

**Step-by-Step Instructions for
Entering Information into
The Shelby System
(Shelby v5.11)**



Invite People to Christ

Christ's mission of evangelism



Abolish Poverty, End Suffering

Christ's mission of compassion



Pursue Peace on Earth

Christ's mission of justice and peacemaking



Develop Disciples to Serve

Equip individuals for Christ's mission



Experience Congregations in Mission

Equip congregations for Christ's mission

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Introduction to Shelby

Shelby Systems, Inc. provides online support for data management of congregational activities: Membership Information, Contribution Activity, and Financial Reporting and Recording. These are accomplished through the following processes, described in the menu selections in Shelby. The software is licensed to the church through its supplier, Shelby Systems, Inc.

CHURCH – Maintains all people and member information through use of the following modules:

- **Membership** – Contains names, addresses, telephone numbers, and other demographic information related to individuals participating in the life of the congregation. It also maintains information related to specific leadership roles and sacramental life events for each person.
- **Contributions** – This module maintains all detail records related to contributions made by individuals to the congregation.
- **Registrations** – This module can be used for registration of individuals to retreats, reunions, and other activities where separate fees and registration lists are needed.

FINANCIAL – Maintains all official financial records of the congregation. While many modules are provided, the primary ones used by a congregation are:

- **General Ledger** – This module maintains the chart of accounts, operating/congregational ministries income and expense budgets, financial reports and controls the posting of transactions.
- **Check Express** – Checks written to pay the bills of the congregation are entered here and then posted to the General Ledger. You would also use this module to enter deposits from other income such as rent, interest, etc.
- **Bank Reconciliation** – Provides an easy and automated way to reconcile all deposits and withdrawals from your individual bank accounts.

Because of the integrated nature of Shelby, many individual pieces of information need only be entered once and are then available to be used repeatedly. For instance, when a person's name and address are entered into Shelby, the congregation can use this information for mailing lists, directories, etc. In addition, Shelby is used when contributions are made, contributor statements are printed, or when reimbursing individuals for expenses paid on behalf of the church. Using Shelby in this way ensures that we have the most up-to-date information available.

The following information provides the detailed steps to be performed in Shelby. This is intended to be a supplement to the standard Shelby Help, which is available online within the system.

General Instructions for Shelby

There are several basic functions within Shelby with which you should become familiar. Please review the information in this section before you begin using the program.

This section covers:

- Access and Security
- Change Password
- Using Online Help/Documentation
- Vocabulary Terms for Navigating Electronically
- Icons/Keyboard Equivalence

Access and Security

To be granted access to Shelby you must first complete the **Shelby Access Request** form. This form is available at: <https://www.formrouter.net/forms@COFC/ShelbyOnlineAccessRequest.html>,

This is an on-line request form. Simply fill it out on-line and submit. You will receive an e-mail with your

1. Citrix user name and password
2. Shelby user name and password.

Also included are instructions for logging onto Citrix and Shelby. Remember, the user names and passwords are **case sensitive**.

The Community of Christ is licensed to use the church-integrated software package developed and maintained by Shelby Systems, Inc.

Open your Internet Browser and copy this link into your browser.

<https://citrix2.cofchrist.org/Citrix/Remote/site/default.aspx>

You may want to add this to your favorites.

Log in using your Citrix Login and Password. Remember they are case sensitive.



Move the arrow cursor to the Shelby icon and double click the mouse button. The **Shelby Systems** login screen will appear.



Type in your **Shelby Name** assigned by Information Technology. The Shelby Name and Shelby Password are case sensitive. Be sure to type them exactly as they appear in the e-mail you receive from IT.



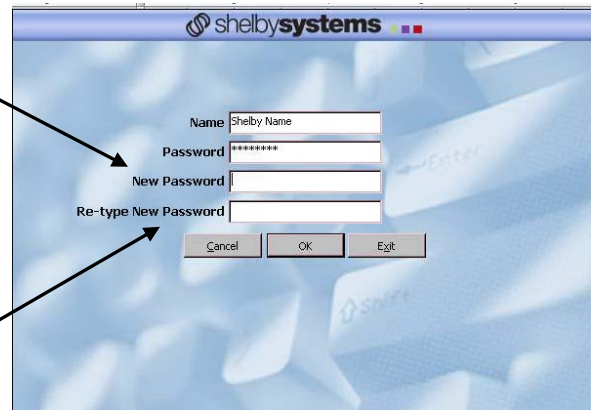
After entering your Shelby Name, type in the **Shelby Password** you have been assigned.

Note: It is very important that you keep your login name and password confidential. The information you are accessing in your database is considered confidential and should not be shared with unauthorized people. If at some later point you choose to change the Password, you may do so by using the following steps.

Changing Your Password

1. Click on the **Password** button on the login screen.

2. Type in your **New Password** in the box provided. This new password should not consist of more than ten letters or numbers.

A screenshot of a web-based password change dialog box for Shelby Systems. The dialog box has a blue header with the 'shelbysystems' logo. It contains four text input fields: 'Name' (pre-filled with 'Shelby Name'), 'Password' (masked with asterisks), 'New Password', and 'Re-type New Password'. Below the fields are three buttons: 'Cancel', 'OK', and 'Exit'. Two black arrows point from the text in step 2 to the 'New Password' and 'Re-type New Password' fields.

3. Retype **New Password** exactly as above.
4. Click **OK** to create new password.

NOTE: You can only change your Shelby password. You cannot change your Citrix password.

Using Online Help/Documentation

Online Help is available for each of the Shelby Version 5 applications. Online Documentation is also available (in Adobe Acrobat PDF format) to view and/or print.

How to Access Help Using F1

1. Press **F1** from any screen. **Help** displays for the current topic in focus.
2. Click the **underlined** subtopic for the information desired.
3. Some screens may show contents, where you can click on the desired topic. **Index** or **Search** may also be used to identify the topic for which you may be seeking help.

How to Access Help from the Menu Bar

1. Select **Help** from the menu bar.
2. Choose Table of Contents or Topic Help.

- **Table of Contents** takes you to the **Help Contents** screen, allowing you to choose the topic of your choice.
- **Topic Help** displays **Help** for the current topic in focus.

How to Search for a Help Topic

1. Select **Search** from the **Help** tool bar.
2. Follow the prompts on the screen.

How to Print Help

Help may be printed once you have accessed a help file by clicking the **Print** button located on the tool bar. Using the **Print** button only prints the **current topic**. Refer to **How to Access Online Documentation** to print an entire document.

1. Choose the **Help Topic** of your choice.
2. Select **File**, and then **Print Topic...** from the **Help** menu bar.

Or

1. Choose the **Help Topic** of your choice.
2. Click the **Print** button located on the tool bar.
3. Click **OK** to continue.

⚠ Note: If your printer cannot be configured to print with the Citrix Server, see the Appendix for printing instructions to a PDF file

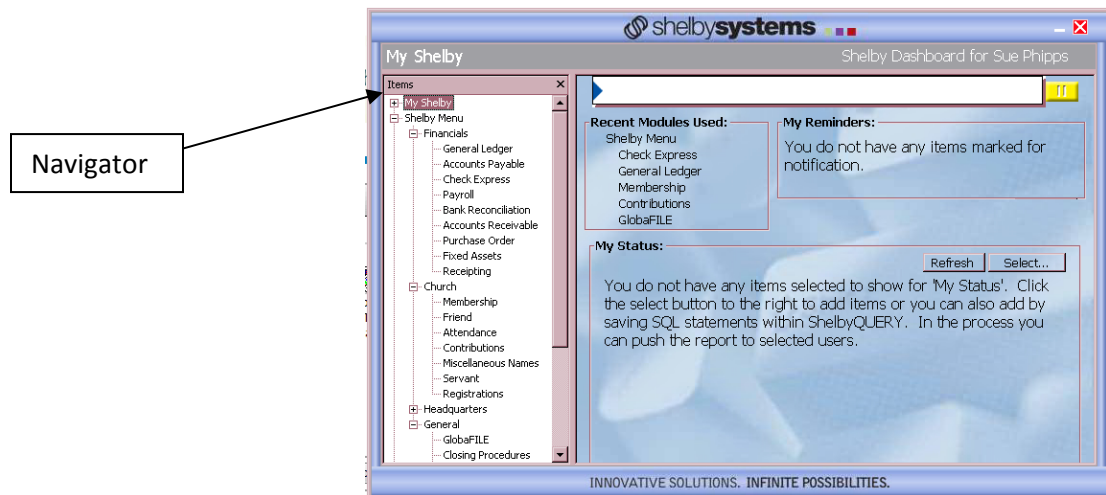
How to Exit Help

1. Select **File**, then **Exit...** from the **Help** menu bar.

Vocabulary Terms for Navigating Electronically

Ministry Information System – a term sometimes used by Community of Christ to describe the Shelby Software.

Dashboard – the following screen shows the main Shelby Systems menu.

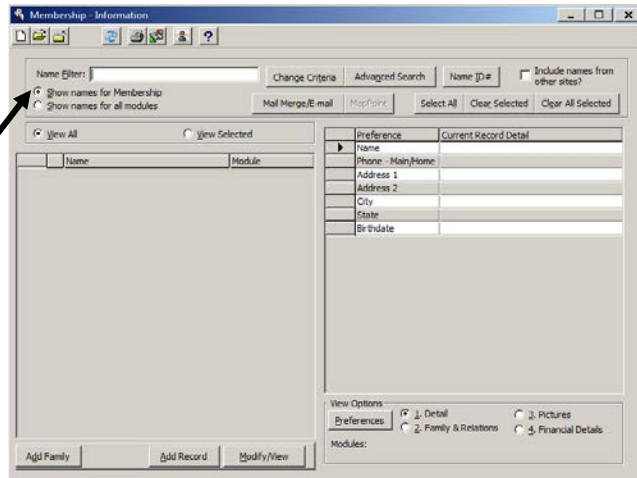


Navigator – Shows all the modules and enables you to move from one to another without closing screens. The Navigator is in Membership, GlobaFile, Accounts Payable, Accounts Receivable, and Payroll.

Items under **Church** are modules available for most local congregational uses.

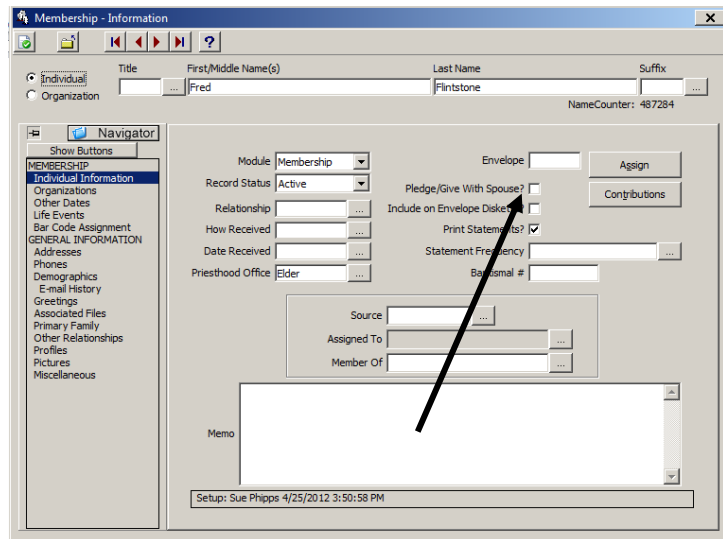
Home Base – The following is an example of the Home Base screen. Generally, the Home Base screen is the first screen when you enter a specific module. It also states it as Home Base on the title bar.




















Radio Button – these are radio buttons. Clicking on one of these buttons turns the other buttons off.

Check Boxes – some screens will have white boxes that you can click to make choices from various options available to that screen. Some examples are shown below.



Icons/Keyboard Equivalents

Throughout the programs you may use keyboard commands or use the mouse to perform various functions. A brief description of each is described below.

<u>Icon</u>	<u>Keyboard</u>	<u>Meaning</u>
	Ctrl + [N]	New is used to add a new item.
	Ctrl + [O]	Open is used to read or modify an existing item.
	F12	Save and Close is used to save changes and close the screen.
	F3	Close is normally used to close or leave a screen.
	Ctrl + [S]	Save is used to store changes.
		Delete is used to remove an item.
	Alt + [R]	Print is used to print a report or list.
	Ctrl + [X]	Cut is used to cut information and use it in other areas via the clipboard.
	Ctrl + [C]	Copy is used to copy information and use it in other areas via the clipboard.
	Ctrl + [V]	Paste is used to move information from the clipboard into another area or application.
	Ctrl + [Z]	Undo is used to back up a step when wanting to reverse the last action processed.
	Ctrl + [F7]	First is used to move to the first of a series of records
	F7	Previous is used to move to the previous line or record of a series.
	F8	Next is used to move to the next of a series of lines or records.
	Ctrl + [F8]	Last is used to move to the last of a series of lines or records.



Graph

Used to display a graph that can be printed.



Memo

Used to add or view a memo attached to a record.



F1

Help is used to display help for the current topic in focus. You may then choose Contents or use Search to go to another topic.

Alt + [F]

File is used to access the File pull-down menu.

Alt + [E]

Edit is used to access the Edit pull-down menu.

Alt + [c]

Records is used to access the Records pull-down menu on the Home Base screen.

Alt + [R]

Reports is used to access the Reports pull-down menu.

Alt + [y]

Utility is used to access the Utility pull-down menu on the Home Base screen.

Help is used to access the Help pull-down menu.

Pick is used to choose an item from available selections.

F5

Refresh is used to restore information on a maintenance screen back to the way it was as long as you have not saved the record.

Alt + [?]

Use **Alt + [the underlined character]** to access items from the Menu Bar or simply click with the mouse.

[+]

Press **+** (**plus**) to advance the cursor to the next field or change to the next focus point. This works the same as tab in most cases.

Tab	Press Tab to advance the cursor to the next field or change to the next focus point.
Shift + Tab	Press Shift + Tab to move the cursor to the previous field or to the previous focus point.
Arrows	(Left/right) are used to move within a field.
Arrows	(Up/down) are used to move up or down on a scrolling list.
Insert	Used to insert characters within a field.
Delete	Used to delete characters within a field.
Home	Used to position the cursor at the beginning of a field.
End	Used to position the cursor at the end of a field.
Page Up	Used to page up in a scrolling list.
Page Down	Used to page down in a scrolling list.

Navigator

About Navigator

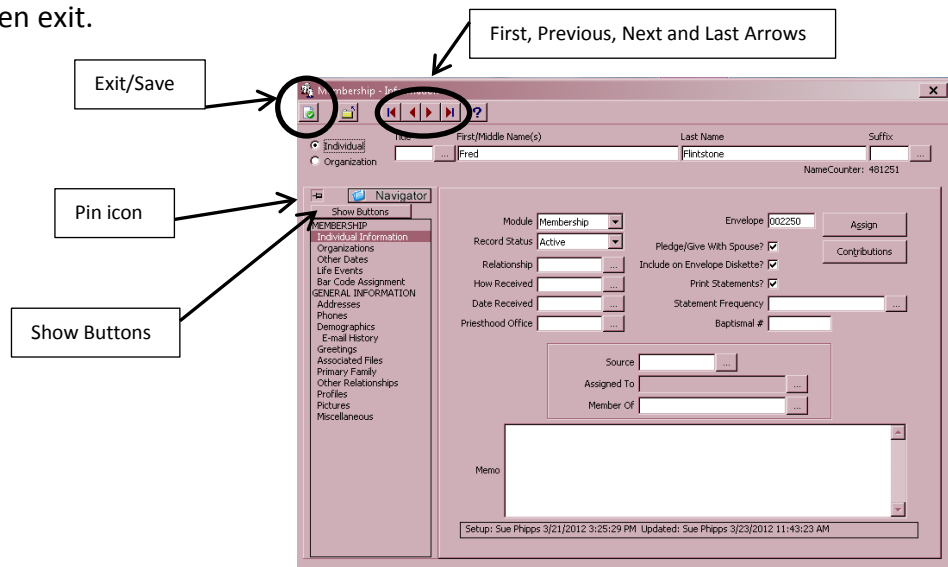
A slide-out menu is available in several Shelby modules to make navigation faster and easier to use. This toolbar, dubbed the Navigator, permits you to quickly access personal information about an individual without flipping through screens. For example, you can access Membership and General Information right from the Membership Information screen.

The **Navigator** allows you to find useful information from other Shelby modules without leaving the module you are currently working in. By default, the Navigator will display the information from the module that you are viewing. The other modules available to view are listed at the bottom of the sidebar. Just click the option that you would like to view in the grid, and that function will display on the right-hand side of the screen. Click one of the buttons at the bottom of the sidebar to see those modules display on the grid. You can alternately click the **Navigator** button to access a pop-up menu with the same module choices. In addition, a list of short cut key combinations will display. If you scroll through the item names on one module on the grid, the Navigator will automatically jump to the next module.

Click the **Show All** button to display all of the modules and options available on the grid. Click **Show Buttons** to revert to the default view.

Click the **Pin** icon (in the top left corner of the sidebar to fix the Navigator into a permanent position. Click it again so that the Navigator slides into position when the cursor is placed over it.

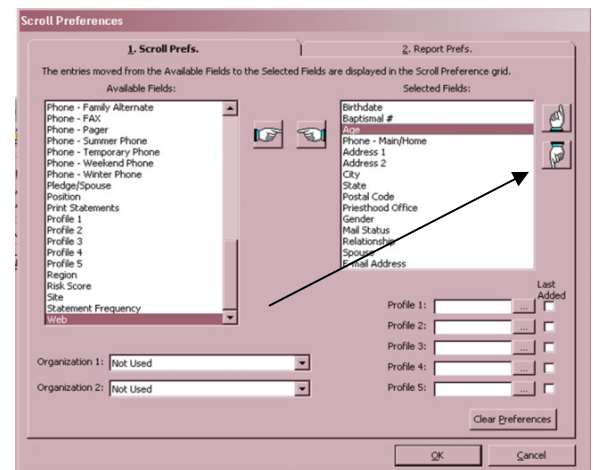
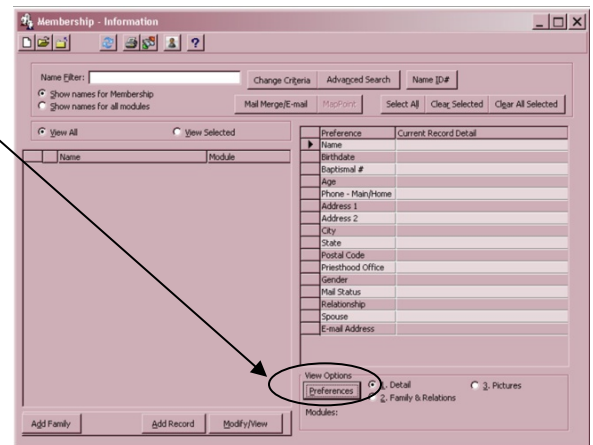
Notice the buttons at the top of the screen. Click the arrow buttons to see the **First, Previous, Next, and Last** records for the topic that you are currently viewing. Click the **Close** icon to exit without saving (you will be prompted to save changes before exiting) or click the **Exit/Save** icon to save changes and then exit.



How to Set Up Your Preferences

To set up or change your preferences: Go to the screen that says “Membership- Information”. At the bottom of the screen is a button that says **Preferences**.

1. Click on the Preferences button and you will get a box that says **Scroll Preferences**.
2. The left side has a list of preferences you can choose from. The fields on the right are what you have chosen. Look over the list on the right. Is there anything there that you don't want showing? If so, double click on that item, and it will move back to the left field.
3. Using the finger that is pointing up or down, you can move your selections around to the order that works best for you.
4. When you have made your selections and moved them into the order you like, click on “OK”.



Note: A good selection to have showing is the Mail Status, as it will show whether an address is deliverable or not. (Please refer to the section on address changes for information regarding mail status).

How to Enter a Baby Blessing

Before you begin entering the information into Shelby, **edit the report**. Check the report for required information, including: Full name (first/middle last), birth date, place of birth, parents' names (when entering a child), address, **full name of officiants (first/middle/last)**, date and place of blessing. If you are missing any required information, **do not** add to Shelby.

1. Before you begin to enter a baby blessing, first check to see if the child has already been entered as a friend or miscellaneous name. If not, you are ready to enter them into Shelby. If the child is already in Shelby and attached to at least one parent, you will use that existing record to enter the blessing (open child's record and continue to Step 7). If they are not already in Shelby, proceed to step 2.
2. If either of the parents are a member, pull up the Head of House parent name. If both parents are non-members, at least one parent will need to be added to Shelby as a "friend" so that the child can be attached to them. The parent must be added before the child.
3. **To add a non-member parent:**

- a. First check to see if the person has already been entered as a friend or miscellaneous name. If not, you are ready to enter. If yes, you will use that record to attach the child to, and you do not need to add them again (proceed to step 4).
- b. Go to the tool bar and click the "New" tab (first item on the toolbar and looks like a white sheet of paper).
- c. You will get a message that says, "Is this new person to be added to the family of..." If yes, click "yes." If no, click "no."
- d. Enter the person's name in the spaces at the top of the screen (**do not add title**).
- e. Make sure the dot beside "individual" is filled in (**not organization**).

4. On the left side of the screen, you will see a list of criteria. By clicking "show all" or "show buttons," you can decide which criteria you want showing. Click "show all" to see the headings that were once shown on tabs (life events, addresses, phones, etc.)

- Click once on "Individual Information" on the left side of the screen. This screen should read:

- Module: Friend
- Record Status: Active
- Relationship: Active

Membership - Information

Individual Organization Title First/Middle Name(s) Last Name Suffix
Christina Leigh Duke NameCounter: 18063

Navigator
Show Buttons
MEMBERSHIP
Organizations
Other Dates
Life Events
GENERAL INFORMATION
Addresses
Phones
Demographics
E-mail History
Associated Files
Primary Family
Profiles
Pictures
Miscellaneous

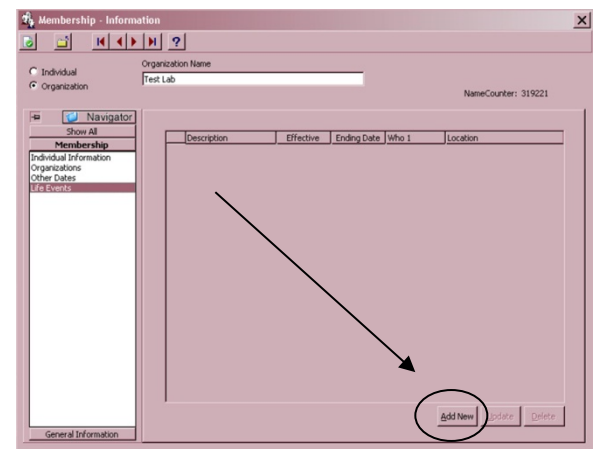
Module: Membership Envelope Assign
Record Status: Active Pledge/Give With Spouse?
Relationship: Active Include on Envelope Diskette?
How Received: Transfer Print Statements?
Date Received: 11/11/1997 Statement Frequency
Presthood Office Baptismal #: 471954

Source Assigned To Member Of
Previous Branch: 990 Parent Memberships: Both Members
Memo

Setup: Conversion 11/14/1997 Updated: Sue Sloan 2/14/2011 4:33:36 PM

- How Received: Leave blank
 - Date Received: Date of Entry
 - Click once on “Addresses” on the left side of the screen, and then double click on the space beside “Home/Main Address.” Enter address.
 - Click once on “Phones” on the left side of the screen, and then double click on the space beside “Main/Home.” Enter the phone number. If there are other phone numbers (cell, business, etc.) add those to the respective fields.
 - Click once on “Demographics” on the left side of the screen. Add parent’s birth date, gender, and marital status. Change salutation, if needed. For example, if the person’s name is William, but they go by Bill, you would enter “William” as the First Name and “Bill” as the salutation. You may also enter an email address in this section, if known.
 - Click once on “Primary Family” on the left side of the screen. Make sure the parent is listed as “Head of House.” (If only one parent is listed, the system will automatically put each added entry in as a spouse.)
 - Click once on “Miscellaneous” on the left side of the screen. If this is a new entry and not connected to someone already in the system, you will need to add the last four digits of the congregation they are attending. If this is a new entry, and they are connected to someone, this should already be entered. To search for the congregation number, click on the button with three dots beside “Site ID#.” A new box will come up. Type in part or the entire congregation name and press enter. Then choose the correct congregation from the list and click “ok.”
 - a. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.
5. Search for the Head of House parent name in the Name Filter. Highlight the name by clicking on it once. Go to the toolbar and click the “new” tab (the first item on the toolbar and looks like a white sheet of paper).
 6. You will get a message that says, “Is this new person to be added to the family of...” Click “Yes.”
 7. Enter the child’s name in the spaces at the top of the screen (do not add title).
 8. Make sure the dot beside “individual” is filled in (**not** organization).
 9. On the left side of the screen, you will see a list of criteria.
 - a. Click once on “Individual Information” on the left side of the screen. This screen should read:
 - Module: Friend
 - Record Status: Active

- Relationship: Active
 - How Received: Baby Blessing
 - Date Received: Date the blessing took place
- b. Click once on “Addresses” on the left side of the screen, and then double click on the space beside “Home/Main Address.” Enter address.
 - c. Click once on “Phones” on the left side of the screen, and then double click on the space beside “Main/Home.” Enter the phone number. If there are other phone numbers (cell, business, etc.) add those to the respective fields.
 - d. Click once on “Demographics” on the left side of the screen. Add child’s birth date, gender, and marital status. Change salutation, if needed. For example, if the child’s name is William, but they go by Bill, you would enter “William” as the First Name and “Bill” as the salutation. You may also enter an email address in this section, if known.
 - e. Click once on “Primary Family” on the left side of the screen. Make sure the child is listed as “Child.” (If only one parent is listed, the system will automatically put each added entry in as a spouse. Make sure you change this to child as needed.) If child has a different last name, check the box “Spouse or child with different last name.”
 - f. Click once on “Miscellaneous” on the left side of the screen. If this is a new entry and not connected to someone already in the system, you will need to add the last four digits of the congregation they are attending. If this is a new entry, and they are connected to someone, this should already be entered. To search for the congregation number, click on the button with three dots beside “Site ID#.” A new box will come up. Type in part or all of the congregation name and press enter. Then choose the correct congregation from the list and click “ok.”
 - g. Click once on “Life Events” on the left side of the screen. Click the “Add New” button at the bottom right of the screen. This will bring up the data entry screen to enter life events. At the top is a small box that will say “Description” and will have “Baby Blessing” already filled in. Add the blessing information:
 - Effective Date: Date of Blessing
 - Officiant: Enter the **full name (first/middle/last)**. Note: make sure the officiant holds the proper Priesthood office. If an officiant from outside of your area has participated, you can call Membership Records to verify the Priesthood



office held by that person. (Do not check “Use GlobaFILE”. When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)

- Location: City, State/Province where the blessing took place. Use the two digit state/province abbreviation. For example: Independence, MO or Chatham, ON.
- Congregation Enrolled: Enter the official name of the congregation.
- In the “notes” section at the bottom, enter the information in the following format:
 - Birthplace: City, two digit state/province abbreviation
 - Father: Full name
 - Mother: Full name (Maiden Name)
- Click “ok” to exit and save.

h. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.

How to Enter a Baptism and Confirmation

Before you begin entering the information into Shelby, **edit the report**. This means checking the report for required information. Required information includes: Full name (first/middle/last), birth dates, place of birth, parents' names (when entering a child), address, full name of officiants, date and place of baptism and confirmation. If you are missing information, **do not** add baptismal information to Shelby.

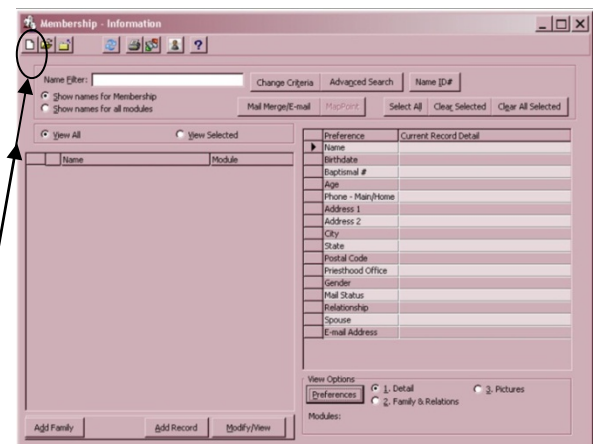
To enter a Child or Spouse

1. A child must be 8 years old before being baptized. The system will not let you enter the baptism if they are not yet 8, even if it is only by a few days. Before you begin to enter a baptism, first check to see if the child/spouse has already been entered as a friend or miscellaneous name. If yes, continue to step 7 to enter the baptism. If they are not in Shelby, go to step 2.
2. If either of the parents/spouse is a member, pull up the Head of House parent/spouse name and continue to step 3. If entering a child and both parents are non-members, at least one parent will need to be added to Shelby as a "friend" so that the child can be attached to them.

To add a non-member parent:

- a. First check to see if the person has already been entered as a friend or miscellaneous name. If not, you are ready to enter. If yes, you will use that record to attach the child to, and you do not need to add them again (proceed to step 3).
 - b. Go to the tool bar and click the "New" tab (first item on the toolbar and looks like a white sheet of paper).
 - c. You will get a message that says, "Is this new person to be added to the family of..." If yes, click "yes." If no, click "no."
 - d. Enter the person's name in the spaces at the top of the screen (do not add title).
 - e. Make sure the dot beside "individual" is filled in (**not** organization).
3. On the left side of the screen, you will see a list of criteria. By clicking "show all" or "show buttons," you can decide which criteria you want showing.
 - Click once on "Individual Information" on the left side of the screen. This screen should read:

- Module: Friend
 - Record Status: Active
 - Relationship: Active
 - How Received: Leave blank
 - Date Received: Date of Entry
- Click once on “Addresses” on the left side of the screen, and then double click on the space beside “Home/Main Address.” Enter address.
 - Click once on “Phones” on the left side of the screen, and then double click on the space beside “Main/Home.” Enter the phone number. If there are other phone numbers (cell, business, etc.) add those to the respective fields.
 - Click once on “Demographics” on the left side of the screen. Add parent’s birth date, gender, and marital status. Change salutation, if needed. For example, if the person’s name is William, but they go by Bill, you would enter “William” as the First Name and “Bill” as the salutation. You may also enter an email address in this section, if known.
 - Click once on “Primary Family” on the left side of the screen. Make sure the parent is listed as “Head of House.” (If only one parent is listed, the system will automatically put each added entry in as a spouse.)
 - Click once on “Miscellaneous” on the left side of the screen. If this is a new entry and not connected to someone already in the system, you will need to add the last four digits of the congregation they are attending. If this is a new entry, and they are connected to someone, this should already be entered. To search for the congregation number, click on the button with three dots beside “Site ID#.” A new box will come up. Type in part or all of the congregation name and press enter. Then choose the correct congregation from the list and click “ok.”
 - a. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.
4. After you have pulled up the Head of House parent/spouse name, highlight the name by clicking on it once. Go to the toolbar and click on the “new” tab (the first item on the toolbar and looks like a white sheet of paper).
 5. You will get a message that says, “Is this new person to be added to the family of...” Click “Yes.”



6. Enter the child/spouse name in the spaces at the top of the screen (**do not add title**).
7. Make sure the dot beside "individual" is filled in (**not** organization).
8. On the left side of the screen, you will see a list of criteria. By clicking "show all" or "show buttons," you can decide which criteria you want showing.
 - a. Click once on "Individual Information" on the left side of the screen. This screen should read:
 - Module: Member
 - Record Status: Active
 - Relationship: Active
 - How Received: Baptism
 - Date Received: Date of Confirmation
 - **The baptismal number will be added from Headquarters**
 - b. Click once on "Addresses" on the left side of the screen, and then double click on the space beside "Home/Main Address." Enter address.
 - c. Click once on "Phones" on the left side of the screen, and then double click on the space beside "Main/Home." Enter the phone number, with area codes. If there are other phone numbers (cell, business, etc.) add those to the respective fields.
 - d. Click once on "Demographics" on the left side of the screen. Add child/spouse birth date, gender, and marital status. Change salutation, if needed. For example, if the member's name is William, but they go by Bill, you would enter "William" as the First Name and "Bill" as the salutation. You may also enter an email address in this section, if known.
 - e. Click once on "Primary Family" on the left side of the screen. If entering a child, make sure relationship says "child." (If only one parent is listed, the system will automatically put each added entry in as a spouse. Make sure you change this to child as needed.) If member has different last name, check the box "Spouse or child with different last name."
 - f. Click once on "Miscellaneous" on the left side of the screen. If this is a new entry and not connected to someone already in the system, you will need to add the last four digits of the congregation they are attending. If this is a new entry, and they are connected to someone, this should already be entered. To search for the congregation number, click on the button with three dots beside "Site ID#." A new box will come up. Type in part or the entire congregation name and press enter. Then choose the correct congregation from the list and click "ok."
 - g. Click once on "Life Events" on the left side of the screen. Click the "Add New" button at the bottom right of the screen. This will bring up the data entry screen to enter life events. At the top is a small box that will say "Description" and will

13. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.

To Enter a Baptism for a Single Adult

Search to make sure the person is not already listed in Shelby. If they are already in Shelby, pull up their record and continue to Step 5. If the person is not already in Shelby, proceed to Step 1.

1. Go to the toolbar and click the “new” tab. It is the first item on the toolbar and looks like a white sheet of paper.
2. You will get a message that says, “Is this new person to be added to the family of...” Click “No.”
3. Enter the person’s name in the spaces at the top of the screen (do not add title).
4. Make sure the dot beside “individual” is filled in (**not** organization).
5. On the left side of the screen, you will see a list of criteria. By clicking “show all” or “show buttons,” you can decide which criteria you want showing.
 - a. Click once on “Individual Information” on the left side of the screen. This screen should read:
 - Module: Member
 - Record Status: Active
 - Relationship: Active
 - How Received: Baptism
 - Date Received: Date of Confirmation
 - **The baptismal number will be added from Headquarters**
 - b. Click once on “Addresses” on the left side of the screen, and then double click on the space beside “Home/Main Address.” Enter address.
 - c. Click once on “Phones” on the left side of the screen, and then double click on the space beside “Main/Home.” Enter the phone number. If there are other phone numbers (cell, business, etc.), add those to the respective fields.
 - d. Click once on “Demographics” on the left side of the screen. Add member’s birth date, gender, and marital status. Change salutation, if needed. For example, if the member’s name is William, but they go by Bill, you would enter “William” as the First Name and “Bill” as the salutation. You may also enter an email address in this section, if known.
 - e. Click once on “Miscellaneous” on the left side of the screen. Add the last four digits of the congregation they are attending. To search for the congregation number, click on the button with three dots beside “Site ID#.” A new box will come up. Type in part or the entire congregation name, and press enter. Then choose the correct congregation from the list and click “ok.”

- f. Click once on “Life Events” on the left side of the screen. Click the “Add New” button at the bottom right of the screen. This will bring up the data entry screen to enter life events. At the top is a small box that will say “Description” and will have “Baby Blessing” already filled in. Choose “Baptism” from the drop down box. Add the baptism information:
 - Effective Date: Date of Baptism
 - Officiant: Enter the **full name (first/middle/last)**. Note: make sure the officiant holds the proper Priesthood office. If an officiant from outside of your area has participated, you can call Membership Records to verify the Priesthood office held by that person. (Do not check “Use GlobaFILE”. When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)
 - Location: City, State/Province where the baptism took place. Use the two digit state/province abbreviation. For example: Independence, MO or Chatham, ON.
 - Congregation Enrolled: Enter the official name of the congregation.
 - If the person has had a baby blessing, the following should be entered in the “notes” section of the baby blessing. If there is no baby blessing, enter the following information in the “notes” section of the baptism:
 - Birthplace: City, two digit state/province abbreviation
 - Father: Full name
 - Mother: Full name (Maiden Name)
 - g. You must click “ok” to exit out of this screen (otherwise the information will not save).
 - h. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.
6. Double click on the name that you just added. Go to “Life Events” on the left side of the screen, and click “Add New.”
 7. Choose “Confirmation” from the drop down menu.
 8. Add the following information:
 - a. Effective Date: Date of Confirmation
 - Officiant: enter the **full name (first/middle/last)**. Note: Make sure the officiant holds the proper Priesthood office. If an officiant from outside of your area has officiated, you can call Membership Records to verify the Priesthood office held by that person. (Do not check “Use GlobaFILE”. When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)

- c. Location: City, State where the confirmation took place. (Use the two digit state abbreviation. For example: Independence, MO)
 - d. Congregation enrolled: Enter the official name of the congregation.
9. Click “ok” to exit out of this screen.
 10. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.
 11. Open that same record again and click twice on “Individual Information”.
 12. Click on the down arrow next to “Module” and choose **Membership**.
 13. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.

How to Enter a Confirmation with Shared Understanding of Previous Baptism

Search to make sure the person is not already listed in Shelby. If they are already in Shelby, pull up the person’s record and proceed to Step 5. If the person is not already in Shelby, proceed with Step 1.

1. Go to the toolbar and click the “new” tab. It is the first item on the toolbar and looks like a white sheet of paper.
2. You will get a message that says, “Is this new person to be added to the family of...” If yes, click “yes.” If no, click “no.”
3. Enter the member’s name in the spaces at the top of the screen (do not add title).
4. Make sure the dot beside “individual” is filled in (**not** organization).
5. On the left side of the screen, you will see a list of criteria. By clicking “show all” or “show buttons,” you can decide which criteria you want showing.
 - a. Click once on “Individual Information” on the left side of the screen. This screen should read:
 - Module: Member
 - Record Status: Active
 - Relationship: Active
 - How Received: Baptism
 - Date Received: Date of Confirmation
 - **The baptismal number will be added from Headquarters**
 - b. Click once on “Addresses” on the left side of the screen, and then double click on the space beside “Home/Main Address.” Enter address.

- c. Click once on “Phones” on the left side of the screen, and then double click on the space beside “Main/Home.” Enter the phone number. If there are other phone numbers (cell, business, etc.) add those to the respective fields.
- d. Click once on “Demographics” on the left side of the screen. Add member’s birth date, gender, and marital status. Change salutation, if needed. For example, if the member’s name is William, but they go by Bill, you would enter “William” as the First Name and “Bill” as the salutation. You may also enter an email address in this section, if known.
- e. Click once on “Primary Family” on the left side of the screen. Adjust relationships as needed.
- f. Click once on “Miscellaneous” on the left side of the screen. If this is a new entry and not connected to someone already in the system, you will need to add the last four digits of the congregation they are attending. If this is a new entry and they are connected to someone, this should already be entered. To search for the congregation number, click on the button with three dots beside “Site ID#.” A new box will come up. Type in part or the entire congregation name and press enter. Then choose the correct congregation from the list and click “ok.”
- g. Click once on “Life Events” on the left side of the screen. Click the “Add New” button at the bottom right of the screen. This will bring up the data entry screen to enter life events. At the top is a small box that will say “Description” and will have “Baby Blessing” already filled in. Choose “Baptism” from the drop down box. Add the baptism information:
 - i. Effective Date: Date of previous Baptism (if known)
 - ii. Officiant: Enter “**other.**” **Do not** enter officiant of previous baptism in this field.
 - iii. Location: City, State/Province where the previous baptism took place (if known). Use the two digit state/province abbreviation. For example: Independence, MO or Chatham, ON.
 - iv. Congregation Enrolled: Enter the official name of the congregation.
 - v. Enter the following information in the “notes” section of the baptism:
 - o Birthplace: City, two digit state/province abbreviation
 - o Father: Full name
 - o Mother: Full name (Maiden Name)
 - o Any additional details from previous baptism (officiant, denomination)
- h. Click “ok” to exit out of this screen.
- i. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.

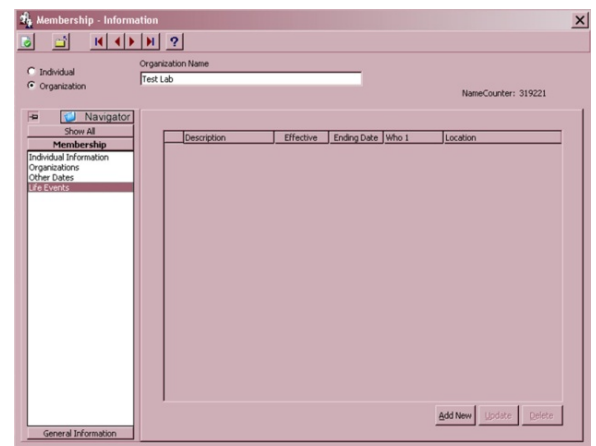
6. Double click on the name that you just added. Go to “Life Events” on the left side of the screen, and click “Add New.”
7. Choose “Confirmation” from the drop down menu.
8. Add the following information:
 - a. Effective Date: Date of Confirmation
 - b. Officiant: enter the **full name (first/middle/last)**. Note: Make sure the officiant holds the proper Priesthood office. If an officiant from outside of your area has officiated, you can call Membership Records to verify the Priesthood office held by that person. (Do not check “Use GlobaFILE”. When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)
 - c. Location: City, State where the confirmation took place. (Use the two digit state abbreviation. For example: Independence, MO
 - d. Congregation enrolled: Enter the official name of the congregation.
9. Click “ok” to exit out of this screen.
10. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.

How to Enter a Marriage

Before you begin entering the information into Shelby, **edit the report**. This means checking the report for required information. Required information includes: Full name (first/middle/last), birth date, address, the marriage date, and if the last name will be changing, what the new last name will be. Do not make the assumption that the wife will be using a different last name. Also, check to see if the husband and wife will be using a different last name. Some couples are choosing to create a new last name. If you are missing information, do not add the marriage information into Shelby until all required information is received. The place (city/state) of the marriage and who officiated are not required to enter a marriage, but should be added, if known. Marriage information is only entered if one or both are members. Also, you will need to make sure that if either has been previously married, whatever caused the dissolution of that marriage (divorce, death) has also been recorded. If this is because of a divorce or death, it must be recorded before the new marriage can be entered.

How to Enter Marriage Information When Both are Members

1. In the membership module, search for the woman's name (as it was before the marriage). Double click on her name to enter her record.
2. Click once on "Individual Information" on the left side of the screen. Where her name appears at the top of the screen, change her last name, if needed. If she is keeping her last name, leave the name as is.
3. Click once on "Addresses" on the left side of the screen. If the address needs to be changed, click on the "tools" button at the bottom of the screen. Click to "archive address" and then enter new address.
4. Click on "Phones" on the left side of the screen. If the phone number needs to be changed, enter the number.
5. Click on "Demographics" on the left side of the screen. Enter or change the email address, if needed.
6. Click on "Life Events" on the left side of the screen. Click "Add New" at the bottom right of the screen. This will bring up the data entry screen to enter life events. At the top is a small box that will say "Description" and will have "Baby Blessing" already showing. Use the drop



down arrow to choose “Marriage.” Add the marriage information:

- a. Effective Date: Date of marriage
- b. Officiant: Name of person that performed the ceremony. (Do not check “Use GlobaFILE”. When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)
- c. Location: City, State where the marriage took place. Use the two digit state abbreviation. For example: Independence, MO
- d. Congregation Enrolled: Enter the official name of the congregation.
- e. In the “notes” section at the bottom of the screen, enter the information in the following format:

- Spouse: Enter his full name
- Maiden Name: Add her maiden name
- Previous Name: if this is a second marriage and you know the previous name.

7. Click “ok” to save and exit out of that screen.
8. Click on the “save and close” button at the top left corner. This button looks like a white sheet of paper with a green check mark.
9. The information for the husband can now be added. Search for the husband’s name and open his record.
10. Click on “Addresses” on the left side of the screen. Update/enter address, if needed.
11. Click on “Phones” on the left side of the screen. Update/enter phone number, if needed.
12. Click on “Demographics” on the left side of the screen. Update/enter email address, if needed.
13. Click on “Primary Family” on the left side of the screen. Click in the first box, and a drop down arrow will appear. Click on the drop down arrow. This will bring up a box where you will enter the last name only of the

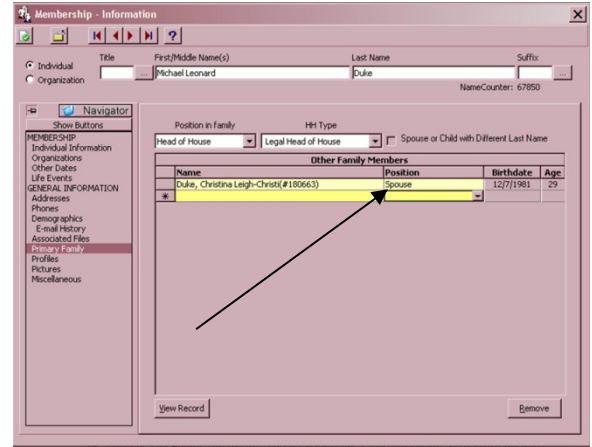
The screenshot shows a 'Life Event' form with the following fields: Description (Baby Blessing), Effective Date, Use GlobaFILE (checkbox), Officiant, Use GlobaFILE (checkbox), Assisting, Location (City, ST), Congr. Enrolled, and Notes. The 'OK' and 'Cancel' buttons are at the bottom right.

The screenshot shows a 'Membership - Information' form for Michael Leonard, Duke. The 'Other Family Members' table is as follows:

Name	Position	Birthdate	Age
Duke, Christina Leigh-Christi(180663)	Spouse	12/7/1981	29

spouse. Anyone with that last name will then appear in the box. Choose the spouse by clicking once on their name and then click “ok.”

14. You will now need to change their “position” to “spouse” by clicking on the drop down arrow.
15. Click “Finished” to save.
16. Click on “Life Events” on the left side of the screen. Click “Add New” at the bottom right of the screen. This will bring up the data entry



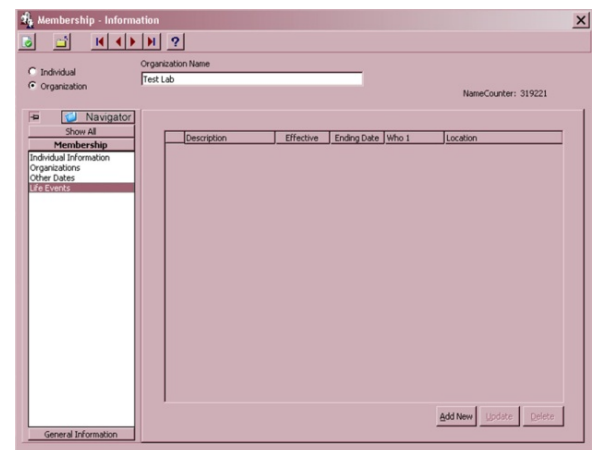
screen to enter life events. At the top is a small box that will say “Description” and will have “Baby Blessing” already showing. Use the drop down arrow to choose “Marriage.” Add the marriage information:

- a. Effective Date: Date of marriage
 - b. Officiant: Name of person that performed the ceremony (Do not check “Use GlobaFILE”. When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)
 - c. Location: City, State where the marriage took place. Use the two digit state abbreviation. For example: Independence, MO
 - d. Congregation Enrolled: Enter the official name of the congregation.
 - e. In the “notes” section at the bottom of the screen, enter the information in the following format:
 - Spouse: Enter her full name
17. Click “ok” to save and exit out of that screen.
 18. Click on the “save and close” button at the top left corner. This button looks like a white sheet of paper with a green check mark.

How to Enter Marriage Information for Member to Non-Member

1. If non-member spouse is active in the congregation, they can be added to Shelby, using the following steps:
2. First check to see if the person has already been entered as a friend or miscellaneous name. If not, you are ready to enter. If yes, you will use that record, and you do not need to add them again (open their record and proceed to step 13).
3. Go to the tool bar and click the “New” tab (first item on the toolbar and looks like a white sheet of paper).
4. You will get a message that says, “Is this new person to be added to the family of...” If yes, click “Yes.” If no, click “No.”

5. Enter the person's name in the spaces at the top of the screen (**do not add title**).
6. Make sure the dot beside "individual" is filled in (**not** organization).
7. On the left side of the screen, you will see a list of criteria. By clicking "show all" or "show buttons," you can decide which criteria you want showing.
8. Click once on "Individual Information" on the left side of the screen. This screen should read:
 - Module: Friend
 - Record Status: Active
 - Relationship: Active
 - How Received: Marriage
 - Date Received: Date of Marriage
9. Click once on "Addresses" on the left side of the screen, and then double click on the space beside "Home/Main Address." Enter address.
10. Click once on "Phones" on the left side of the screen, and then double click on the space beside "Main/Home." Enter the phone number. If there are other phone numbers (cell, business, etc.) add those to the respective fields.
11. Click once on "Demographics" on the left side of the screen. Add person's birth date, gender, and marital status. Change salutation, if needed. For example, if the person's name is William, but they go by Bill, you would enter "William" as the First Name and "Bill" as the salutation. You may also enter an email address in this section, if known.
12. Click once on "Miscellaneous" on the left side of the screen. If this is a new entry and not connected to someone already in the system, you will need to add the last four digits of the congregation they are attending. If this is a new entry, and they are connected to someone, this should already be entered. To search for the congregation number, click on the button with three dots beside "Site ID#." A new box will come up. Type in part or all of the congregation name and press enter. Then choose the correct congregation from the list and click "ok."
13. Click on "Life Events" on the left side of the screen. Click "Add New" at the bottom right of the screen. This will bring up the data entry screen to enter life events. At the top is a small box that will say "Description" and will have "Baby Blessing" already showing. Use the drop down arrow to choose "Marriage." Add the marriage information:
 - Effective Date: Date of marriage



- Officiant: Name of person that performed the ceremony (if Community of Christ) (Do not check “Use GlobaFILE”. When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)
- Location: City, State where the marriage took place. Use the two digit state abbreviation. For example: Independence, MO
- Congregation Enrolled: Enter the official name of the congregation.
- In the “notes” section at the bottom of the screen, enter the information in the following format:
 - Spouse: Enter his/her full name
 - Maiden Name: Add her maiden name
 - Previous Name: if this is a second marriage and you know the previous name.

14. Click “ok” to save and exit out of that screen.

- a. At the top left of the screen, click the “save and close” button, which looks like a white sheet of paper with a green check mark.

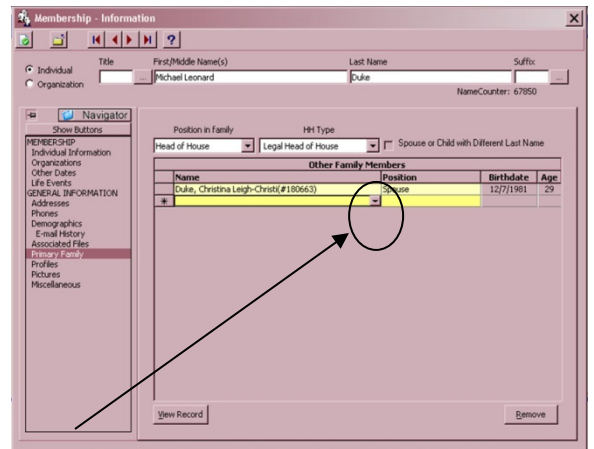
15. The information for the member can now be added. Search for the member’s name and open his/her record.

16. Click on “Addresses” on the left side of the screen. Update/enter address, if needed.

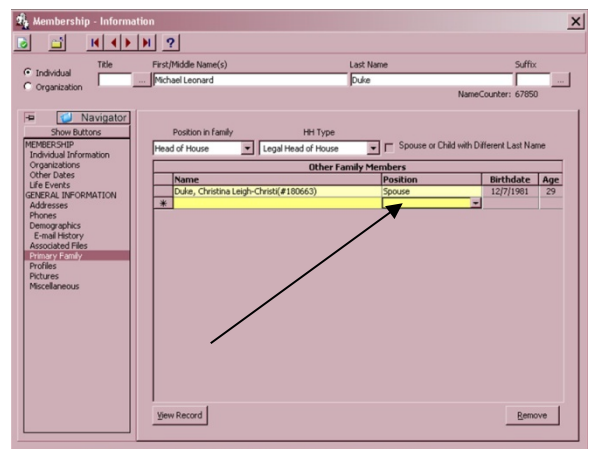
17. Click on “Phones” on the left side of the screen. Update/enter phone number, if needed.

18. Click on “Demographics” on the left side of the screen. Update/enter email address, if needed.

19. Click on “Primary Family” on the left side of the screen. Click in the first box, and a drop down arrow will appear. Click on the drop down arrow. This will bring up a box where you will enter the last name only of the spouse. Anyone with that last name will then appear in the box. Choose the spouse by clicking once on their name and then click “ok.”



20. You will now need to change their “position” to “spouse” by clicking on the drop down arrow (if wife).



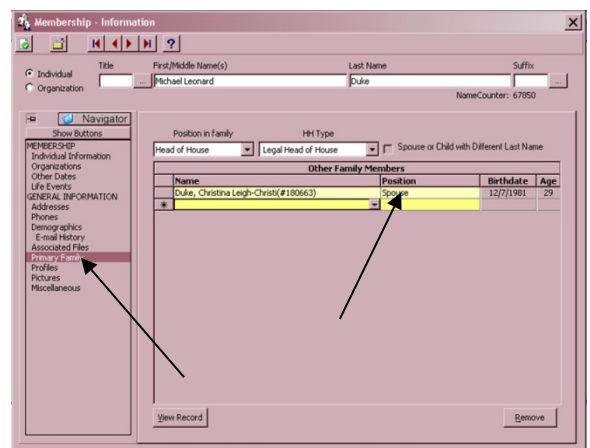
21. Click "Save and Close".
22. Click on "Life Events" on the left side of the screen. Click "Add New" at the bottom right of the screen. This will bring up the data entry screen to enter life events. At the top is a small box that will say "Description" and will have "Baby Blessing" already showing. Use the drop down arrow to choose "Marriage." Add the marriage information:
 - a. Effective Date: Date of marriage
 - b. Officiant: Name of person that performed the ceremony (if Community of Christ) (Do not check "Use GlobaFILE". When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)
 - c. Location: City, State where the marriage took place. Use the two digit state abbreviation. For example: Independence, MO
 - d. Congregation Enrolled: Enter the official name of the congregation.
 - e. In the "notes" section at the bottom of the screen, enter the information in the following format:
 - i. Spouse: Enter his full name
23. Click "ok" to save and exit out of that screen.
24. Click on the "save and close" button at the top left corner. This button looks like a white sheet of paper with a green check mark.

How to Enter a Divorce

Before you begin entering the information into Shelby, **edit the report.** This means checking the report for required information. Required information includes: Full name (first/middle/last), birth date, address, the divorce date, and if the last name will be changing, what the new last name will be. If you are missing information, do not add the divorce information into Shelby until all required information is received. The place (city/state) of the divorce is not required but can be added, if known.

If divorcing a member from a member

1. Enter the woman's name in the name filter and press "enter." When her name appears, double click on it to enter the record.
2. On the left side of the screen, you will see a list of criteria. By clicking "show all" or "show buttons," you can decide which criteria you want showing.
3. Click on "Individual Information" on the left side of the screen. Where her name appears at the top of the screen, change it if she will be going by a different last name.
4. Click on "Primary Family" on the left side of the screen. Change the woman's "position" to "Head of House." To do this, click the arrow next to the word "spouse" and choose "Head of House." You will then get a message saying, "since you changed this person to be the head of house, do you want to set him/her up in a new family?" Click "Yes." This **must** be done before proceeding; otherwise, information will be changed on both the wife and husband's record.
5. If there are children who will be living with the mother, click in the blank space under "name." Click on the arrow, and a new box will come up. Type the child's name (last, first) and then choose from the list that appears. Click "ok," and a box will appear that says, "...is a member of another family. Do you want to move this person to be part of this new family?" Click "yes." You may repeat for all children.
6. Click on "Addresses" from the left side of the screen. Verify the address. If it needs to be changed, click on the "Tools" button at the bottom left of the screen, and archive the address. Add the new address.



7. Click on “Phones” from the left side of the screen. If the phone number needs to be updated, enter a new phone number or click the “delete” button to remove existing phone numbers, if needed.
8. Click on “Life Events” on the left side of the screen. Click “Add New.” This will bring up the data entry screen to enter life events. At the top is a small box that will say, “Description” and will have “Baby Blessing” already showing. Use the drop down arrow to choose “Divorce.” Add the following information:
 - Effective Date: Date of divorce
 - Location: City, State where the divorce took place. Use the two digit state abbreviation. For example: Independence, MO.
 - Congregation Enrolled: Enter the official name of the congregation.
9. In the “Notes” section at the bottom of the screen, enter the information in the following format:
 - Divorced: Enter the full name of the spouse
10. Click “ok” to exit the screen.
11. Click on the “save and close” button at the top left corner. This button looks like a white sheet of paper with a green check mark.
12. You now need to change the information on the husband’s record. Open the husband’s record.
13. Click on “Addresses” on the left side of the screen. Update as needed.
14. Click on “Phones” on the left side of the screen. Update as needed.
15. Click on “Life Events” on the left side of the screen. Click “Add New.” This will bring up the data entry screen to enter life events. At the top is a small box that will say, “Description” and will have “Baby Blessing” already showing. Use the drop down arrow to choose “Divorce.” Add the following information:
 - Effective Date: Date of divorce
 - Location: City, State where the divorce took place. Use the two digit state abbreviation. For example: Independence, MO.
 - Congregation Enrolled: Enter the official name of the congregation.
16. In the “Notes” section at the bottom of the screen, enter the information in the following format:
 - Divorced: Enter the full name of the spouse
 - If wife took back former name at time of divorce, it needs to be noted here.
17. Click “ok” to exit the screen.
18. Click on the “save and close” button at the top left corner. This button looks like a white sheet of paper with a green check mark.

If Divorcing a Member from a Non-Member

1. You will first need to check to see whether or not the non-member spouse has been added to Shelby. If the name is in the system, use the same steps listed above for divorcing a member from member.
2. If a non-member spouse has not been added to Shelby, you will just need to change the record of the member.
3. Search for the member's name in the Name Filter. Open the member's record.
4. Click on "Addresses" on the left side of the screen. Update as needed.
5. Click on "Phones" on the left side of the screen. Update as needed.
6. Click on "Life Events" on the left side of the screen. Click "Add New." This will bring up the data entry screen to enter life events. At the top is a small box that will say, "Description" and will have "Baby Blessing" already showing. Use the drop down arrow to choose "Divorce." Add the following information:
 - Effective Date: Date of divorce
 - Location: City, State where the divorce took place. Use the two digit state abbreviation. For example: Independence, MO.
 - Congregation Enrolled: Enter the official name of the congregation.
7. In the "Notes" section at the bottom of the screen, enter the information in the following format:
 - Divorced: Enter the full name of the spouse
8. Click "ok" to exit the screen.
9. Click on the "save and close" button at the top left corner. This button looks like a white sheet of paper with a green check mark.

How to Enter a Death

Death of a spouse where both are members

Spouse that dies is Female

1. Search for the woman's name in the Name Filter. When the name appears, double click on it to enter the record.
2. On the left side of the screen, you will see a list of criteria. By clicking "show all" or "show buttons," you can decide which criteria you want showing.
3. Click on "Primary Family" on the left side of the screen. You will need to change the "position" of the spouse to "Head of House." To do this, click in the box next to the word "Spouse" and a drop down arrow will appear. Click on the drop down arrow and choose "Head of House." You will then get a message saying "Since you changed this person to be the head of house, do you want to set him/her up in a new family?" Click "Yes."
4. Click on "Demographics" on the left side of the screen. Make mail status "N."
5. Click on "Life Events" on the left side of the screen. Click "Add New." This will bring up the data entry screen to enter life events. At the top is a small box that will say, "Description" and will have "Baby Blessing" already showing. Use the drop down arrow to choose "Death." Add the following information:
 - Effective Date: Date of death
 - Location: City, State where the person died. Use the two digit state abbreviation. For example: Independence, MO.
 - Congregation Enrolled: Enter the official name of the congregation.
6. Click on "Individual Information" on the left side of the screen. Change to read:
 - Module: Member
 - Record Status: Deleted
 - Relationship: Deceased

NOTE: If deceased person has made contributions, the Record Status will change to "I" for inactive instead of deceased.

7. Click "ok" to save and exit.
8. Click on the "save and close" button at the top left corner. This button looks like a white sheet of paper with a green check mark.
9. Search for husband's name in the Name Filter. When his name appears, double click on it to enter the record.
10. Click on "Demographics" on the left side of the screen. Change his marital status to "Widowed."

11. Click on “Life Events” on the left side of the screen. Open the marriage and enter an end date on the marriage (this will be the date of death of the spouse).
 - Go to the notes section on this screen. Next to where the spouse’s name was added for the marriage, type “Deceased.” If the spouse’s name is not listed there, please add it and then type, “Deceased.”
 - Click “Ok” to save and exit this screen.
12. Click on the “save and close” button at the top left corner. This button looks like a white sheet of paper with a green check mark.

Spouse that Dies is Male

1. Search for the woman’s name in the Name Filter. When her name appears, double click on it to enter the record.
2. Click once on “Primary Family” on the left side of the screen. Change the “position” of the spouse to “Head of House.” To do this, click in the box next to the word “Spouse” and a drop down arrow will appear. Click on the drop down arrow and choose “Head of House.”
3. Click on “Demographics” on the left side of the screen. Change her marital status to “Widowed.”
4. Click on “Life Events” on the left side of the screen. Open the marriage and enter an end date on their marriage (this will be the date of death of the spouse).
 - Go to the notes section on this screen. Next to where the spouse’s name was added for the marriage, type “Deceased.” If the spouse’s name is not listed there, please add it and then type “Deceased.”
 - Click “Ok” to save and exit this screen.
5. Click on the “save and close” button at the top left corner. This button looks like a white sheet of paper with a green check mark.
6. Search for the husband’s name in the Name Filter. When his name appears, double click on it to enter the record.
7. Click on “Demographics” on the left side of the screen. Make mail status “N.”
8. Click on “Life Events” on the left side of the screen. Click “Add New.” This will bring up the data entry screen to enter life events. At the top is a small box that will say, “Description” and will have “Baby Blessing” already showing. Use the drop down arrow to choose “Death.” Add the following information:
 - Effective Date: Date of death
 - Location: City, State where the person died. Use the two digit state abbreviation. For example: Independence, MO.
 - Congregation Enrolled: Enter the official name of the congregation.

9. Click on “Individual Information” on the left side of the screen. Change to read:
 - Module: Member
 - Record Status: Deleted
 - Relationship: Deceased

NOTE: If deceased person has made contributions, the Record Status will change to “I” for inactive instead of deceased.

10. Click “ok” to save and exit.
11. Click on the “save and close” button at the top left corner. This button looks like a white sheet of paper with a green check mark.

Death of a Non-Member Spouse

1. You will first need to check to see whether or not the non-member spouse has been added to Shelby. If the name is in the system, follow the instructions above for entering a death when both are members.
2. If the non-member spouse has not been added to Shelby and is female (you do not need to add her to Shelby):
 - Search husband’s name in the Name Filter and when his name appears, double click on it to open the record.
 - Click on “Demographics” on the left side of the screen. Change marital status to “Widowed.”
 - Click on “Life Events” on the left side of the screen. Open the marriage and add end date (the end date will be the date of death for the spouse). In the notes section, next to where the spouse’s name was added for the marriage, type “Deceased.” If the spouse’s name is not listed there, please add it and then type, “Deceased.”
3. If the non-member spouse has not been added to Shelby and is male (you do not need to add him to Shelby):
 - Search wife’s name in the Name Filter and when her name appears, double click on it to open the record.
 - Click on “Demographics” on the left side of the screen. Change marital status to “Widowed.”
 - Click on “Life Events” on the left side of the screen. Open the marriage and add end date (the end date will be the date of death for the spouse). In the notes section, next to where the spouse’s name was added for the marriage, type “Deceased.” If the spouse’s name is not listed there, please add it and then type, “Deceased.”

Death of a Single Person Over 18

1. Search for the member's name in the Name Filter. When the name appears, double click on it to enter the record.
2. Click on "Demographics" on the left side of the screen. Make mail status "N."
3. Click on "Life Events" on the left side of the screen. Click "Add New." This will bring up the data entry screen to enter life events. At the top is a small box that will say, "Description" and will have "Baby Blessing" already showing. Use the drop down arrow to choose "Death." Add the following information:
 - Effective Date: Date of death
 - Location: City, State where the person died. Use the two digit state abbreviation. For example: Independence, MO.
 - Congregation Enrolled: Enter the official name of the congregation.
- a. Click on "Individual Information" on the left side of the screen. Change to read:
 - i. Module: Member
 - ii. Record Status: Deleted
 - iii. Relationship: Deceased

NOTE: If deceased person has made contributions, the Record Status will change to "I" for inactive instead of deceased.

- b. Click "ok" to save and exit.
- c. Click on the "save and close" button at the top left corner. This button looks like a white sheet of paper with a green check mark.

Death of a Child

1. Search for the child in the Name Filter. When the name appears, double click on it to enter the record.
2. Click on "Demographics" on the left side of the screen. Make mail status "N."
3. Click on "Primary Family" on the left side of the screen. You will need to change the "position" of the child to "Head of House" to separate it from the parents' record. To do this, click in the box next to the word "child" and a drop down arrow will appear. Click on the drop down arrow and choose "Head of House." You will then get a message that says, "Since you changed this person to be the head of house, do you want to set him/her up in a new family?" Click "Yes."
4. Click on "Life Events" on the left side of the screen. Click "Add New." This will bring up the data entry screen to enter life events. At the top is a small box that

will say, "Description" and will have "Baby Blessing" already showing. Use the drop down arrow to choose "Death." Add the following information:

- Effective Date: Date of death
 - Location: City, State where the person died. Use the two digit state abbreviation. For example: Independence, MO.
 - Congregation Enrolled: Enter the official name of the congregation.
5. Click on "Individual Information" on the left side of the screen. Change to read:
 - i. Module: Member
 - ii. Record Status: Deleted
 - iii. Relationship: Deceased

NOTE: If deceased person has made contributions, the Record Status will change to "I" for inactive instead of deceased.

6. Click "ok" to save and exit.
7. Click on the "save and close" button at the top left corner. This button looks like a white sheet of paper with a green check mark.

How to Enter a Priesthood Ordination and Priesthood Categories

Before you begin entering the information into Shelby, **edit the report.** This means checking the report for required information. Required information includes: Full name (first/middle/last), address, full name of officiants (first/middle/last), and the date and place of ordination. If you are missing required information, do not add to Shelby.

NOTE: Make sure the officiants hold the proper Priesthood office. If an outside officiant has officiated, you can call Membership Records to check on the Priesthood office held by the minister.

1. Search for the member's name in the Name Filter. When the name appears, double click to open the record.
2. On the left side of the screen, you will see a list of criteria. By clicking "show all" or "show buttons," you can decide which criteria you want showing.
3. Click on "Addresses" on the left side of the screen. Verify the address and make changes, if needed.
4. Click on "Phones" on the left side of the screen. Verify the phone number and make changes, if needed.
5. Click on "Life Events" on the left side of the screen. Click "Add New." This will bring up the data entry screen to enter life events. At the top is a small box that will say, "Description" and will have "Baby Blessing" already entered. Use the drop down arrow to choose "Priesthood Ordination." Add the following information:
 - Effective Date: Date of ordination
 - Officiant: Spokesperson for the ordination (first/middle/last) (Do not check "Use GlobaFILE". When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.)
 - Assisting: If there were two officiants, the second one is listed here (first/middle/last).
 - Location: City, State where the ordination took place. Use the two digit state abbreviation. For example: Independence, MO.
 - Congregation Enrolled: Enter the official name of the congregation.
 - Type: This is the priesthood office to which they were ordained.

NOTE: If the person already holds priesthood, you will need to open that ordination and put an end date on that entry. The only exception to this would be if the person is a High Priest and is being ordained to the office of Evangelist or Bishop. In that case, you do not put an end date in the High Priest ordination. Also, if ordained to an Evangelist and they have NOT been ordained to a High Priest, you will need to enter two ordinations: one to High Priest and one to Evangelist. Use the same day, place and officiants. This is entered at the Mission Center or World Church level.

The screenshot shows a software form for entering ordination information. The form includes the following fields and options:

- Description: Priesthood Ordination (dropdown menu)
- Effective Date: 11/17/1985 (calendar icon)
- Ending Date: 11/29/1987 (calendar icon, circled in red)
- Use GlobaFILE:
- Officiant: Howard S. Sheehy, Jr. (text field)
- Use GlobaFILE:
- Assisting: Vincent E. Lewis (text field)
- Location (City, ST): Des Moines, IA (text field)
- Congr. Enrolled: West Des Moines, IA (text field)
- Type: Priest (text field)
- Notes: (text area)
- Buttons: OK, Cancel

A red arrow points from the 'Description' dropdown menu to the 'Ending Date' field, which is circled in red.

6. Click "Ok" to save and exit out of that screen.
7. Click on the "save and close" button at the top left corner. This button looks like a yellow folder.
8. Exiting out of the record should cause the priesthood information under "Individual Information" to change to reflect the new priesthood office. If it does not, you will need to go back and change it manually. **Note:** the priesthood office listed under "Individual Information" will default to the most recently entered priesthood office in life events.

Update on Priesthood Status Categories (as of July 1, 2017)

The church desires to support and equip priesthood members for meaningful and effective ministry. This support includes priesthood status categories that encourage faithfulness and are responsive to changing personal circumstances. The categories are:

1. Active
2. Leave
3. Emeritus
4. Suspension
5. Inactive
6. Release

Active

- When entering a new ordination, it is assumed that the priesthood member is active in their office. No further action is required in Shelby.

Leave

- *Leave* is appropriate when a priesthood member needs a break from priesthood responsibilities for a time with *the clear intent of returning to active ministry*.
- *Leave* also is appropriate when a priesthood member has significant personal burdens or stresses that are best managed by stepping away from priesthood ministry for a time *with the clear intent of returning to active ministry*.
- *Leave* is appropriate, but not mandatory, during dissolution of marriage unless the divorce petition alleges illegal conduct or unchristian behavior that could cause *release* from priesthood if proven true. If such conduct is alleged, see the *suspension* category.
- *Leave* is requested by a priesthood member and approved by the supervising officer for up to one year.

To record a “Priesthood Leave” go to the person’s record in Membership, click on “Life Events” → Click on “Add New” in the lower left of the screen.

On the “Life Event” screen, choose “Priesthood Leave”

Add the begin date, and congregation enrolled

In the notes add “Per instruction of (Pastor’s Name), Pastor”

Click OK

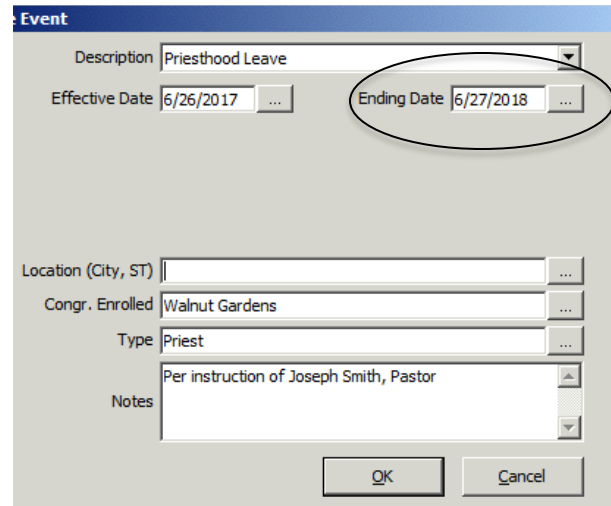
Note: Do not put an “ending date” on the original ordination Life Event.

The screenshot shows a 'Life Event' form with the following details:

- Description: Priesthood Leave
- Effective Date: 6/26/2017
- Ending Date: (empty)
- Location (City, ST): (empty)
- Congr. Enrolled: Walnut Gardens
- Type: Priest
- Notes: Per instruction of Joseph Smith, Pastor

When the priesthood member is ready to resume functioning in their office, open the Life Event of “Priesthood Leave” and enter an ending date.

Click OK



Inactive

The *inactive* category is for:

1. A priesthood member who does not want to continue in active priesthood ministry and has no desire to return to active priesthood ministry in the foreseeable future. This priesthood member also can request *release*.
2. A priesthood member who is not participating in the life of Community of Christ and who has no plans to do so in the foreseeable future.
3. A priesthood member who becomes “unknown” to the church because of lack of response to communications and opportunities to express continuing commitment.

An *inactive* priesthood member retains her or his priesthood certificate.

A priesthood member may be returned to *active* status by personal request and action by the presiding officer.

To record a “Priesthood Inactive” go to the person’s record in Membership, click on “Life Events” → Click on “Add New” in the lower left of the screen.

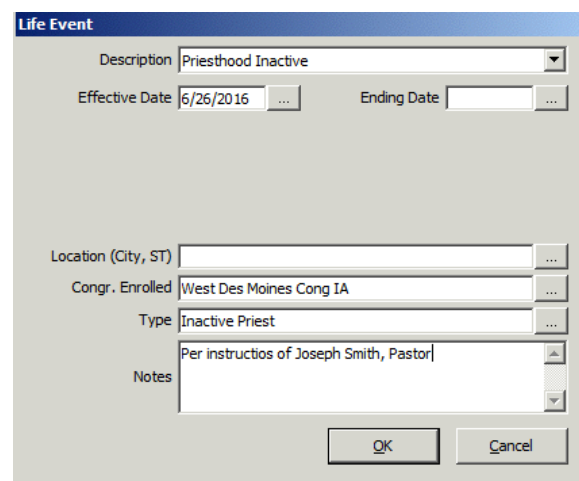
On the “Life Event” screen, choose “Priesthood Inactive”

Add the begin date, congregation enrolled, and type (Priesthood Inactive).

In the notes add “Per instruction of (Pastor’s Name), Pastor”

Click OK

Note: Do not put an “ending date” on the original ordination Life Event.



Go to “Individual Information” and verify that the Priesthood Office has changed to “Inactive (Priesthood office)”. If it has not, you will need to enter it manually.

Individual Information

To change it manually, simply type in “Inactive Priest” or whatever office is applicable.

When you click on the “close” icon to save your changes, you may get the following message.

If you do, verify you have typed it correctly and then click “Yes”.

It will ask if you want to save the changes, click “Yes”.

When the priesthood member is ready to resume functioning in their office, open the Life Event of “Priesthood Inactive” and enter an ending date.

Click OK.

Go to “Individual Information” and manually change the “Priesthood Office” to the appropriate office.

Individual Information

Click the “close” icon and save.

Suspension

- *Suspension* removes priesthood members from active ministry who are facing legal charges or accusations of unchristian conduct that may adversely affect one’s ministry or make it unacceptable to a congregation or the World Church.
- *Suspension* is applied by the supervising officer and lasts up to one year. During *suspension*, a priesthood member does not participate in priesthood ministry. If charges or accusations have not been resolved after one year, *suspension* may be extended in six month increments.
- A priesthood member in the suspension category retains his or her priesthood certificate.

To record a “Priesthood Suspension” go to the person’s record in Membership, click on “Life Events” → Click on “Add New” in the lower left of the screen.

On the “Life Event” screen, choose “Priesthood Suspension”

Add the begin date, congregation enrolled, and type (Priesthood Office).

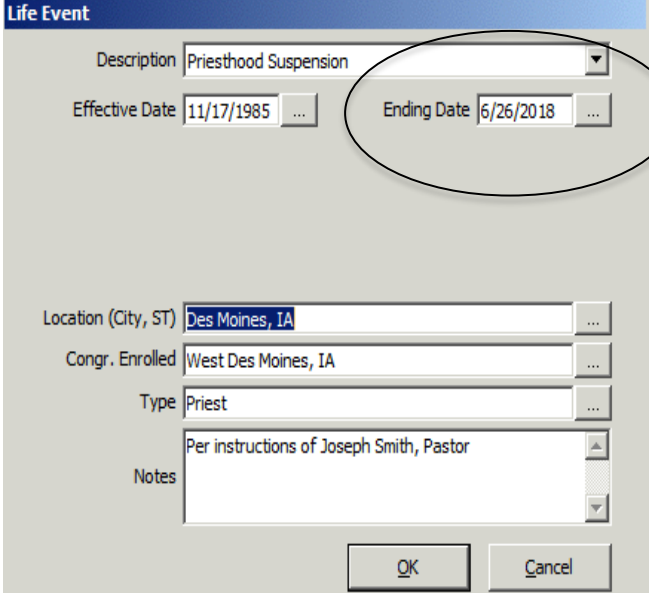
In the notes add “Per instruction of (Pastor’s Name), Pastor”

Click OK.

Note: Do not put an “ending date” on the original ordination Life Event.

When the priesthood member is ready to resume functioning in their office, open the Life Event of “Priesthood Suspension” and enter an ending date.

Click OK.



The screenshot shows a 'Life Event' dialog box with the following fields:

- Description: Priesthood Suspension
- Effective Date: 11/17/1985
- Ending Date: 6/26/2018 (circled in red)
- Location (City, ST): Des Moines, IA
- Congr. Enrolled: West Des Moines, IA
- Type: Priest
- Notes: Per instructions of Joseph Smith, Pastor

Buttons for OK and Cancel are at the bottom right.

NOTE: The World Church Recorder records **Priesthood Emeritus** and **Priesthood Release**.

How to Enter an Address Change

Before you make an address change, please make sure you have all information you need to enter the address change. You will need the complete address (including apartment number if needed) and whether or not the change is for the entire family. If mail is returned without a forwarding address, **do not** remove the address from Shelby. The address should only be made undeliverable (see instructions below).

1. Search for the member in the Name Filter. When the name appears, double click to open the record.
2. On the left side of the screen, you will see a list of criteria. By clicking “show all” or “show buttons,” you can decide which criteria you want showing.
3. Click on “Addresses” on the left side of the screen. Highlight the Main/Home address (or the address that is changing) by clicking on it once.
 - a. In the bottom left corner of the screen is a button labeled “Tools.” Click once and then choose “Archive Address.” You will get a message that says, “Archive to previous address?” Click on “yes.” This will automatically move the address that is Main/Home to the previous address line.
 - b. You should now have a screen to enter the new address. It is important to enter the address in the correct way. We use the guidelines put out by the Postal Service.
 - Address line 1—this is where you enter the street address. For example: 1234 Main St Apt 3 (no commas, periods or all caps)
 - Address Line 2—this is where you enter a PO Box or information that will not fit on line 1.
 - Enter the zip/postal code, city, state/province and **country**.
 - Click “ok.”
4. Click on “Demographics” on the left side of the screen. This screen is used to change the mail status on a record.
 - a. If the address is deliverable, the mail status should be blank.
 - b. If the address is undeliverable, a “U” for undeliverable should be entered.
 - c. If the address is a good address, but the person does not want to receive mail, “N” for no mail should be entered.

- d. If someone is transferred to the general category, a “G” for general should be entered.
- e. The notes section of this screen can be used to enter information regarding returned mail or no mail requested. In the first line of the notes section, enter the date and a brief note. For example: “mail returned 8/29/11” or “forwarding order expired 8/29/11,” or “no mail requested 8/29/11.”

NOTES:

- Do not use punctuation in an address
- If mail is returned without a forwarding address, **do not** remove the address from Shelby. The address should only be made undeliverable.
- Do not use all capitals in an address
- Do not spell out North, South, East or West
- Do not spell out Street, Avenue, Drive, Lane, Circle, Terrace or any other street description. They should be abbreviated using the US Postal Service Guidelines.
- All addresses must have a country listed.
- When entering a new address, be sure to archive the previous address.
- The notes section of the “Demographics” screen can be used to enter information regarding returned mail or no mail requested.

Legal Name Change

It is the policy of the church to record the legal names of its members. Do not record members under an alias or nickname. Enter nicknames in the "Salutation" field under "Demographics."

Legal name changes can happen in connection with marriages, divorces, adoptions, or by court order. An effective date must be given for a court ordered name change. This information is entered in the notes section of the life event. For women taking their maiden name as their middle name, the change should not be made to the system unless you have a legal document stating the change, unless the change was made at the time of marriage or divorce. Follow the steps below for entering a name change or adoption.

1. Search the member's name in the Name Filter. When the name appears, double click to open the record.
2. When the person's name appears at the top of the screen, make changes as necessary.
3. Go to the first life event recorded for that person (usually a baby blessing or baptism). In the notes section of that life event, add the date the change was made legal.
4. Click "ok" to save and exit.
5. Click on the "save and close" button at the top left corner. This button looks like a white sheet of paper with a green check mark.

Adoptions

The church recognizes and records all legally valid adoptions. Any comments concerning the adoption should be put in the notes section of the first life event.

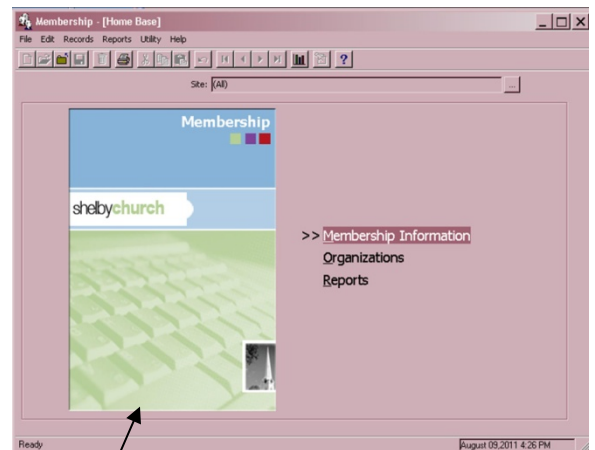
Include the date the adoption was final, who the adoptive parents are and the previous name of the person. To change the name, follow the steps listed above for a legal name change.

How to Process a Transfer

To process a transfer, you will need a person's membership/baptismal or Shelby ID number. Please do not transfer someone outside of your area without first updating their address and phone number. If you are transferring someone to the unknown, their mail status needs to be changed to "U" and if to General, to a "G." Contact must be made before transferring someone to the general category.

You can only transfer people INTO your congregation.

If you need to transfer someone out of your congregation, please see the instructions below on "transfers out."



1. From the Membership – [Home Base] screen, choose "Utility" (top of the screen). A drop down list will appear, and you will then click on "Multi-Site Link Utilities" and then on "Membership Transfer."
2. You will now have a box where you enter the baptismal number or Shelby ID number. Click in the circle by which you are using and then enter that number in the space provided. If you do not know the number, click on the box with 3 dots, beside the blank field. A new box will appear, and you can type the name of the person and press "enter." Choose the name from the list. Click "ok" and then "next."
3. You will now have a new box that has the person's name at the top and shows where they are currently enrolled. There will be an empty line to enter where they are being transferred. Click in the "to" box, and you will get a message telling you to press the F4 key on the top of your keyboard. You can either:
 - Press the F4 button, which will give you a small field to add the Name/ID. Enter the last four digits of the congregation they are transferring to or the name of the congregation. Click in the large box under where you added the number/name. It should now list the name of the congregation you entered. If more than one is listed, click on the correct one and then click "ok." You will now be back to the previous screen, and

the name of the congregation will be entered. If you are transferring a family, click in the box next to "Transfer entire Family." Click "ok."

OR

- Click in the "to" box, and you will get a message telling you to press the F4 key on the top of your keyboard. Type in the name of the congregation and press "enter." Choose the correct congregation from the list that comes up, and click "ok." You will now be back to the previous screen, and the name of the congregation will be entered. If you are transferring a family, click in the box next to "Transfer entire Family." Click "ok."
4. Another box will come up with the message, "You are about to move (name of person) from (Congregation enrolled) to (new congregation) continue?" If this is correct, click "Yes," and if not, click "No."
 5. If you choose "Yes," you will get another box saying, "Transfer complete." Click "Ok."
 6. You will now be taken back to the first box to enter a baptismal number. If you are finished with transfers, click on closed. If you are doing more transfers, enter the next baptismal/Shelby ID number into the box and continue.

Once pulled into your congregation, you can make any changes needed.

To transfer out of your congregation

To process a transfer out, you will need to contact the congregation that they will be going to and contact that area so that they can be transferred in. To know who to send the transfer to, you can look on the Church's website and send it to the mission center office, or you can contact Membership Records. It is important to remember that you should only transfer people **into** your congregation. To transfer to the Mission Center General, contact your Mission Center Recorder. To transfer to the World Church Unknown, contact the Membership Records.

To get to the church directory online, go to

www.cofchrist.org/find-a-congregation

Printing PDF Document through Shelby

1. Once you have run a report and it is on the screen, you can print the report or you can print to Acrobat PDF Writer and save it to your hard drive. Once it is saved to your hard drive, you can print it at any time or you may want to send the file electronically.
2. When you run a report, it will appear in a “Print Preview” format. If it is too small to read, change the percentage.

Percentage

Font icon button

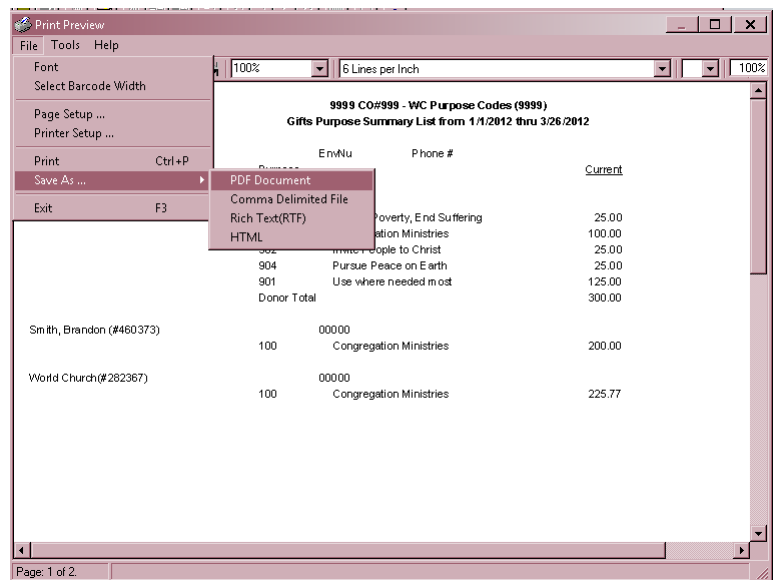
Percentage: to change distance between columns, i.e. 90% moves columns closer together.

Donor	Purpose	EmvNu	Phone #	Current	
Flintstone, Fred (#481251)	903	Abolish Poverty, End Suffering		25.00	
	100	Congregation Ministries		100.00	
	902	Invite People to Christ		25.00	
	904	Pursue Peace on Earth		25.00	
	901	Use where needed most		125.00	
Donor Total				300.00	
Smith, Brandon (#460373)	100	Congregation Ministries		200.00	
World Church(#282367)	00000				
	100	Congregation Ministries		225.77	

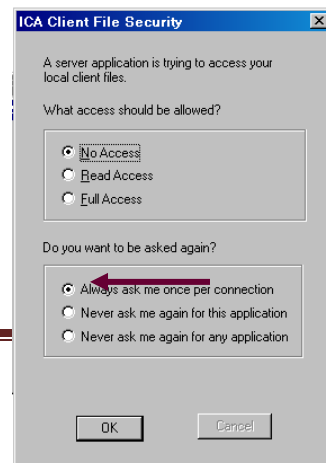
Page: 1 of 2

Note: It is very important that the font be Times Roman 8 pt for the PDF document to be formatted correctly. If you are unsure of the font or need to change it, click on the font button on the Print Preview screen and make the adjustments.

3. To save as a PDF Document, click on **File**, choose **Save As**, choose **PDF Document**.

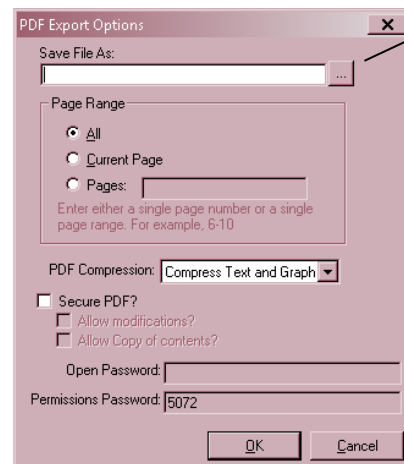


4. If you have Version 16.31.1051 or higher, the ICA Client File Security screen will appear.
5. Click on **Full Access** and **Never ask me again for any application**.
6. Click **OK**



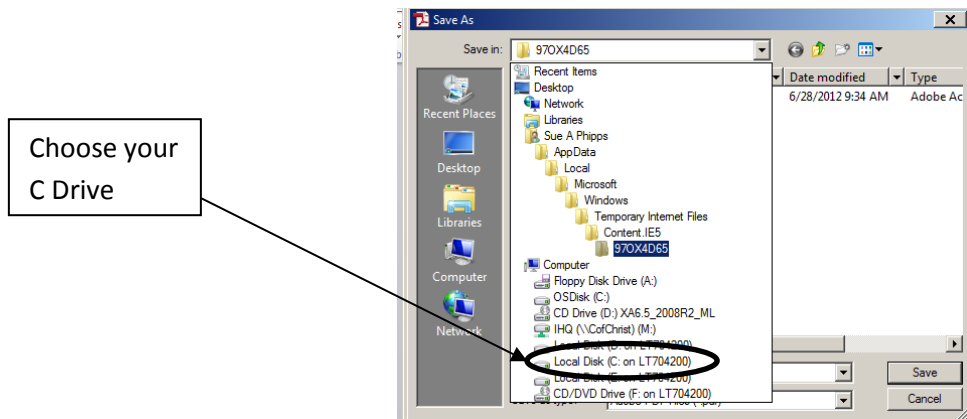


The next screen will appear as follows:



Click on box and find your drive

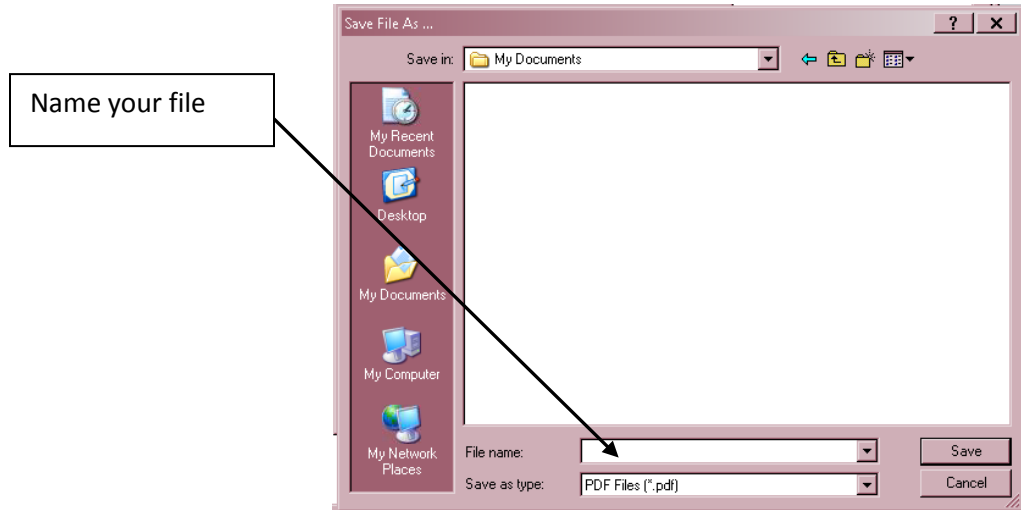
7. Click on the box at the end of Save File As and find the C drive (C is your hard drive). Your C drive is shown as C\$ on 'Client' (C), as seen in the figure below.



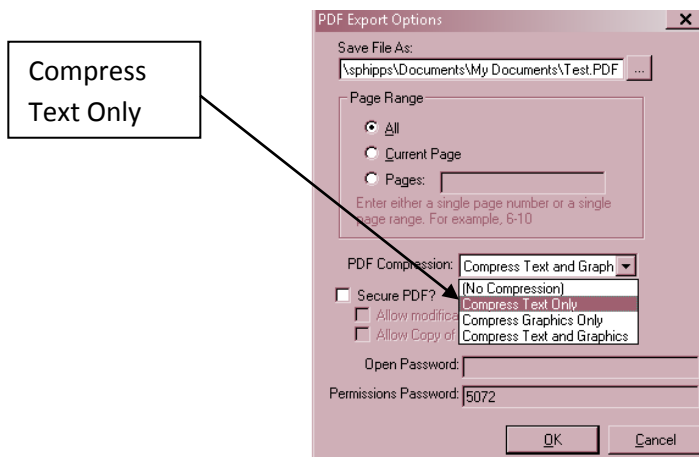
Choose your C Drive

9. Find your **My Documents** folder

10. Name the file and click **Save**.



11. Click **OK**.



12. Change the PDF compression to “Compress Text Only” and click **OK**.

13. Your report will be saved in your My Documents folder on your hard drive.

14. Open the file in My Documents that has the PDF extension.

15. Your document is an Acrobat file and can be opened with Acrobat Reader. The file will look the same as it would if you printed it from Shelby, but it is now a PDF file and cannot be changed.

16. Choose **File** and **Print**.

17. If you want to send this file electronically, create an e-mail message and attach the PDF file.

Phone Numbers and E-Mail Addresses

Membership Records 800 number	800-825-2806 x2211
Help desk ext.....	1234
Membership Question.....	option 1
Contribution or accounting question	option 2
Technical question	option 4
Membership questions e-mail	memrec@cofchirst.org
Contribution or accounting e-mail	Miscalservices@cofchrist.org
Technical question e-mail	infosys@cofchrist.org

SHELBY access can be gained by contacting the Mission Center office. They will then submit an access form from the church website:
<https://www.formrouter.net/forms@COFC/ShelbyOnlineAccessRequest.html>

This form must be submitted by the **Mission Center**.

Hints, Tips, and Reminders

- Do not change the record status (tab 2) to “inactive.” The **only** time the record status should show as “inactive” is when the person is deceased, and there are contributions linked to that member, in which case SHELBY will automatically change the record status to “inactive” instead of “deleted.” If you wish to note that a member is inactive in congregational life, you may change the relationship to “inactive.”
- **Do not** Withdraw or Reinstate Membership of a person. This information should be sent to First Presidency office, and then they will notify Membership Records.
- **Do not** change anyone’s Priesthood Status. This type of change should only be made by Membership Records. Changes in priesthood status (Release, inactive, silence or priesthood reinstatement) must to be sent to the First Presidency Office, who will then notify Membership Records.
- Priesthood Emeritus needs to have apostolic approval before it can be processed. Send the request to the apostle for your area, and they will then send notice to Membership Records. We will then issue a certificate that will be mailed to the Mission Center President, and the Priesthood Emeritus will be added to Shelby.
- The # after a person’s name is their Shelby ID number, NOT their baptismal number.
- When looking at someone’s records and not making any changes, be sure to click “Cancel” and not “OK” when exiting the record.
- Do not list the priesthood office before the officiants name. For example, Elder Jonathan Quincy Smith. It should be listed as Jonathan Quincy Smith. Also, full legal names should be entered—NOT nicknames. For example, Jon Smith.
- **Do not** use all CAPS when entering any information in Shelby.
- **Do not** use punctuation in the address.
- Be sure and include area code with phone number.
- **Check to see if a name is already in the database before adding.**
- When entering a location in the Life Events section, enter the city, followed by the two-letter state/province abbreviation for USA and Canada. Examples: Independence, MO or Chatham, ON. If you are unable to get the city and state, the country and state/province or just the state/province can be entered. For areas other than USA and Canada, include the country. Example: London, England or Chingola, Zambia.
- When entering an officiant or location on the Life Events Tab, **please pay attention to what is typed.** As you start to type, the system will fill in the information for you. The information being filled in is not from the database, it is from a table,

which will allow any name or spelling to be added. If it fills in the information, **PLEASE VERIFY** it before going on. If it fills in the name or location and you find that it is incorrect, please type it in correctly. This includes adding punctuation in a name or location, middle name or changing incorrect spellings.

- When entering officiants, use full names (first/middle/last). In the past, we have only used a middle initial; however, we are now using full names. There are many members who share the same name (and sometimes middle initial). When printing certificates, it is difficult for Membership Records to verify priesthood for members without a full name. Also, using a first name, middle initial, last name is an "American" way of writing out names. This does not make sense to members in other countries; therefore, using full names will eliminate any cultural insensitivity. **(Do not check "Use GlobaFILE". When that is checked, the Officiant field is blank on the report that goes to Membership to generate the certificate.**
- When an address is undeliverable, enter a "U" in the mail status, but leave the undeliverable address on the main/home address line. Even though it is not a good address, we want it left there for reference. Only archive it if a new address is found.
- When you add, remove, or change the mail status, you will need to do it for each member in the family. It is not automatically changed on other family members.
- Check mail status in the Demographics section. If address is valid, leave mail status blank. If address is undeliverable, mail status should be "U". If someone is deceased or does not want to receive mail, status should be "N". A "G" means the person is on the General. If you transfer the person to a congregation, the "G" should be removed. The notes section of the demographics screen can be used to enter information regarding returned mail or no mail requested. In the first line of the notes section, enter the date and a brief note. For example, "mail returned," "forwarding order expired" or "no mail requested."
- All addresses must have a country listed.
- When entering a new address, always archive the old address.