

Conference Financial Reporting Instructions

Once you have logged into the [Data Hub](#), go to **Record Management** and select **Conferences**. Click on the name of your conference and click on the **Conference Finances tab**.

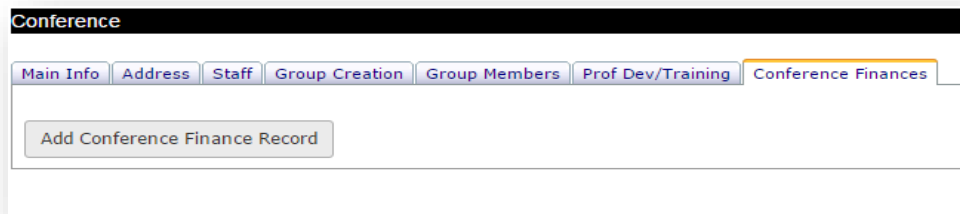
Click on **Add Conference Finance Record**. Use the drop down to select the **Year** that corresponds with the data you'll enter.

There will be three tabs. (1) **Incoming Dollars/Income**, (2) **Outgoing Dollars/Expenses**, and (3) **Other**. See the Definitions Tip sheet for clarity of the fields within each tab.

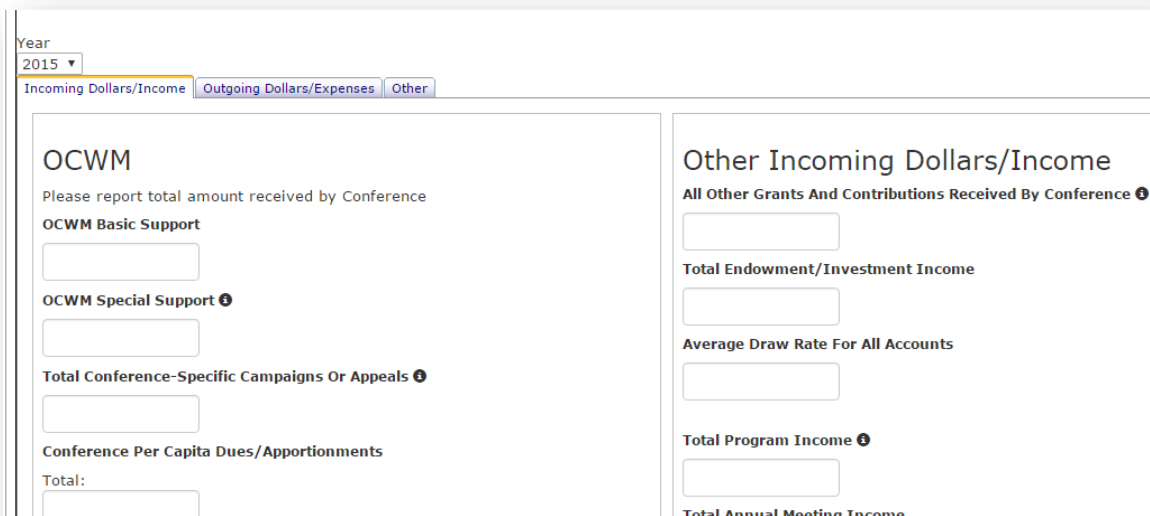
Enter the conference finance information into the corresponding fields and click the **Add** button. You must click on the **Add** button in order to save the information and to reveal the Association fields: **Association Per Capita/Apportionments**, **Association Ministerial Dues**, and **Other Income/Other Expenses**.

Once you have entered all the information for one tab, click on **Update**. Then continue entering information onto the remaining sub tabs under the **Conference Finances Tab**.

***NOTE: This year we ask that you include zeros "o" instead of leaving a cell blank This helps to provide accuracy when reporting trends.**



The screenshot shows a web interface for managing conference records. At the top, there's a header 'Conference'. Below it, a series of tabs are visible: 'Main Info', 'Address', 'Staff', 'Group Creation', 'Group Members', 'Prof Dev/Training', and 'Conference Finances'. The 'Conference Finances' tab is currently active. Below the tabs, there is a button labeled 'Add Conference Finance Record'.



The screenshot displays a detailed reporting form for the year 2015. At the top, a 'Year' dropdown menu is set to '2015'. Below it, three tabs are visible: 'Incoming Dollars/Income', 'Outgoing Dollars/Expenses', and 'Other'. The 'Incoming Dollars/Income' tab is selected. The form is split into two main sections. The left section, titled 'OCWM', contains the following fields: 'OCWM Basic Support', 'OCWM Special Support', 'Total Conference-Specific Campaigns Or Appeals', and 'Conference Per Capita Dues/Apportionments' with a 'Total:' label. The right section, titled 'Other Incoming Dollars/Income', contains the following fields: 'All Other Grants And Contributions Received By Conference', 'Total Endowment/Investment Income', 'Average Draw Rate For All Accounts', 'Total Program Income', and 'Total Annual Meeting Income'.

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