Logging into Church Dashboard

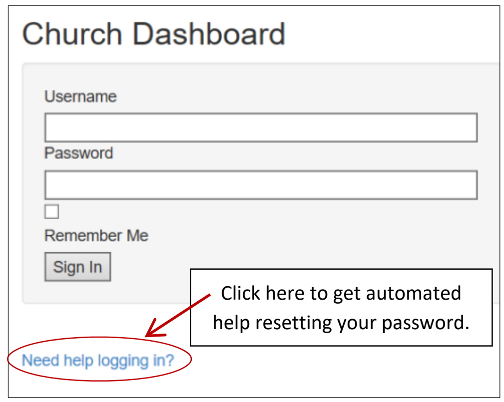
The Church Dashboard is to be used by each church to manage information about the church, parsonage, and church leadership.

Here are 2 ways to Launch Church Dashboard:

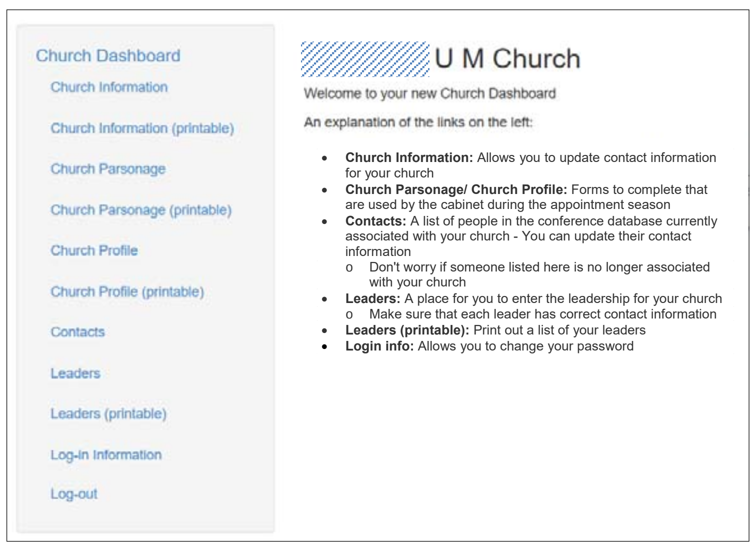
- Go to http://www.wpaumc.org/Dashboard
- From the WPAUMC website, select the CHURCHES menu and then select Login – Church Dashboard

Logging in:

1. Enter your church's 5 or 6 digit (without leading zeros) GCFA Number as the Username
2. Enter your password. If you aren't sure of your password, click on the "Need help logging in?" link or contact the District Office to have your password reset

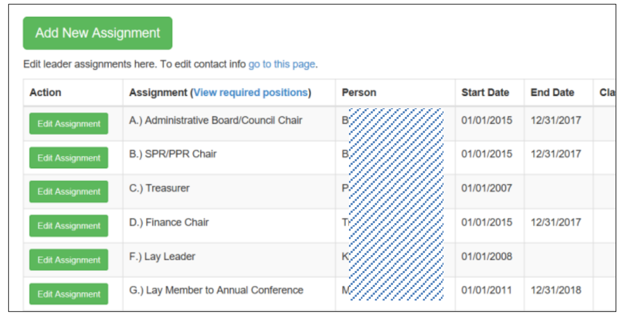


Once you are logged in, you will see a menu down the left side showing the links used to edit and enter information about your church, parsonage and leaders



Using the Church Dashboard to Update Your Church Leadership Assignments

Click on **"Leaders"** in menu on the left side of the Church Dashboard. If leaders were previously entered for your church, and they have an end date in the future or no end date, you will see them listed.



The following are the Leadership Assignments that can be assigned to people in your church:

A) Administrative Board/Council Chair
B) SPR/PPR Chair
C) Treasurer
D) Finance Chair
E) Financial Secretary
F) Lay Leader
G) Lay Member to Annual Conference
H) Alternate Lay Member to Annual Conference
I) Trustee Chair
J) Church Secretary
K) UM Men President
L) UM Women President
M) UM Youth President
N) Young Adult Coordinator
O) Youth Director
P) Communications
Q) Missions Chair
R) Evangelism Chair
S) Camping Advocate
T) Christian Education
U) Outreach Chair
V) Nurture Chair
W) Witness Chair
X) Disaster Response
Y) Principal Delegate to District Conference
Z) Reserved Delegate to District Conference

Assigning/Changing Leadership Assignments

1. If the person you wish to enter is already listed along with the correct position and information, do nothing.

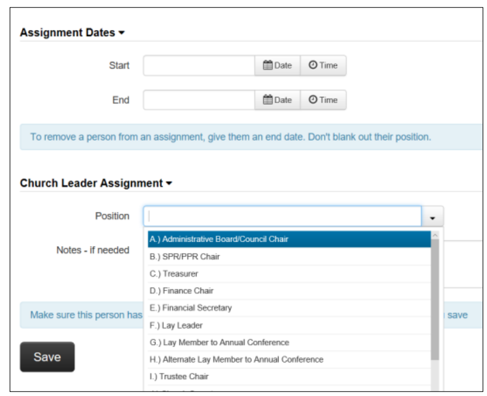
2. If the person is listed ***but his/her assigned position is changing or has changed,*** do the following.
   - Click on "Edit Assignment" and fill in the correct end date for the currently assigned position and click "Save"
   - **Continue to STEP 3 to add the new position**

3. If the person you wish to enter ***is already listed with a correct position, but the person also needs to be added to an additional leadership position***, do the following.
   - Scroll to the top of the page and click on big green "Add Position Assignment" button
   - Scroll through your alphabetical list of church contacts to find the person you are looking for
   - Click on the "Give assignment" button to the right of the person
   - **Continue as outlined in the box on the next page below**.

4. If the person ***does not appear in the list,*** FIRST CHECK TO SEE IF THE PERSON IS ALREADY IN DASHBOARD. (This is an important step to avoid duplication, as the Dashboard database includes information for all of the WPA Conference!!)
   - Scroll to the bottom of the page and click on "Add a New Person."
   - Type the last name of the person in the search bar and press enter or click search
   - If the person you are looking for comes up in the search results, click on the "Give assignment to this person" button and **continue as outlined in the box on the next page**. If the person you are looking for does not come up in the search results, click on the "Add a brand new person to our database" button. After adding the person's first and last name, as much information as you wish for the person, but be sure to enter the email, phone and complete mailing address. Click the "Save" button to save the person and then click on "Return to Church Contact." Click on "Leaders" on the left and follow the steps under ITEM 3 above to add the person you just added to the database to a leadership assignment.

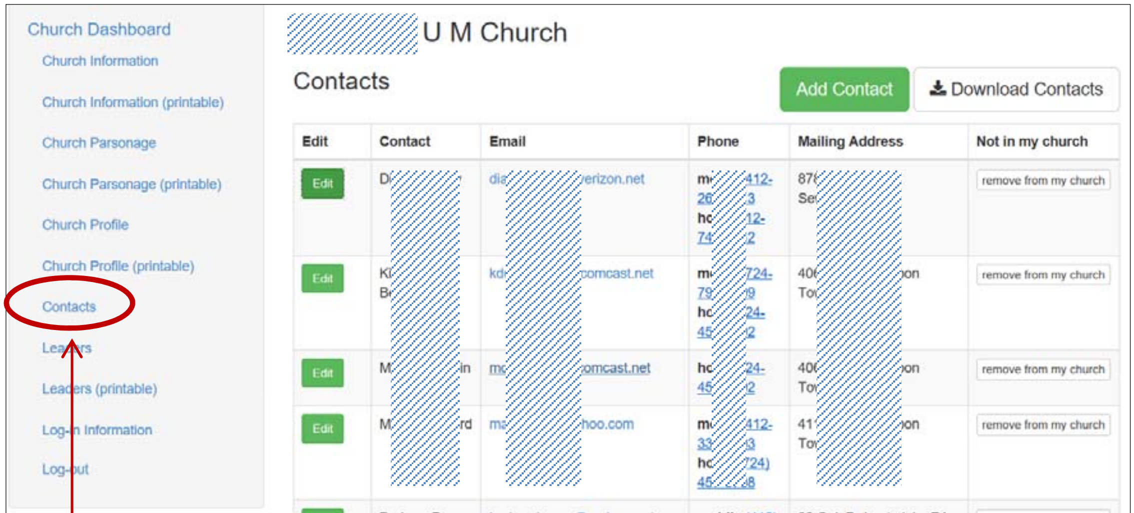
1. Enter the START and END dates. Leave END empty if the assignment is indefinite
2. Click the drop down arrow next to Position to assign the person to a position
3. Click on the "Save" button

The new person and position should now be included in your leadership list.



Using the Church Dashboard to Update Your Church Contacts

As a minimum, church contacts should have a first and last name, email address, mailing address and phone number. This information should be checked for accuracy at least once a year, especially for those assigned to leadership positions and as lay equalization.



Click on “Contacts” to see a list of contacts associated with your church. The summary chart that appears can quickly show information that is missing or needs to be updated, as well as people who are no longer associated with your church.

- ***If a person in your list is now deceased***, click the “Edit” button to the left of their name, scroll to the “Statuses” section at the bottom, click in the “Deceased” field to switch to “yes” and click the save button
- ***If a person is no longer associated with your church***, click the “remove from my church” button to the right of the person
- ***To edit a person’s information***, click “Edit” to the left of the contact’s name, make the necessary edits and click the “Save” button when finished. As a minimum, make sure email, phone number(s) and the mailing address are correct.
- There are some individuals you cannot edit, such as clergy. To make changes in these cases, contact your District Office.