are written as part of the application, and open directly in the application for completion. Data entered into these forms is stored directly into the database upon saving. These forms will show a % of completion in the upper-left corner, and data entered can be cancelled or saved.

Certified Lay Minister Annual Report: The HTML-type forms are identified by a button containing the name of the form. Click the form's button to open a NEW copy of the form for completion (if multiple versions allowed), or to continue on the form where you left off if this form requires only one copy to be completed.

Once the HTML form is completed, it becomes read-only. If it needs to be edited after completion, click the EDIT button. The "...completed by:" line or other data near the end of the form is removed in order to make it editable (< 100% completed). After editing and saving your changes, be sure to complete the form again, replacing any data that was removed.

Multiple versions of the form: If the HTML Form can potentially be completed for more than one person per church, then a pop-up will appear when the report button is clicked. The names of all persons in the conference database connected to this church will appear in the drop-list for selection. If the person's name does not appear in the drop-list, then click the "Add New Person" button, and complete the pop-up form, and Save. Only "First Name," "Last Name," and Clergy or Lay status are required. The form will then open in edit mode automatically for completion. The form may be Saved at any time.

Finalist Person

Select the person this form is for: <No Selection>

If the desired person is NOT found in the drop-list above, click the "Add New Person" button.

Cancel Add New Person

point, and Closed to be completed later.

Open: To reopen the form, click the "Folio" button to the right of the blue Report button, and the name of the person each is connected to.

Open: To the right of each form being is an "Open" button, to reset that individual's report and a "Track" button to delete the report, should it need to be corrected and completed again.

11% Complete: The percentage completed will display in the upper-left corner to track your progress through the report. Once the form saves as 100% complete, it will be displayed in "Read-Only" mode.

You may print the report at any time by clicking the print button. This will display the report in your browser for printing, or saving as a PDF.