

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