

Minister Tracking and Changes

The Disciples of Christ regional version of CDM+ Membership includes additional information on the Individual Record to facilitate the tracking of ministers in the region, while maintaining information about standing, professional codes, church of call, work location, and more. CDM+ Regional for Disciples of Christ allows regional staff to submit this information to the minister database in the Office of Christian Vocation at Disciples Home Missions. By communicating changes on a regular basis, regional staff can keep information in the Minister Directory current and avoid the need for annual, large-scale updates.

General and Regional Databases

Each regional office uses a CDM+ database, at a minimum, to interact with the Search and Call system. A handful of Disciples regional offices only use CDM+ Search and Call and do not have access to the CDM+ Membership and Regional programs.

Most regions, however, use the CDM+ Regional and Membership programs alongside the Search and Call program. This provides the additional data and functions for tracking ministers, churches, and submitting changes to the General database.

Differences Between Regional and General

The CDM+ Regional program pairs with the CDM+ Membership program to store and maintain information about people, and regional offices need to maintain information for more people than just ministers. Like churches, regions maintain data on leaders in the region, congregational leaders, donors, contributions, and events. All of these relate to the Address, Individual and Giving Unit Records in CDM+ Membership.

The general minister database does not require donor management or event registration, and so the general database uses Minister Records to store information about people.

Note: In regional databases, the term Minister Records applies to minister profiles in the Search and Call program. Keep in mind that the general database uses Minister Records to represent people, and the regional database uses Individual Records to represent people. This naming has been confusing from time to time.

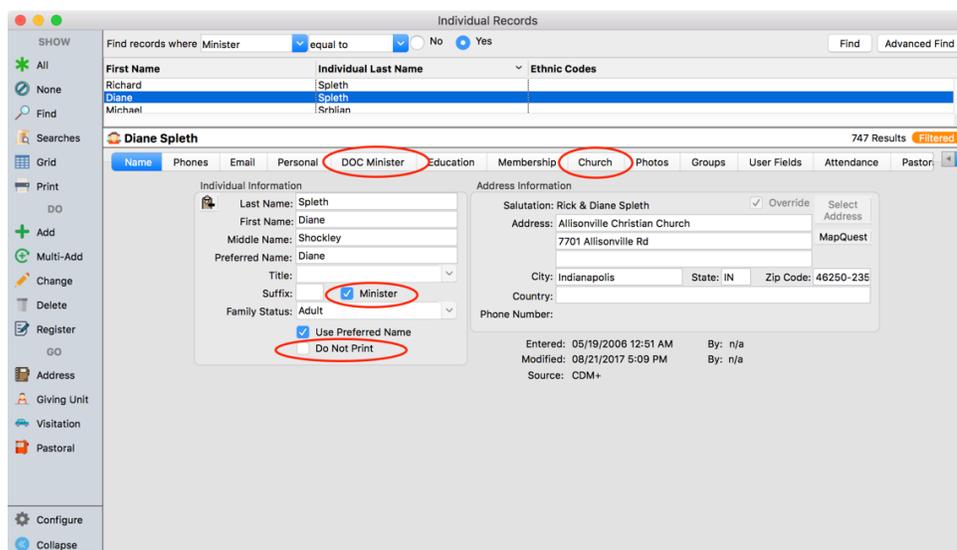
Codes for Ministers

The general and regional databases share code values pertaining to ministers and their ministry. These include Professional Classification Codes, Ethnic Codes, and Order of Ministry (previously known as Standing Codes). These code values are established by the General Commission on Ministry (GCOM), coded into the general database, and shared with the regional databases. Regions cannot add, modify, or delete values for these codes.

- **Professional Code (PCC)** is a one- to three-character code that describes the primary ministry in which a minister is engaged.
- **Ethnic Codes** describe one or more ethnic identities for a minister.
- **Order of Ministry (Standing Code)** identifies the source of a minister’s standing: **O CC(DOC)** identifies ministers ordained by Disciples; **O (UCC)** identifies ministers ordained by the United Church of Christ who either hold or qualify for Ordained Ministerial Partner standing; and **C** identifies ministers who are commissioned by a Disciples region. **LM-r** is deprecated and should no longer be used. Regional staff may also code Order of Ministry as **None**.

Individual Records for Ministers

In CDM+ Regional, the Individual Records window contains additional information. These additional tabs and fields are used for tracking ministers and for defining the connections between individuals and churches. CDM+ helps regional offices track leadership positions in churches, ministerial or otherwise.



Minister Checkbox

The *Minister* checkbox on the Name tab indicates that the region regards this person as a minister. Checking this box makes the information on the DOC Minister tab available.

Note: The *Minister* checkbox does not indicate standing! The *Has Standing* checkbox on the DOC Minister tab indicates whether a minister has standing held by the region.

Do Not Print

The Do Not Print checkbox on the Name tab of the Individual Record is not unique to CDM+ Regional. It provides a way to mark an individual record as inactive. When *Do Not Print* is checked for an individual, that person will not appear in directories and other reports using standard searches. The *Do Not Print* box is usually checked when a person dies, for example. This allows that person’s records and history to continue in the database without including them in reports

and directories. Some regions check this box when a minister transfers oversight of their standing out of the region to exclude the minister from clergy listings.

CDM+ Membership uses *Do Not Print* to filter the results of simple finds, such as *Minister equal to Yes*. If an individual record has the Do Not Print box checked, that record will not be displayed in simple find results or when showing all records. The orange **Filtered** icon will indicate that the results have been filtered. To show the filtered records, click the icon. The records will be displayed, and the icon will change to the green **Unfiltered** icon to indicate that no records are being filtered. The result count will be updated accordingly.

Note: CDM+ Mobile and Engage will not display individuals where *Do Not Print* is checked.

When a Minister Dies

When a minister dies, the death date should be recorded on the Personal tab of their Individual Record. *Has Standing* should be unchecked, and *Do Not Print* should be checked. This change should be submitted promptly to the general database.

When a Minister Leaves the Region

When a minister leaves the region, their standing will transfer to another region, so the *Has Standing* box should be unchecked, indicating that this region no longer has oversight of the minister's standing. Search and Call should be set to 'Minister transferred to another region.'" The *Minister* box should remain checked, however, to continue access to information on the DOC Minister tab. Regional staff may check the *Do Not Print* box so that minister does not appear on directories and other reports of ministers in the region.

Address Override

The Override check box provides the capability for a minister's mail from the region to be delivered to an address other than the address (usually their home address) on the address record. For example, several ministers prefer to have mail from the region delivered to the church rather than to their home.

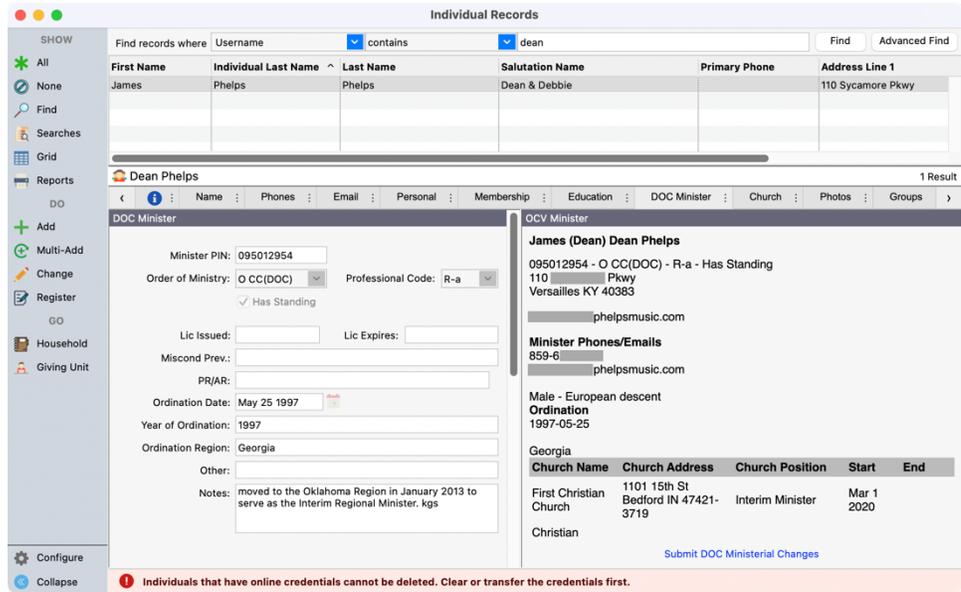
By checking the Override box, you can then enter the church address as the override address. Then CDM+ will use the override address when creating individual letter notices, envelopes, or labels for mailing to the minister. Mail to the family, such as from Address or Giving Unit Records, will be delivered to the home address on the Address Record.

DOC Minister Tab

The DOC Minister tab contains a substantial part of the information in regional database that is shared with and communicated to the General database. The lower section of the DOC Minister tab contains two panels. The left-hand panel has the heading **DOC Minister** and contains information in the Regional database. Regional data is available for update. The right-hand panel has the heading **OCV Minister** and displays information drawn in real time from the general database.

OCV Minister data is only visible to the region that has oversight of the minister's standing. When a region does not have oversight of the minister with the entered Minister PIN, The OCV Minister section displays the message: **You do not have oversight over this minister.**

The OCV Minister section displays the minister's name, PIN, Order of Ministry, Professional Code, and standing status. It also includes contact information, ordination date and region, and information about the minister's ministry settings. Information from the OCV Minister section can be copied and pasted.



Having this information side by side is an easy way to determine whether the regional and general records are in sync and whether the region needs to submit any changes.

DOC Minister Data

The following fields are used in communication with the General database.

Minister PIN – The Minister PIN provides the link between an Individual Record in a regional database and a Minister Record in the general database. When a PIN in a Regional database matches a PIN in the General database, those two records are associated.

Order of Ministry – Described earlier.

Professional Code – Described earlier.

Has Standing – The Has Standing checkbox, when checked, indicates that the minister currently has standing held by the region.

Note: The general database also has a *Has Standing* checkbox. The checkbox in the general database is the authoritative source regarding whether a minister currently has standing. The *Has Standing* checkbox in the general database determines whether a minister appears in the Minister Directory and whether they can create a profile to enter

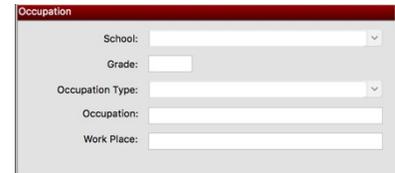
search and call. The general database also indicates which region (or the General Commission on Ministry) holds oversight of the minister's standing.

Ordination Date – Date of the minister's ordination.

Ordination Region – Region in which the minister was ordained.

Ethnic Codes – Described earlier.

Occupation – Regional staff should use the *Occupation* box for ministers who are primarily engaged in ministry outside of a local congregation.

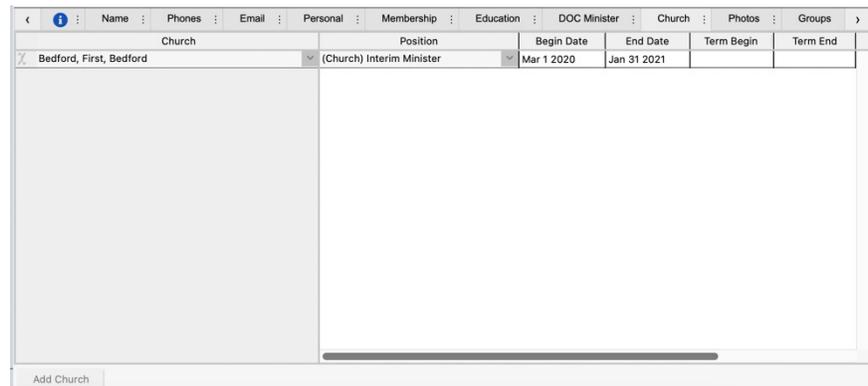


Work Place – identifies the ministry setting for ministers who are serving outside of a Disciples local congregation.

Church Tab

The Church tab connects Individual Records with one or more Church Records. To connect a minister to a church:

- Click Change.
- On the Church tab, click Add Church.
- Choose the church from the drop-down list.
- Choose the position from the drop-down list.
- Enter the Start Date.
- Click Save.



Positions are defined by the region in the Master Coding System. A regional database may use lots of positions, but only a few of these may be ministry positions that need to be communicated to the General database. Ministry positions to be communicated from the Regional database to the General database are defined in CDM+ System Preferences, under the Regional tab on DOC. Use this preference to map positions that should be reported from the regional database to position values in general database. This is described below.

If a minister has an entry on the church tab, the position matches one in the System Preferences list, and the entry does not have an End Date, that church entry will be included when changes are submitted.

Note: CDM+ considers any position used on the Church tab to be a Church Position. Church Positions are considered groups in CDM+. They can be used in selecting data for directories and listings, sending letter or email notices, looking up individuals in CDM+ Mobile, and viewing groups in CDM+ Engage.

Reporting Church Position Information

Positions recorded on the Church tab for a minister contain three pieces of information that connect the position to the general minister database: the church PIN, the minister PIN, and the position code. For regional staff to compare and report church position information to the general minister database correctly and completely, these values must be available in the regional database.

When comparing church positions in the regional database with church positions in the general database, CDM+ also looks at the position start date.

Church PIN

The church PIN is the six-character code that identifies a congregation across the life of Disciples. The church PIN not only connects congregations in the regional and general databases for minister reporting, but it also identifies congregations in the Treasury Services database of giving data and in the yearbook database of congregational data.

Regional staff record the church PIN on the Address tab of the Church Record in CDM+ Regional. For a church position to report correctly to the general minister database, the church PIN for the congregation shown with the position must have a Church Record with a PIN that matches the PIN of a Church Record in the general minister database.

Information			
County:	Lawrence	YB County Code:	<input type="text"/>
Acct#:	<input type="text"/>	Year Began:	<input type="text"/>
PIN:	150030	CFC:	<input type="text"/>
Budget Year:	<input type="text"/>	EIN:	<input type="text"/>

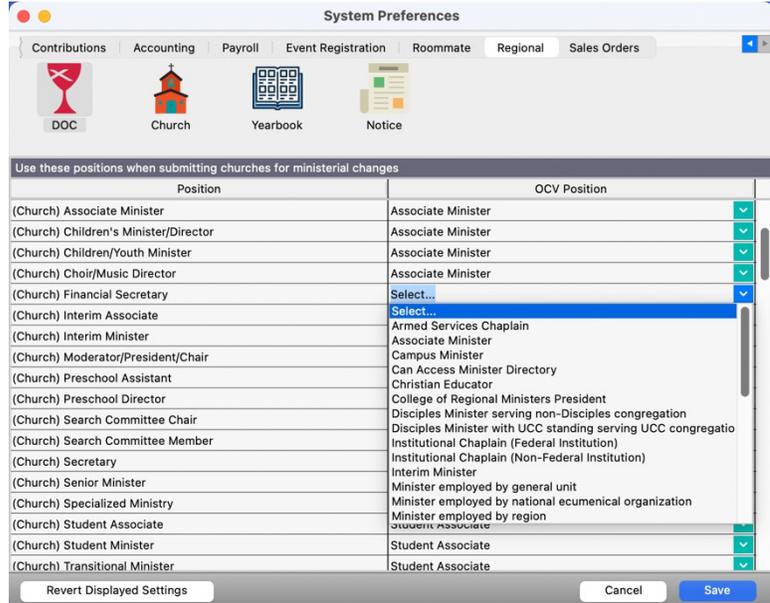
Minister PIN

The minister PIN is a nine-digit code that uniquely identifies a minister in the general minister database. Before submitting any minister changes from the regional database for an existing minister the general database, the Individual Record for the minister must have a PIN that matches the minister's record in the general minister database. The minister PIN connects the records in each database. A region must have oversight of the minister's standing in order to submit changes for the minister.

Position Mapping

Each region defines its own Position code values, and these are not consistent across regions. The general minister database also has its own list of Position code values. To accurately record positions in the general minister database, regional staff need to map their Position code values to the Position codes in the general database.

Regional staff complete this mapping in CDM+ System Preferences by going to the *Regional* tab. Choose the *DOC* icon at the top. (This icon is unique to the Disciples of Christ customization of CDM+ Regional.)



The window shows two columns. The left-hand column displays all the Position codes in the Master Coding System of the regional database. The right-hand column contains drop down lists of the position codes defined in the general database. (The screen shot shows the open list.) To map a regional position, drop the list on the same line in the OCV Position column and choose the appropriate code.

When the needed positions are mapped, click *Save*.

Minister Reporting Actions

The lower right corner of the **DOC Minister** tab for ministers (*Minister* box is checked) displays the action that regional staff can use to report minister information to the general database. The specific action is contextual, depending on the current data the region has recorded for the minister.

When a region clicks the reporting action, information from the minister's Individual Record in the regional database is compared with the information for that minister in the general database. The differences are compiled into a set of changes that regional staff can review before submitting. The submission requires notes to inform OCV staff about the reason for the change.

Submit DOC Ministerial Changes

This is the most common action that regional staff will request. Regions submit ministerial changes to maintain current data in the general database and the Minister Directory. CDM+ shows this change action when the minister PIN matches, the region has oversight of the minister's standing, and the general database indicates that the minister currently has standing.

This action will compare data values between the regional and general databases. In addition to data from the DOC Minister tab, the program compares address, phone numbers, email addresses, genders, death date, and positions listed on the Church tab. The program then compiles the differences into a change set and presents it to the regional staff person for review.

Submit DOC Ministerial Changes

Notes
This is a test change for the DOC Minister Changes and Tracking class.

Sender's email: dean@suran.com

Changes

CHANGE James (Dean) Phelps

- Credential Region from **Kentucky** to **Indiana**
- Credential Standing set to **O CC (DOC)**
- Ethnic Codes from **European descent** to **<blank>**
- Work Location set to **Christian Church in Oklahoma**
- Zip/Postal Code from **40383** to **40383-9168**

ADD New Other Phone Number/E-Mail Address

Number **<blank>**
Type **Alternate e-mail address**
Unlisted: **No**

ADD New Other Phone Number/E-Mail Address

Number **dean@suran.com**
Type **Email Address**
Unlisted: **No**

Cancel Submit

The Submit DOC Ministerial Changes window reads as changes that will occur in the general minister database. That is, this field in the general database will be changed from this old value to this new value. For example, in the screen shot the *Credential Region* will change from *Kentucky* to *Indiana*. In the Change section, values in the general database (old values) are shown in blue, and the values from the regional database (new values) are shown in orange.

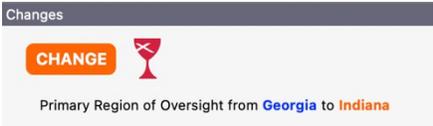
At this point, regional staff should review the changes included. They have the option to Cancel and make any needed changes to the minister's information in the regional database before resubmitting. To submit the change set for processing by OCV staff, include Notes that explain the reason for the change, and click Submit.

Note: This is the preferred method to report changes to the general minister database. Once received by OCV staff, they can review these changes before applying them to the minister's information in the general database. This eliminates manual entry, reducing both the human intervention required and the potential for data errors.

Request Oversight Transfer

When a minister moves from one region to another or no longer qualifies for standing through GCOM, the minister needs to transfer their standing to the new region. The receiving region needs to create an Individual Record for the minister with the Minister PIN. At that point, the action button on the DOC Minister will read: *Request Oversight Transfer*.

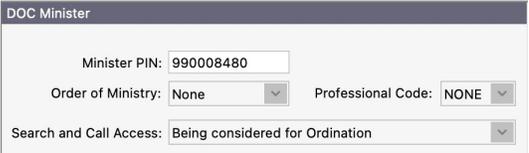
When regional staff click *Request Oversight Transfer*, the change set will only include the change in Primary Region of Oversight. The submitting regional staff person will receive a confirmation email when OCV staff completes the transfer request. Then the region can submit a ministerial change to update contact and other information for the minister.



Submit Regional Directive

Regional staff submit a regional directive when a minister without standing needs access to search and call. If the minister already has a record with a PIN in the general database and the region has recorded PIN in the regional database, the action button will read: *Submit Regional Directive*.

Regional staff should set Order of Ministry to *None* and select the reason for search and call access from the drop-down list in Search and Call Access. Click *Submit Regional Directive* to submit the directive for processing by OCV staff.



Submit New Minister

When a region is introducing a new minister into the system, such as when a candidate comes under care of the regional Commission on Ministry, regional staff should check the *Minister* box on the Name tab and leave the *Minister PIN* blank on the DOC Minister tab. The action button will read: *Submit New Minister*. Clicking *Submit New Minister* will generate a PIN and create a change set with the new minister's information.

Watch out! Submit New Minister means creating a new Minister Record in the general minister database, not in the regional database.

Be careful when submitting a new minister! Before taking this action, check with OCV staff and make sure that the minister does not already have a Minister Record in the general database. Regional staff should have the full legal name for the minister. This helps to ensure that submitting a new minister will not create a Minister Record that duplicates an existing one. The region should have an address, phone numbers, and email addresses for the minister before submitting the request to add a new minister.

Regional Directive to Submit a New Minister

Regional staff can submit a new minister and request access to search and call for that minister at the same time. If regional staff set Order of Ministry to *None* and select the reason for access from the Search and Call Access drop-down list, the action button will read: *Submit Regional Directive to create this minister*. Regional staff can click this action to create a new minister with access to search and call.

Change History

The regional and general databases each maintain a history of change sets submitted for a minister. In a regional database the Change Sets tab lists the change sets that regional staff have submitted for this minister.

In the general database, the Change Sets tab shows the changes that have been received from all regions. The general database also records how the change was processed. Selecting a change from the list will display the changes that were included in that submission.

The screenshot shows a software interface for 'Dean Phelps' with a 'Change Sets' tab selected. The interface includes a navigation menu at the top with options like 'User Fields', 'Attendance', 'Pastoral', 'Care', 'Notices', 'Check-In', 'Connections', 'Change Sets', 'Engage', and 'Events'. Below the menu is a table with columns for 'Type', 'Submitted Date', and 'Status'. The table contains four rows of data, with the third row highlighted in blue. To the right of the table is a 'Notes' section with a 'Demo' note. Below the notes is a 'Submitted' section with the text 'Submitted Jan 30 2023 3:40 PM by Dean Phelps <dean@suran.com>'. Below that is a 'Changes' section with two entries, each starting with a 'CHANGE' icon and a profile picture. The first entry is for 'James (Dean) Phelps' and lists several changes: 'Credential Standing set to O CC (DOC)', 'Ethnic Codes from European descent to <blank>', 'Work Location set to Christian Church in Oklahoma', and 'Zip/Postal Code from 40383 to 40383-9168'. The second entry is for 'Interim Minister at Bedford, IN, First Christian Church' and lists 'End Date set to Jan 31 2021'.

Type	Submitted Date	Status
DOC Oversight Transfer	Jan 30 2023 3:29 PM	Submitted
Ministerial	Jan 30 2023 3:33 PM	Submitted
Ministerial	Jan 30 2023 3:40 PM	Submitted
Ministerial	Mar 22 2023 1:36 PM	Submitted

Submitted Jan 30 2023 3:40 PM by Dean Phelps <dean@suran.com>

CHANGE **James (Dean) Phelps**

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- Ethnic Codes from **European descent** to **<blank>**
- Work Location set to **Christian Church in Oklahoma**
- Zip/Postal Code from **40383** to **40383-9168**

CHANGE **Interim Minister at Bedford, IN, First Christian Church**

End Date set to **Jan 31 2021**