Consents Enablers Training Day

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Web Applications and SharePoint Designer

Housekeeping

- Fire Drills

- Facilities

Agenda

1000	Welcome Tea & Coffee
1030	Introduction and aims for the day
1100	Overview of the Online Suite
1130	TEA AND COFFEE BREAK
1145	Presentation: Common Issues
1300	LUNCH
1345	Workshop: Problem Solving
1430	Discussion
1530	END

Introduction

Exercise 1

1. How do you feel about being a Consent Champion?

2. How do you feel about using the Property Consents System?

Aims for the day

Why Consents Enablers?

- Understand how Consents fits in to the larger Online Suite

- Provide local knowledge

- Quicker responses to queries

- Familiar faces within the district.

Learning Outcomes

- Can guide a user through the consents process.

- Understand some of the basic principles of the system.

- Answer general issues raised by users of the system.

- Know the correct people to escalate issues to.

- New communications channel.

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Anything else?

Overview of the Online Suite

Online Suite Welcome Page

The **Methodist** Church

> PROPERTY CONSENTS

> STATISTICS FOR MISSION

> ANNUAL RETURNS

> GRANT ASSESSMENTS

> GRANT APPLICATIONS

> MANAGE USERS

> CONTACT US

Welcome to the Online Suite!

This is the Methodist Online Suite of Applications.

From here you will be able to access a variety of Methodist interactive data sites, depending on the permissions you have been given, by clicking on the relevant button on the left hand side.

If you find you cannot access a site that you believe you need, please contact your circuit or district representative to be given the necessary security permissions.

Help and Guidance documentation is located on the right hand side.

Help and Guidance Links

> Property Consents Management System

> Statistics for Mission Guidance Notes

> How to report a change of Church status

> Annual Returns Help and Guidance
> Annual Returns FAQs
> Returns Completed Data

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The Methodist Church

> **PROPERTY CONSENTS**

> **STATISTICS FOR MISSION**

> **ANNUAL RETURNS**

> **GRANT ASSESSMENTS**

> **GRANT APPLICATIONS**

> **MANAGE USERS**

> **CONTACT US**

Allows users to perform a number of tasks such as creating projects, logging returns and applying for grants.

Help and Guidance Links

> Property Consents Management System

> Statistics for Mission Guidance Notes

> How to report a change of Church status

> Annual Returns Help and Guidance
> Annual Returns FAQs
> Returns Completed Data

Common Issues

Whilst we strive to minimise the issues users experience, there will always be issues with the system.
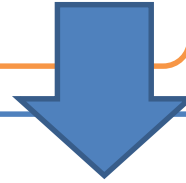
Accessing Property Consents

- User not authorised

- User accessing Property Consents using the incorrect role.

- User does not have appropriate permissions

User Not Authorised

Confusion between authorisation and permissions.
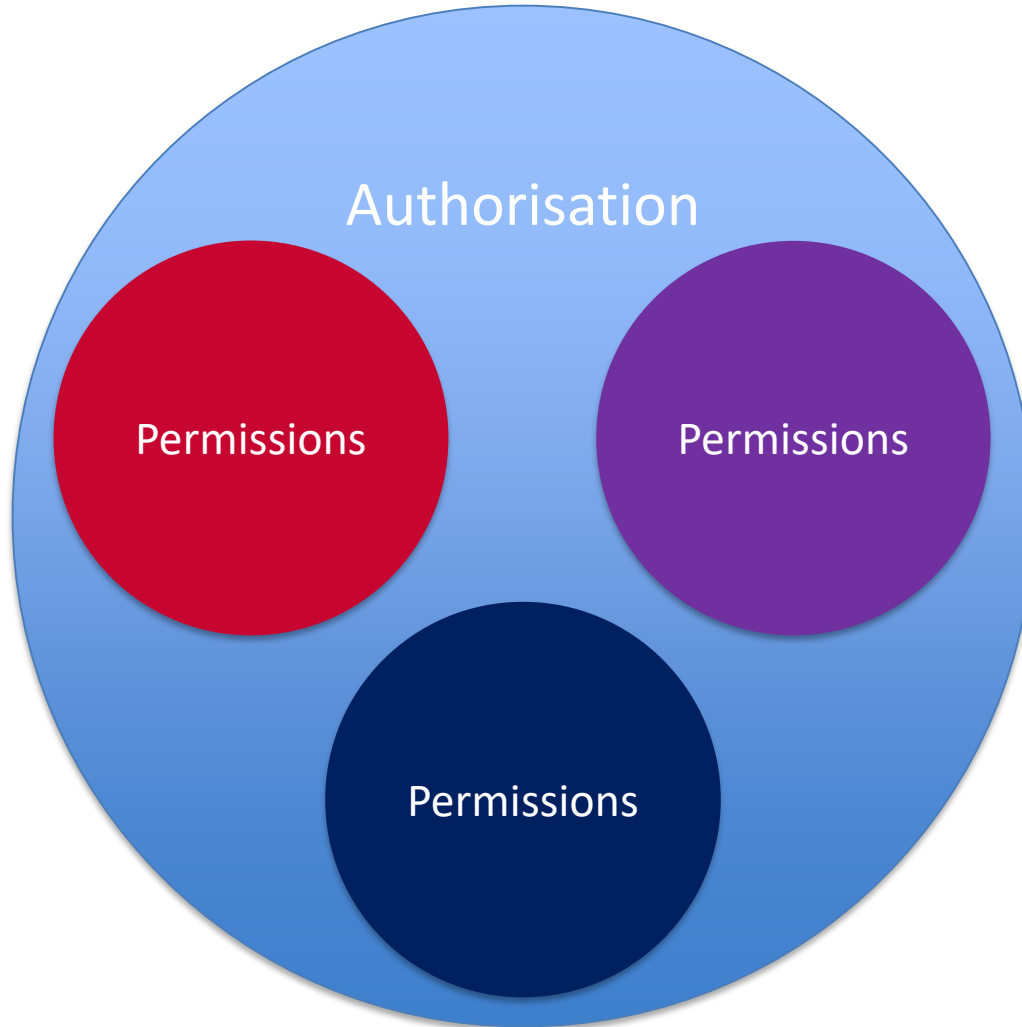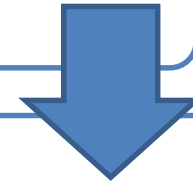
Awaiting approval?

Your user account has been registered successfully.
Your superintendent minister or circuit administrator will need to approve your account before you can continue.

If you are experiencing delays with your authorisation, **please contact your circuit office for an update.**

If you have any technical difficulties, please contact **the Web Support Officer**

Thank you

The Web Applications Team

User does not have appropriate permissions

Read Property: Enables users to view projects on the consents site (as well as entries on the Returns site.)

Update Consents: Enables users to create and edit projects on the Consents site.

Manage Users (District and Circuit Users Only): Allows users to authorise users and assign permissions to user accounts.
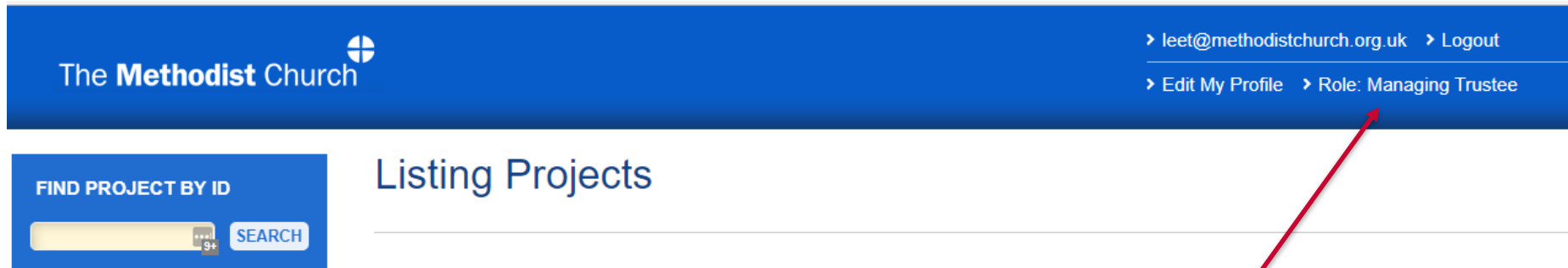
CHURCH NAME	MANAGE USERS	UPDATE RETURNS	UPDATE STATISTICS	READ PROPERTY	UPDATE CONSENTS	APPLY FOR NON-PROPERTY GRANTS	OPTIONS
Keir Hardie	N/A	No	No	Yes	Yes	No	EDIT ✕
Pilgrims Way	N/A	No	No	No	Yes	No	EDIT ✕
High Street South	N/A	No	No	No	No	No	EDIT ✕
Manor Park	N/A	No	No	Yes	No	No	EDIT ✕

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Manor Park	N/A	No	No	Yes	No	No	EDIT ✕

User accessing Property Consents using the incorrect role

Logging in under the incorrect role is one of the most common issues.

Current role is indicated in the blue bar at the top, where it says "Role: …".

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> leet@methodistchurch.org.uk   > Logout

> Edit My Profile   > Role: Managing Trustee

FIND PROJECT BY ID

SEARCH

Listing Projects

Managing Trustees

- Managing Trustee is the role that will be doing most of the work on the system.

- Often church managing trustees, but can be circuit, district, or even Connexional.

Circuit User

- Supervisory role.

- Confirm funds

- Authorise payment requests from TMCP circuit funds.

- Give Circuit Support to a Project

Circuit vs Circuit Managing Trustee

Features	Circuit User	Circuit Managing Trustee
Raise Projects	✖	✔
Edit Projects	✖	✔
Add funds	✖	✔
Confirm circuit funds	✔	✖
Raise payment requests	✖	✔
Authorise payment requests against circuit funds	✔	✖
Give managing trustee authorisation	✖	✔
Give circuit support	✔	✖

Consent Giving Body

- Supervisory role.

- Confirm funds

- Authorise payment requests from TMCP District funds.

- Give Final Consent to a Project.

Project Finance

- Project Funding

- TMCP vs Local Funding

- Confirming Funding

- Payment Requests

Project Funding

- Issues occur mostly around sales, leases, and easement projects.

- Trustees need to indicate what fees they are paying.

- Where are these fees being paid from?

TMCP vs Local Funding

- Most funding comes from either church, circuit or district funds.

- Two sub-types: TMCP and Local, indicating where funds are held.

- TMCP funds held in trust on behalf of church, circuit or district.

- TMCP funds will always have a trust number.

- Local funds held locally in bank accounts.

- Examples of TMCP funding:

  - Church Funds
    - Bequests
    - Legacies

  - Circuit Funds
    - Model Trust

  - District Funds
    - District Advance Fund

Other Funds (TMCP)

- Rarely used but useful to be aware of

- Useful for district projects where money is coming from the advance fund.

- Hunter Rowe Trust (11974)

Confirm Funding

- Who is responsible for the fund?

- Managing Trustees can confirm the majority of funds.

- Exceptions: Circuit, District, and Connexional Grants.

Payment Requests

- Only accessible once final consent has been given.

- TMCP or Connexional Funds only.

- Locked if project is amended and before final consent.

- All payments are requested by the managing trustee.

Payment Requests

| Funding Type	Authoriser
Church Funds (TMCP)	**Managing Trustees**
Other Funds (TMCP)	
Connexional Priority Fund	
CPF Levy Refund	
Fund for Property	
Circuit Funds (TMCP)	**Circuit User**
District Funds (TMCP)	**District User**

Authorisations

- Main complications are around Connexional Approval

- Two types of Connexional approval:
    - Sharing Clearance – LEPs
    - Conservation/Listed Building Approval

- Both lock the form when given.

- Currently needs to be removed by Web Applications Team.

Authorisations

- Managing Trustee authorisation can only be given when Step One has been completed.

- If a tab to the left of Documents is amber or red, then information is missing.

- All tabs to the left of Documents need to be green.

- Documents, Payments, and Authorisations do not need to be green to give authorisations.

Authorisations
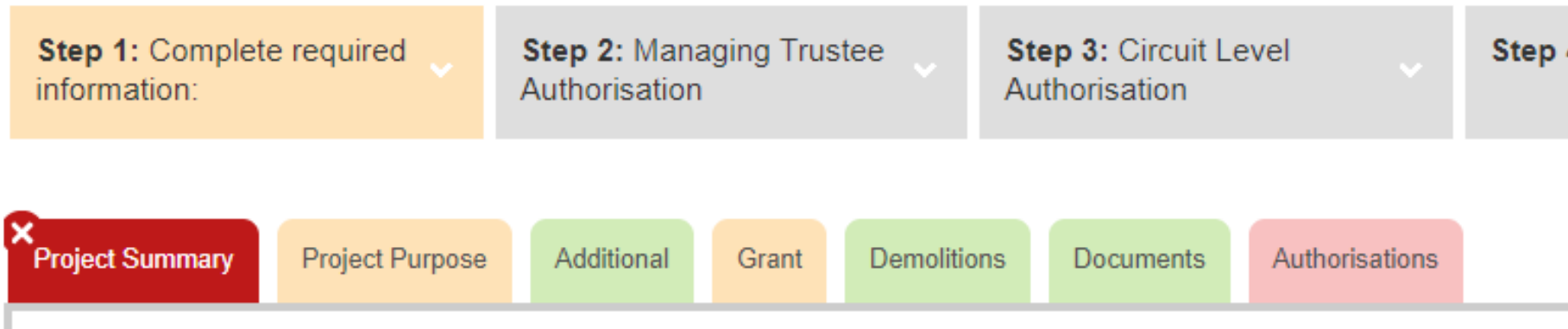
Why can't this project be given managing trustee authorisation?

Authorisations

- Some projects require Connexional authorisation:
  - Listed Buildings
  - Buildings within conservation areas
  - LEPs

- Final Consent can't be given until Connexional authorisation given.

- Can only be rolled back by the consents team.

Replacement Projects

What is a replacement project?

- A replacement project is a project where a sold church or manse is being replaced by a new building.

- Is not for projects such as replacing windows.

- A replacement project creates a CPF Levy Refund funding line against the project.

- A replacement project currently requires a sale project and an estimation of the CPF Levy Refund.

Issue Escalation

List of Relevant Teams

General Queries
Web Applications Team
(consents@methodistchurch.org.uk)

Conservation/Listed Buildings
Conservation Team
(conservation@methodistchurch.org.uk)

Sharing Clearance/LEPs
Connexional Ecumenical Officer
(eo@methodistchurch.org.uk)

List of Relevant Teams

CPF Levy Refund Approvals & Replacement Projects
Andrew Thorpe-Apps (Thorpe-appsa@methodistchurch.org.uk)

CPF Levy Refund Finance
TMCP Finance (finance@tmcp.methodist.org.uk)

Sales/Leases/Purchases/Easements
TMCP Legal (legal@tmcp.methodist.org.uk)

LUNCH

Workshop

Solving Technical Issues

- Split in to 5 groups of 3 people.

- 10 different problems that need to be solved.

- Discuss with people in your group

- 45 Minutes

- Please see the worksheet that is being passed around for further instructions.

- Feel free to scribble notes in the boxes provided.

- We will discuss these at the end of the session.

Discussion

END