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 <u>relationship</u> to "inactive."

➤ **<u>Do not</u>** Withdraw or Reinstate Membership of a person. This information should be sent to First Presidency office, and then they will notify Membership Records.

➤ **<u>Do not</u>** 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.

➤ **<u>Do not</u>** use all CAPS when entering any information in Shelby.

➤ **<u>Do not</u>** 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, **<u>please pay attention to what is typed.</u>** 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, **<u>PLEASE VERIFY</u>** 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, <u>always</u> archive the old address.