

The Michigan Conference Dashboard



The Michigan Dashboard for the local church (<https://portal.michiganumc.org>) is accessible to the persons who are coded in the Conference database (also known as Brick River) as holding one of the positions below. Each church staff should determine who among these positions is responsible for maintaining and updating its dashboard.

- The Pastor or Pastors. All persons designated in the database as active Clergy, plus actively serving Certified Lay Ministers and District Superintendent Assignments. Clergy are coded by the Conference and appear in your dashboard automatically.
- The Administrative Assistant. This overall position title refers to those whose actual workplace title may be Church Secretary, Office Manager, Executive Assistant, etc. On a larger church staff, there may be more than one person assigned to this position.
Position Code: *LC-Administrative Assistant*.
- The Staff/Parish Relations Chairperson.
Position Code: *LC-Pastor/Staff Parish Relations, Committee on*; Role: *Chair*
- The Church Treasurer.
Position Code: *LC-Treasurer, Church*

Currently, other positions such as Lay Leader, Financial Secretary, or Membership Secretary do not have access to edit the church dashboard.

Why Use the Michigan Dashboard for the Local Church?

For the Local Church:

- It keeps your leadership organized, accessible, and useful to you.

For the District and Conference:

- It makes it simple to communicate your church and leadership changes to us.

1. Like your car's dashboard, it **keeps all the facts right in front of you**. It is a place for you to collect, maintain, and access all the basic data about your church and its leadership.
2. It is **how you communicate with the Conference** about your church and its leadership. For example, because Conference leadership often works with your Church Treasurer and your Lay Member to Annual Conference, we need to know who those persons are and how to reach them.
3. If your church's email address, phone number, or Post Office Box number changes, you can edit those things yourself in your dashboard, and the main database will be automatically updated. Did you sell your parsonage and buy another one? Please add the new details. **You won't have to wonder who to notify**; simply make the change in your dashboard, and your District office and the Conference administration will see it.



A good time to update your dashboard is immediately following your fall church or charge conference, when you have elected new leadership – and of course whenever leadership changes throughout the year.

Ezra was discontinued in 2021 by the General Council on Finance and Administration (GCFA.) The Michigan Conference chose to transfer its data to a new system using a company called Brick River Technologies.

Important Note: Your Local Church Statistical Report to the Annual Conference, also known as Tables 1, 2, and 3, is no longer accessed using the same login as your church dashboard. There is a separate website for the statistical report, called ACStats. The URL is <https://stats.gcfa.org>. The username for this site is always your church's 6-digit General Church Number. A new universal password is created for you each year.

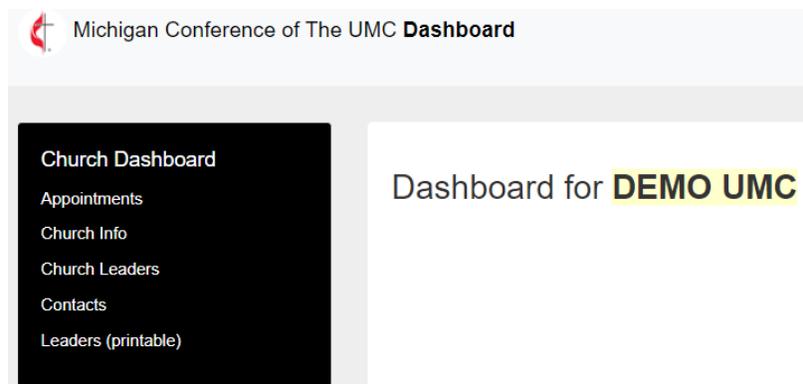
TO SET UP YOUR FIRST LOGIN:

1. Go to <https://portal.michiganumc.org>. Save it to your Favorites.
2. When the Sign In screen opens, click the link, "Need help logging in?" Since you serve in one of the designated positions listed in the first section, your email address should be already in the system, and you will be allowed to proceed. If you are an Administrative Assistant (or one of its variations,) you may be using the church's email address.
3. A recognized email address will generate a return email with login instructions. The sender will be shown as, "Notifications at the Michigan Conference." The subject line will read "Login Help."
4. If you don't see the email right away, please check your spam or junk mail folder.
5. If you get an error that says email not recognized, please try an alternate email address that you may have in the database, or simply ask for assistance: pstewart@michiganumc.org

The instructions will prompt you to create a username and password. Caution: avoid using your generic church domain email such as admin@firstumc.org or pastor@trinitychurch.org as your username. Please choose something individual, such as your personal church domain email, like susan@firstumc.org; or your personal email address; or simply a made-up username. Your password can be anything you choose, at least 8 characters long.

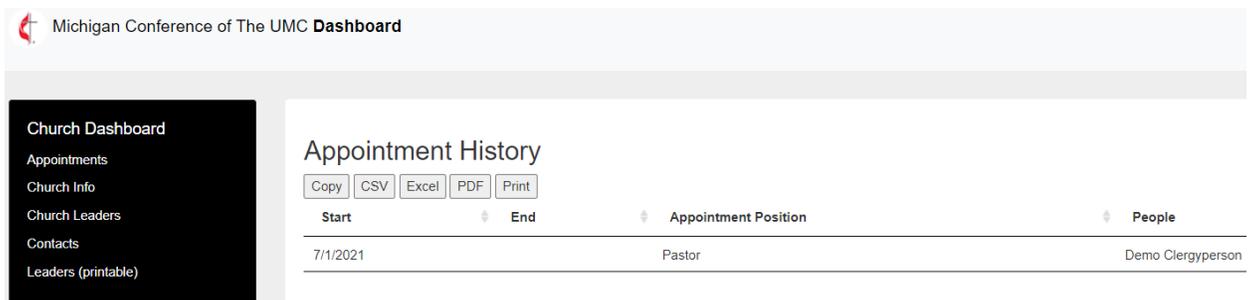
How to Use the Michigan Dashboard

This sample church called Demo UMC shows what the local church's home screen looks like:



A short list of tabs on the left gives you access to edit your church's information.

1. **Appointments:** The current pastoral appointment, and your church's pastoral history, showing name, position, and dates of service. Since Demo UMC is a made-up church, only one pastor so far is listed. If your church has existed for many years, you will see a longer list of pastoral appointments here. *This part of the dashboard is Read Only.* Use the five tabs below the title to copy and paste, download, or print if you wish.



Clergy appointments are always input by the Conference, so there is never a need for you to add your clergy person(s) to your dashboard.

2. **Church Info:** This page contains email, phones, and address, as well as things like web address, service times, and parsonage information. (The example below shows only part of the page.) To make changes, click the green Update button at the top right and the fields will open for editing. Be sure to upload a recent photo of your church in the Image field!

Michigan Conference of The UMC Dashboard

DEMO UMC Log-out

Church Information Update

Primary Image

Church SHORT Name: DEMO UMC

Church FULL Name: DEMO UMC

Email Address: pstewart@michiganumc.org

Alternate Email Address: pstewart@michiganumc.org

Business Phone: (517) 347-4030 ext 4137

3. **Church Leaders:** All your church's leadership, including committee members, should be listed here; but at the very least, please list committee chairs. This page shows the name of the person, their position, their role on a committee, and the start and end dates of their service.

Michigan Conference of The UMC Dashboard

Leaders Add New Assignment

Edit leader assignments here. To edit contact info [go to this page](#).

Action	Assignment	Person	Start Date	End Date	Class
Edit Assignment	LC - Administrative Assistant	Geraldine Jones 1313 First St Oldtown, MI gerry@gmail.com	07/01/2019		
Edit Assignment	LC - Christian Education Secretary	Pauline Schneider	08/01/2021		
Edit Assignment	LC - Disaster Response Chair	John Jefferson 231 21st St Uptown, MI johnjack@yahoo.com	08/01/2021		
Edit Assignment	LC - Nominations and Leadership Development, Committee on Co-Chair	Demo Clergy person 1161 East Clark Rd. Suite 212 DeWitt, MI pstewart@michiganumc.org	07/01/2021		

Note: The Church Treasurer is a required position, and this person must be included in the dashboard listing. The Lay Member(s) of Annual Conference must also be identified. Other suggested leaders to list are the Lay Leader, Trustees Chair, and of course the Administrative Assistant and the SPRC Chair. Although it is helpful to the local church to keep a complete list of its leadership here, it is not absolutely required to show every single member of a committee.

HOW TO ADD/EDIT LEADERSHIP:

- A. To remove a person from your list of leadership, select Edit Assignment to the left of their name, and then enter an End Date for their service. That takes them out of your view but does not delete them from the database, as they may wish to serve again later.

Assignment Dates ▼

Start	7/1/2019	📅 Date	🕒 Time
End		📅 Date	🕒 Time

- B. To edit an existing assignment, select Edit. Make the changes and save. If you need to edit contact information for a particular person, select either the “go to this page” link at the top or the Contacts tab on the left.

Leaders

Edit leader assignments here. To edit contact info [go to this page](#).

- C. If you are adding a new person and assignment, select Add New Assignment. You will first select the position from the dropdown menu, for example, Lay Leader. The next screen will prompt you to select from the existing names in the list.

Michigan Conference of The UMC Dashboard

Church Dashboard
Appointments
Church Info
Church Leaders
Contacts
Leaders (printable)

Leaders

1. PICK THE POSITION LC - Lay Leader

2. PICK THE PERSON - LOOK AT PEOPLE IN YOUR CHURCH FIRST

Pick this person →	George Anderson	1616 16th St Midtown, MI
Pick this person →	Demo Clergy person	1161 East Clark Rd. Suite 212 DeWitt, MI
Pick this person →	John Jefferson	231 21st St Uptown, MI
Pick this person →	Geraldine Jones	1313 First St Oldtown, MI
Pick this person →	Demo Layperson	4444 5th St Four Rivers, MI

- D. If the name is not there, scroll down the page to “Can’t find the person in your church?” If you search and the correct name pops up as you begin typing, select Pick this Person, and finish the assignment.

Can't find the person in your church? Search the whole database...

George Anderson

Pick this person →

George Anderson

1616 16th St Midtown , MI

Be careful to choose the correct name – for example, several John Smiths may appear. The address might be a clue.

Finishing the Assignment

Leadership Assignment

Save

People George Anderson

Assignment Dates ▾

Start 7/21/2021

End

Class of ⓘ

Church Leader Assignment ▾

Position LC - Lay Leader

Role

Office Types and Other Tags

Area of Responsibility ⓘ

Notes

- Enter the Start Date. If the End Date is known, you may enter it, too. When the end date will occur in the future, the assignment will automatically disappear from the list on that date. (It remains, however, in the person's portal page.)
- The *Class Of* field refers to assignments that have a fixed term commitment, such as a four-year term. You would enter the year that the assignment ends. This is optional.
- The *Position*, already chosen and shown, refers to the committee or stand-alone assignment. The Position, LC-Church Staff is vague, and a more specific position can usually be chosen instead. *If you are the Administrative Assistant, do not code yourself as LC-Church Staff, or you will not be able to access the dashboard.*

- If a person is serving on a committee, they may also have a *Role*. For example, someone serving the Trustees may be the Chair, Member, Secretary, etc.
- Positions such as Lay Speaker, Treasurer, or Lay Leader stand alone and don't require a Role. (The LC prefix stands for Local Church-level assignment.)
- The *Office Types* field is mostly for District and Conference level assignments. You won't need to use this. You may make notations in the *Area of Responsibility* and *Notes* fields if you wish.

More About Name Searches

If you know that Jennifer Jefferson should be in the database, but she doesn't appear, try entering only part of the name. Perhaps she is listed as Jen or Jenny Jefferson.

If the name you want cannot be found, you will be shown a tab at the bottom of the page to add a brand-new person. Fill in as many of the contact fields as you can and save. It is possible to save only a first and last name; but try to obtain at the very least an email address and a phone number to make the information more useful.

Can't find the person in your church? Search the whole database...

Jerry Jameson

Sorry, we did not find anyone with that LAST or FIRST name in our database

Still not able to find the person?

Add a brand new person to our database

Each person in the Conference database MUST have their own individual record. When adding a new person, please do NOT create a page with more than one name. For example, a record may not read, Larry and Susan Jones. When these pages are found, one of the names will be deleted, possibly making the remaining information inaccurate. If you have any of these "couples" pages in your dashboard, please separate the names and create an individual record for each person.

When you search it is not necessary to use uppercase letters.

If you are unsure of spelling, just begin typing as much of the name as you do know, and options will pop up.

You can try first initial and last name but be aware that common last names may return many results. Same with first name and last initial. Choose carefully from the options given.

When you are finished editing, you will see a section on the right where you can click on the words “I am Done!” This will signal to the Conference that you have made changes.

Finished? Please let us know.

[I am done!](#)

You last told us on Aug 02, 2021.



4. **Contacts:** This page shows your leadership in a usable format. You can download to Excel (tab at upper right) for use in a directory, a mail merge, an upload, or other uses. Names are linked so you can quickly edit a person’s contact information. Or use the Edit button. If a person has left your church or seems to appear in error, click the field on the right titled, “Not in My Church.”

Michigan Conference of The UMC Dashboard DEMO UMC Log

Church Dashboard

Appointments

Church Info

Church Leaders

Contacts

Leaders (printable)

Contacts

[Download Contacts](#)

Edit	Contact	Email	Phone	Mailing Address	Not in my church
Edit	George Anderson	georgetrustee@gmail.com	MOBILE 616-444-4444	1616 16th St Midtown, MI	remove from my church
Clergy are not editable					
	Demo Clergy person	pstewart@michiganumc.org pstewart@michiganumc.org	BUSINESS (517) 347-4030 MOBILE (555) 555-5555 HOME (444) 444-4443	1161 East Clark Rd. Suite 212 DeWitt, MI	
Edit	John Jefferson	johnjack@yahoo.com	MOBILE 248-655-6555	231 21st St Uptown, MI	remove from my church
Edit	Geraldine Jones	gerry@gmail.com	BUSINESS (517) 555-5656	1313 First St Oldtown, MI	remove from my church
Edit	Demo Layperson	pstewart@michiganumc.org	MOBILE (444) 444-4443	4444 5th St Four Rivers, MI	remove from my church

5. **Leaders (printable):** Your data appears in a table format for printing your leadership information.

You can also copy and paste to another document or export to CSV or Excel. This can be a helpful shortcut if you are creating a staff and leadership directory.

The tab at top left allows you to print the entire page, including all the header information for Demo UMC. Note: The View Future Leaders tab refers to those whose start dates begin at some time in the future.

Print Page

<p>Date: 08/04/2021 DEMO UMC</p> <p>Street Address: 1161 East Clark Rd. Suite 212 DeWitt, MI 48820-8312</p> <p>Mailing Address: 1161 East Clark Rd. Suite 212 DeWitt, MI 48820-8312</p> <p>Church Phone: (517) 347-4030 ext 4137 Church Email: pstewart@michiganumc.org Church Website:</p>	<p>Church Number: 00000 GCFA Number: T00001</p> <p>Main Service Time: 10:00 am Summer Worship Time: 10:00 am School Time: 9:00 am Other Worship Time: 11:00 am Sundays Youth Service</p>
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CURRENT Leaders ("required" listed first) as of 8/4/2021 [View FUTURE Leaders](#)

Copy CSV Excel PDF Print

TYPE	POSITION	PERSON	DATES	ADDRESS	PHONES
Required	LC - Treasurer, Church	Demo Layperson	07/21/2021	4444 5th St, Four Rivers, MI, 44444	Business: Mobile: (444) 444-4443 Home:
	LC - Administrative Assistant	Geraldine Jones	07/01/2019	1313 First St, Oldtown, MI, 44444	Business: (517) 555-5656 Mobile: Home:
	LC - Christian Education Secretary	Pauline Schneider	08/01/2021	...	Business: Mobile: Home:

Pastors' Access to the People Portal

If you are designated as Clergy in the database, you will be able to see your own contact information and leadership assignments, as well as the directory of all active and retired clergy, with a link to the dashboard of the church(es) to which you are currently appointed. This applies also to laypersons serving in a clergy role, such as Certified Lay Ministers (CLM) and District Superintendent Assignments (DSA.)

To log in, use the same URL previously mentioned: www.portal.michiganumc.org.

Michigan Conference of The UMC **People Portal**

- Home
- Update Contact Information
- Leadership Assignments
- Clergy Directory
- DEMO UMC**
 - Church Dashboard

Portal for **Demo Clergy**person

- You may update your own contact information as necessary.
- Leadership assignments are Read Only; if you have questions or corrections on these entries, please email pstewart@michiganumc.org.
- The Clergy Directory contains information on all Active and Retired Clergy in the Conference. (It is a large file and may take a moment to download.)
The entries update every time a clergyperson makes a change to their portal page. The directory is provided for your judicious contact of peers when necessary. To find a name, use the search bar at the top.
- The dashboard of the church(es) you are currently appointed to is available from your portal page. Once you go to the dashboard, you will not be able to link back directly to your portal page. Simply close the browser tab and your portal page should reappear.



QUESTIONS?

pstewart@michiganumc.org

517-347-4030 ext. 4137

Office hours 8 am – 4 pm M-F

I hope this overview is helpful to you. Please feel free to ask questions. If I don't know the answer, I will find out for you. And if you find something that doesn't seem to work right, please let me know. I am always happy to assist. *Email is the best way to reach me!*

Pamela Stewart, Database Manager