Charge Conference Checklist

<u>Overview</u>

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.

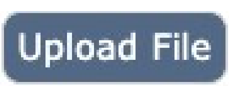
For assistance related to completion of the various forms, please contact your District Administrative Assistant by clicking the MENU button found in the upper-right corner of the application. Select “Need Assistance?” then “Call/Email Staff”.

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

<u>Charge Conference Forms</u>

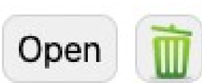
Hyperlinked forms: For hyperlinked forms, click the hyperlinked name of the form to open it. Most are fillable PDFs which can be completed in your web browser, then saved to your local computer. If not a fillable PDF, then download or send directly to a printer for hand-written completion.

UPLOAD: If completion of the form was hand-written, then the form will first need to be scanned to a file for upload. Once the file is saved onto the computer...
Click the “Upload” button, and a pop-up window will appear.
Click the “Choose File” button, and locate and select the file on your computer.
Once selected, the “Upload File” button will appear. Click this button to upload the file. If successful, a “paper clip” icon which will appear.



<u>Multiple versions of the Form:</u>
If the Upload button remained, then it is because there is a possibility of multiple copies of this form being uploaded. (ie: Compensation form – where there is more than one pastor serving the church.) *** Be sure to give EACH FILE a unique name so it can be distinguished from the others of the same form. ***
Example:

File 1) Compensation for Jerry Johnson.pdf
File 2) Compensation for Ralph Smith.pdf



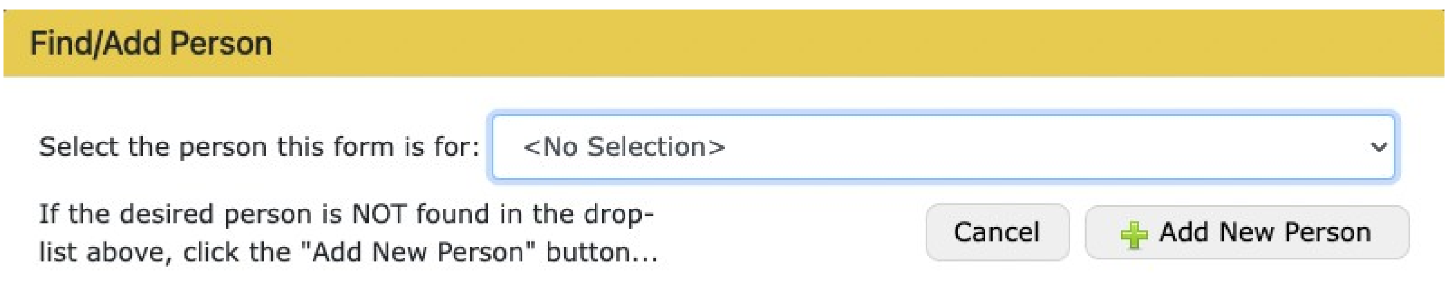
Clicking the paper-clip icon button opens a pop-up listing all the uploaded version of that form. Click the “Open” button to open the form to a browser window, or if a correction needs to be made, then click the trash-can button to delete the form. Then upload another version to replace it.

<u>Single version of the Form:</u>
If the Upload button is replaced with a trash-can button, then only one copy of this form is expected.
Clicking the paper-clip button will immediately open the form for view in a browser window. The trash-can button will delete the form, allowing a replacement to be uploaded.

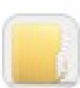
HTML Forms: Some forms are written as part of the application, and open directly in the application for completion. Data entered into these forms is stored directly into the database upon saving. These forms will show a % of completion in the upper-left corner, and data entered can be cancelled or saved.
Note: Once the form is 100% complete, it cannot be edited further. Corrections would require deleting the form, and completing it again.

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.

Multiple versions of the Form:
If the HTML Form can potentially be completed for more than one person, such as with a Lay Ministry Report, or Retired Pastor's Report, then a pop-up to "Find or Add Person" 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 Laity responses are required.



The form will then open in Edit mode automatically for completion. The form may be Saved at any point, and Closed to be completed later.



To re-open the form, click the "Folder" button to the right of the blue Report button, and a pop-up will open containing a list of all started copies of this form, and the name of the person each is connected to.

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

The percentage completed will display in the upper-left corner to track your progress through the report. Be sure to check your responses thoroughly before completing the last required field (usually "This form was completed by:...")! Once the form Saves as 100% complete, it will be in "Read-Only" mode, and unable to be edited further.

Upon completing the form, the print option will be available to print a copy of the completed form, or save as a PDF.