2026 Charge Conference Form Checklist & FAQs

SUBMIT ALL FORMS ONLINE at this link: www.htcumc.org/charge-conferences

Churches may use this printable checklist to track submitted forms or log into the Connections Web Portal to view a list of submitted forms for their charge. Once a form is submitted, an email confirmation with a copy of the completed form is sent to the submitter and, in most cases, to the church email address on file with the conference. **Churches should save the PDF attachment from each form submitted for the church's charge conference records.**

Please reach out to your district administrator if you need additional assistance.

Required forms for all churches and appointed clergy:

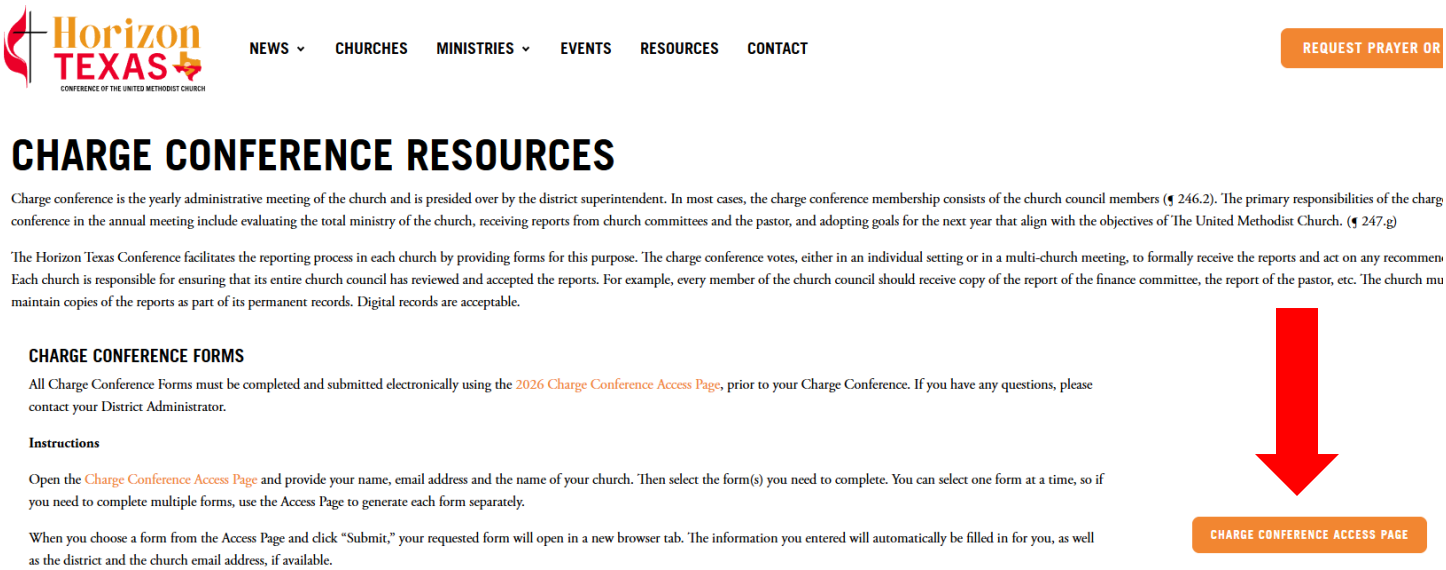
- ☐ ***Pre-Minutes of the Charge Conference**
  - If attending a GROUP charge conference, attach the attendance record for the administrative/church council meeting held prior to the group charge conference.
  - Report recommendations for candidates, including local pastors on lines 18a and 18b.
- ☐ ***Report of the Trustees**
  - Submitter will need a copy of the church's insurance policy declaration page.
- ☐ ***Report of the Finance Committee**
- ☐ ***2027 Church Leadership Roster**
  - Requires a Connections Web Portal login
  - Complete the Church Leadership Roster for **2027.**
- ☐ ***Report of the Pastor to the Charge Conference**
  - Completed by Senior and Associate Pastors
- ☐ ***2027 Pastor Compensation Reports**
  - Requires Connections Web Portal login
  - Complete the report(s) for **2027**.
- ☐ ***Pastor's Continuing Education Report**

Submit these forms only if applicable:

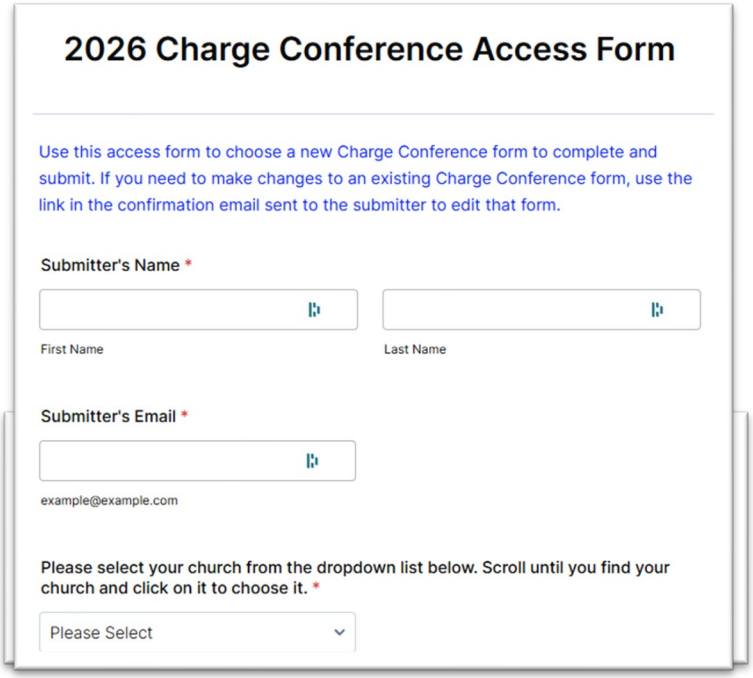
- ☐ **Lay Servant Ministries Annual Report/Certification Application** (See question #14 in FAQ's.)
- ☐ **Annual Report of the Deacon with Primary Appointment to a Local Church**
- ☐ **Appointment to an Extension Ministry Report**
  - Extension Ministry Reports are emailed directly to clergy serving in extension ministry. Extension Ministers should forward a copy or summary of their report to their charge conference.
- ☐ **Retired Member of the Annual Conference Report**
- ☐ **Annual Report of Clergy Member on Leave of Absence**
- ☐ **Parsonage Inspection Report**

1. Where do I find the Charge Conference forms?

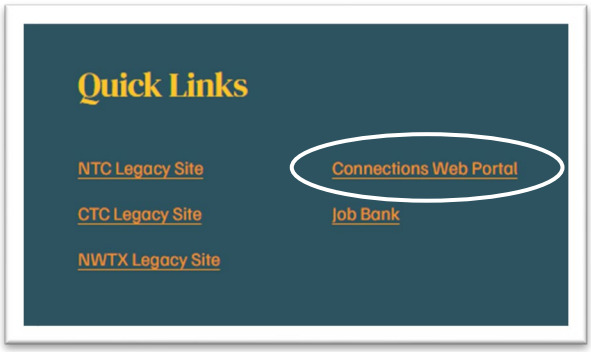
Go to https://www.htcumc.org/charge-conferences/ . From this page you will see instructions and additional information. To access the forms, click the orange button for the Charge Conference Access Page.



You will be directed to the **2026 Charge Conference Access Page**. To begin a form, enter the submitter's name and email address, select the church name, and mark which form you would like to begin. Click the orange "Submit" button to open the form.



2. How do I log into Connections?



For those with existing Connections user accounts, go to the HTC website and scroll down to the menu at the bottom of the home page. Under *Quick Links*, click on *Connections Web Portal*.

For those who have never set up a user account in Connections, please reach out to your District Administrator. The following individuals should each set up a unique Connections user login:

- Clergy
- A designated Connections church administrator (if applicable)
- S/PPRC Chair

3. Are all charge conference forms completed in Connections?

No. The only charge conference reporting that will require logging into the Connections Web Portal are:

- 2027 Church Leadership Roster
- 2027 Pastor Compensation Reports

NOTE: *While it is not a part of charge conference reporting, S/PPRCs and clergy will also need to access Connections to complete annual Clergy Effectiveness Reviews.*

4. There are multiple church leadership rosters available in Connections: 2025, 2026, and 2027. Which one should my church complete?

Churches must complete the **2027 Church Leadership Roster** in Connections to report their leaders elected at 2026 Charge Conferences.

5. How do I help my church leadership access the forms that they must complete?

Anyone may access the charge conference forms from the HTC website. The link to the Charge Conference Resources page (https://www.htcumc.org/charge-conferences) can be shared with church leaders.

6. Can I print blank copies of charge conference forms?

To print a blank copy of any charge conference form, the submitter will need to start a new form using the 2026 Charge Conference Access Form, then use your web browser's "Print" option to print the blank form. **As a reminder, all charge conference forms must be submitted online through the 2026 Charge Conference Access Form.** Printed copies may be used for planning/drafting purposes at committee meetings, but hard copies of charge conference forms should be entered online for final submission.

7. Can I save a form before I am ready to submit it?

Yes. At the bottom of each charge conference form is the option to "Save and Continue Later". A signature is required for saving to prevent accidental submission. All answers will be saved and a link will be sent to the submitter's email address where the submitter can continue completing the form at a later time. The emailed link can be forwarded to others for access/review. Once a form is submitted, the submitter will receive an email with an "Edit" link that can also be forwarded to someone else if necessary.

8. How do I access charge conference forms that have already been submitted?

Both the ***submitter*** and the ***church email address*** on file with the conference will receive an emailed copy of the following forms once they have been submitted. **Churches should save the PDF attachment from each form submitted for the church's charge conference records.**

- Pre-Minutes of the Charge/Church Conference
- Report of the Trustees
- Report of the Finance Committee
- Report of the Pastor
- Pastor's Continuing Education Report
- Lay Servant Ministries Annual Report/Certification Application
- Annual Report of the Deacon with Primary Appointment to a Local Church
- Retired Member of the Annual Conference Report
- Report of Clergy Member on Leave of Absence
- Parsonage Inspection Report

The following forms are **NOT** automatically sent to the church email address on file with the conference. Once submitted, copies of these forms will be sent to the **clergy email address** and/or the form **submitter**:

- Appointment to an Extension Ministry *(**NOTE:** It is the responsibility of the clergy serving in extension ministry to provide this report, or a summarized version, to their HTC charge with which they are affiliated.)*

***Reviewing Submitted Forms in Connections*:** Church administrators and clergy with access to the Connections Web Portal will only be able to see which forms have been submitted, the name of the person submitting the form, and when they were submitted, however form contents are not available through Connections.

9. How do we submit names of candidates that have been recommended for certification or continuation of certified candidate status?

Churches whose S/PPRCs have recommended candidates for certification or who continue to support candidates in the process toward licensed/ordained ministry, should list individuals under 18.a or 18.b of the Pre-Minutes of the Charge Conference. ***NOTE: Licensed local pastors who are pursuing Course of Study or a graduate degree***

require an annual recommendation from the S/PPRC of their home charge conference. *If the home charge is unable to provide a recommendation (i.e. due to disaffiliation or from another conference), the S/PPRC of the charge to which they are appointed may provide this recommendation. The licensed local pastor name(s) should be listed on line 18.b for continuation in their process with the district committee on ordained ministry.*

10. Where do I find the number of lay members to Annual Conference our charge is assigned?

Each charge is assigned a certain number of lay member(s) to annual conference to elect during charge conference. This is a change from previous years for districts that supplied "at large" lay members. Please refer to the Charge Conference Resources page for more information on electing lay members to annual conference. All elected lay members should be recorded in the Church Leadership Roster available through Connections.

11. Where can we find 2027 Apportionment numbers?

2027 Apportionment numbers are can be accessed at https://www.htcumc.org/resources/ , but they can also be accessed with this direct link.

12. Are signatures required on charge conference forms? Will each chair need to sign a "signature page"?

At the bottom of each charge conference form is a space for a digital signature which is required before the form may be submitted. No hard copy checklists or signature pages will be collected at charge conferences; however, all attendees will need to sign in to record their attendance at charge conferences.

13. Our church hosts a Boy Scouts of America troop. What is required as part of charge conference to document this relationship?

No reporting for charge conference is required on this matter. HTC board of trustees prohibits chartering of Boy Scouts of America groups by local churches. Instead, churches hosting BSA troops must only enter into "facilities use" agreements using this template pre-approved by the HTC trustees. In addition to the facilities use agreement, churches may enter into a pre-approved "affiliation" agreement with the BSA or local BSA councils using this template in order to continue to engage with this important organization in our communities. While the conference does not need a copy of these agreements, churches must keep them on file in the church office. Churches can continue to involve scouts in the life of the church through Scouting Sundays and other activities.

14. What actions should be taken by the charge conference/church council in regard to lay servants seeking certification as Lay Servant, Lay Speaker, or Lay Minister?

Lay servants should be in communication with their pastor about their desire to seek certification. The church council or charge conference must vote annually to recommend a lay servant for certification. The minutes of the charge conference should reflect the recommendation for certification of lay servants. Pastors should share the charge conference forms link so that lay servants may submit their annual LSM report/application.