



UMCARES

United Methodist Candidate and Record Entry System



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH

UMCARES:

Historical Track Conversion and The Transfer System

Historical Track Conversion: Overview

- Historical Tracks appear in candidates records who began the process before UMCARES was live.
- These tracks cannot be worked and will need to be converted to the current track options before the candidate can continue
- Conversions must be completed by a user with conference level access

[Profile](#) | [Change Status](#) | [Convert Track](#) | [Help](#)

This track is marked complete. Step changes will not be allowed.
The track has been disabled. Step changes will not be allowed.
This track was imported from OCAS.
This track requires conversion to run in UMCARES. Please contact your District Superintendent.

Description

This track includes all tasks from OCAS and was designed to keep historical task data when importing into UMCARES.

Steps

Historical Track Conversion: Converting Track

- Open the Historical Track
- Click on **Convert Track**
- Confirm the **Status** of each step
- NOTE: Setting the Personal Data Inventory status to *In Progress* and removing the Form Completed will allow the candidate to update their information
- Click on **Convert**

Profile | Change Status | **Convert Track** | Help

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The Candidacy Steps

Candidacy Step	Type	Status	Status Date	Other	Historical Step	Status
Candidacy Application Form	Form	Complete	10/1/2012	Form Completed 10/1/2012	Candidacy Application Form	Accomplished
District Superintendent Signature	Signature	Complete	10/3/2012		District Superintendent Signature	Accomplished
Mentor Signature	Signature	Complete	10/5/2012		Mentor Signature	Accomplished
Administration Fee for the Candidacy Process	Fee	Complete	10/5/2012		Online Candidacy/Assessment Re-Test/Guidebook	Accomplished
Request Hardcover Candidacy Guidebook	Form Plus	Complete	7/31/2013		No Match	No Match
Candidate's Assessment Interview	Signature	Not Started	7/31/2013		No Match	No Match
Local P/SPRC or Equivalent Meeting	Signature	Complete	12/5/2012		Meeting Completed with Local P/SPRC or Equivalent	Accomplished
Conference or Equivalent Meeting	Signature	Complete	12/18/2012		Meeting Completed with Charge Conference	Accomplished
Appearance Before District Committee	Signature	Complete	6/4/2013		Appearance Before District Committee Completed	Accomplished
Report of Completion	Form	Complete	7/31/2013	Form Completed 7/31/2013	Complete Form 113 (Report of Completion)	Accomplished
Close Track	Manual Track	Not Started	7/31/2013		No Match	No Match

Conversion Notices

- Ensure that the track and step status are accurate.
- This process can take several minutes and once completed will return you
- Closing or refreshing your browser during conversion could result in data c
- Once converted and verified you can then unassign the Historical Candida
- Remember to assign mentor if track remains in progress.
- Due to the fact the data being converted may be for history sake only no e
- If MAS is selected, on the Psychological Assessment track, they will receiv

Convert

The Transfer System: Overview

- The Transfer Request System is used to transfer candidates between conferences. Use Add Location to move candidates or users between districts and churches in the same conference.
- Administrative users information can be updated without using the transfer system by adding a new location.
- The receiving conference initiates the transfer requests and the home conference will decide to approve or deny the transfer request

The Transfer System: Requesting a Transfer

- To initiate a transfer the receiving conference will open the candidate's record
- Click on **Location Information**
- Select **Request Transfer**
- Complete the new location information
- Add notes as necessary
- Click on **Request**
- The request will now appear in the receiving conference's **Transfer Requests Outbox**

Transfer Request: Select Destination

Jurisdiction*

Conference*

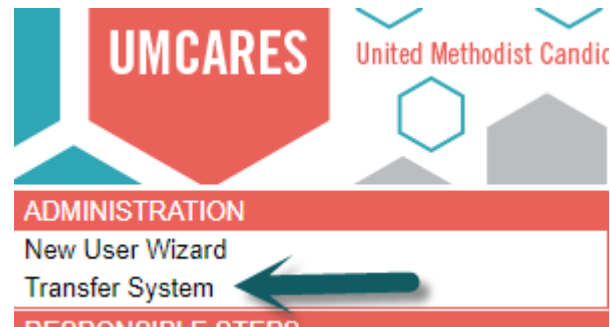
District*

Church

Notes

The Transfer System: Approving a Transfer

- To approve or deny a transfer the home conference will open the **Transfer System** from the administration menu on the home screen
- Click on the open request in the **Transfer Requests Inbox**
- Review and enter the transfer decision
- If the transfer is denied a note will be required

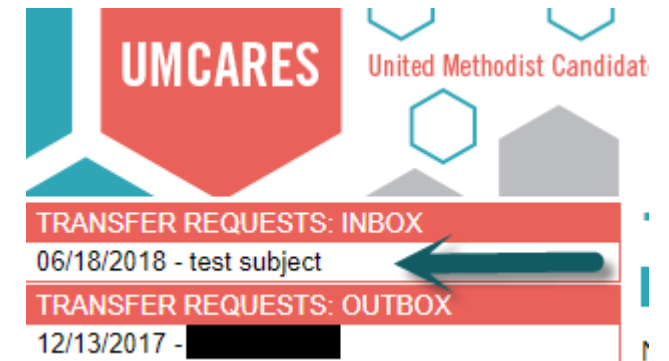


Transfer Decision

Accept Deny ←

Reason/Note (required when denied)

Submit ←





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Questions?

Contact US

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