

## Hints, Tips, and Reminders

- ✓ **Do not** Withdraw or Reinstate Membership of a person. This information should be sent 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. If the status change is to inactive or to reactivate priesthood, send the request to Membership Records. All other changes in priesthood status (Release, silence or priesthood reinstatement) must be sent to the First Presidency Office, who will then notify Membership Records.
- ✓ Superannuations need to have apostolic approval before they can be processed. Send the request to the Mission Center, who will then send it on to the Apostle for your area. They will then send notify Membership Records at which time we will issue a certificate that will be mailed to the Mission Center President and the superannuation added to Shelby.
- ✓ When transferring someone who holds priesthood to the Unknown, let Membership Records know, so that their Priesthood status can be changed to inactive. If someone has been found and transferred into a congregation, the Pastor will need to take action to make the priesthood active.
- ❖ **Shelby is not a genealogical database.** Do not connect anyone but immediate family. (Father, mother, children under 18) Do not enter grandparents or other family or list this information in Shelby. Refer to the section on entering a baby blessing for where to enter parental information.
- ❖ The # after a person's name is their Shelby ID number, NOT their baptismal number.
- ❖ **Do not** change the record status of anyone to "*Inactive*". The only time this should be used is if someone has died and had contributions tied to their record. Their record status becomes "*Inactive*" instead of "*Deleted*". If someone does not attend, follow procedures regarding transfer to the general category. If records are found with "*Inactive*" record status, they will be changed back to "*Active*".
- ❖ When looking at someone's records and not making any changes be sure to say Cancel and not OK when exiting the record.
- ❖ **Do not** list the priesthood office before the officiants name. For example, Elder Jonathan Q. Smith. It should be listed as Jonathan Q. Smith. Also, full legal names should be entered NOT nicknames. For example, Jon Smith. If someone uses their middle name instead of their first list the name as J. Quincy Smith.
- ❖ You can look on tab 8 in the GlobaFile to see how the congregational name is formatted.
- ❖ **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.
- ❖ **Do not** use the GlobaFile box in Life Events when entering officiants.
- ❖ 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 county 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 initials or changing incorrect spellings.
- 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 (Tab 3, GlobaFile) you will need to do it for each member in the family. It is not automatically changed on other family members.
- Check mail status on the #3 Demographics Tab in the GlobaFile. If address is valid leave mail status blank. If address is undeliverable mail status should be "U". If someone 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 (Tab 3) can be used to enter information regarding returned mail or no mail requested. In the first line of the notes section on Tab 3, 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.