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**
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
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
Questions?

Contact US

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