

INSTRUCTIONS

GENERAL

- 1 Use Tab to move to next box. Use Shift + Tab to move back a box.
- 2 Fill in the colored boxes
- 3 Choose an option from the drop down boxes
- 4 Please print the forms & have the appropriate individuals to sign & give copies to them for their records
- 5 Save the file
- 6 Generate and send an email using the link to the appropriate district on the bottom of all the forms & attach the saved file. The conference office will also be included in the email as long as one of the links are used.

CHURCH PASTOR COMPENSATION REPORT *(page 1)*

PART 1

- 1 Enter the Effective Date of the Compensation Information/Appointment.
- 2 Select the District from the drop down list.
- 3 Enter the number of churches in the charge.
- 4 Enter the 6 digit church number. This usually starts with an "8" or "9". Look at apportionment sheets and other pension invoices to find this number.
- 5 Enter the Church Name - don't include UMC, but please include the name of the town if the church name is something common such as First UMC.
- 6 Enter the Pastor's Name.
- 7 Enter the pastor's Participant Number. The District has this number.
- 8 Select the Pastor's Status from the drop down list.
- 9 Select the Percentage of the pastor's appointment to the whole charge from the drop down list.

PART 2

- 1 Check the appropriate box: "Parsonage Provided" or "Own/Rent Home". Once one box is selected the reminder in red to "Please check the appropriate box" will disappear.
- 2 If you marked "Own/Rent Home", enter the amount the church is providing for a Housing Allowance in Lieu of Parsonage. This will automatically feed over to the Housing Allowance in Lieu of Parsonage Resolution (pg. 3).

PART 3

- 1 On Line 1, please enter the amount of money that is paid to the church for the pastor's salary from the District and/or Conference. Examples include, but not limited to: Equitable Compensation, Hispanic Ministry Funds.
- 2 On Line 2, please enter the amount of money that is paid by the church to the pastor prior to deductions taken out. Do NOT include any amounts listed in Part 2 or Part 3.
- 3 Line 3 will automatically calculate. This is total of Line 1 + Line 2.
- 4 Line 4 will automatically be filled in once you have completed the Before-Tax/After-Tax Contribution Agreement Form (pg. 5). (Include on W-2 under Box 12 & enter in Code E)
- 5 Line 5 will automatically be filled in once you have completed the Flexible Spending Account section under For Informational Purposes Only (pg. 6). (Include only the Dependent Care amount on the W-2 under Box 10)
- 6 On Line 6, please enter the amount that the pastor would like to designate as his/her housing exclusion. This is typically used for those housing related expenses such as utilities, furnishings, and other housing expenses not covered by the Housing Allowance in Lieu of Parsonage (Part 2).
- 7 Line 7 will automatically calculate. This is the difference of Line 3 - Line 4 - Line 5 - Line 6. (Include on W-2 under Box 1)

PART 4

- Billable Compensation will automatically calculate. This is the amount used by the General Board of Pension & Health Benefits in calculating pension costs. This takes Total Base (Part 4 Line 3) and adds either Housing Allowance in Lieu of Parsonage (Part 3) or a parsonage factor for those that have a parsonage provided. The parsonage factor is 25% of the Total Base (Part 4 Line 3).
- 1 Total Pension will automatically calculate. This is the total of CRSP-DB + CRSP-DC + CPP.
 - 2 CRSP-DB is the Clergy Retirement Security Program Defined Benefit portion of the pension plan. This is equal to 12% of Billable Compensation up to 12% of the Denominational Average Compensation (DAC).
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