



## Schedule of Clergy and Church Forms

Reports on church statistics and ministries helps the annual conference and the denomination to have an accurate picture of trends and ministries across the United Methodist connection. Completing the forms in a timely way is a matter of clergy accountability. Keep this schedule convenient so that you will complete your forms on time. Others may be relying on your information in order to complete their obligations. Please avoid putting the district administrative assistants in a position where they have to spend time reminding you to meet the deadlines.

Packet or Form	Purpose	Contents and Notes	Available	Due
<b>Transitions Packet</b>	Needed at the time of the move	Form I-9 Health insurance automatic deduction agreement <a href="#">Wespath UMPIP contribution option</a> Contact <a href="#">Jason Mackey</a> for more information Safety procedures for moves during pandemic	Supplied to you before your move	Soon after your move. Wespath retirement plan contribution choices can be changed at any time
<b>Form 14: Parsonage Inspection</b>	Documenting maintenance that might be required.	Find this with the Charge Conference Forms: <a href="https://susumc.org/charge-conference/">https://susumc.org/charge-conference/</a>	Always available online	Two weeks before the exiting pastor moves

Packet or Form	Purpose	Contents and Notes	Available	Due
<b>Vital Signs</b>	Statistics for weekly attendance at worship, youth groups, Christian education, etc.	Online form through the United Methodist General Council on Finance and Administration The <a href="#">conference office</a> will update your email address at the time of your move. Check with your church administrative assistant to learn who typically completes this for your church	Reminder e-mail sent to you or designated church person weekly	To be completed weekly
<b>Charge Conference Packet Forms 1-8</b> Find these at <a href="https://susumc.org/charge-conference/">https://susumc.org/charge-conference/</a>	Reporting on church officers, ministries, etc.	<ol style="list-style-type: none"> <li>1. Charge Conference Checklist Preparation Sheet</li> <li>2. Membership Report</li> <li>3. Certification of election of lay members</li> <li>4. Church Officer &amp; Structure Instruction Church Officer &amp; Structure Login</li> <li>5. Annual Parsonage Inspection Report</li> <li>6. Instructions and Worksheet</li> <li>6. Pastoral Compensation</li> <li>6(b). CLM DS Hire Compensation</li> <li>7. Safe Sanctuaries Report</li> <li>8. Lay Servant Report CLM Annual Report</li> </ol>	Updated documents posted online in September	Two weeks before your charge conference
<b>Charge Conference Packet Forms 9-11</b> Find these at <a href="https://susumc.org/charge-conference/">https://susumc.org/charge-conference/</a>	Trustee-related matters  Clergy continuing formation	<u>Forms 9-11</u> 9. Trustee Form Instructions; Church Trustees 9(a). Weekday Children’s Ministry 10. Charge Trustees 11. Continuing Formation	September (online)	January 31

Packet or Form	Purpose	Contents and Notes	Available	Due
<b>Ezra Statistical Reports</b>	Denominational database  Determining Shares of Ministry	Online database provided by the United Methodist General Council on Finance and Administration  The data that your church provides will determine your church's Shares of Ministry amount. Thus, you will want to be sure you are submitting accurate, up-to-date information.  Watch the Susquehanna Conference's weekly e-mail newsletter, <i>QuikLink</i> , for announcements about when the database will be open to receive your church's data.	January 1	January 31
<b>Charge Conference Packet Forms 12 and 13</b> Find these at <a href="https://susumc.org/charge-conference/">https://susumc.org/charge-conference/</a>	Financial accountability	12. Local Church Annual Financial Audit 13. Charge Annual Financial Audit	September	March 15 of following year

If you have questions about these forms, please contact your district office.

*Updated June 2021*