

Search and Call

The Search and Call program in CDM+ provides Disciples of Christ regions with a tool to connect congregations seeking ministers with ministers seeking a ministry position. Through the Search and Call program, regional staff have access to profiles for ministers who are currently seeking a call, and ministers can view profiles of congregations seeking to fill a ministry position.

Through the Search and Call program, regions both connect the profiles of available ministers with congregations that are currently seeking to fill ministerial positions and retain a history of search and call activity.

Ministry Position Records

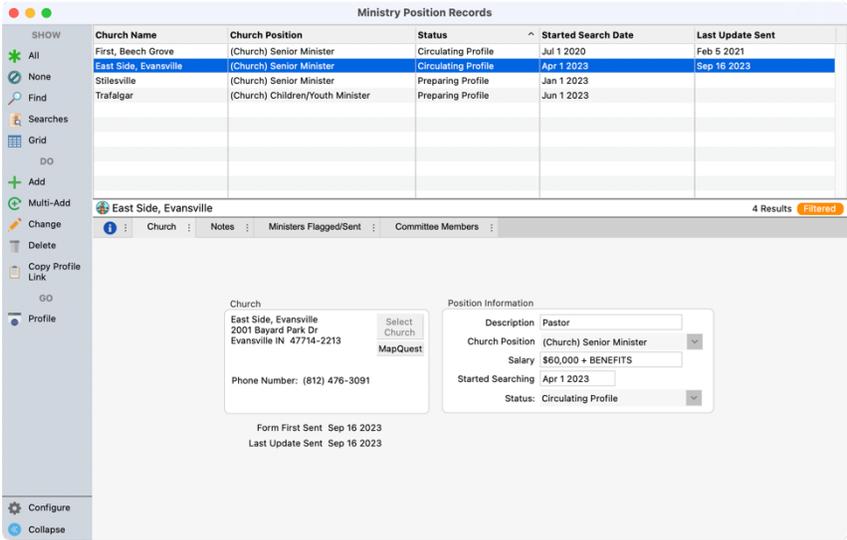
The Search and Call program uses **Ministry Position Records** to represent the position a congregation seeks to fill. These records connect to the congregation's **Church Record** in the CDM+ Regional program.

The Ministry Position Record window looks and functions like other record windows in other CDM+ programs.

Program > Search and Call > Ministry Position Records

Ministry Position Records describe a ministry position in a congregation that exists in the Church Records of the CDM+ Regional program. Regions are responsible for all data in the Ministry Position Record. Data entered on the Ministry Position Record is only available in the region's CDM+ Regional database. **Nothing on the Ministry Position Record is shared with the general search and call database or with any other regions.**

The Ministry Position Records window looks and functions like other record windows.



Church

The Church tab contains information about the congregation and the position to be filled. Contact information for the church comes from the Church Record, but the other data items are provided by the person creating the record.

Form First Sent and **Last Update Sent** show the first and most recent dates that regional staff sent minister profiles to the search committee.

NOTE: Profile data entered in the Congregational Profile Tool (described later) is stored in the regional database and connected to the Ministry Position Record. To retain this information, set the Status to *Complete* on the Ministry Position Record when the search is completed rather than deleting the record.

Position Information

Description—This free text field describes the ministry position, for example, Senior Minister, Pastor, Associate Minister. The value in this field appears on the home page of the Congregational Profile Tool (described later).

Church Position—This drop list provides choices from the Positions code in the Master Coding System. When the search is complete and a call is made, the Create Individual function uses this value to create the Church tab entry on the Individual Record in CDM+ Membership for the called minister.

Salary—This free text field can be used to highlight compensation information by the search committee in the congregational profile. This provides a reminder to regional staff of the position compensation. The Search and Call program does not use this information when searching minister profiles.

Started Searching—This date field contains the date the search began, such as the date the search committee was formed or the date the committee met with the regional minister for orientation. It is advisable to be consistent with the date used in every Ministry Position Record. Using consistent start dates provides a meaningful history about the length of searches.

Status—The choices in this dropdown list indicate the status of the search committee's work on this Ministry Position. Five status options are available: Preparing Profile, Circulating Profile, On Hold, Extending a Call, and Complete. Ministry positions with the status *Complete* are filtered by default and do not appear in simple searches such as Show All. The status options cannot be modified through the Master Coding System.

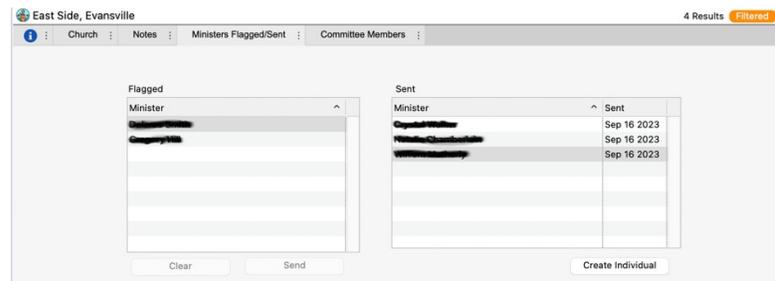
Notes

The region can enter notes about this ministry position on the Notes tab. These notes only pertain to the Ministry Position. They are not related to any Minister Records or profiles that might have been flagged or sent.

Ministers Flagged/Sent

The Ministers Flagged/Sent tab displays a history of minister profile records that have been linked to this ministry position by being marked as either flagged for the position or sent to the committee. The **Clear** button is used to clear the flag for a

minister profile to this ministry position. The **Send** button marks either a selected minister profile or the entire list as sent to the committee for this ministry position.

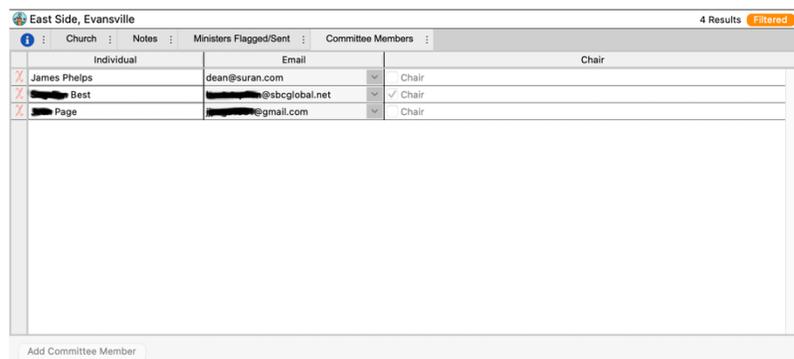


Committee Members

The Committee Members tab connects members of the search committee with their Individual Record in CDM+ Membership. The email address on the

Committee Members tab is the email address that the committee member will use to create their account for logging into the Congregational Profile Tool. A check box allows you to indicate which member or members serve as the chair of the

committee.



Creating a Ministry Position Record

To create a Ministry Position, start by clicking the Add button in the sidebar. use the Select Church button to select the Church Record for this ministry position. In the Select Church window, find the church record, select it from the search results, and click OK. CDM+ will fill the address and phone number for the church. Complete the Position Information and set the Status to *Preparing Profile*.

Proceed to the Committee Members tab to enter the search committee members. To add a committee member, start by clicking Change in the sidebar, then click the Add Committee Member button. Use the Select Individual window to find and choose the individual. Select an email address from the dropdown list in the Email column.

It may be necessary to add a new individual and address record for one or more committee members. This is done from the Select Individual window and is the same as adding a record from the Individual Records window.

Note: An email address is required for a committee member to use the Congregational Profile Tool.

Click Save in the sidebar and celebrate the creation of a brand-new Ministry Position record!

Minister Records

Minister Records contain profile data for ministers currently in search and call circulation and that are available for circulation in the region. Regional staff do not create or add Minister Records. Minister records are loaded to and removed from each regional database through a nightly sync with the general search and call database.

> Program > Search and Call > Minister Records

Information from the minister profile can be viewed on the various tabs of the Minister Records window.

By default, the records displayed in the Minister Records window will be filtered based on whether regional staff has marked the profile as **Ignored** (see

The screenshot shows the 'Minister Records' application window. At the top, there is a table with columns: 'Date Forms Last Updated', 'Last Name', 'First Name', and 'Ignored'. The table contains four rows of data. Below the table, the profile for 'Dora Mae Devan' is displayed. The profile includes a 'Minister Summary' section with fields for 'Dora Mae Devan', '990007500 - O CC(DOC) - OP - Has Standing', 'Denver CO 80231', 'United States', and an email address. Below this, it lists 'Master of Divinity-to be conferred June 8, 2017 IIIIF School of Theology' and 'Bachelor of Science Columbia College'. It also shows 'Entered General Circulation (G) on 4/07/2017, updated 6/02/2017'. A 'Salary' section shows '000 - 000'. There are three columns: 'Church Size', 'Ministry', and 'Community', each with a list of three options. A 'Regions' section lists various geographical areas. At the bottom, there are 'Ignore' and 'MapQuest' buttons.

Date Forms Last Updated	Last Name	First Name	Ignored
02/12/2016	Brown	Michelle	No
02/03/2017	Castetter	Jeff	No
06/02/2017	Devan	Dora	No
11/11/2016	Elliott	Paul	No

Minister Summary

Dora Mae Devan
990007500 - O CC(DOC) - OP - Has Standing
Denver CO 80231
United States
(home)
@hotmail.com

Master of Divinity-to be conferred June 8, 2017 IIIIF School of Theology
Bachelor of Science Columbia College
Entered **General Circulation (G)** on 4/07/2017, updated 6/02/2017

Salary 000 - 000

Church Size	Ministry	Community
1. 51-150	1. Senior Pastor	1. Any
2. 151-350	2. Associate Pastor	2. Suburb
3. 1-50	3. Interim/Transitional	3. Town

Regions
Arizona, Central Rocky Mountain, Greater Kansas City, Indiana, Kansas, Kentucky, Mid-America, Nebraska, Northwest, Pennsylvania, Tennessee, Upper Midwest

Ignore MapQuest

below). If a minister profile record has been set to *Ignored*, it will not be displayed in simple results or when showing all records. The orange **Filtered** icon will indicate that records have been filtered. To show the filtered records, click the **filtered** 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.

Record filtering can be turned off or modified by using the **Configure** button in the sidebar.

Unique Sidebar Buttons

Profile Search – Opens the Profile Search window, which searches minister profiles based on ministry preferences. This is described in more detail below.

Profile – Opens the minister profile as a PDF document. The criminal background check is now included in the profile PDF.

Flag/Send – Opens the Mark Ministers window for pairing minister profile records with Ministry Position records. This is described in more detail below.

Mark – The *Mark* button appears after clicking Flag/Send to open the Mark Ministers window. Clicking the *Mark* button adds the selected minister to the list in the Mark Ministers window.

Summary

The Summary tab displays contact information, the minister’s PIN, order of ministry, academic credentials, salary requirements and a summary of the ministry preferences from the minister’s profile. The ministry preferences include type of ministry, congregation size, community size, and regional preferences for circulation.

The *Regions* area displays the regions selected by the minister either for limited circulation (LC) or for general circulation with strong preferences (GSP). No regions are displayed for ministers who are in general circulation with no preferences (G), based on the circulation preference selected by the minister.

Notes—This is one of three places in the Search and Call program where a region can enter notes. Notes entered here pertain to the selected minister and their profile. Information entered in the Notes field does not become part of the profile. It is not shared with the general search and call database, with other regions, or with the minister.

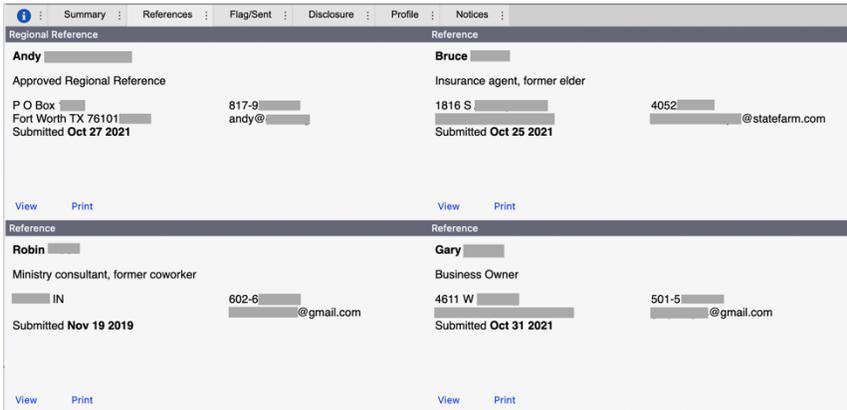
Ignore (Un-ignore)—A region has the option to ignore a profile in the system. This button marks a profile as ignored. When a profile is marked as ignored, the button changes to *Un-ignore*, which will clear the ignored status. Profiles that have been ignored will not appear in simple find results. **Note:** You have to click *Change* in order to toggle the Ignore status.

When an ignored record is selected, a red status line appears at the bottom of the Minister Records window that indicates that the profile record has been ignored, when it was ignored, and who set the profile to ignore. It is a good practice, when ignoring a profile record, to add information to the notes indicating why the profile is ignored.

(Ignored on Sep 17 2023 7:39 AM by Dean Phelps)

References

The *References* tab data area is divided into four boxes. Each box displays contact information for one of the four references associated with the minister’s profile along with the date that the reference was submitted. The regional reference will always appear in the top left and will be labelled as such.



Under each box are buttons that allow viewing and printing of the reference.

Flag/Sent

The Flag/Sent tab contains a table that displays the ministry positions currently in progress. That is, the ministry position status is not *Complete*. The Display Completed checkbox will include completed searches in the list.

The screenshot shows the 'Flag/Sent' tab interface. It features a table with columns: Code, Congregation, Marked, Sent, and Complete. The table lists four entries: Stilesville, Stilesville; Trafalgar, Trafalgar; Beech Grove, First, Beech Grove (highlighted); and Evansville, East Side, Evansville. To the right of the table is a form with the following fields: 'Display Completed' checkbox, 'Flag Info' section with 'Sent' checkbox (At the request of the minister), 'Flag Date' (Sep 17 2023) and 'Contact Date' input fields, 'Contacted by' input field, 'Flag Status' section with radio buttons for 'Minister flagged for Congregation' (selected), 'Minister has agreed to have name sent', 'Minister has declined to have name sent', 'No Response from Minister', and 'Other', and a 'Clear' button. Below the form is a 'Contact Notes' text area.

Two additional columns indicate whether the minister's profile has been flagged for a congregation or sent to a congregation. This provides a record of the search committees to which regional staff have sent this minister's profile.

Watch out! Each minister/church combination has its own set of flag/sent data. Make sure the intended congregation is selected in the table before flagging the profile or entering comments!

Sent shows the date a profile was marked sent to a congregation. This field is set by the system when a profile is marked as sent.

At the request of the minister is set by regional staff to indicate that the minister contacted the region and requested that their profile be sent to the committee for the ministry position.

Flag Date is the date that regional staff flagged the minister's profile for this ministry position. CDM+ sets this date when regional staff flag the profile.

Contact Date can be set by regional staff to indicate the date that the region contacted the minister about this congregation.

Contacted By can be set by regional staff to indicate the person that contacted the minister regarding this ministry position.

Regional staff choose a **Flag Status** to reflect the response of the minister regarding this congregation: agreed to have name sent, declined to have name sent, did not respond, or other.

Contact Notes is a text field for recording notes. These notes regard a particular pairing of minister profile and ministry position. More general notes about a minister's profile should be recorded in the Notes pane on the Summary tab. Notes about a congregation in process should be recorded on the Notes tab of the Ministry Positions window.

This is a close-up of the form area from the screenshot above. It shows the 'Sent' checkbox (At the request of the minister), 'Flag Date' and 'Contact Date' input fields, 'Contacted by' input field, 'Flag Status' section with radio buttons for 'Minister flagged for Congregation' (selected), 'Minister has agreed to have name sent', 'Minister has declined to have name sent', 'No Response from Minister', and 'Other', and a 'Clear' button. Below the form is a 'Contact Notes' text area.

Use the **Clear** button to erase the flag for this minister and ministry position. When clearing a flag, it is a good practice to add a message about why the flag may have been created and why it was cleared in the Contact Notes.

Disclosure

The data area of the Disclosure tab shows the date that the minister completed the disclosure form and the version of the disclosure form completed. It also indicates any disclosures that are part of the minister's profile. This information comes from the general search and call database and cannot be updated by regional staff.

The text of the disclosure is not shown on this tab. It is included as part of the printed profile.

Profile

The data area of the Profile tab displays the complete ministerial profile in print format, including all references and disclosures. The profile can only be viewed on this tab, not printed. To print the profile, use the *Reports* or *Profile* buttons in the sidebar.

Using a right-click (Windows) or Control-click (MacOS) in the profile data area provides an option to display a page list in the profile data area. The page list provides navigation to the content of the profile.

Notices

The data area of the Notices tab presents a list of email notices that have been sent to this minister, showing the description of the notice and the timestamp when it was sent. To the left of each item in the list, three icons appear. From left to right, the first  jumps the user to the Minister Sent Notice record that matches the description and timestamp. The second  allows the user to resend this notice to this minister. The third  deletes the record of this notice being sent to this minister.

Searching Minister Profiles

The Search and Call program of CDM+ provides a number of ways to search minister records for profiles that fit any number of criteria. These range from very simple to very complex and powerful.

Profile Search

The *Profile Search* button on the sidebar of the Minister Records window opens the Profile Search window. The Profile Search window is also available from the CDM+ menu, **Program > Search and Call > Profile Search**.

The Profile Search window provides a quick and simple way to search for profiles matching ministry preferences, enabling regional staff to search for minister profiles that match the characteristics of a congregation, community, and ministry position. The Profile Search window contains two tabs: Preferences and Expenses. These criteria can be used in any combination to search for ministerial profiles that fit a particular situation.

The screenshot shows the Profile Search window with two tabs: Preferences and Expenses. The Preferences tab is active. It contains several sections of search criteria:

- Type of Congregation:** Congregation with one Pastor, Congregation with Multiple Staff, Yoked Congregations, New Church Development, Part-time Ministry, Bi-Vocational, Non-Congregational Ministry, Multi/Inter-cultural, Multi/Bi-lingual. A "Clear all" button is at the bottom.
- Select Type of Ministry:** Pastor, Co-Pastor, Associate Pastor, Christian Education, Music Ministry, Youth Ministry, Children and Ministry, General/Regional, Ecumenical Ministry, Campus Ministry, Chaplaincy, Pastoral Counseling, Spiritual Direction, Missionary, Interim Ministry. A "Clear all" button is at the bottom.
- Average Worship Attendance:** 1-50, 51-150, 151-350, 351+, Any. A "Clear all" button is at the bottom.
- Community Type:** Rural/Under 2,500, Town/2,500-50,000, City/50,000-250,000, Urban/Over 250,000, Suburb in Urban Area, Any. A "Clear all" button is at the bottom.
- Salary Range:** Include Salary Range, Include Negotiable. Min: 0.00, Max: 0.00.

At the bottom right, there are "Search" and "Close" buttons.

Regional staff can use any number of boxes to define the search. Using fewer boxes results in a broader search and returns more profiles. Using more boxes provides a narrower search, returning fewer profiles.

Note: The checkboxes under Average Worship Attendance only appear when a congregational ministry setting is selected under *Select Type of Ministry*.

The **Salary Range** box on the Profile Search window allows regional staff to find profiles where the minister's salary requirements align with the congregation's capacity to compensate for the position. To consider compensation in the search, check the *Include Salary Range* box. Enter a minimum and maximum value for the salary range. To include profiles where the minister has indicated that their compensation is negotiable, check the *Include Negotiable* box.

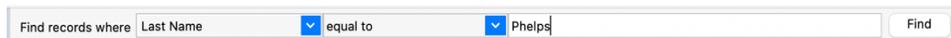
Note: For the salary range search to produce a match, the minister's salary requirements must fall entirely within the range specified in the Salary Range box. It is a good idea to enter minimum and maximum values wider than those indicated by the congregation for a broader search result.

After checking the options that match your search, click the *Search* button in this window to load the results into the Minister Records window. Click the *Close* button to close the Profile Search window.

Note: Results loaded from the Profile Search window will not be filtered based on the Ignore setting. Ignored profiles will be included in these search results.

Find

Regional staff can use the search bar on the Minister Records window to search for profiles using a single search parameter, such as searching for a minister by name or searching for profiles updated since a certain date.



Find records where Last Name equal to Phelps Find

Open the search bar by clicking the Find button in the sidebar.

Remember: The **Searches** button in the sidebar will recall the most recent searches used. By default CDM+ remembers the last ten (10) searches. The **Configure** button can also be used to configure the records that are presented when the Minister Records window is first opened.

Advanced Find

Using Advanced Find on the Minister Records window opens up the full power of the Search and Call database, enables searches using multiple criteria, and makes data available for search that is not available in the Profile Search window. With Advanced Find it is possible to search minister profiles using any piece of information that is available in the profile.

The results of an advanced find are not filtered.

Saving Searches

Advanced Find searches can range from fairly simple to extremely complex. Often the same search needs to be done multiple times or by multiple people. Rather than building searches repeatedly, CDM+ provides the capability to save searches, the same as in the other programs of CDM+. This enables use by multiple people and saves the time and trouble of always building a search from scratch.

Connecting Minister Records and Ministry Position Records

The Search and Call program in CDM+ exists to help regional staff match minister profiles with ministry positions. There are two possible approaches to making the connection. One focuses first on the position; the other begins with the minister.

Using the *Flag/Send* button on the sidebar of the Minister Records window lets regional staff approach the process by thinking first about the congregation and position and then seeking minister profiles that might be a match for the position. In contrast, using the *Flag/Sent* tab on the Minister Records window lets the regional minister approach the match first by thinking about the minister and then considering ministry positions that might be a match.

Flag/Send Sidebar Button

The *Flag/Send* button in the sidebar of the Minister Records window opens the Mark Ministers window, which requires the selection of a ministry position to continue. This approach begins

with considering the position and the congregation. To use the Flag/Send button for connecting a ministry position with one or more minister profiles, follow these steps.

- Click the Flag/Send button. This will open the Mark Ministers window.
- Select the congregation you're working on from the drop-down list of Ministry Positions. The window will then show a list of all profiles currently flagged for that position. Checking *Show Sent Ministers* will include minister profiles in the list that have been marked as sent.
- Choose the desired default action of Flag or Send. The system will default to the current date for Flag/Send with Date, but the user can change the date for the group action.
- **Leave the Mark Ministers window open** and return to the Minister Records window.
- Use any of the search techniques described above to locate and browse minister profiles in the Minister Records window. To flag a profile for the ministry position, select it in the search results pane and click the *Mark* button. This will add the profile to the list in the Mark Ministers window.
- Continue in the same manner, browsing, selecting, and marking until you are satisfied you have marked the desired profiles.
- Return to the Mark Ministers window, and double check the list of profiles and be sure that *Flag* is selected under Action for each.
- Click OK. The system will mark the profiles as flagged using the *Flag/Send with Date*.
- Close the Mark Ministers window.

Flag/Sent Tab

A minister's profile can also be flagged for a ministry position using the Flag/Sent tab on the Minister Records window. This approach first considers a minister profile and then explores ministry positions that might be a match. To use the Flag/Sent tab to connect a minister profile with a ministry position, follow these steps.

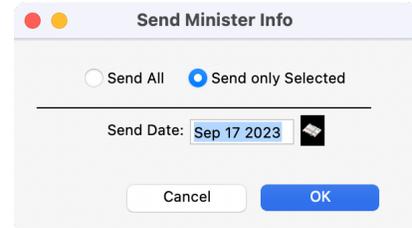
- With the minister selected in the results area, click Change.
- On the Flag/Sent tab, select the congregation name from the list of ministry positions. **It is important** to double check that you have the right ministry position selected!
- Choose the appropriate Flag Status. The system will fill in the Flag Date.
- Check *At the request of the minister*, if appropriate.
- Fill in *Contact Date* and *Contacted by*, if appropriate.
- Add any notes that may be appropriate.
- Click Save.

Marking a Profile Sent from the Ministry Position Record

A minister profile can be marked as sent using the **Send** button on the Ministers Flagged/Sent tab of the Ministry Position Record window.

- With the ministry position selected in the results pane of the Ministry Position Records window, click Change in the sidebar.
- Select one or more ministers from the list of flagged ministers to mark as sent.
- Click the Send button. This will open the Send Minister info window. The system defaults to the current date for Send Date, but this can be changed as needed.

Watch out! The system defaults to *Send All*. To send only the ministers selected, be sure to check the radio button for *Send only Selected*.

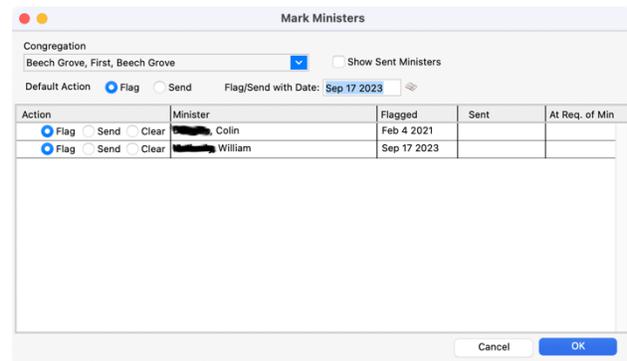


- Click OK on the Send Minister Info window, then click Save on the Ministry Position Record window.

Marking a Profile Sent from the Mark Ministers Window

Regional staff can mark Minister Profiles as sent from the Mark Ministers Window as well.

- Click *Flag/Send* in the sidebar of the Minister Records window.
- In the Action column, select the Send radio button for the profiles to mark as sent.
- Click OK.



Sending Profiles

The Search and Call program in CDM+ does not send a profile to a search committee. The program instead marks profiles as having been sent. The Search and Call program prepares the profile for sending. Sending the profile is still a process that takes place outside the program.

Preparing PDFs, Printed Profiles, and Background Checks

Profile Button

As described earlier, the Profile button in the sidebar of the Minister Records window will open a printable version of ministerial profile and criminal background check in the default PDF reading program. From this program, you can save a copy of the PDF for later sending or printing.

Please use caution when sending ministerial profiles and criminal background checks to a printer. These reports contain confidential information and should be guarded carefully.

Concluding a Search

When a search is completed and the ministry position is filled, it is a good idea to take these two steps.

- Go to the **Flagged/Sent** tab of the Ministry Position Record. Select the minister called from the names in the *Sent* box and click the Create Individual button. This will create Address and Individual Records for the minister using information from the minister profile and the Ministry Position Record, including the minister PIN. The DOC Minister tab is then ready for regional staff to request oversight of the minister's standing. (This is covered in the *DOC Minister Reporting* class.)
- On the Church tab of the Ministry Position Record, set the Status to *Complete*.

Minister	Sent
Cynthia Walker	Sep 16 2023
Natalie Chaudhary	Sep 16 2023
Vishal Chaudhary	Sep 16 2023

Create Individual

Notices

One important feature of CDM+ is the ability to send notices from the program using search results and contact information stored in the database. As in other parts of CDM+, these email notices can be personalized using content from the profile information.

Details on creating and sending notices are covered in the *CDM+ Notices* class.

Minister Email Notices

The Search and Call program provides regional staff with the ability to send letter, card, or email notices to ministers in circulation in the region. Minister notices are available through the **Reports / Search and Call** menu or the Reports button on the Minister Records window.

Ministry Position Notices

The Search and Call program also gives regional staff the ability to send letter, card, or email notices to search committee members. Ministry Position notices are only accessible through the **Reports / Search and Call** menu. The Ministry Position Record window does not have a *Reports* button in the sidebar.

Minister Sent Notice Records

Choosing Minister Sent Notice from the **Program / Search and Call** menu will open the Minister Sent Notices window, which is used to display and search the notices that have been sent from CDM+. The system keeps a sent notice record for each recipient of a notice. The Minister Sent Notice window will display a record for each time the same notice is sent.

Sent Notice Records are covered in the *CDM+ Notices* class.

Reports

In addition to the ministerial profile, a number of helpful reports are available in the Search and Call program. These can all be accessed from the Print button on the Minister Records window and the **Reports / Search and Call** menu.

Minister Master Info

The Minister Master Info report presents detailed profile information for ministers selected by either the Standard or Advanced Search criteria. The report includes contact and preference information as well as a listing of churches where the minister's profile has been flagged or sent.

Minister Listing

The Minister Listing presents a summary of profile information based on the search criteria. The summary includes the minister's PIN, phone and email, and a summary of preferences.

Flagged Minister Report

The Flagged Ministers Report presents all ministers that have been flagged or sent for a ministry position according to the search criteria selected. One key difference is that the Standard Search dates are based on the dates that profiles were flagged or sent. The report can also be printed for selected ministers using the Standard Search criteria.

Note—It is a good idea to print and store copies of the Flagged Ministers Report for all dates and all ministers on a regular basis. This will provide a historical record of profiles flagged for and sent to congregations. When a minister removes their profile from circulation, that profile then is removed from the regional Search and Call database. When that happens, the connection between that minister and congregation will be lost and the minister will no longer appear on the Flagged Minister Report.

Exports

As in other areas of CDM+, the Search and Call program provides the ability to export data from the Minister Record to text files that can then be imported into other programs. Exports are available from the Print button on the Minister Records window and from the **Reports / Search and Call** menu.

The **Minister Export** allows the export of data from the Minister Record. The standard search criteria is based on dates of activity.

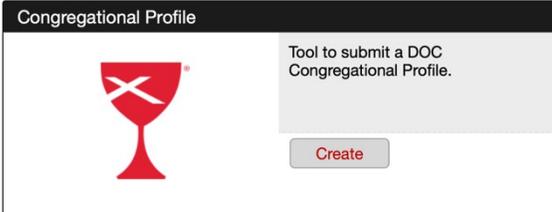
The **Flagged Minister Export** uses Standard Search criteria based on the dates when profiles were flagged or sent. The Flagged Minister Export can create text files that contain not only Minister Record data but also data from Ministry Positions, Church Records, and the Flag Records that connect Minister Records with Ministry Position Records.

Congregational Profile Tool

The Congregational Profile Tool uses Suran’s Web Ministry Tools to give search committees the ability to complete the congregational profile using a web browser like Safari™ or Google Chrome™. Ministers can review congregational profiles created with the tool using a web browser on their computer, phone, or mobile device.

Setting Up the Congregational Profile Tool

A region only needs to set up the Congregational Profile Tool once. This creates the link that every search committee will use to access the tool. Access to the congregational profile for a specific ministry position is controlled by the Committee Members tab on the Ministry Position Record. Only the individuals recorded on that tab can view or modify the congregational profile for that ministry position.



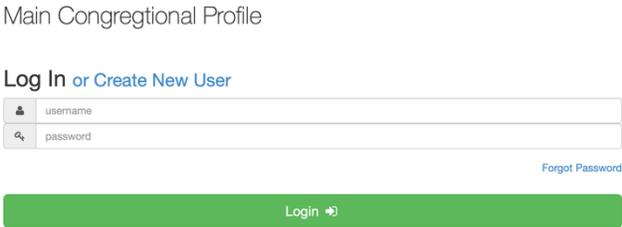
After the region sets up its Congregational Profile Tool, the link is available by clicking *Publish* on the tool. Share this link with search committee members.

Note: Information that identifies a particular region’s Congregational Profile Tool is coded in the web address for the tool. This makes the web address long without clear language. It’s a good idea to provide a link to the region’s tool in a common place that all search committees can access, such as the region’s web site.



Launching the Tool

When a search committee member follows the link for the Congregational Profile Tool, they will land on the login page. If they have not yet created their username and password, they can do that from the login page.

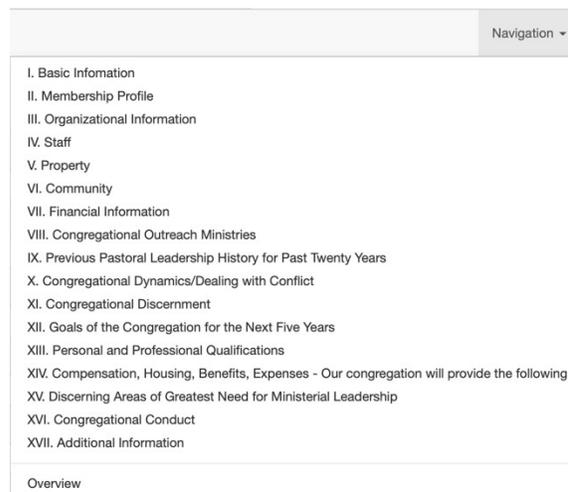


Note: If the search committee member has an Engage account with the region, the Congregational Profile Tool uses the same username and password. They do not need to create a new one. (Learn more about Engage login credentials in the *Engage Administration* class.)

Entering Profile Data

After search committee members have logged into the tool, they enter data in the various sections. The content and outline of the Congregational Profile Tool matches the paper-based profile. Data entered on the tool is stored in the regional database and connected to the Ministry Position Record.

Search committee members navigate to the various sections of the profile using the Navigation menu in the upper right corner of the site.

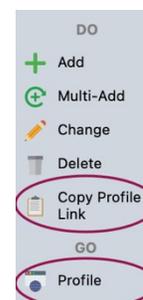


The Basic Information (first) section is the only section with required fields. All fields in this section must be completed before navigating to other sections of the profile.

Reviewing the Profile

Clicking the *Profile* button in the sidebar of the Ministry Position Record opens the profile in a browser window. This allows regional staff to review the congregational profile while it is in progress.

Note: For regional staff to modify the profile, they have to include themselves as committee members on the Ministry Position Record window.



Sharing the Profile

When regional staff click the *Copy Profile Link* in the sidebar of the Ministry Position Record, CDM+ copies the web address of the profile to the clipboard. The address can then be pasted and shared, for example, in an email to potential candidates or on the Ministry Positions section of WebMinPro.

Note: The congregational profile contains contact information for the search committee chair and other information about the congregation, so it is not advisable to share the profile link on a site that is publicly accessible.