



**eAdventist**

technology for churches

## **User Guide**

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## GETTING HELP

The eAdventist team is dedicated to your success while working with the eAdventist program. We provide several resources to help you – documentation (on the “help” page), our blog (<http://eadventistnews.com>) and Twitter feed (@eadventist). In addition, other membership clerks, your conference membership clerk, and our eAdventist team are available to assist you.

### When You Have Questions or Need Technical Assistance

1. Check your eAdventist documentation, including this document and other documents available on the **Help** page of the eAdventist site, to see if your question has been addressed.
2. If your question is not addressed in the documentation, **church clerks** should contact their conference membership clerk, and **conference personnel** should send an email message to the eAdventist support team at [help@eAdventist.net](mailto:help@eAdventist.net). Be sure to include your name and your church (or conference’s) name. Also, let us know:
  - What were you are trying to do?
  - What did you type or click?
  - What did you see (e.g. error messages)?

### When You Get an Error Message

On rare occasions an error message may display on your screen. If this happens, copy the message exactly (either manually or by using your computer’s **copy** capability) and include this error in an email message to the support team at [help@eAdventist.net](mailto:help@eAdventist.net). Exit the program and do not use it again until a support representative responds to your message and indicates that it is OK to continue working.

## CONNECTING TO THE SITE

**You must have a user account in the demo site that has been successfully activated before you can begin practicing. You must also have a SEPARATE user account established in the live site in order to begin accessing the real data.** *Once your conference clerk sets up your demo or live account, you will receive an email message from eAdventist with instructions for activating that account. If you have difficulty with that procedure or if you are not sure if you have the appropriate account(s), ask your conference clerk for assistance. For more details on the activation process, see Appendix A of "Exercise Set 1".*

1. Connect to the Internet and open your browser.
2. **To use the DEMO website to practice using the program:**

Enter <http://demo.eadventist.net> in the **Address** or **URL** field of your browser. A screen will display with the eAdventist logo in the top right corner with a red "DEMO" stamped on it..

**OR, to use the LIVE website to enter actual member information (after you have practiced in the demo website and are comfortable with the program):**

Enter <http://www.eadventist.net> in the **Address** or **URL** field of your browser. A screen will display with the eAdventist logo in the top right corner with no watermark behind it.

3. Click the purple **Membership login** box on the left side of the screen.
4. Enter your email address and password on the **Membership login** screen. *Remember, you selected your own password when you activated your account. If you do not remember it, or need further assistance logging in, contact your conference clerk.*
5. Click the "Login" button.

You have now connected to the program and the **Welcome to eAdventist** page will be displayed. This opening screen contains information and links that have been grouped into the following categories:

- **eAdventist News**—News about new features, tips and explanations in a blog format.
- **Transfer Reminders**—Lists number of transfers that are either waiting for clerk interaction ("Pending") or have been completed within the past 30 days
- **User Group**—Shows which group you are in and which quarter
- **Resources**—Provides direct links to outside information which may help you maintain your church's records accurately
- **Tweets** – Recent messages from our Twitter feed (@eAdventist).

The menu on the left –**Home, People, Organizations, Subscriptions, Reports, and Admin**—go

to different functions of the program when they are clicked, and will be referenced as needed in the various sections of these instructions. *If some of these menu items, or other menu items referenced in this document, are not visible to you, your user account has not been set up with permission to access that particular information. If you feel that you need access to the additional menu items, talk with your conference membership clerk about having your account changed.*

## ADDING NEW PEOPLE/FAMILIES

### How is “Family” Defined?

A **family**, or **family unit**, is a group of people (members and/or nonmembers) who share the same addresses. The family unit may also be a single individual and functions primarily as a mailing unit rather than as a family tree. Each family has one person designated as the **Primary Contact**. The Primary Contact should be the first, or might be the only, family member that you enter and should be a member of your church. A family unit may include members of different churches.

### Beginning a New Family by Adding the Primary Contact

1. To check and make sure that the family hasn't already been entered, see the **Finding a Person** section of this document for instructions.
2. Click the **People** menu item on the left side of the screen.
3. Click **new family** in the **People** menu section. This will bring up a blank **Person** screen with only default information displayed.
4. Enter the Primary Contact's name, suffix (such as “Jr.”; or use this field to enter an inmate number if necessary), salutation, email address, be sure that the correct church is selected, and enter their gender, marital status, and birth date (use ‘1800’ as the year if you only have the month and day).
5. Enter **Family Unit** information, keeping in mind that information entered in this portion of the **Person** screen will apply to the Primary Contact you are entering **and also** to any subsequent family members.
  - **Mailing name** – If you leave this field blank, union papers will be addressed to the Primary Contact (first and last name). Fill this field in only if you want these mailings addressed in a different manner. For example, “John Smith” is a Primary Contact but he and his wife would prefer that the union paper is addressed to both of them. Enter “Mr. & Mrs. John Smith” in the **Mailing name** field to accommodate their request.
  - **Default address type** – The address used for mailings.
  - **Default phone type** – The number printed as the family phone on reports.
  - **Allow promo mail** – Uncheck this box if a family requests to be omitted from promotional mailing lists.
  - **Union paper** – Check this box if the family is to receive a copy of the union paper.
  - **Adventist World** – Check this box if the family is to receive the conference-subsidized monthly edition of *Adventist World*.
  - **Phone type** – Select a type of phone number to enter. Note that after entering

one type of phone and the subsequent phone number, **you can select additional phone types and enter those numbers as well.**

- **Phone** – Enter the phone number for the **Phone type** currently displayed. Remember that phone numbers in this section apply to an entire family and are not just for a given individual. *Individual work and cell numbers can be entered on the upper portion of the screen.*
  - **Unlisted phone** – Check this box if the phone numbers are not to be given out.
  - **Address type** – Similar in function to the **Phone type** field. Select the type of address you want to enter, and after you enter the actual address, **you can select additional address types** and enter those addresses as well. Remember, addresses apply to an entire family, and if you have a unique address for one family member, they should be in a separate family unit.
  - **Optional line** – **Do NOT put the street or PO Box info here.** This line is provided for non-address information such as “c/o”, apartment names, and company names.
  - **Address** – Enter street or PO Box info here.
  - **City** – Enter city here.
  - **StateProv** – Enter state or province 2-character code here.
  - **Postal code** – Enter the zip or postal code here.
  - **Country** – Select the appropriate country, enter the country name if you choose “Other”.
  - **Carrier route** – This will be filled in automatically if the address is validated by the Auto-certify feature that uses postal software.
  - **Auto-certify** – Uncheck this box only if the certification process is undoing address changes that you know are correct.
  - **Confidential** – Check this box if the address is not to be given out.
  - **Stop delivery** – Set to appropriate reason when postal returns are received.
  - **Address source** – Only filled in when a change to the address is made – the source of that change can be selected from the drop-down menu.
6. Click the **Personal** tab to enter additional information unique to the individual, i.e., their marriage date, language, ethnicity and occupation. Enter dates in mm/dd/yyyy format, for example, 04/21/1981.
  7. Ignore the **Membership** tab for now (this tab is only used AFTER an individual has been entered as a member in your church; to make them a member see the **Changing/Undoing Membership Status** or **Transferring Members** section of this document).
  8. Click the **Student** tab only if you have school information to enter. Enter the current grade a student is in and the type of school attending (SDA, non-SDA, Home school). If you selected **SDA** for the school type, select the school using the "Select" box provided. If you selected **Non-SDA** as the school type, type in the name of the school in the **School (Non-SDA)** field.
  9. Click the **Notes** tab only if you have additional information about someone that can assist you or your pastor in serving that individual’s needs better **without betraying their**

**expectation of privacy.**

10. Ignore the **Offices** tab for now (this tab only *displays* information about the offices the individual holds in the church; to enter an office for an individual see the **Changing a Person's Church Offices** section of this document).
11. Click the "Save" button.
12. If this individual has become a member by Baptism or Profession of Faith, see the **Changing/Undoing Membership Status** section of this document.

### **Adding Family Members to an Existing Family**

1. Display the **Person** screen for any member of the existing family (*if you are unsure how to accomplish this, see the **Finding a Person** section of this document for instructions*).
2. Click the "New Person" button on the bottom right of your screen.
3. Enter the family member's name, suffix and salutation, email address, church, gender, marital status, and birth date.
4. The information in the **Family Unit** tab should already be filled in. If you make any changes to this info remember that it will make those changes **for everyone in the family**, not just the person you are entering now. (*For a reminder on how the **Family Unit** fields are used, see Step 5 in the **Beginning a New Family by Adding a Primary Contact** section of this document above.*) If this person needs unique information in this section, consider starting a new family for this individual.
5. Enter the appropriate information for this person in the **Personal**, **Student**, and **Notes** tabs (*for a reminder on how these tabs are used, see Steps 6-9 in the **Beginning a New Family by Adding a Primary Contact** section above*).
6. Click the "Save" button at the right side of your screen.
7. If this individual has become a member by Baptism or Profession of Faith, see the **Changing/Undoing Membership Status** section of this document.
8. To enter a church office for this new family member, see the **Changing a Person's Church Offices** section of this document.
9. Repeat steps 1-8 above for each additional family member.



## FINDING A PERSON

### Searching by Name and Status

1. Click the **People** menu item, then click **Search** below it.
2. On the **Person Search** screen, enter whatever portion of the **Last name** and/or **First name** that you are sure of. For example, to find Randy Ingraham, enter “Ing” and “Ran”. This will help locate variations such as “Randy” vs. “Randall” and “Ingraham” vs. “Ingram”. Another example is when you know the individual’s first name is “Priscilla”, you can leave the **Last name** field blank and just enter “Priscilla” in the **First name** field.
3. Indicate which member status you believe this person is in the **Member status** field. If you are not sure, select the “—Any status—” option. **NOTE:** The status of “Nonmember” does **NOT** include members who are now “Removed”, “Deceased”, “Missing”, or “Duplicate member”, but rather refers to individuals who have **NEVER BEEN** members of the Seventh-day Adventist church such as a nonmember spouse, or a child.
4. Click the “Search” button.
5. A list of names matching the criteria you entered will be displayed. If the person you are looking for is in that list, click on their name.
6. If the person you are looking for is **NOT** displayed in the above list, either they are not in eAdventist, there is a different spelling of their name than you are expecting, or their status is not what you thought. To try another search for the same person, repeat steps 2-5 above using fewer letters of their name than in your previous search, limiting the chances of a spelling difference, and perhaps setting the **Member status** to “—Any status—”. If you still aren’t finding the correct person, see the next paragraph on searching by other criteria, to try another search method.

### Searching by Other Criteria, with or without the Name

The **Advanced Search** screen allows you to search using first and last names as described in the above section, however, it also offers additional fields that can be searched **along with** the name and status fields, **or independent of** the name and status fields. These additional fields include street address, city, postal code, email address, birthdate ranges, church, offices held, and occupations. These search capabilities are particularly useful if you are unsure of someone’s name, or if you are searching for a **type** of individual (i.e., all people at a given street address, all members living in a certain zip code, or all individuals born during a specific date range).

1. If the **People** menu section is not already expanded, click it.
2. Click the **advanced search** menu item.

3. Enter whatever criteria you would like to search with in one or more of the fields displayed, **making sure that all other fields are blank**. For example, to find all of your **members** that live in the “20904” zip code, enter “20904” in the **Postal code** field and select “Member” in the **Member status** field. Or, to find people born between 1960 and 1969, enter “01/01/1960” in the **Birthdate – From** field and enter “12/31/1969” in the **Birthdate – To** field.
4. Click the “Search” button.
5. A list of names matching the criteria you entered will be displayed. If the person you are looking for is in that list, click on their name.

**TIP:** After the list of matching individuals displays, click any of the column headings to sort the list by that value. For example, if you search for all the “Smith”s in your church, then click the **Address** column heading, the program will group all of the Smith’s together by street address, effectively putting families together.

6. If the person you are looking for is NOT displayed in the above list, either they are not in eAdventist, or they have a different value for one of the search criteria than you are expecting. To try another search, repeat steps 3-5 above using different entries than in your previous search.

## Displaying Someone Else in the Same Family

When you have one family member displayed on your screen, you can find and display other family members, *that you have permission to access*, directly from the **Person** screen without doing a separate search.

1. Be sure that the **Family Unit** tab is the active tab (by clicking on it if necessary) for the person displayed on your screen.
2. Click on the underlined family member’s name located on the bottom of the screen. *If a family member’s name is **not** underlined, you do not have permission to see or modify their information. This might happen when the displayed family member belongs to your church but the other family member has not transferred in yet and remains a member in a different church.*
3. If there is a “more” link below the list of family members, click it to see a list of other family members who are “deceased”, “missing”, “removed”, “duplicate” or “deleted”.

## CHANGING A PERSON'S BASIC INFORMATION

This section is for making changes to a person's general information. *To change whether a person is a member or not, or to change how they became a member, see the **Changing/Undoing Membership Status** section of this document. To change the offices a person holds, see the **Changing a Person's Church Offices** section.*

1. Display the person that needs to be updated (*see **Finding a Person** if you are unsure how to do this*).
2. Make the corrections to the person's information noting the following:
  - Any change made to information in the **Family Unit** tab will affect **all family members**, not just the person displayed;
  - If necessary, see steps 5-9 of the **Beginning a New Family by Adding the Primary Contact** section of this document for instructions and explanations regarding the fields in the **Family Unit**, **Personal**, **Student**, and **Notes** tabs;
  - The **Membership** tab is used strictly to update details *associated with* a member's baptism and membership, **not** to change whether they are a member or not.
3. Click the "Save" button.

## CHANGING A PERSON'S OFFICES/ADDING AN OFFICER

Changing a person's offices is accomplished by **changing the officers associated with a given church, school, or other organization**. Once the officers have been updated, you can see the person's current office titles from the **Offices** tab of the **Person** screen for that individual. *Note that you can only make these changes if your user account has been set up to allow you to do so.*

1. Display the information for the person whose offices need updating (*see **Finding a Person if you are unsure how to do this***).
2. To update a church officer, click on the underlined church name at the top of the **Person** screen (or next to a given office, if any are listed in the **Offices** tab for that person). This will display the **Organization** screen for the given church. *Updating officers for schools or other organizations follows the same procedure outlined here for churches.*
3. If the office to assign **is** listed in the **Office title** column of the **Officers** tab in the bottom portion of the screen:
  - Click on the underlined office title, which will bring up the **Edit Officer** screen.

If the office you need to assign is **not** listed in the **Office title** column:

- Click the "New Office" button on the right side of the screen;
  - Select the office title you need from the **Office title** drop-down menu on the top of the **New Officer** screen.
  - Enter a **Custom title** if your organization uses a different name for this position.
4. Indicate the member that will hold this office using the "Select person" link provided. After searching for, selecting, and clicking the "Ok" button, that person's name will be displayed in the **Officer name** field.
  5. Indicate where mail to this particular officer is to be sent--their default personal address or the church's address--by clicking in the appropriate circle of the **Mail to** option.
  6. Click the "Save" button and you will be taken back to the **Officers** tab of the **Organization** screen where you will see that the change has been made.

You can click on the name of the person you just updated to return to their **Person** page, then click their **Offices** tab and the new office will be shown.

## CHANGING THE FAMILY UNIT

Family units periodically change structure due to marriages, divorces, deaths, moves, etc. These changes may require that either the Primary Contact designation be changed, one family may need to be split into two, or one or more persons may need to leave one family and join a different family that is already in the system. Determine which type of change you need to make and follow the appropriate set of instructions.

### Changing the Primary Contact

The Primary Contact designation is changed after some family structure changes, such as marriages or divorces, and when the existing Primary Contact will be leaving your membership for some reason—transferring out, will be removed, or has died—**and at least one other person in the family is remaining an actual member (or nonmember) of your church.** When the Primary Contact is leaving your membership, one of the remaining church members of the family will need to become the new Primary Contact\*.

1. Display the information for the Primary Contact or one of his/her family members on the **Person** screen (*see **Finding a Person** if you are unsure how to do this*).
2. Click the “Change” button beside the Primary Contact name to open the **Change Primary Contact** window.
3. Select the new Primary Contact from the list of family members. Note that you can only choose a “member” or “nonmember”.
4. Click the “Save” button to close the **Change Primary Contact** window. You should see the new Primary Contact’s name displayed in the **Family Unit** tab.
5. Double-check the **Mailing name** field in the **Family Unit** tab to be sure that this change to the Primary Contact doesn’t conflict with the family’s request for how mail should be addressed. Remember that if this field is blank, union papers will be addressed to the new Primary Contact’s first and last name.

\*After the Primary Contact’s new membership status has been processed, **DO NOT CHANGE** the Primary Contact designation **IF** there will only be **nonmembers** left in the family, or if there are **no** other family members at all. Just process the new membership status, and either **delete** the remaining nonmembers (if the Primary Contact was removed or died) or **move them** to the Primary Contact’s new church, if the Primary Contact transferred out of your church (*see **Changing a Nonmember’s Church Designation***).

## Splitting One Existing Family into Two Separate Families

Use this procedure to split one or more members out of one family and **start a second family** in your system. This will need to be done when someone in the family moves out and is **not** moving in with another one of your church families. *(If the individual moving out is moving in with a different church family, see the next section of this document, **Moving a Person from One Existing Family into Another Existing Family**).* Splitting a family will also need to be done when multiple adults living in one home decide they want to be categorized as separate family units so each receives their own mailings.

1. Display the information for the person who will be the Primary Contact for the **new** family unit *(see **Finding a Person** if you are unsure how to do this).*
2. Click the “Change Family” button.
3. On the **Change Family** screen, click in the circle next to **Create a new Family**.
4. Click the “Save” button. You will now have a new family unit with just this one person as the Primary Contact. They will no longer be attached to the old family unit.

*If you need to move other family members from the **original** family to this newly created family, see the next section of this document, **Moving a Person from One Existing Family into Another Existing Family**.*

## Moving a Person from One Existing Family into Another Existing Family

Use this procedure whenever someone needs to switch from one family unit to another family unit in your system *(if the person moving out is **not** joining a family **already in your membership**, see the previous section of this document, **Splitting One Existing Family Into Two Separate Families**).* This may happen when a person in one family marries a member of another family, when there has been a divorce and the children need to be moved to the newly created family unit, or when an elderly person moves from one home into another. In each of these cases, the person will be **joining** a different **existing** family in your church body.

1. Display the information for the person who is moving from one family to another (*see **Finding a Person** if you are unsure how to do this*).
2. Click the “Change Family”.
3. On the **Change Family** screen click in the circle next to **Join an existing Family**.
4. Click the “Select” link to the right of that field.
5. Enter the first few letters of the last name (and first name if you want to narrow the search down further) of the family this person will be joining. Click “Search.”
6. The Primary Contact for each matching family will be displayed. Select the correct family by clicking in the circle to the left of the Primary Contact’s name.
7. Click the “Ok” button and the search screen will close and the Primary Contact’s name will be displayed in the **Select** field.
8. Click the “Save” button. This will take you back to the **Person** screen, and note that the family members displayed in the bottom portion of the screen will now be the new family unit which this person just joined.

## CHANGING/UNDOING MEMBERSHIP STATUS

The capabilities for changing an individual's membership status **within your own church** are discussed in this section. *To learn about transferring members in to or out of your church see **Transferring Members**.* Within your church, you can make several status changes to individuals as follows:

**Members** – Existing members can be rebaptized, or they can be taken off of your membership records by assigning them a status of “Deceased”, “Missing”, “Removed (Apostasy)”, or “Duplicate member”\*.

**Nonmembers** – Existing nonmembers in your records can be deleted from your system, or they can be added to your membership records by “Baptism”, “Profession of Faith”. Note that “Prior baptism”, “Prior Profession of Faith” and “Prior transfer” should only be used by conference clerks and not church clerks.

### Changing a Person's Membership Status

1. Display the information for the person whose status needs changing (*see **Finding a Person if you are unsure how to do this***).
2. Click the “Change Status” button on the **Person** screen. The **Change Status/Rebaptize** screen will display the person's **current** status on the left side of the screen, allowing updates on the right side.
3. Select the **Transaction** type, **Change to** (except when Rebaptizing), and enter the **Effective date** for the transaction.
4. If the new status is “Member”, enter how they became a member in the **Member by** field, and for “Prior transfers” type in the name of the person's **Prior church**.
5. Click the “Save” button.
6. If you just indicated that this person became a member by baptism, a **Baptism** screen will be displayed. You have the option of entering the **Baptized by**, **Event**, and **Original baptism place** fields. Click the “Save” button whether you enter anything in any of these fields or not.
7. The **Person** screen will now be displayed and the new status is shown at the top of the screen.

\*Be careful if you are changing a Primary Contact to “Deceased”, “Removed”, “Missing”, or “Duplicate Member”. Consider whether you need to change the Primary Contact designation to a different family member first, or, if there are no other church members left in this family, whether the remaining nonmembers should be deleted.



## Undoing a Person's Membership Status

There will be times when an incorrect membership status change was made. Either a wrong selection was inadvertently picked, or perhaps you were given the wrong name to change. In any event, provisions have been made to undo errant membership status postings. It needs to be noted, however, that if a **transfer** of an individual in to or out of your church was a mistake, contact your conference membership clerk to help rectify that situation. However, for status changes **within your church**, an undo feature is available.

1. Display the information for the person whose status needs undoing (*see **Finding a Person** if you are unsure how to do this*).
2. Click the “Change Status” button on the **Person** screen.
3. Click the “Undo ...” button next to the “Save” button on the right side of your screen. The individual's membership status will now revert to its previous status and the screen will return to the **Person** screen for that individual.

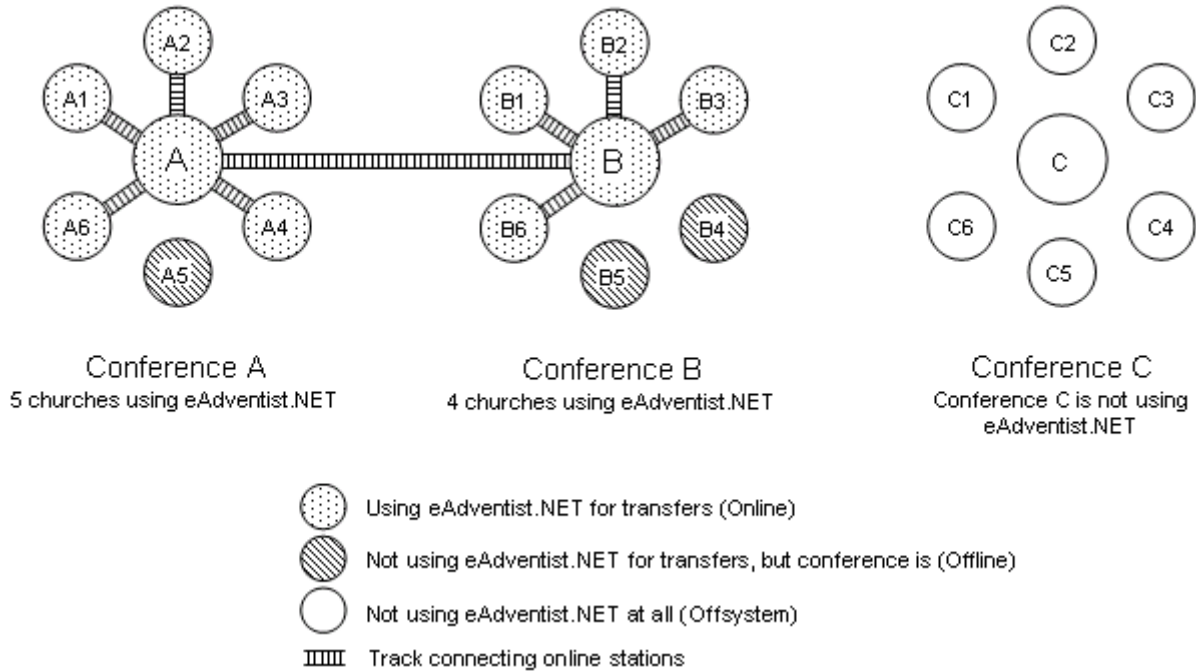
# TRANSFERRING MEMBERS

## How Online Transfers Work (Overview)

Transfer requests, recommendations and acknowledgments have traditionally been mailed back and forth between clerks throughout the North American Division and around the world. While this process continues to serve our clerks and church extremely well, eAdventist uses Internet technology to provide an alternative method of managing membership transfers for those conferences and churches that choose to use the program (*as of this printing, all 58 conferences within the North American Division are online with eAdventist*). It is beneficial to have an understanding of how eAdventist fits into an already existing network of clerks that is currently functioning within our worldwide church (some church clerks are using eAdventist and some are not) in order to understand how to process transfers. This section attempts to paint a visual picture of the eAdventist transfer process without getting into any technical details or instructions. Specific instructions are in subsequent sections of this document.

So envision, if you will, the transfer portion of the eAdventist program as an exceptionally fast network of trains that move their cargo, the transfers, to their proper destinations, or stations, within the eAdventist railway system. The stations within our railway are the churches and conferences that have chosen to use eAdventist. Hundreds of stations are already in place, and more are on the way. The stationmasters are the clerks, who load and unload the cargo onto the trains by entering and retrieving transfer information into/from the computer.

Conferences provide the hub stations for the eAdventist railway system, and churches using eAdventist within that conference are satellite stations of the hub. Track extends from the hub stations to each of its satellite stations. Track also connects the hub stations to one another.



Within eAdventist, trains carrying transfers cannot jump off the tracks, but **they WILL travel through stations WITHOUT STOPPING if there is another station closer to their destination.** Note that our trains can move from one station to the next virtually instantly, and that track is automatically laid as soon as a new station is established on eAdventist.

**Example 1 – Member wants to transfer from Church A3 to A1 in diagram**

**above:** The clerk in Church A1 will enter the request into the computer and the transfer will travel the only way the track goes which is to the conference. But it will travel **THROUGH** this conference station (because there is another station closer to its destination) and go on to Church A3 and stop there. The church clerk in Church A3 will take the request to their church board and church body for appropriate actions and enter the recommendation into the computer. This recommendation will follow the same track back through the conference to Church A1. The clerk in Church A1 will take the recommendation to their church board and church body for appropriate action and then enter the acceptance (acknowledgement) into the computer. At that time, the clerk in Church A3 will be able to see that the transfer is complete. Only the church clerks for Church A1 and Church A3 enter anything in the computer for this transfer; the conference clerk does nothing.

**Example 2 – Member wants to transfer from Church B3 to A1 in diagram**

**above:** The transfer process is virtually the same as in Example 1, however, the transfer will pass through one additional station before stopping at Church B3. The transfer request will get entered at Church A1, travel through Conference A, then travel through Conference B and stop at Church B3. It will follow that same path back to Church A1 when subsequent actions are entered. Only the church clerks for Church A1 and B3 enter anything in the computer for this transfer; the conference clerks do nothing.

**There are times when a transfer may need to travel to or from somewhere other than an established station.** Our track does not extend to these locations...what happens in these cases? In general, **if there is no track**, a courier (the US Post Office) is used to move the transfer.

**Example 3 – Member wants to transfer from Church A5 to A1 in diagram**

**above:** In this case, Church A1 will enter the transfer request and it will travel to the station for Conference A. The transfer cannot travel on our system any further because there is no track extending to Church A5. So the conference stationmaster needs to print the request and mail it (using the US Post Office as the courier) to Church A5. The clerk at Church A5 will then mail the recommendation back to Conference A's clerk who will load it on a train heading back to Church A1 by entering the recommendation in the computer. The clerk in Church A1 will instantly have access to the voted recommendation. Subsequent steps follow the same path back and forth between Church A1 and A5.

**Example 4 – Member wants to transfer from Church B5 to A5 in diagram**

**above:** Because there is no track extending from Church A5 to Conference A, the clerk at Church A5 will use the US Post Office to mail the transfer request to Conference A. The Conference A clerk will put the request onto the train lines by entering it into the computer. The request will travel to the station closest to Church B5; in this case that is Conference B. At this point, the transfer cannot travel any further in the system, so the clerk at Conference B will use the US Post Office as courier and mail the request to Church B5. When the clerk at Church B5 mails the recommendation back to Conference B, that conference clerk will enter the recommendation online and it will immediately travel back to Conference A. At that point, the recommendation cannot travel any further in the system so the Conference A clerk will mail it to the clerk at Church A5. Subsequent actions follow the same path.

**Example 5 – Member wants to transfer from Church C2 to A3 in diagram**

**above:** The clerk at Church A3 will enter the transfer request and it will travel to the station for Conference A. There is no track extending to Conference C because they are not using the eAdventist program at all in their conference. So the transfer cannot travel on the system any further so the Conference A clerk needs to mail the request to Church C2 using instructions within eAdventist which are explained in subsequent sections. This request will automatically include instructions to return the recommendation to Conference A. When the clerk at Conference A receives the recommendation back from the clerk at Church C2, she will then enter it online where it will automatically take the track back to Church A3. Subsequent actions will follow the same path.

**Example 6 – Member wants to transfer from Church A6 to C5 in diagram**

**above:** If an individual has been attending Church C5 and notifies the church clerk there that they want to transfer their membership from Church A6, we must keep in mind that the clerk at Church C5 is not aware of the eAdventist membership program. Because of this, they will be initiating the transfer request by following the traditional method of mailing a request to the clerk at Church A6. The clerk in Church A6 will

enter that request into the system **on behalf of** Church C5, take it to their board to vote, enter the recommendation into the computer, where it will travel as far as it can in the system, to Conference A. Conference A will then mail the recommendation to Church C5 with instructions to return the acceptance date to Conference A. When Conference A receives the acceptance date, she will enter that date into the system on behalf of Church C5, and it will immediately be visible to Church A6 that this transfer has been completed.

Not all possible combinations of transfer requests have been illustrated in the examples above. However, the principals are the same for all transfers. Specific instructions for carrying out each step of the process within the eAdventist program are in the following sections.

## Instructions for Processing Transfers using eAdventist

Instructions for the eAdventist portions of the transfer process are given below. To assist you in pinpointing which steps you need to complete at which point, refer to **Appendix A** if you are a church clerk, and to **Appendix B** if you are a conference clerk. **Use the appropriate appendix as a roadmap to guide you through the transfer process.**

**Note that each person needs to be transferred individually from one church to another.** And when transferring out **all** church members in a family, **be sure to check if there are any remaining nonmembers** of that family in your system. For example, if you transfer two parents out, you may still have one or more children listed in your church. Be sure to move these remaining nonmembers to the correct church with the rest of their family (*see **Changing a Nonmember's Church Designation***).

### Getting into the Transfer Section of eAdventist

If you are on the **Home** page, click the **Transfers** link displayed on the right side of your screen. (Or you can click one of the links in the **Transfer Reminders** category on the right side of the screen to go directly to a subsection of the **Transfers** section).

*Or*, click the **People** menu item and click the **transfers** link below it.

### Entering a Request for a Transfer TO Your Church

1. Be sure you are in the **Transfers** section of the program (*see **Getting into the Transfer Section of eAdventist** if necessary*).
2. Click the “Request transfer” button toward the top of your screen.
3. On the **Request Transfer** screen, click the “Select” link to the right of the **To clerk of** field.
4. Enter any portion of the name of the church the member will be leaving in the **Church name** field. Click the “Search” button.
5. Church names will be displayed that contain the letters you entered in the previous step. Select the correct church by clicking in the circle to the left of the church name. *If the correct church is NOT in the list, try the search again using a different portion of the church's name. If the church is STILL not displayed, your transfer will have to wait until the church has been added to the list, at which point you will need to begin again with Step 1 of this section. Click the “Cancel” link in the **Select Church** box and see the **Requesting a New Organization** section of this document to initiate the process of adding a church.*
6. Click the “Ok” button and the search screen will close and the church's name will be displayed in the **To clerk of** field.
7. Select your church from the list given in the **To join** field (note that your church may be the

**only** church displayed in the drop-down list).

8. Enter the last name, first name, and middle name (if you have it), of the person that is requesting the transfer. You can also enter birth date and suffix to further identify the member you are requesting.
9. Click the “Save” button. This will take you back to the main **Transfers** screen where you can see the transfer request listed in the **To grant** tab. Note, however, that this transfer is now waiting for another entity to grant (or recommend) the request, at which time the transfer will automatically move to your **To accept** tab.

### **Entering a Recommendation for a Transfer OUT of Your Church**

1. Be sure you are in the **Transfers** section of the program (*see **Getting into the Transfer Section of eAdventist** if necessary*).
2. Click the **To grant** tab to be sure that you are looking at the correct list of transfers.
3. Click the **Vote** link next to the individual’s name.
4. On the **Process Transfer Request** screen, there will be a list of your members whose names are similar to the name the requesting church entered. Select the correct member to transfer by clicking in the circle to the left of their name.
5. Enter the action your church took when voting on this transfer request by clicking in the circle next to **Granted** or **Denied** on the top right side of your screen.
6. Enter the date the vote was made in the **Voted** field.
7. Click the “Save” button. This will take you back to the **Transfers** screen where you can see the transfer request listed in the **To accept** tab. Note, however, that this transfer may now be waiting for another entity to accept (or acknowledge) the recommendation, at which time the transfer will automatically move to your **Completed** tab (if you are a *conference* clerk and you are completing this set of instructions after receiving a signed FUR from one of your offline clerks for a transfer to an offsystem church, this transfer is now waiting for you to continue the transfer instructions as found in the appendix you are using as a guide).

## Entering Acknowledgement of Completed Transfer

1. Be sure you are in the **Transfers** section of the program (*see **Getting into the Transfer Section of eAdventist** if necessary*).
2. Click the **To accept** tab to be sure that you are looking at the correct list of transfers.
3. Click the **Vote** link next to the individual's name.
4. On the **Accept Transfer** screen, select either "Accepted" or "Declined" in the **Action** field based on the vote taken by your church regarding this transfer.
5. Enter the date the vote was made in the **Voted** field.
6. Click the "Save" button. This will take you back to the **Transfers** screen where you can see the transfer request listed in the **Completed** tab. The individual's records have now been updated to reflect their new church membership.

## Entering a Request for a Transfer to an Offsystem Church

1. Be sure you are in the **Transfers** section of the program (*see **Getting into the Transfer Section of eAdventist** if necessary*).
2. Click the "Request transfer" button toward the top of your screen.
3. On the **Request Transfer** screen, select "to an Offsystem church (from my church)".
4. Select your church from the list given in the **To clerk of** field (note that your church may be the **only** church displayed in the drop-down list).
5. Click the "Select" button to the right of the **To join** field.
6. Enter any portion of the name of the church the member will be joining in the **Church name** field and click "Search".
7. Church names will be displayed that contain the letters you entered in the previous step. Select the correct church by clicking in the circle to the left of the church name. *If the correct church is NOT in the list, try the search again using a different portion of the church's name. If the church is STILL not displayed, your transfer will have to wait until it has been added to the list, at which point you will need to begin again with Step 1 of this section. Click the "Cancel" button in the **Select Offsystem Church** box and see the **Requesting a New Organization** section of this document to initiate the process of adding a church.*
8. Click the "Ok" button to close the search screen and the church's name will be displayed in the **To join** field.



9. Enter the last name, first name, and middle name (if you have it), of the person that is transferring. Birth date and suffix may also be entered to further identify the member you are requesting.
10. Click the “Save” button. This will take you back to the main **Transfers** screen where you can see the transfer request listed in the **To grant** tab. This transfer is now waiting for you to continue the transfer instructions as found in the appendix you are using as a guide.

## Requesting a New Organization

1. Click the **Organizations** menu item and click the [request new](#) link below it.
2. To request a new organization that is within the North American Division (United States, Canada, Bermuda):
  - Click the “Request NAD Organization” button
  - Enter the name of the organization you are requesting
  - Enter the conference this organization is part of in the **Parent organization** field
  - Enter any further information you have on this organization in the remaining fields
  - Click the “Create request” button on the right side of your screen
  - The **Organization Requests** screen will display and your request will be in the queue

To request an organization that is outside of the North American Division:

- Click the “Request Non-NAD Organization” button
  - Enter as much of the requested information as you can
  - Click “Create request”
  - The **Organization Requests** screen will display and your request will be in the queue on the **Non-NAD** tab.
3. You will receive an email message from a member of the eAdventist support team when this organization has been added and you can proceed with your transfer.

## MOVING A NONMEMBER TO ANOTHER CHURCH

Individual nonmembers in your system may need to be moved to another church at some point. For example, if parents transfer out of your church, the nonmember children need to be moved to the same church their parents now belong to.

1. Display the information for the nonmember you need assigned to a different church (*see **Finding a Person** if you are unsure how to do this*).
2. Click the “Change” button in the top right portion of your screen, next to the **Church** field.
3. Click the “Select” link to the right of the **New church** field on the **Change Church** screen.
4. Enter a portion of the church name the person will be assigned to in the **Church name** field, and click “Search.” Note that entering “meadow” will find all churches that have “meadow” anywhere in their name, such as “Meadow Glade SDA Church” or “Sanford Meadows SDA Church”.
5. Select the correct church by clicking in the circle to the left of its name.
6. Click the “Ok” button and the search screen will close and the church name will be displayed in the **New church** field.
7. If there are other nonmembers in this family that need to be reassigned to this new church, click in the button to the left of their position and name and they will be moved **at the same time**.
8. Click the “Save” button.

*If you moved the nonmember to a church outside of your access rights, you will no longer have access to their membership record and only their history information will displayed.*

## WORKING WITH COMMITTEES *(For labels, mailings, and conference directory)*

To create subsets of individuals for mailings, or to print reports containing their names and addresses, there is a feature called “**committees**”. For example, you may want to create a committee, or subset of individuals, that consists of the Planning Committee or Decorating Committee members. Then, when you want to mail the committee members information, you can print labels for them or export this information to a program of your choice (such as a word processor) to create form letters, labels, or whatever you choose. You can create as many committees as you need. *Committees are not intended to be used to group officers together. Use the officer labels feature under the **Organizations** menu section to generate labels for your officers.*

### Creating Committees

1. Click the **People** menu section, then click the committees link below it.
2. Click the “New committee” button on the right side of your screen.
3. Enter a name for your committee in the **Committee name** field.
4. Check the **Public** box if you want others within your organization to be able to view and use the committee. Note that individuals **outside** of your organization will **not** be able to view your committee even if the **Public** box is checked, and that at no time is anyone else allowed to change the composition of a committee you create.
5. Conference clerks, check the **Export for Directory** box if you want this committee to be exported when creating the conference directory.
6. Click the “Save”.
7. Click the “Add members” button on the right side of your screen.
8. Enter information in the fields displayed to search for people to add to your committee.
9. Click the “Search” button on the right side of the screen.
10. Select the people you want to add to the committee by clicking in the box to the left of their name. To **unselect** one you have marked, just click in the same box again. (To quickly select all names displayed, click the “Select all” link; to clear all selected names, click the “Select none” link).
11. When you have selected the correct people, click the “Add to Committee” button on the right side of your screen.

12. A screen listing the members of the committee will be displayed. At this point, you can delete names by clicking **delete** on the right side of the person's info. To add additional names, click the "Add members" button and repeat Steps 9-12.
13. Click the "Back to committees" link. This brings you back to the **Committees** page with a successfully created committee.

## Printing Labels for a Committee

1. If you are not already on the **Committees** screen, click the **People** menu section and then click the **committees** link below it.
2. Select the committee(s) you need labels for by clicking in the box(es) to the left of the committee name.
3. Select the type of label you want in the **Label type** drop-down box.
4. Click the "Print Labels" button to generate your labels on screen. You may now print the displayed labels or save the PDF file. *If you have difficulty with the labels displaying, refer to the **frequently asked questions** link on the **Help** page for further assistance with printing reports.*

## Downloading Committees

1. If you are not already on the **Committees** screen, click the **People** tab on the top of your screen and then click the **committees** link displayed just under the **People** tab.
2. To download information for all members of a particular committee, use the **Download data** field to indicate how much information to download, and select the committee(s) to download by clicking in the box to the left of the committee name.
3. Select either **ASCII text** or **XML** in the **Download format** field. (You will need to know how you intend to use the information that will be downloaded and what type of format will be required for that use. For example, if you are planning to use a word processor and set up a mail merge letter, you will probably want to export using the **ASCII** format.)
4. Click the "Download selected committees" button on the right side of your screen.
5. You will be asked whether you want to open the file **committee\_labels.csv** (or **committee\_labels.xml**), save it, cancel, or get more info. Click "Save."

6. Depending on your Internet browser settings, you will then be asked where you want to save the file and at this point, you can rename the file to something more descriptive (i.e. planningcomm.csv or planningcomm.xml). Click “Save” to save the file to the folder and filename selected. *Note, your browser may have saved the file to a default location on your computer, if indicated in your browser's settings.*
7. You have now exported the committee members' information to a file on your computer. This file can be used by word processors, spreadsheets or other programs to print form letters, address labels, reports, etc.

**Appendix A -  
Transfer Processes for Church Clerks**

# Appendix A - Transfer Processes for Online Church Clerks

## *What you MUST know...*

### DEFINITIONS

**Online church** – Church and conference are using eAdventist

**Offline church** – Church is NOT using eAdventist, but conference is

**Offsystem church** – Church is not using eAdventist, and neither is conference

**FUR** – A Family Unit Record form: whatever form your conference requires churches to use to record family information such as multiple addresses, children, etc.

### SUMMARY OF PROCESSES INVOLVED

**Church clerks using eAdventist will enter all transactions online.** In addition, some paperwork may be received from offsystem churches.

## *What may be helpful...*

**In any given stage of a transfer, only a few instructions need to be performed depending on the type of transfer taking place and what stage the transfer is currently in.** When you receive communication regarding a transfer, either online or printed (mailed/faxed), use the chart below to find the communication received and type of transfer taking place, and then follow the instructions given.

<i><b>If you receive...</b></i>	<i><b>For...</b></i>	<i><b>Do...</b></i>
---------------------------------	----------------------	---------------------

...a request from an individual stating that they want to join your church	<p>...a transfer <b>from</b> any other church</p> <ul style="list-style-type: none"> <li>• Enter Request online<sup>4</sup>, being sure to note whether granting church is <b>offsystem</b> or not</li> <li>• Only if granting church is offsystem, enter person as nonmember in your church<sup>5</sup></li> </ul>
...an <b>online</b> Request <sup>1</sup> for one of your members	<p>...a transfer <b>to</b> another church</p> <ul style="list-style-type: none"> <li>• Vote<sup>6</sup></li> <li>• Enter Recommendation online<sup>7</sup></li> </ul>
...a <b>printed</b> Request for one of your members (a “green card”)	<p>...a transfer to an <b>offsystem</b> church</p> <ul style="list-style-type: none"> <li>• Enter Request Transfer to Offsystem online<sup>8</sup></li> <li>• Vote<sup>6</sup></li> <li>• Enter Recommendation online<sup>7</sup></li> </ul>
...an <b>online</b> Recommendation <sup>2</sup>	<p>...a transfer <b>from</b> another church</p> <ul style="list-style-type: none"> <li>• Vote<sup>6</sup></li> <li>• Enter Acknowledgement online<sup>9</sup> to complete transfer</li> </ul>
...a <b>printed</b> Recommendation (white, triplicate form)	<p>...a transfer from an <b>offsystem</b> church</p> <ul style="list-style-type: none"> <li>• Enter Recommendation online<sup>10</sup></li> <li>• Vote<sup>6</sup></li> <li>• Enter Acknowledgement online<sup>9</sup></li> <li>• Your conference will send Acknowledgement to offsystem church</li> </ul>
...an <b>online</b> Acknowledgement <sup>3</sup>	<p>...a transfer <b>to</b> another church</p> <ul style="list-style-type: none"> <li>• Nothing needs to be done; transfer is complete</li> </ul>
...a <b>printed</b> Acknowledgement	<p>...a transfer to an <b>offsystem</b> church</p> <ul style="list-style-type: none"> <li>• Enter Acknowledgement online<sup>11</sup> to complete transfer</li> </ul>



**NOTE:** All footnotes below assume you are in the **Transfers** section of eAdventist. See the *Transferring Members* section of this document if you need instructions for getting into the **Transfers** section.

<sup>1</sup> Online requests are listed in the **To grant** tab of the **Transfers** section and will have a **green** indicator followed by a **Vote** link. There may be names listed with yellow indicators, but these are transfers waiting for attention from a conference or another church, not you. **Your** online requests will have **green** indicators.

<sup>2</sup> Online recommendations are listed in the **To accept** tab of the **Transfers** section and will have a **green** indicator followed by a **Vote** link. There may be names listed with yellow indicators, but these are transfers waiting for attention from a conference or another church, not you. **Your** online recommendations will have **green** indicators.

<sup>3</sup> Online acknowledgements are listed in the **Completed** tab of the **Transfers** section. If you want to change the number of days this list displays acknowledgements for, enter a new number in the **Voted & Withdrawn – show for past \_\_\_ days** field at the top of your screen, and then click the “Refresh” button on the right side of your screen.

<sup>4</sup> Follow the instructions in the *Entering a Request for a Transfer TO Your Church* section of this document.

<sup>5</sup> Follow the instructions in the *Adding New People/Families* section of this document.

<sup>6</sup> As always, the transfer request needs to be taken to your church body for the appropriate motions (whether joining or leaving your fellowship). Only after the appropriate vote has been made can the transfer process continue.

<sup>7</sup> Follow the instructions in the *Entering a Recommendation for a Transfer OUT of Your Church* section of this document.

<sup>8</sup> Follow the instructions in the *Entering a Request for a Transfer to an Offsystem Church* section of this document.

<sup>9</sup> Follow the instructions in the *Entering Acknowledgement of Completed Transfer* section of this document.

<sup>10</sup> The person transferring in should already be entered as a nonmember in your church. However, if they have not been added, enter them now<sup>5</sup> and enter the transfer request online<sup>4</sup>. Then working **ON BEHALF OF** the offsystem church, follow the instructions in the *Entering a Recommendation for a Transfer OUT of Your Church* section of this document noting that in this case there will be a **yellow** indicator by the transferee’s name instead of green.

<sup>11</sup> You need to complete this transfer in the computer system by working **ON BEHALF OF** the offsystem church. Follow the instructions in the *Entering Acknowledgement of Completed Transfer* section of this document noting that there will be a yellow indicator by the transferee’s name instead of green.

**Appendix B –**  
**Transfer Processes for Conference Clerks**

## **Appendix B - Transfer Processes for Conference Clerks**

### ***What you MUST know...***

#### **DEFINITIONS**

**Online church** – Church and conference are using eAdventist

**Offline church** – Church is NOT using eAdventist, but conference is

**Offsystem church** – Church is not using eAdventist, and neither is conference

**FUR** – A Family Unit Record form: whatever form your conference requires churches to use to record family information such as multiple addresses, children, etc.

#### **SUMMARY OF PROCESSES INVOLVED**

**Conference clerks using eAdventist will facilitate transfers that involve an offline church within their conference or an offsystem church.** All other transfers (those involving a combination of online churches and offline churches in other conferences) will **not** need the assistance of a conference clerk.

*As additional churches within your conference become **online** churches, the need to have transfers facilitated will diminish.*

### ***What may be helpful...***

**In any given stage of a transfer, only a few instructions need to be performed depending on the type of transfer taking place and what stage the transfer is currently in.** When you receive communication regarding a transfer, either online or printed (mailed/faxed), use the chart below to find the communication received and type of transfer taking place, and then follow the instructions given.

<i><b>If you receive...</b></i>	<i><b>For...</b></i>	<i><b>Do...</b></i>
...an <b>online</b> Request <sup>1</sup>	...a transfer from an <b>offline church in your conference</b> or from an <b>offsystem church</b>	<ul style="list-style-type: none"> <li>• Send printed Request to the <b>offline</b> or <b>offsystem</b> church<sup>4</sup></li> </ul>
...a <b>printed</b> Request from an offline church in your conference	...a transfer from <b>any online church</b> (in or out of your conference)	<ul style="list-style-type: none"> <li>• Enter Request online<sup>5</sup></li> </ul>
	...a transfer from <b>another offline church in your conference</b>	<ul style="list-style-type: none"> <li>• Enter Request online<sup>5</sup></li> <li>• Send printed Request to the offline church which currently holds the membership<sup>4</sup></li> </ul>
	...a transfer from an <b>offline church in a different conference</b>	<ul style="list-style-type: none"> <li>• Enter Request online<sup>5</sup></li> </ul>
	...a transfer from an <b>offsystem church</b> in a different conference	<ul style="list-style-type: none"> <li>• Enter person as nonmember in your offline church<sup>6</sup></li> <li>• Enter Request online<sup>5</sup></li> <li>• Send printed Request to the offsystem church<sup>4</sup></li> </ul>
...an <b>online</b> Recommendation <sup>2</sup>	...a transfer to an <b>offline church in your conference</b> or to an <b>offsystem church</b>	<ul style="list-style-type: none"> <li>• Send printed Recommendation to the <b>offline</b> or <b>offsystem</b> church<sup>4</sup></li> </ul>
...a <b>printed</b> Recommendation from an offline church in your conference (FUR should have been included with the Recommendation) or from an offsystem church	...a transfer to <b>any online church</b> (in or out of your conference)	<ul style="list-style-type: none"> <li>• Enter Recommendation online<sup>7</sup></li> </ul>
	...a transfer to an <b>offline church in your conference</b>	<ul style="list-style-type: none"> <li>• Enter Recommendation online<sup>7</sup></li> <li>• Send printed Recommendation to church where member wants to join<sup>4</sup></li> </ul>

	<p>...a transfer to an <b>offline church in a different conference</b></p> <ul style="list-style-type: none"> <li>• Enter Recommendation online<sup>7</sup></li> </ul> <p>...a transfer to an <b>offsystem church</b> in a different conference</p> <ul style="list-style-type: none"> <li>• Enter Request Transfer to Offsystem online<sup>8</sup></li> <li>• Enter Recommendation online<sup>7</sup></li> <li>• Send printed Recommendation to church where member wants to join<sup>4</sup></li> </ul>
...an <b>online</b> Acknowledgement <sup>3</sup>	<p>...a transfer from an <b>offline church in your conference</b></p> <ul style="list-style-type: none"> <li>• Send printed Acknowledgement to <b>your offline church</b><sup>4</sup></li> </ul>
...a <b>printed</b> Acknowledgement from an offline church in your conference or from an offsystem church	<p>...a transfer from <b>any online church</b> (in or out of your conference)</p> <ul style="list-style-type: none"> <li>• Enter Acknowledgement online<sup>9</sup></li> <li>• If Acknowledgement was sent to you by one of your offline churches, send that church a new FUR<sup>10</sup></li> </ul> <p>...a transfer from <b>another offline church in your conference</b></p> <ul style="list-style-type: none"> <li>• Enter Acknowledgement online<sup>9</sup></li> <li>• If Acknowledgement was sent to you by one of your offline churches, send that church a new FUR<sup>10</sup></li> <li>• Send Acknowledgement to church the member left<sup>4</sup></li> </ul> <p>...a transfer from an <b>offline church in a different conference</b></p> <ul style="list-style-type: none"> <li>• Enter Acknowledgement online<sup>9</sup></li> <li>• Send FUR to <b>your</b> offline church<sup>10</sup></li> </ul> <p>...a transfer from an <b>offsystem church</b> in a different conference</p> <ul style="list-style-type: none"> <li>• Enter Acknowledgement online<sup>9</sup></li> <li>• Send FUR to your <b>offline church</b><sup>10</sup></li> </ul>
...ONLY a <b>signed and dated FUR</b> from an offline church in your conference and this is the first communication you have received regarding this transfer (transfer was completed between the churches)	<p>...a transfer to an <b>offsystem church</b> in a different conference</p> <ul style="list-style-type: none"> <li>• Enter Request Transfer to Offsystem online<sup>11</sup></li> <li>• Enter Recommendation online<sup>12</sup></li> <li>• Enter Acknowledgement online<sup>13</sup></li> </ul>

**NOTE:** All footnotes below assume you are in the **Transfers** section of eAdventist. See the *Transferring Members* section of this document if you need instructions for getting into the **Transfers** section.

<sup>1</sup> Online requests are listed in the **To grant** tab of the **Transfers** section and will have a **green** indicator followed by a **Vote** link. There may be names listed with yellow indicators or no indicators, but these are transfers waiting for attention from a church or different conference, not you. **Your** online requests will have **green** indicators (there may be times when one of your churches is not able or has not entered the appropriate information online; in these cases transfers with a **Vote** link are available for your intervention even if they do not have the green indicator).

<sup>2</sup> Online recommendations are listed in the **To accept** tab of the **Transfers** section and will have a **Vote** link beside the individual's name. There may be names listed with **View** links, but these are transfers waiting for attention from a church or different conference, not you. **Your** online recommendations will have **Vote** links and will print in the "Print all Pending" report which will be required in a subsequent step in the transfer process.

<sup>3</sup> Online acknowledgements are listed in the **Completed** tab of the **Transfers** section. If you want to change the number of days this list displays acknowledgements for, enter a new number in the **Voted & Withdrawn – show for past \_\_\_ days** field at the top of your screen, and then click the "Refresh" button on the right side of your screen.

<sup>4</sup> Any new requests, recommendations, or acknowledgements that have been entered throughout the week--that you are responsible for mailing (sending)--will AUTOMATICALLY be generated and addressed to the correct clerk each time you click the "Print all Pending" button toward the top of the **Transfers** screen. We recommend running "Print all Pending" once a week, and mailing out those reports. This once-a-week procedure will take care of all of the individual "Send" instructions in this chart.

<sup>5</sup> Working **ON BEHALF OF** the church that sent you the printed request, follow the instructions in the *Entering a Request for a Transfer TO Your Church* section of this document noting that "Your Church" is the one that sent you the request.

<sup>6</sup> Follow the instructions in the *Adding New People/Families* section of this document being sure to select the offline church that sent you the request as the individual's church on the **Person** screen.

<sup>7</sup> Working **ON BEHALF OF** the church that sent you the recommendation, follow the instructions in the *Entering a Recommendation for a Transfer OUT of Your Church* section of this document noting that "Your Church" is the one that sent you the recommendation.

<sup>8</sup> Working **ON BEHALF OF** the offsystem church, follow the instructions in the *Entering a Request for a Transfer to an Offsystem Church* section of this document noting that "your church" is the one that sent you the recommendation.

<sup>9</sup> Working **ON BEHALF OF** the church that sent you the acknowledgement, follow the instructions in the *Entering Acknowledgement of Completed Transfer* section of this document.

<sup>10</sup> The transferee's name should be displayed in the **Completed** tab of the **Transfers** section as a link. Click their name to be taken to their **Person** screen and then click the "Print FUR" button to print the FUR for this individual and mail it to your offline church.

<sup>11</sup> Working **ON BEHALF OF** the offsystem church, follow the instructions in the *Entering a Request for a Transfer to an Offsystem Church* section of this document noting that "your church" is the one that sent you the signed FUR.

<sup>12</sup> Working **ON BEHALF OF** the church that sent you the signed FUR, follow the instructions in the *Entering a*

***Recommendation for a Transfer OUT of Your Church*** section of this document noting that “Your Church” is the one that sent you the signed FUR.

<sup>13</sup> Working **ON BEHALF OF** the church that sent you the signed FUR, follow the instructions in the ***Entering Acknowledgement of Completed Transfer*** section of this document.

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