

## Online Document Sharing - UMCAREsplus

*UMCAREsplus (United Methodist Candidacy and Record Entry System)* is a secure, web-based file management software program developed by The United Methodist Church. UMCAREs is a document sharing tool for active candidates, local pastors, and certified lay ministers as they relate to the DCOM. Required documents, written materials, and forms for each conference relationship are detailed in UMCAREs. These documents, written materials, and forms are uploaded into a candidate's account for access and review by all members of the DCOM prior to action being taken. **No paper candidate files are maintained by the DCOM, as all documentation should be uploaded to UMCAREs.**

Each user is responsible for keeping their profile up to date with current contact information. The DCOM Registrar is responsible for creating and maintaining the candidate, local pastor, and certified lay minister accounts on their district, and for placing each candidate/local pastor on the appropriate "track". The Center for Clergy Excellence are responsible for creating and managing accounts for district committee members and updating the conference relationship status according to the action reported by the DCOM.

### **Instructions for DCOM Members using UMCAREsplus:**

*(These and other instructions can be found at [www.vaumc.org/UMCAREsplus](http://www.vaumc.org/UMCAREsplus)).*

#### **Step 1:**

DCOM Chair notifies DCOM regarding which candidates are to be interviewed at the next meeting.

#### **Step 2:**

Login to UMCAREs at <http://www.umcares.org/> using your email address.

#### **Step 3:**

From the top menu, click on "Search"; if needed, use the advanced search function to find candidates by track or other criteria. Note that the system searches the entire denomination, although you will only have access to those users located on your district.

#### **Step 4:**

Click on the "Track" button for the candidate or local pastor

#### **Step 5:**

Click on the track related to the interview scheduled

#### **Step 6:**

Click on a bold step title to reveal and then open the files that you want to review; DCOM members have access to all documents for every candidate and local pastor related to the district. Candidates have access to the documents attached to a step that they have access to view - are responsible for. Contact [ClergyExcellence@vaumc.org](mailto:ClergyExcellence@vaumc.org) if you have questions or concerns about file security.

#### **Step 7:**

To return to the track and list of steps to view the next document, click "Track" in the menu bar under the candidate's name; to exit and return to the full list of all tracks for the candidate, click "Profile".



## Context, Navigation, FAQs and Assistance

### Context

In 2014 the Virginia Conference digitized all DCOM files and launched an online candidate and local pastor file sharing system called *Pathways to Ministry*. Soon after, in 2015, the General Board of Higher Education and Ministry updated its website for registering candidates a new platform called UMCARES. The long term plan to merge these systems (*Pathways to Ministry* and UMCARES) into one UMCARESplus was realized by the Virginia Conference in July 2018. Candidates and district superintendents no longer have multiple logins and multiple systems to manage. All correspondence, notes, documents, forms, and materials related to a candidate or local pastor is contained in one system and accessible without driving to the district office.

Just as with Pathways, the UMCARES system was developed and is administered by GCFA and GBHEM, for conferences large and small. There are some elements we can change and many we cannot. Please don't hesitate to offer recommendations and we will forward those on for consideration in future patch updates.

### Navigation

After searching for and selecting a candidate account, use the left navigation panel to shift between different panels of information. When viewing the list of tracks associated with a candidate account, any track name ending with "(Pathways)" is an archived track which migrated - along with the associated documents - from the former system. These tracks are for reference only and can no longer be worked.

Each track is a series of steps to be completed by the candidate, district office, mentor, or DCOM Registrar. The person "responsible" for that step is listed under the bold step title. A candidate can only open a step, or see documents attached to a step, that they are responsible for. DCOM Members have access to open or view files on all steps that are not assigned to the Conference Registrar.

When a step is marked complete or marked as not required, an automated email is triggered to the person responsible for the next step in the track (which may be a step above the one just completed). This helps to keep the candidate moving along in the process, or nudges a mentor or district superintendent that it is time to complete a report or recommendation.

To return to the track and list of steps, click "Track" in the menu bar under the candidate's name; to exit and return to the full list of all tracks for the candidate, click "Profile". Click "Search" in the primary menu bar to return to the most recent search results or to begin a new search.

### FAQs and Assistance

Within UMCARES, on the left menu panel, there is a section called "Available Resources." Users will find materials there relevant to your role within the system. As training materials are developed, they will be added under your Available Resources and to the [www.vaumc.org/UMCARESplus](http://www.vaumc.org/UMCARESplus) webpage. Contact the Center for [ClergyExcellence@vaumc.org](mailto:ClergyExcellence@vaumc.org) if you have specific technical questions or feedback.

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### Searching for a user by name or for a group of users

#### **How do I search for a user?**

##### Simple Search

Clicking Search on the Main Menu bar opens the Simple Search feature, allowing the user to search all users in the denomination by name for a specific person. A user might not be able to access all of the returned results due to security settings.

1. Click the Search hyperlink on the Main Menu bar.
2. Enter the person's name, then click Search.  
The fewer characters you enter the more results are returned. Searching for “Mar Sm” will return Mary Smith as well as Martin Smoot. Searching for “Thomas Coke” will not return Tom Coke.
3. Review the search results.

##### What do the colors mean?

A gray shaded record means the user is inactive.

An orange shaded record means the user is active but has not yet registered their account.

A blue/teal shaded record means that the user is both active and registered.

##### Advanced Personal Search

Advanced Search allows the user to search UMCARES using specific information, assigned tracks, or a user's role in the system. The results can also be filtered by conference, role, or track.

1. Click Search on the gray Main Menu bar.
2. Click Advanced.
3. Select the tab for track or role.
4. Select the role you wish to view from the drop-down menu.
5. Select the conference and district.
6. Click Search.

#### **How do I access a user's track and list of steps?**

1. From the search results, click Tracks on the desired person's row.
2. Click the Open button on the desired track row.

#### **How do I mark a step as complete?**

1. Click the Open button on the desired track row.
2. When the Tasks page opens, scroll down to the step and click the bold step title.
3. Click Sign to mark that you agree that the instructions for the step have been completed.
4. Click Profile to exit the track.

#### **OR**

1. Select a step from the Responsible Steps side panel on the Home page.
2. Click Sign to mark that you agree that the instructions for the step have been completed.
3. Click Profile to exit the track.