

LOCAL CHURCH LEADERSHIP ROSTER

Church Leadership Roster Entries MUST be completed prior to your Charge Conference session or December 1, whichever is earlier.

How to Get Started:

Go to the conference's website: www.la-umc.org. Now, find the box on the Home page entitled: "Local Church Leadership On-line Entry;" it has a picture of hands on a keyboard of a computer. You will need to enter your church Username (six-digit permanent General church ID number) and your church Password (four-digit Conference church ID number). These numbers are also found on your Apportionment Remittance form and Benefits Billing sheet or you can call your district office.

Login form:

The login form consists of two input fields and a button. The first field is labeled 'Username:' and contains the text '123456'. The second field is labeled 'Password:' and contains four asterisks '****'. Below the password field is a button labeled 'Login'.

Enter Username (permanent ID) and Password (Conference ID)

Your local church name should appear at the top left of the form in the green section. To the right of the name is a print button. Please click on the button to print your church's current record of Local Church Officials to use as a worksheet when updating your roster.

Top of Church Leadership form:

The screenshot shows the top of the form with a green header area. The header contains the text 'LAFAYETTE, COVENANT [AC]' and 'District: Acadiana'. To the right of the district name is a red arrow pointing to a printer icon. Below the header is a table with the following columns: Position, Name, Start, and Stop. The table is currently empty.

Click the Printer button to print your report. Select either "as of a selected date" (and select current date) or "as of 01/01/19".

Printing Instructions:

Click the Print button, then select "Print report as of selected date" and select the current date. The report will print as a PDF file. It may display in your browser, or it may display in your PDF reader program (such as Adobe Acrobat Reader™). If you do not have a PDF reader program, you can download the free Acrobat Reader program here: <https://get.adobe.com/reader/>.

Editing your Church Leadership List:

We recommend working your way from top to bottom on the list, to help you keep track of your progress.

The Local Church Leadership website may be used to add leaders to your church's roster, replace leaders, enter the end of a leader's term with a Stop Date, or edit a leader's contact information. All functions follow a similar sequence of steps, except for editing a person's first and last name. See the special section below regarding the editing of a person's name.

General Instructions:

1. **Data Entry Protocol:** Do not use all caps to enter data.
2. **Contacts:** Please list only one contact person, such as the chair or other person in charge of the ministry area. There are a few cases when more than one person should be listed. For example; a church with more than one pastor will have more than one lay member to annual conference. A church may also have more than one reserve member to annual conference.
3. **Required Contacts:** **The following leadership positions are required:**
 1. Church Council Chair
 2. Finance Committee Chair
 3. Financial Secretary
 4. Lay Leader
 5. Lay Member(s) to Annual Conference for the Charge
 6. Pastor Parish Relations Chairperson for the Charge
 7. Recording Secretary
 8. Treasurer
 9. Trustees Chair

These positions are listed first and noted with asterisks in the database.

PLEASE MAKE CERTAIN THERE IS THE FOLLOWING INFORMATION ON THESE INDIVIDUALS: TELEPHONE NUMBER(S), EMAIL ADDRESS(ES) and US MAIL ADDRESS(ES).

4. **Using Stop Dates:** A Stop Date removes an individual from a leadership position on the date set, preventing them from getting future district or conference mailings regarding that position. The historical information on that person remains in the database. The Stop Date does not remove the individual from the database. All Stop Dates should be entered as 12/31 of the current year if the person will be rotating off in December. If a person is rotating off mid-year or an interim change, use the date the person is leaving the position. If a person is NOT rotating off and will continue the position the next year, leave the stop date blank. It is important that stop dates be entered for all individuals leaving a position.

To enter a Stop Date of December 31, click the “stop sign” icon to the right of the calendar button. To clear a Stop Date that is already entered, click that same button.

Stop Date Button:

*When blank, click the stop sign to add a 12/31 Stop Date.
When filled, click the stop sign to clear the Stop Date*

5. If you enter a person into a position by mistake, set the Stop Date field to the same date as the Start Date. Do not remove them from the database list.

To change a Stop Date, click in the Stop Date field or click the calendar icon located to the side. You can scroll through the calendar months by clicking the arrows located at the top of the calendar. Select the appropriate Stop Date from the calendar. Click the [Save] button to SAVE the information.

How to Start An Update:

1. Click on the leadership position that you wish to edit. It may be an open position (with no name), or a position that contains a leader currently.
2. If the position is open (no one currently appointed), the following window will open:

Select a Person for Administrative Board

<No Selection>

If the desired person is not found in the list above...

+ Add New Person

Cancel

- a. **BEFORE** clicking the “add new person” button, click on the drop down arrow in the box above it and scroll in the list to see if the person you are adding is already there. This list contains people who are related to your church within the conference database, listed in alphabetical order by last name.

- i. **If the person is listed**, select the person. The following window will open:

Add a New Person as Administrative Board

First Name: John Middle Name: Last Name: Doe Use Name (Nickname):

Prefix Name: <No Selection> Suffix Name:

Primary Church: LAFAYETTE, COVENANT [AC] (1220) (711350)

Gender: Male Female Ethnicity: White

Mailing Address: 123 Happy Lane Address Type: <No Selection>

City: Lafayette State: LA Zip: 70508

Email: john@home.com Email Type: <No Selection>

Primary Phone: (337) 555-5555 Extension: Phone Type: <No Selection>

Secondary Phone: Extension: Phone Type: <No Selection>

Start Date: 01/01/2019 Stop Date: MM/DD/YYYY

Cancel Save


Now, verify the person’s information and make corrections as needed. Add missing information as necessary. It is important to have an email address if available as email is our main form of communication. If a person prefers to go by his or her middle name or a nickname, please enter this name in the “Use Name (Nickname)” field.

Be sure that you select the correct Start Date for this person in this position but **DO NOT** enter a Stop Date. The Start Date for a new leader will default to the first of January of the coming year. You may change the start date if a leader is starting their position at another time of the year. Click save when done.

- ii. **If the person is not listed**, go back and click “add new person.” Add the person’s information. It is important to have an email address if available as email is our main form of communication. If a person prefers to go by his or her middle name, please enter this name in the “Use Name (Nickname)” field.

Be sure that you select the correct Start Date for this person in this position but **DO NOT** enter a Stop Date. The Start Date for a new leader will default to the first of January of the coming year. You may change the start date if a leader is starting their position at another time of the year. Click save when done.

3. If the position has someone appointed, the following window will open:

Click on the  in the upper right corner to add a person to this position or to replace the person in this position.

The following window will then open:

This step is self-explanatory. Select the appropriate option.

Either option you select, then refer to step 2 a. then 2 a. i. if the person is listed or 2 a. ii. if the person is not listed.

If you select “replace the person in this position,” this will automatically put a stop date on the current person the day before the start date of the new person.

4. If you don’t need to add a person to the position or replace the person in a position, please check the person’s information to make sure all data is up to date. Do this by clicking on the position then select the pencil icon in the top right of the window.

Continue to edit your leadership list, adding, editing, and stopping leaders as needed. Again, we recommend working your way through the report that you print in the beginning as a guide.

TIP: If you need to set the end of a person’s term in a position, but do not yet have a replacement person, select the position then the pencil icon in the top right to edit the current leaders’ information and add a Stop Date to the person’s leadership record.

PRINT A NEW REPORT

When your list is complete, print a new copy of your leadership report for your use. This time select the option to “Print report as of 01/01/2019”.

When you are done, click the menu button to log out. If you have another church’s list to edit, log back in using that church’s account information and begin the process again.