Key Fields for People
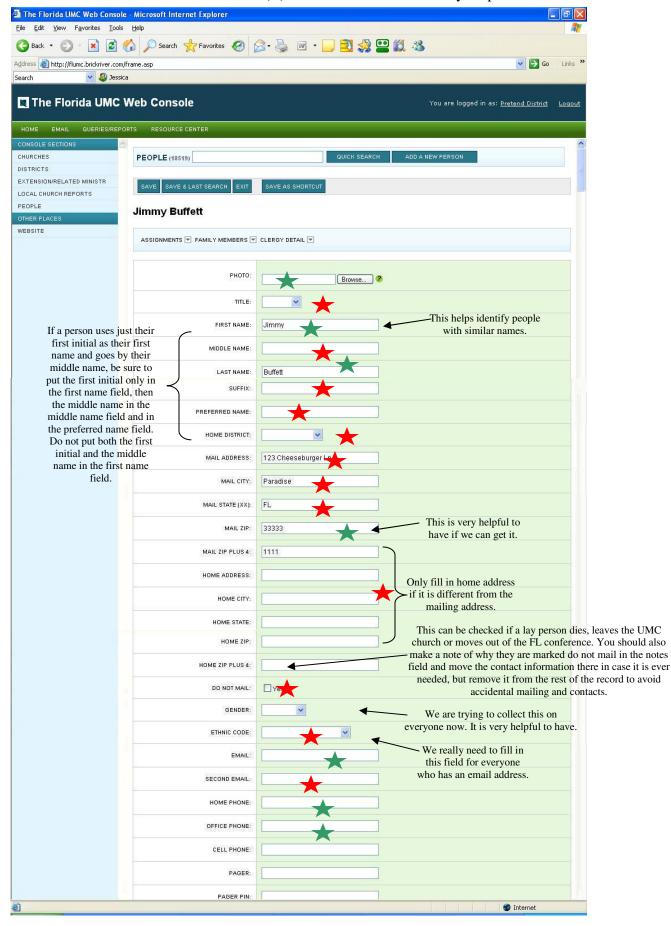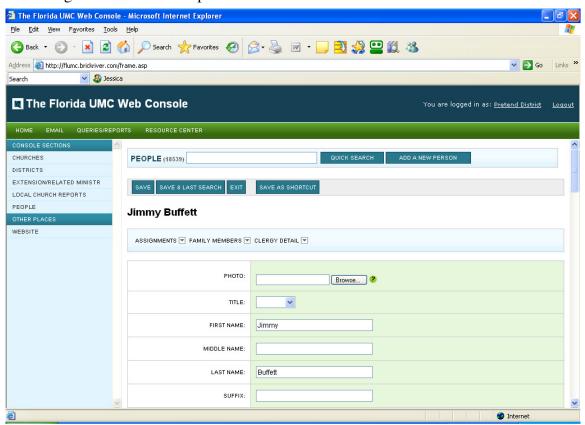
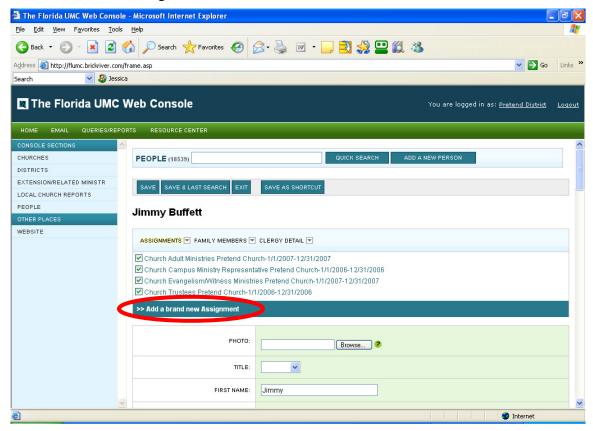⭐ Indicates a field that must be filled in.   ⭐ Indicates a field that is very helpful if it can be filled in.

If a person uses just their first initial as their first name and goes by their middle name, be sure to put the first initial only in the first name field, then the middle name in the middle name field and in the preferred name field. Do not put both the first initial and the middle name in the first name field.

This helps identify people with similar names.

This is very helpful to have if we can get it.

Only fill in home address if it is different from the mailing address.

This can be checked if a lay person dies, leaves the UMC church or moves out of the FL conference. You should also make a note of why they are marked do not mail in the notes field and move the contact information there in case it is ever needed, but remove it from the rest of the record to avoid accidental mailing and contacts.

We are trying to collect this on everyone now. It is very helpful to have.

We really need to fill in this field for everyone who has an email address.
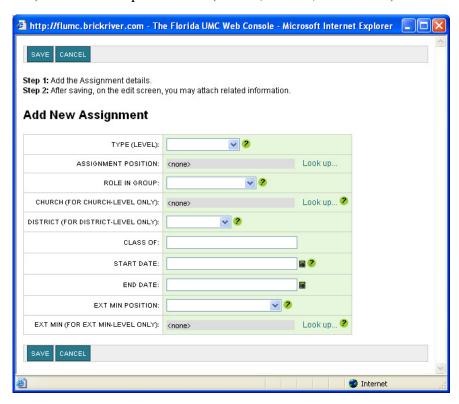
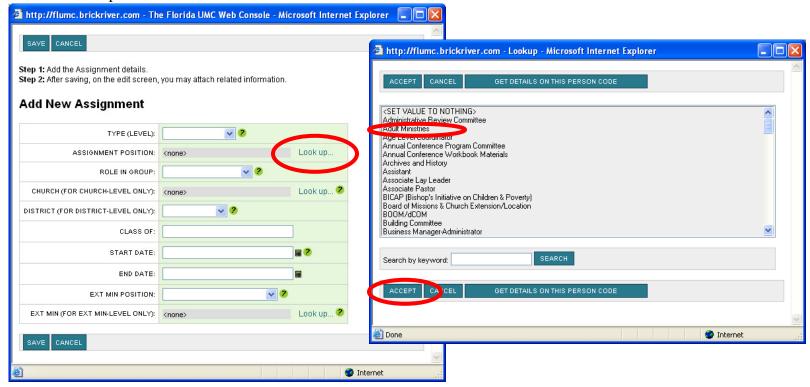1. Click on the assignments tab at the top of the screen.
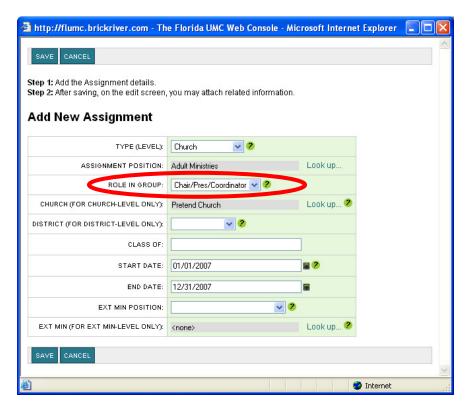

2. Click "Add Brand New Assignment."

3. Select a "Type (Level)" from the drop down box (church, district, conference).
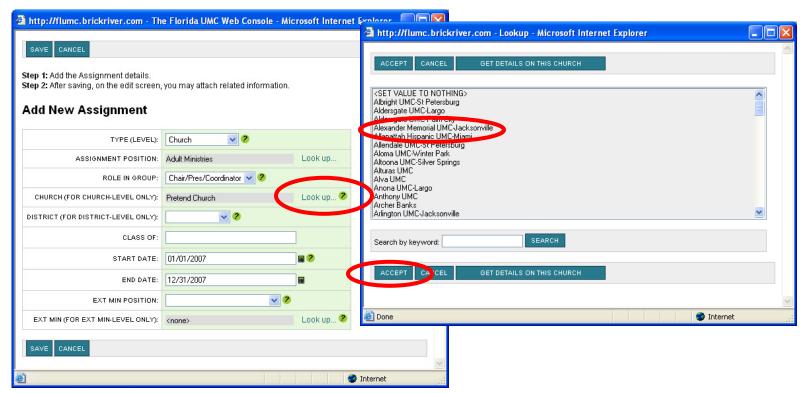

4. Click on "Look up…" next to the "Assignment Position" box and select the position the person will be in. Click "Accept."
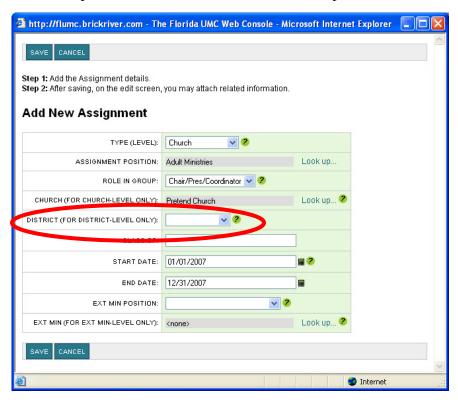
5. Select the person's role in the group. If it is a church level position, the role should not be "Member" since we are only collecting data on the chairs of church committees, not all of the members. District and conference level positions may have any of the roles since we do track all members of those committees.

6. If the position is church level, select the church name by clicking on "Look up…" next to the "Church (for church- level only) field. Once you have selected the church name, click "Accept."
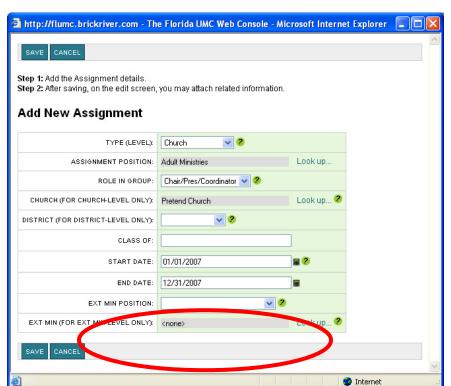
7. If it is a district level position, select the district from the drop down box.
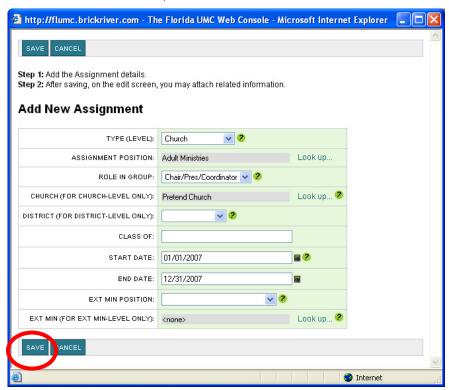

7. Enter the date the person joined or will join the committee/position in the start date field. Enter the date the person left or will leave the committee/position in the end date field. If the position is nominated annually, it is suggested that the end date be one year from the start date so that if the person continues the date can be extended, but if they do not, their end date will already be entered. Use the format of MM/DD/YYYY for the dates. The "/" should fill in automatically as you type.

LOCAL CHURCH START/END DATES: 01/01/20XX – 12/31/20XX
DISTRICT START/END DATES: 07/01/20XX – 06/30/20XX

CONFERENCE START/END DATES: 07/01/20XX – 06/30/20XX

8. If a person's term is being extended, the only date you need to change is the END DATE. Do NOT create a new assignment when you are extending a term for the same assignment.

9. Once you have entered all of the data, click "Save."

9. You should be returned to the person's main screen and the assignment should now appear when you click on that person's "Assignments" button.