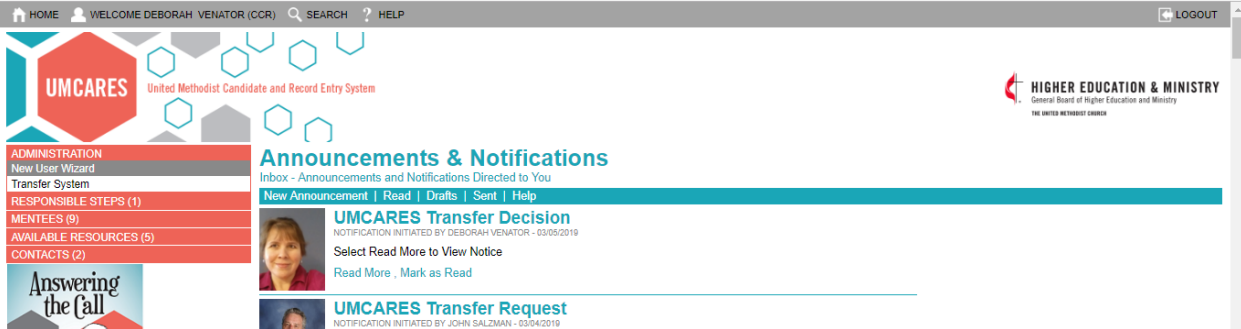


# Instructions

## DS Entering NEW Candidates into UMCARES

Log Into [www.UMCARES.org](http://www.UMCARES.org)

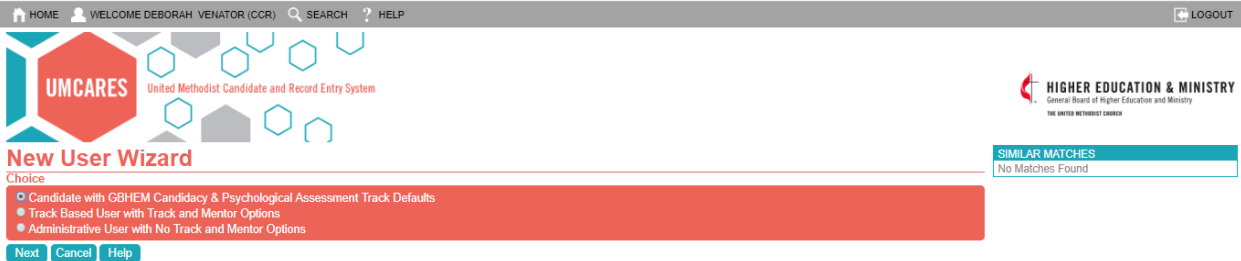
#1 - Click “new user wizard” at left on your screen (as below):



The screenshot shows the UMCARES dashboard. On the left sidebar, there is a menu with several items: ADMINISTRATION, New User Wizard, Transfer System, RESPONSIBLE STEPS (1), MENTEES (9), AVAILABLE RESOURCES (5), and CONTACTS (2). A blue arrow points to the 'New User Wizard' link. The main content area displays 'Announcements & Notifications' with two items: 'UMCARES Transfer Decision' and 'UMCARES Transfer Request'. The top navigation bar includes 'HOME', 'WELCOME DEBORAH VENATOR (CCR)', 'SEARCH', 'HELP', and 'LOGOUT'. The right side of the page features the logo for 'HIGHER EDUCATION & MINISTRY'.

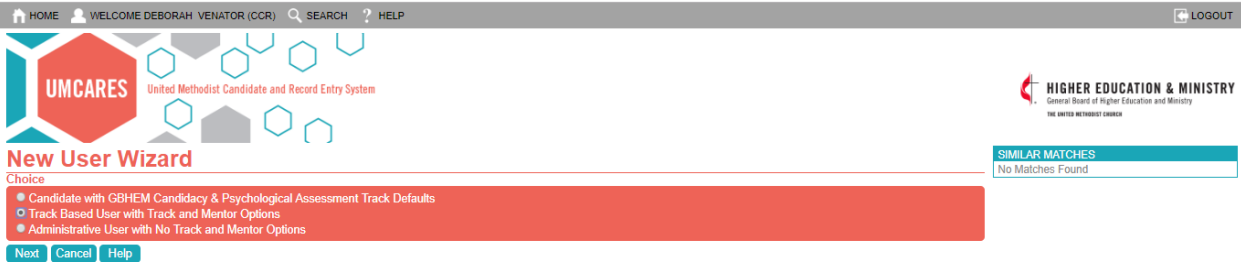
#2 - On the next screen (below)

- if candidate applying for certified candidate, select 1<sup>st</sup> option (as shown)



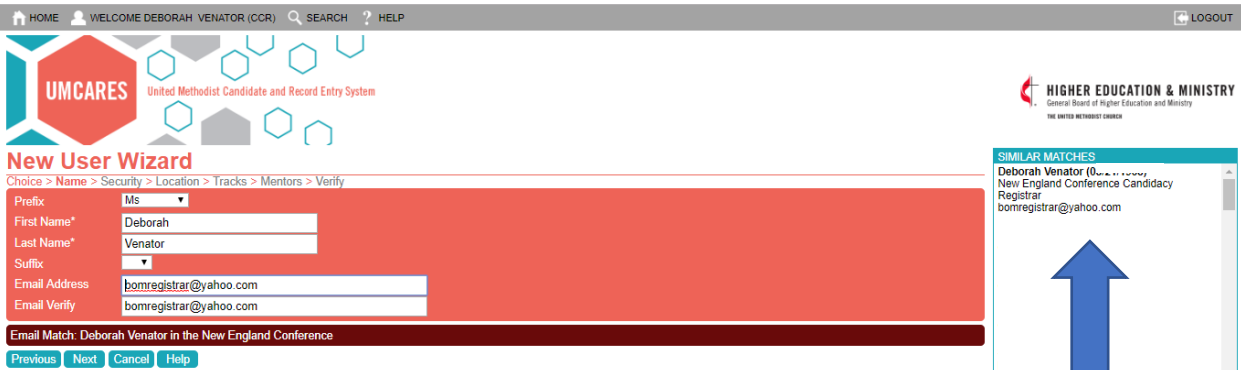
The screenshot shows the 'New User Wizard' screen. The 'Choice' section has three radio button options: 'Candidate with GBHEM Candidacy & Psychological Assessment Track Defaults' (selected), 'Track Based User with Track and Mentor Options', and 'Administrative User with No Track and Mentor Options'. A blue arrow points to the first option. The 'SIMILAR MATCHES' section on the right shows 'No Matches Found'. The bottom of the form has 'Next', 'Cancel', and 'Help' buttons.

- if candidate applying for Certified Lay Minister (CLM), select 2<sup>nd</sup> option (Track Based User...)



The screenshot shows the 'New User Wizard' screen. The 'Choice' section has three radio button options: 'Candidate with GBHEM Candidacy & Psychological Assessment Track Defaults', 'Track Based User with Track and Mentor Options' (selected), and 'Administrative User with No Track and Mentor Options'. A blue arrow points to the second option. The 'SIMILAR MATCHES' section on the right shows 'No Matches Found'. The bottom of the form has 'Next', 'Cancel', and 'Help' buttons.

#3 - Enter the candidate name and email – look at right to see if any matches come up – this helps prevent us from making a second account. This is important as they may have a history in an older system and don’t realize it matters.



The screenshot shows the 'New User Wizard' screen with the candidate details form filled out. The 'Prefix' is 'Ms', 'First Name' is 'Deborah', 'Last Name' is 'Venator', 'Email Address' is 'bomregistrar@yahoo.com', and 'Email Verify' is 'bomregistrar@yahoo.com'. A blue arrow points to the 'Email Match' warning: 'Email Match: Deborah Venator in the New England Conference'. The 'SIMILAR MATCHES' section on the right shows a match: 'Deborah Venator (bomregistrar@yahoo.com) New England Conference Candidacy Registrar bomregistrar@yahoo.com'. A blue arrow points to this match. The bottom of the form has 'Previous', 'Next', 'Cancel', and 'Help' buttons.

#### #4 – If CLM candidate, will see screen below

Note: if applying for Certified Candidate, you'll skip this step and UMCARES will jump to #5

Select "Individual" for access level and candidate for title role (As below)

The screenshot shows the UMCARES New User Wizard interface. At the top, there is a navigation bar with 'HOME', 'WELCOME DEBORAH VENATOR (CCR)', 'SEARCH', and 'HELP'. Below the navigation bar is the UMCARES logo and the text 'United Methodist Candidate and Record Entry System'. The main heading is 'New User Wizard'. Below the heading is a breadcrumb trail: 'Choice > Name > Security > Location > Tracks > Mentors > Verify'. The form contains two dropdown menus: 'Access Level\*' set to 'Individual' and 'Title Role\*' set to 'Candidate (GBHEM)'. At the bottom of the form are four buttons: 'Previous', 'Next', 'Cancel', and 'Help'.

#### #5 – On the next screen, make sure the candidate's location info is correct and select church.

The screenshot shows the UMCARES New User Wizard interface. At the top, there is a navigation bar with 'HOME', 'WELCOME DEBORAH VENATOR (CCR)', 'SEARCH', and 'HELP'. Below the navigation bar is the UMCARES logo and the text 'United Methodist Candidate and Record Entry System'. The main heading is 'New User Wizard'. Below the heading is a breadcrumb trail: 'Choice > Name > Security > Location > Tracks > Mentors > Verify'. The form contains four dropdown menus: 'Jurisdiction\*' set to 'Northeastern', 'Conference\*' set to 'New England', 'District' set to 'New Hampshire', and 'Church' set to 'Alexandria (Alexandria)'. At the bottom of the form are four buttons: 'Previous', 'Next', 'Cancel', and 'Help'.

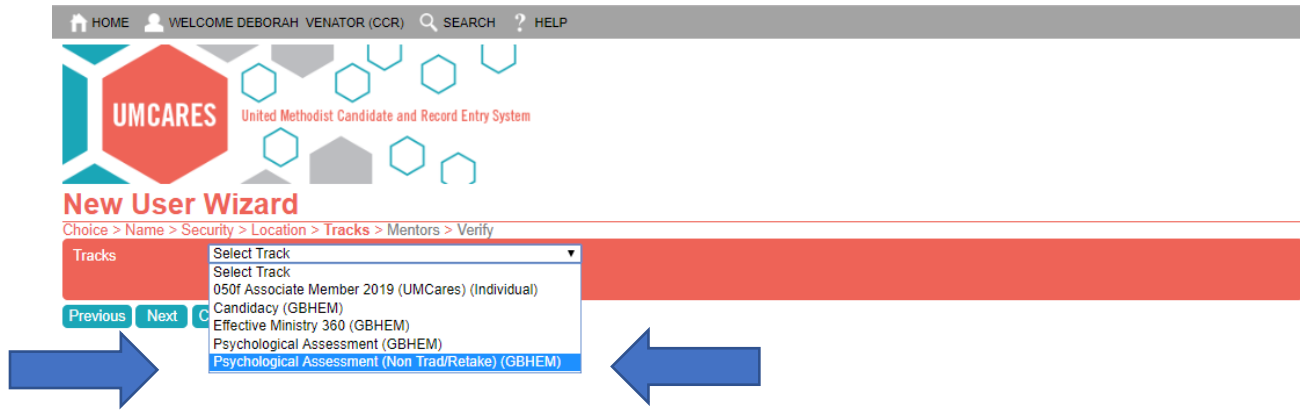
#### #6 – Checking or selecting tracks (below—2 options)

- OPTION 1: If applying for certified candidacy, you should see what is shown below:  
If you do not, you selected a previous step wrong.  
There is nothing to do here—they have already added 1 candidacy track and 1 psych track (based on your previous selection), you don't need to add any other tracks and also don't delete them.

The screenshot shows the UMCARES New User Wizard interface. At the top, there is a navigation bar with 'HOME', 'WELCOME DEBORAH VENATOR (CCR)', 'SEARCH', and 'HELP'. Below the navigation bar is the UMCARES logo and the text 'United Methodist Candidate and Record Entry System'. The main heading is 'New User Wizard'. Below the heading is a breadcrumb trail: 'Choice > Name > Location > Tracks > Mentors > Verify'. The form contains a dropdown menu for 'Tracks' set to 'Select Track'. Below the dropdown menu are four buttons: 'Another Track', 'Delete Candidacy', 'Delete Psychological Assessment', and 'Help'. At the bottom of the form are four buttons: 'Previous', 'Next', 'Cancel', and 'Help'.

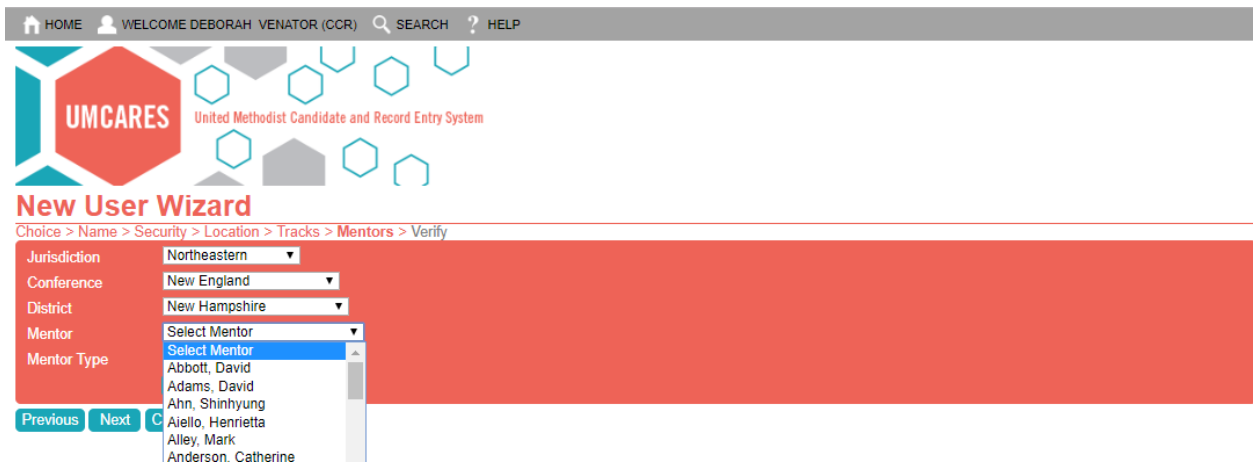
#6 continued:

- **OPTION 2:** If applying for CLM, you should see no tracks added yet on this step and when you pull down the menu of choices, you should select the one that says “Psychological Assessment NON TRAD/RETAKE”:



### #7 – Select Mentor

NOTE: if mentor is not on list, it is either because they do not have a UMCARES account or because they have not registered their account. Just send these to [bomregistrar@yahoo.com](mailto:bomregistrar@yahoo.com) and Deborah will take care of that.



**#8 – Select Mentor Type** – for most candidates choose “home”; if one of our folks are acting just for a temporary purpose (but not really the person’s mentor) select “courtesy”; and, if this is a mentoring group, select group.



**#9 Check this summary and then select your choice for the next action along the bottom in teal “buttons”-**

I recommend “save and go to profile screen” so that the address and phone info can be added. But you may choose to enter another candidate so in that case you would select “save and return to home screen”

As long as you save, the person will be entered.

AND, as long as the box to the right of the words “invite user on save” (see arrows), the candidate will get an email invitation to UMCARES.

If the invited candidate does not register within 30 days, the invitation will expire.

Send any problems or questions to me bomregistrar@yahoo.com

HOME WELCOME DEBORAH VENATOR (CCR) SEARCH ? HELP

**UMCARES** United Methodist Candidate and Record Entry System

### New User Wizard

Choice > Name > Security > Location > Tracks > Mentors > Verify

Name: Ms Deborah Venator  
Email: debvenator@yahoo.com  
Location: Northeastern, New England, New Hampshire  
Church: Alexandria  
Main Role: Candidate  
Access Level: Individual  
Track(s) Selected: Psychological Assessment (Non Trad/Retake) (GBHEM)  
Mentor(s) Selected: Peter Hey (Home)

Invite User On Save  User Invitation (System) ▼

Previous Save and Return to Home Screen Save and Add Another User Save and Go to Profile Screen Cancel Help