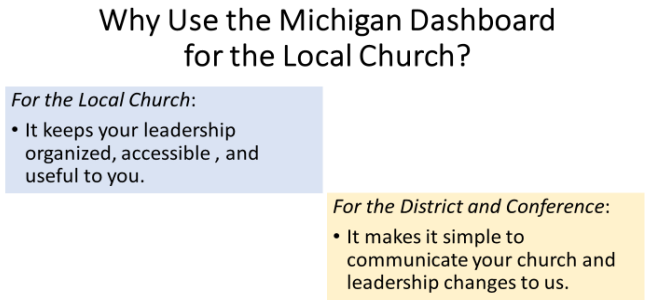
The Michigan Conference Dashboard

The Michigan Dashboard for the local church (https://portal.michiganumc.org) is accessible to the persons who are coded in the Michigan 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 general 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 type of 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.



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. Very importantly, 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.

Important Note: Your Local Church Statistical Report to the Annual Conference, also known as Tables 1, 2, and 3, can now be accessed using the same login as your church dashboard. There is a link shown as GCFA ACStats auto-login on your dashboard home screen. The direct 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.

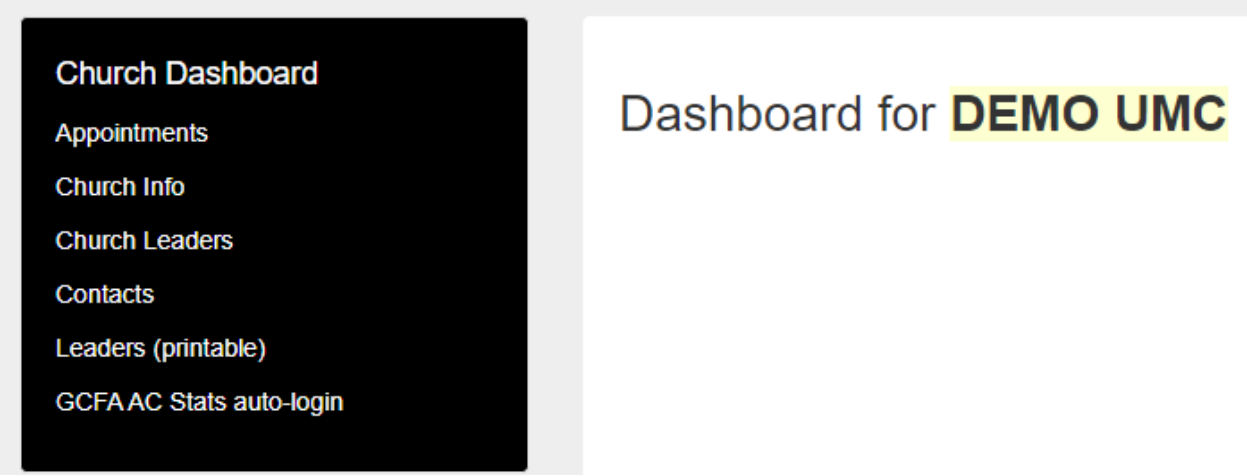
TO SET UP YOUR FIRST BRICK RIVER DATABASE LOGIN:

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: kvandermolen@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.

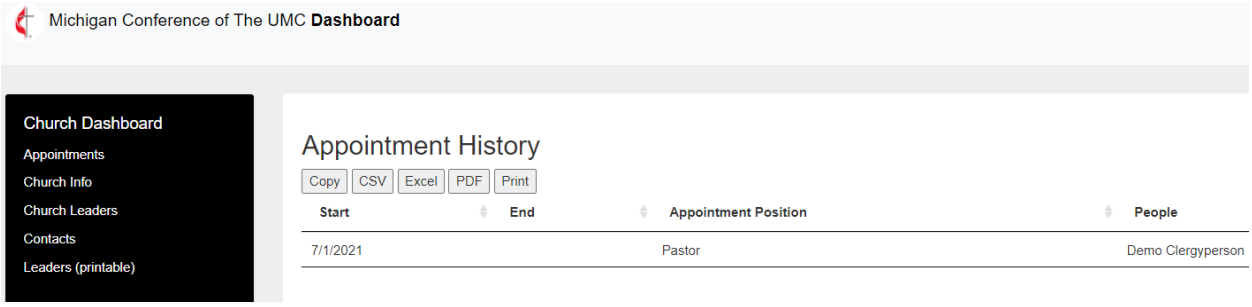
How to Use the Michigan Dashboard

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



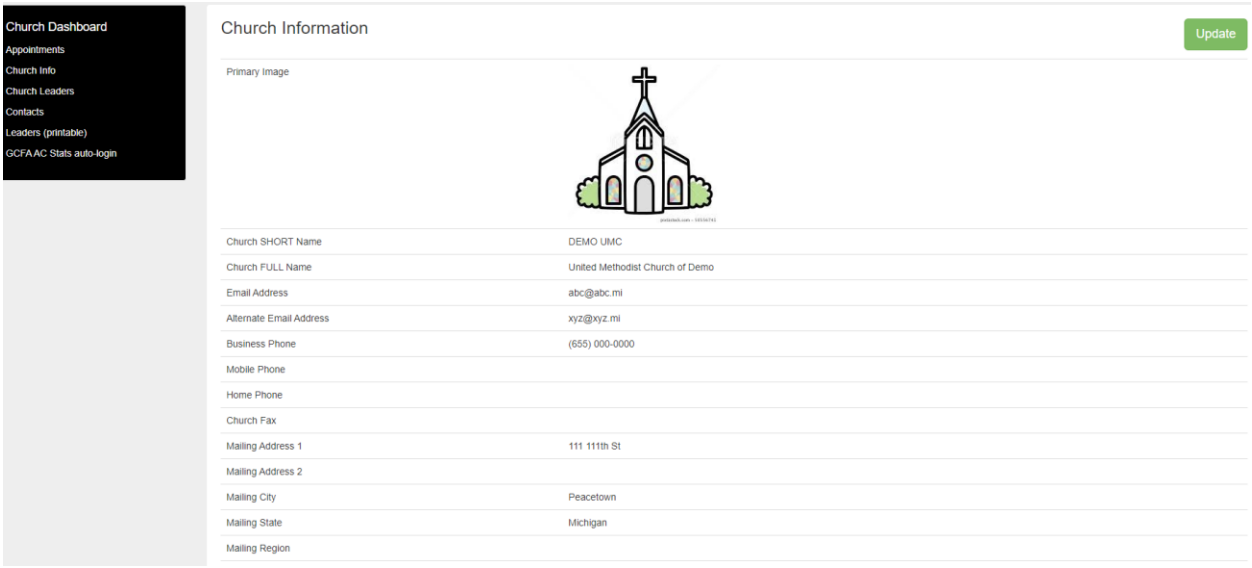
A list of 6 tabs on the left gives you access to edit your church's information.

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.

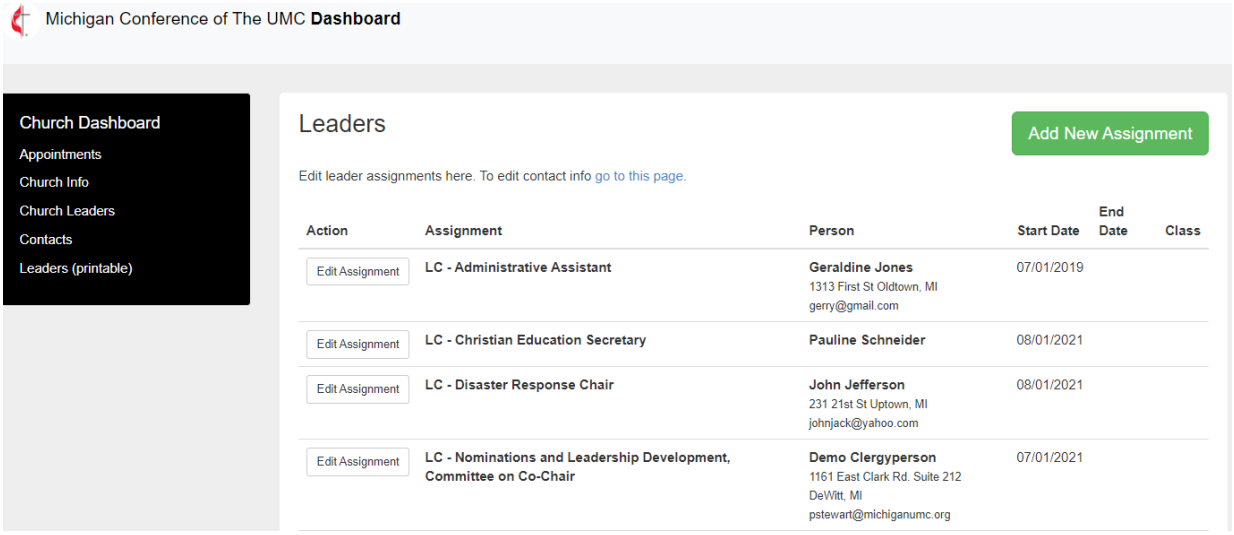


Clergy appointments are always entered by the Conference, so there is never a need for you to add your clergyperson(s) to your dashboard.

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!



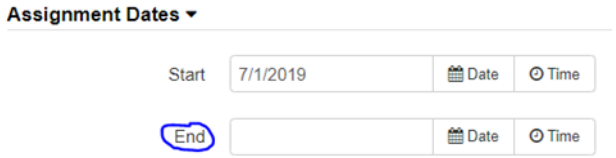
3. **<u>Church Leaders</u>**: All your church's leadership, including committee members, should be listed here; but at the very least, please list committee <u>chairs</u>. This page shows the name of the person, their position, their role on a committee, and the start and end dates of their service.



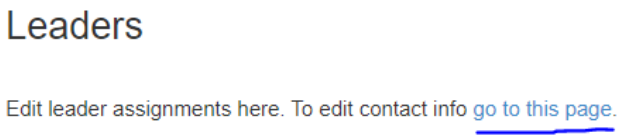
Note: The Church Treasurer is a required position, and this person must be included in the dashboard listing. The Lay Member(s) of Annual Conference must also be identified. Other suggested leaders to list are the Lay Leader, Trustees Chair, and of course the Administrative Assistant and the Staff/Parish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

HOW TO ADD/EDIT LEADERSHIP:

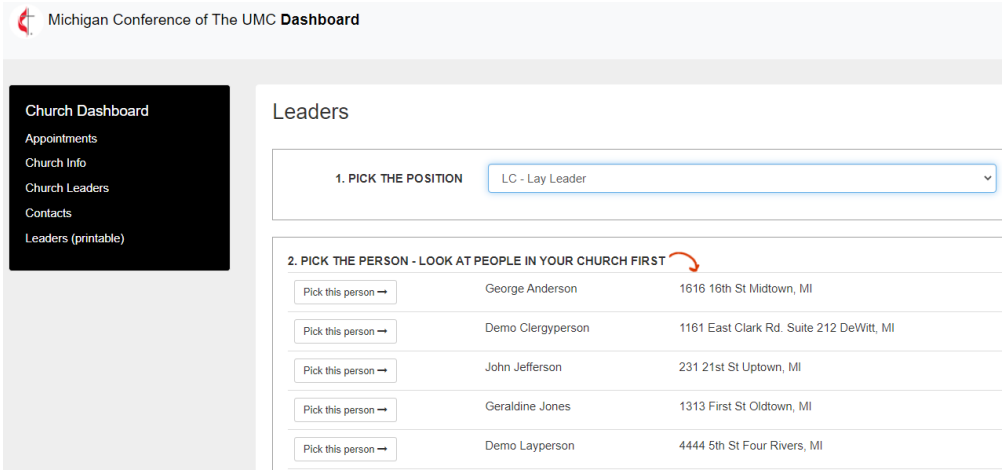
A. To *remove a person* from your list of leadership, select Edit Assignment to the left of their name, and then enter an End Date for their service. That takes them out of your view but does not delete them from the database, as they may wish to serve again later.



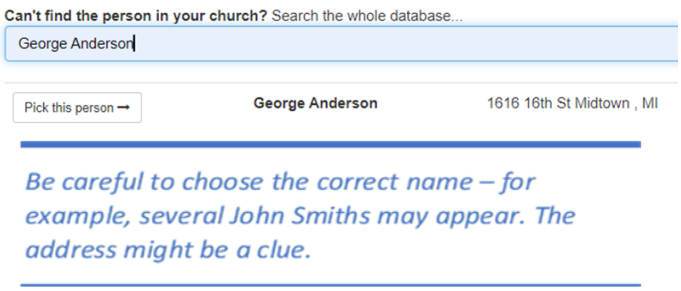
B. To *edit an existing assignment*, select Edit. Make the changes and save. If you need to edit contact information for a particular person, select either the "go to this page" link at the top or the Contacts tab on the left.



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.

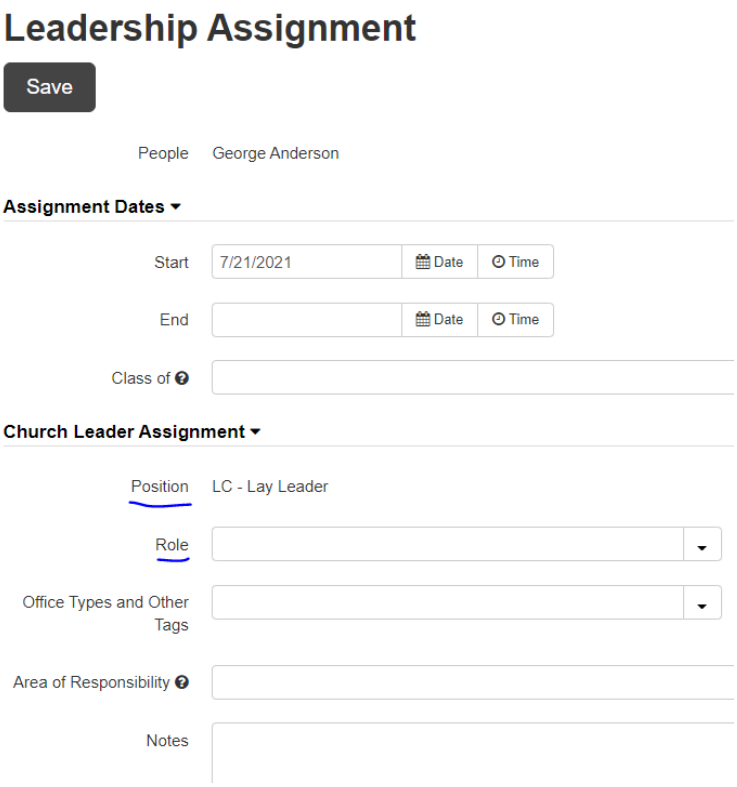


D. If the name is not there, scroll down the page to "Can't find the person in your church?" If you search and the correct name pops up as you begin typing, select Pick this Person, and finish the assignment.



Important – *do not try to overwrite an existing leadership position with a new name.* This will create overlapping records. You must first end the existing assignment by giving it an end date. Then create a new assignment for the new person.

Finishing the Assignment



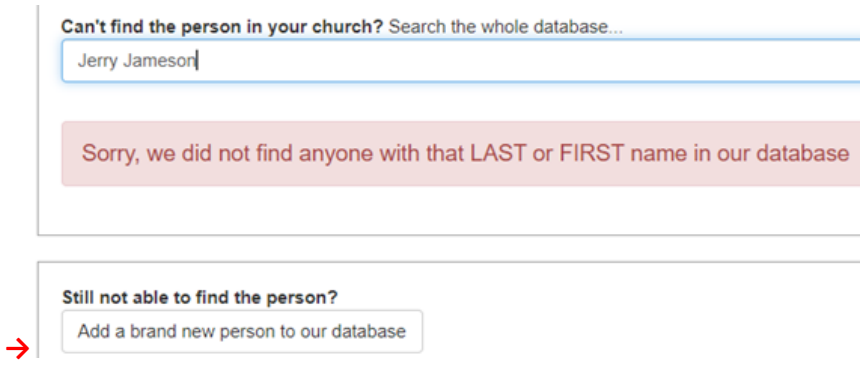
- Enter the Start Date. If the End Date is known, you may enter it, too. When the end date occurs in the future, the assignment will automatically disappear from the list on that date. (It remains, however, in the person's People Portal page.)
- The *Class Of* field refers to assignments that have a fixed term commitment, such as a four-year term. You would enter the year that the assignment ends. This is typical of boards such as Trustees and 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 Administrative Board may be the Chair, Member, Secretary, etc.
- Positions that are not part of a committee, such as Lay Speaker, Treasurer, or Lay Leader stand alone and should not be assigned a Role. (The LC prefix stands for Local Church-level assignment.)
- The *Office Types* field is used 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.



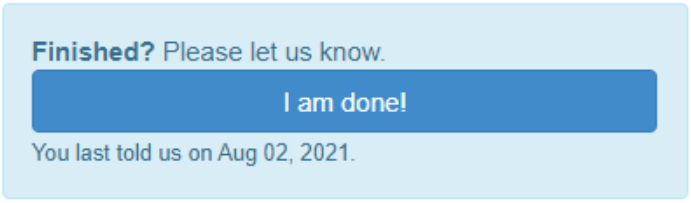
Each person in the Conference database MUST have their own individual record. When adding a new person, please do NOT create a page with more than one name. For example, a record may not read, Larry and Susan Jones. When these pages are found, one of the names will be deleted, possibly making the remaining 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.

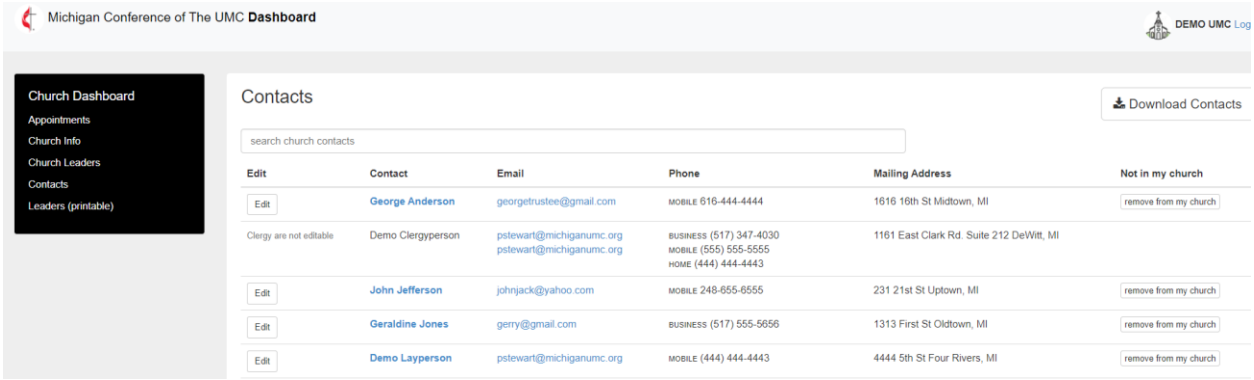
If you are unsure of spelling, just begin typing as much of the name as you do know, and options will pop up.

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.



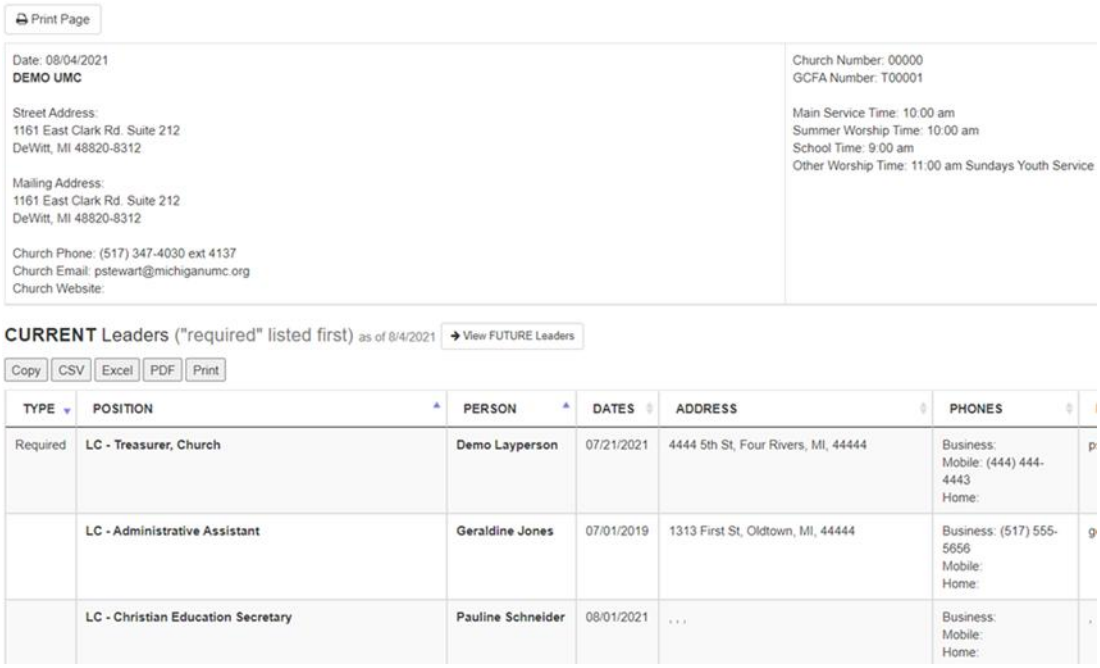
4. **<u>Contacts</u>**: This page shows your leadership in a usable format. You can download to Excel (tab at upper right) for use in a directory, a mail merge, an upload, or other uses. Names are linked so you can quickly edit a person’s contact information. Or use the Edit button. If a person has left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



The church dashboard is for recording people serving in leadership positions only. It is not designed to function as a congregational directory. Other software exists for that purpose.

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

Date: 08/04/2021
DEMO UMC

Street Address:
1161 East Clark Rd. Suite 212
DeWitt, MI 48820-8312

Mailing Address:
1161 East Clark Rd. Suite 212
DeWitt, MI 48820-8312

Church Phone: (517) 347-4030 ext 4137
Church Email: pstewart@michiganumc.org
Church Website:

Church Number: 00000
GCFA Number: T00001

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

CURRENT Leaders ("required" listed first) as of 8/4/2021 → View FUTURE Leaders

Copy | CSV | Excel | PDF | Print

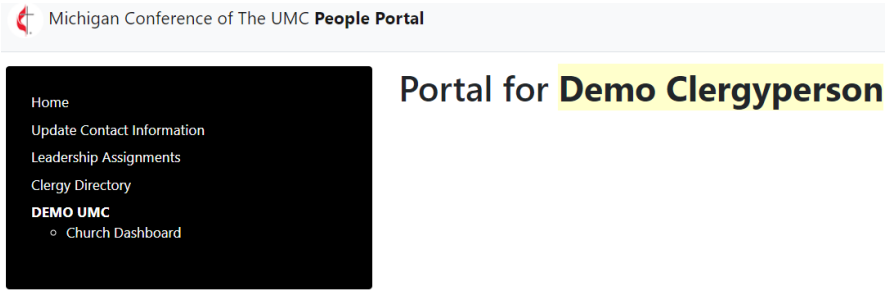
TYPE	POSITION	PERSON	DATES	ADDRESS	PHONES
Required	LC - Treasurer, Church	Demo Layperson	07/21/2021	4444 5th St, Four Rivers, MI, 44444	Business: Mobile: (444) 444-4443 Home:
	LC - Administrative Assistant	Geraldine Jones	07/01/2019	1313 First St, Oldtown, MI, 44444	Business: (517) 555-5656 Mobile: Home: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

6. **GCFA ACStats auto-login**
   This link gives you quick access to the End-of-Year Local Church Report to the Annual Conference (also known as Tables 1, 2, and 3.

Pastors' Access to the People Portal

If you are appointed as Clergy (or in a lay appointment,) 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.



- 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 kvandermolen@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.

- If you have a new appointment, your same log in from your previous church will still work, provided you are still using the same email address. The new church name will appear in your portal.

QUESTIONS?

kvandermolen@michiganumc.org

517-347-4030 ext. 4131

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!*

Karin VanderMolen, Database Manager