



# District Office Reference Sheet

Updated July 2018

## General System Notes

- New accounts are created by the DCOM Registrar or Chair. The District Superintendent no longer creates new accounts.
- When there is a change to DCOM membership, please notify Clergy Excellence with the outgoing and incoming member name and email address.
- User profile information is updated by the user themselves. Questions about login errors, expired or missing invitations, and changes to email addresses can be directed to the DCOM Registrar or [ClergyExcellence@vaumc.org](mailto:ClergyExcellence@vaumc.org).
- Training materials and instructions for all users are available from [www.vaumc.org/UMCARESplus](http://www.vaumc.org/UMCARESplus)
- Annually between Annual Conference and July 1, the Center for Clergy Excellence will update district relationships for candidates and local pastors moving to a new district. Also at this time, candidates and local pastors will be placed on new renewal tracks for the coming conference year. Older file materials are retained in the archives.

## Documents and file materials

- While you may have access to a number of modules within the system, please remember your role is to scan and upload paper documents, received in the district office, to the corresponding step on a user's track (see below for a list of these documents).
- Once a document is uploaded to a UMCARES account, that paper document can be shredded. Documents should not be retained in the district office or forwarded to a district committee member for any reason. Some documents (such as the State Background Report or Medical Report) contain confidential personal data that should never be shared through Dropbox. Questions about this policy can be directed to the Center for Clergy Excellence.
- All clergy under appointment have a paper Supervisory file kept by the District Superintendent which is separate from the district committee's records on UMCARESplus.
- The system is candidate and local pastor driven, that is to say most documents and materials should be uploaded by the candidate directly into UMCARESplus.
- You have access only to those steps you are responsible for. If you receive documentation that should have been uploaded by the candidate, either scan and return the materials to them (assuming there is no confidential personal information), or contact [ClergyExcellence@vaumc.org](mailto:ClergyExcellence@vaumc.org) so that we can update the system as necessary.

# District Office Reference Sheet

Following are the documents which candidates and local pastors are instructed to mail to the district office. Please scan and upload these documents to the corresponding step on the listed track(s). Contact [ClergyExcellence@vaumc.org](mailto:ClergyExcellence@vaumc.org) if you are receiving documents not listed here.

<u>Document</u>	<u>Track(s) with corresponding step</u>
• Annual Evaluation by P/SPRC	License Renewal
• Candidate's Disclosure Form	<i>Should be uploaded by the candidate</i>
• Declaration of Candidacy (Form 104, Part 1 from EVC) <i>[Step: Recommendation by Charge Conference]</i>	Becoming a Certified Candidate
• Lay Servant/Speaker Course Completion	Certified Lay Minister or CLM Renewal
• Local Pastor Mentor Report <i>Note the candidacy mentor report is now being submitted directly through UMCARES</i>	License Renewal
• Recommendation by the local church (Letter from pastor)	Certified Lay Minister or CLM Renewal
• Renewal of Candidacy (Form 104, Part 2 from EVC) <i>[Step: Charge Conference Recommendation]</i>	Candidacy Renewal or Licensed, Not Appointed (MQ20)
• State Background Check Report	Inquiring Candidate, Readmission, Certified Lay Minister, Transfer, or Minister of Another Denomination
• Medical Report	Becoming a Certified Candidate
• Transcripts and Grade Reports	<i>Should be uploaded by the candidate</i>

Action Reports, DCOM Meeting Minutes, and all communication with candidates should be uploaded by the DCOM Registrar or sent to [ClergyExcellence@vaumc.org](mailto:ClergyExcellence@vaumc.org) for inclusion in the file.

Sermon videos for those seeking licensed local pastor should be submitted via web-link and included with their sermon description. If you continue to receive DVDs, please contact your DCOM Chair to inquire about distribution.

## How do I upload a file?

1. Search for the candidate or local pastor by name, click the "Track" quick button
2. Click "Open" next to the track with the corresponding step
3. Locate the step and click the step title to open the details
4. Click "Add File"
5. Begin with selecting the "Local File" location
6. Click "Browse" to navigate to and select the file on your computer you wish to upload  
*The file name will automatically complete and the description field is optional*
7. Click "Save" to upload the file
8. You may now sign that the requirements for the step are complete.

*You will see a pop-up box indicating that an email notification has been sent to the user with the first available incomplete step, asking them to take action on that step.*