

# Membership Clerks:

**You are the guardian of your church members' information.**



Every person has the right to privacy, and you are trusted to respect that right.

**Do not share information with anyone (*including board members and church leadership*) without permission from the affected person.**

**Rocky Mountain  
Conference**

**Membership  
Information  
& Procedures**

2023





# Rocky Mountain Conference

Summer  
2023

# MEMBERSHIP



## INFORMATION & PROCEDURES



### MEMBERSHIP TRANSFERS (within NAD):

1. Member asks **new church/accepting church** to request their membership transfer from **previous church/granting church**
2. **New church/accepting church** clerk enters a request in eAdventist OR sends request to RMC Membership Clerk
3. **Previous church/granting church** clerk receives request (an email via eAdventist) and takes the request to the pastor, who presents it to the Church Board
4. The **previous church/granting church** votes on the transfer, having a 1<sup>st</sup> and 2<sup>nd</sup> reading in the two weeks following the Board meeting
5. The **previous church/granting church** clerk enters the date of the 2<sup>nd</sup> reading into eAdventist OR sends the date to the RMC Membership Clerk
6. Once the date of the 2<sup>nd</sup> reading is entered and the transfer is **granted**, the clerk of the **previous church/granting church** has fulfilled their task, and nothing else is required of them for this transfer.
7. Now the **new church/accepting church** clerk receives notification (an email via eAdventist) that request has been granted, and takes the request to their pastor, who presents it to the Church Board
8. The **new church/accepting church** votes on the transfer, having a 1<sup>st</sup> and 2<sup>nd</sup> reading in the two weeks following the Board meeting
9. The **new church/accepting church** clerk enters the date of the 2<sup>nd</sup> reading into eAdventist OR sends the date to the RMC Membership Clerk
10. Once the date of the 2<sup>nd</sup> reading is entered and the transfer is **accepted**, the clerk of the **new church/accepting church** has fulfilled their task, and nothing else is required of them for this transfer. (The **previous church/granting church** clerk will receive an email from eAdventist)
11. The member now holds membership at the **new church/accepting church**.

## INTERNATIONAL TRANSFERS (outside NAD):

Transfers involving a church outside of the NAD can be tricky. The eAdventist database is not used outside of the NAD, so the clerks have to depend on standard mail service, which is unreliable in many areas of the world. If you receive a request for an international transfer, follow the steps listed below.

**Incoming** from an international congregation:

1. Add person to eAdventist as a nonmember
2. Ask the person if they have one of the following:
  - a) A letter from their former church, granting their transfer
  - b) Their baptismal certificate
  - c) A specific person from their previous church that they can call or email
    - If the incoming person does NOT have a letter or their baptismal certificate, then they need to get a written document (email or letter) from the pastor, clerk, or an elder from their previous church.
3. Once you have the certificate, letter, or email, send a copy to the RMC Membership Clerk. They will process it and enter it into eAdventist.
4. You will receive notification that the transfer has been ***granted***, and you proceed with the transfer just like any other.

**Incoming** from an international congregation, and NO DOCUMENTATION IS AVAILABLE:

1. Add person to eAdventist as a nonmember
2. Email the RMC Membership Clerk, and they will process it from the Conference level. Because the transfer will need to be voted through Executive Committee if the international church cannot be reached, it will take a few months.

**Outgoing** to an international congregation:

1. Provide the outgoing member with a signed letter on church letterhead, stating
  - a) Full Name
  - b) Date of Birth
  - c) Church Name and Location (City, State, and Country)
  - d) Member in Good Standing
  - e) Date of Board Meeting in which they were voted out.
2. Send a copy of the letter to the RMC Membership Clerk for final processing out of your church and off of your books. This may take a while, as it will need to be voted in RMC's Executive Committee.

## MISSING vs. REMOVED

When you discover that you have people on your books that no longer attend, your first thought may be to get them off of your records, but there is a procedure that needs to be followed.

A member is **removed** for one of 2 reasons:

1. Disciplinary actions
2. Member requested removal from the SDA Church in general.

According to the SDA Church Manual, a member can be listed as **missing** only when they have been out of contact with the church for 2 years. The church needs to make a reasonable effort, via letters, phone calls, or visits, to locate the member. If there is no response and they cannot be located, they can be moved to **missing** status.

MISSING	vs.	REMOVED
<ol style="list-style-type: none"><li>1. Has not attended in at least 2 years <u>AND</u></li><li>2. No contact information; any attempt to contact has been unsuccessful</li></ol>		<ol style="list-style-type: none"><li>1. Disciplinary Action  <u>OR</u></li><li>2. Member requests to be removed from SDA World Church</li></ol>
<p><b>**This action is easily reversed if the member regains contact with the church.**</b></p>		<p><b>**This action requires evidence of repentance and a return to a life consistent with SDA standards, as well as in-depth conversation with the pastor. It is not to be taken lightly.**</b></p>
<p>Must be voted in church business meeting and specific names of those members (to be moved to “missing” status) recorded in the minutes.</p>		<p>Must be voted in church business meeting and specific names of those members (to be moved to “removed” status) recorded in the minutes.</p>

## BAPTISMS and PROFESSIONS of FAITH

When a baptism or Profession of Faith occurs, it is the clerk's job to

1. prepare a certificate for the new member, and
2. record the new member's information.

Entering the information into eAdventist serves as reporting to the Conference, and no other paperwork is needed.

Certificates in English or Spanish are available from the RMC Membership Clerk.

## CHURCH ATTENDANCE

We don't ask for weekly attendance, but the NAD requires RMC to collect church attendance numbers for the ***2nd and 7th weeks of each quarter***. The RMC Membership Clerk sends out a reminder email to each pastor, clerk, and church secretary prior to each Sabbath when a count is needed, as well as, in December, sending a complete list of dates for the upcoming year. You can submit your numbers in 2 ways:

1. [eAdventist.net](http://eAdventist.net)
2. Email them to the RMC Membership Clerk

It is up to the pastor to decide if this task is done by the pastor, clerk, or secretary.

## CHURCH OFFICERS

A current list of church officers is necessary so that the correct person can be contacted. Officers are anyone in the church in a leadership role. You can include as many as you'd like on eAdventist, but you need to have at least the following officers listed below.

### ***Pastor(s) – entered by RMC Membership Clerk***

<i>Clerk</i>	<i>Pathfinder Director</i>
<i>Deacon, head</i>	<i>Prayer Ministries</i>
<i>Deaconess, head</i>	<i>Treasurer</i>
<i>Elder, head</i>	<i>Women's Ministries</i>
<i>PARL Director</i>	<i>Youth Leader</i>

## MEMBER INFORMATION

The most time-consuming part of being a church clerk is keeping the members' information current. Please encourage your members to inform you of any changes to their family status and contact information. Those changes should be recorded in eAdventist.

## MEMBER of a DIFFERENT CHURCH IN YOUR DIRECTORY

There are times that someone who is not a part of your church will show up in your directory. That usually happens when a member of a family unit belongs to a different church, but is still listed in the same family record. You will not be able to make changes to this person's information, because they are not your member. Moving them and/or changing their information will require the help of the RMC Membership Clerk.

**PERSON**

Last name: Fesler  
First name: R  
Middle/Suffix: Scott  
Salutation: Mr.  
Mobile phone:  
myEADVENTIST: Not enabled

Church: **Boulder Hispanic SDA Church** since 07/13/2023  
Status: Member by Baptism since  
Involvement:  
Family position: Primary  
Marital: Divorced  
Gender: Male  
Born on/Age: 06/02/1960 63 years old  
Changed: 07/13/2023 (Kelly Waller)

Statistics History Change Status Edit Person

Family Personal Membership Student Volunteer Notes Offices Committees Tags Lists

Addresses Street Mail/PO Box Alternate Work  
Default / Valid  
209 E Highline Cir Apt 101  
Centennial CO 80122-1035  
USA  
Google Maps

Phones Home Fax Alternate  
Default / Valid  
303-795-9272

Primary contact: R Fesler (Member) Change  
Mailing name: Mr R Scott Fesler  
Allow promo mail: Yes  
Subscriptions: Union paper • Adventist Journey  
SubscriberID: M115788/GMBO/O • update  
Include in: Church Directory • myEADVENTIST  
Photo caption:

Change Family Print Envelope Print Family New Person

NAME	BORN	AGE	GENDER	MARITAL	CHURCH	STATUS
R Scott Fesler primary	06/02/1960	63	M	Divorced	Boulder Hispanic SDA Church	Member
Zachary S Fesler child	06/09/1986	37	M	Single	LifeSource Adventist Fellowship	Member

## THINGS TO KEEP IN MIND:

1. An outgoing member holds membership at the **previous church/granting church** until the **date of acceptance is entered into eAdventist and saved**.
2. Access to a member's Person Page in eAdventist is only allowed to the church/clerk where the membership is held.
3. Only members be transferred. **Nonmembers cannot be transferred**, but the RMC Conference Clerk can change their church of affiliation.
4. The document lists some of the tasks that the RMC Membership Clerk oversees. Your pastor may ask you to perform different and/or additional tasks.



# eAdventist

technology for churches





**eAdventist**

technology for churches

# Using eAdventist

in your church:  
some helpful reminders and  
tips

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# How eAdventist Works

1. The official membership record of the NAD
2. Web-based database – available anywhere you have internet
3. Must have a link from RMC Membership Clerk to begin
4. Every user has their own log in information
5. Church clerk and/or Pastor see only their own church(es)
6. RMC Membership Clerk can see all of RMC
7. RMC Membership Clerk can see others' actions and fix as needed
8. Updates instantly



# Uses of eAdventist

1. Membership records
2. Transfers
3. Church Officers/Leadership Positions
4. Church directory - printed or digital
5. Labels
6. Mail merge
7. Attendance
8. myEADVENTIST – online directory
9. Committees
10. Notes
11. Visitation/Interest Tracking



# Layout of eAdventist

1. Your name is always in the upper, right-hand corner of the page
2. Colored boxes down the left-hand side are always there
3. Colored boxes down the left-hand side are tabs – click on them and more information will drop down
4. Underlined words or **words in purple** are links to more information and/or will take you to another screen

# Person Search & Person Page

1. A search for a person automatically searches for member/nonmember/missing in your church
2. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
3. Choose **search**
4. On the **PERSON SEARCH** page, enter the name (or first few letters of the name) and click **Search**
5. When a name or names pop up, click on the underlined name of the person you want & it will take you to the **PERSON** page
6. On the **PERSON** page, you will see a horizontal gray line (with words/tabs in it) on the middle of the screen. ↑↑*Above*↑↑ the gray line is information pertaining to the individual member; ↓↓*below*↓↓ the gray line is information pertaining to the entire family group, listed at the bottom of the screen.

# SAMPLE PERSON PAGE

PERSON

help ▾ Kelly Waller Logout

Last name: Fitzherbert

First name: Rapunzel

Middle/Suffix: Disney

Salutation: Mrs. 1

Email (personal): info@rmcsda.org

Mobile phone: 303-282-3635 voip

myEADVENTIST: Not enabled 2

Church: 3 Denver West SDA Church - since 01/12/2020

4 Status: Member - by Baptism - since 01/12/2020

Involvement: 5

6 Family position: Spouse

Marital: Married

Gender: Female


Born on/Age: 11/24/2000 - 22 years old

Changed: 07/03/2023 (Kelly Waller) 7

8 Statistics 9 History

10 Change Status

Edit Person 11



change delete view

Family Personal Membership Student Volunteer Notes Offices Committees Tags Lists

Addresses Street Mail/PO Box Alternate Work

12 Default / Valid 13 2525 S Downing St Denver CO 80210-5817 USA Google Map

15 Primary contact: Eugene Fitzherbert (Member) Change

Mailing name: Eugene & Rapunzel Fitzherbert 16


17 Allow promo mail: Yes

Subscriptions: Union paper • Adventist Journey 18

SubscriberID: M1766076/GMFG/7 update

Include in: 19 Church Directory • myEADVENTIST

20 Photo caption:



change delete view

Phones Home Fax Alternate

14 Default / Valid 303-733-3771

21 NAME BORN AGE GENDER MARITAL CHURCH STATUS

22 Change Family

23 Print Envelope

24 Print Family

25 New Person

Eugene Fitzherbert - primary	11/24/1998	24	M	Married	Denver West SDA Church	Member
Rapunzel Disney Fitzherbert - spouse	11/24/2000	22	F	Married	Denver West SDA Church	Member
Max Fitzherbert - other	11/24/2010	12	M	Single	Denver West SDA Church	Nonmember
Pascal Fitzherbert - child	11/24/2012	10	M	Single	Denver West SDA Church	Nonmember

INITIAL VIEW

# KEY to

## Sample Person Page Initial View - 1

1. Person's basic information
2. Tells if person is enrolled in myEADVENTIST (the church directory app for members)
3. Church in which membership is held
4. Member or Nonmember status
5. The **Involvement** is customizable to each church. If your church has not added in their classifications for member involvement, there will be no options here
6. Choose **primary**, **spouse**, **child**, or **other**. The first family member entered will automatically set as **primary**. Any additions to the family after that will not have a position listed unless it is chosen
7. This was the last person to make a change on the page
8. Shows the history of the membership – transfers between churches
9. Shows a complete list of changes made to the page in the past
10. Options to change the status of the person – use when a person is baptized, removed, deceased, etc.
11. Click to make changes to the displayed information
12. Person's street address
13. Use if mailing address differs from street address. This is the address all mailings will go to if something is entered
14. Land line phone number





15. Head of the family; the person in the family specified as **primary**. You can choose another person in the family by clicking on **Change** next to the name.
16. Name to appear on mailings
17. Do they want to receive mailings from the ABC and other mass mailings?
18. Are they subscribed to receive the Union paper & *Adventist Journey*?
19. Should they be included in the directories? eAdventist defaults to include each person, but you can change it as needed; some church members don't want their information shared
20. Names to be listed under the family photo in the directory
21. All of the people listed in the family unit
22. Moves a family member into a different or separate family – marriage, divorce, etc.
23. Downloads a pdf of the address, formatted to be printed on a #10 envelope
24. Downloads a pdf of the **Family Unit Record (FUR)**
25. Adds a new person to the family unit



**PERSON (EDIT)**

help Kelly Waller Logout

Last name: Fitzherbert

First name: Rapunzel

Middle/Suffix: Disney Suffix

Salutation: 1 Mrs.

Legal name:

Former/Maiden:

Email (personal): 2 info@rmcsda.org Unlisted? ☐

Mobile phone: 303-282-3635 Unlisted? ☐ 3

Work phone:

Church: Denver West SDA Church · since 01/12/2020

Status: Member · by Baptism · since 01/12/2020

4 Mission group:

Involvement:

Family position: Spouse

Marital: Married

Gender: Female

Born on: 11/24/2000 m/d/yyyy

Changed: 07/03/2023 (Kelly Waller)

Cancel Save

Family Personal Membership Student Notes

Addresses Street Mail/PO Box Alternate Work

Optional line: 5

Address: 2525 S Downing St Valid 7

City/StateProv: Denver CO

Postal code: 80210-5817

Country: USA

Carrier route: C015 (for USA) 8

Auto-certify: ☒ Address Fully Verified - 07/03/2023 Valid

Confidential: ☐ 9

Stop delivery: --- Not stopped --- 10

Address source: 11

Phones Home Fax Alternate 12

303-733-3771 Unlisted? ☐

Primary contact: Eugene Fitzherbert (Member)

Mailing name: Eugene & Rapunzel Fitzherbert

Allow promo mail: ☒

Subscriptions: ☒ Union Paper ☒ Adventist Journey 13

SubscriberID: M1766076/GMFG/7

14

Default address type: Street

Default phone type: Home 15

Include in: 16 ☒ Church Directory ☒ myEADVENTIST

Photo caption: 17

# KEY to Sample Person Page Editing View - 1

1. Add all forms of person's name, past and present
2. Contact information, which will be included in all directories
3. Clicking the **Unlisted** box will keep details from being included in directories
4. For use if person is part of a mission group or church plant, but still has their membership in the "mother" church or a different church
5. For use if there is a facility name or more information that needs to be included in the address
6. Clears all address fields, making it easier to update an address
7. eAdventist automatically checks the address entered against the USPS database and will alert you if the address is not valid
8. If you are 100% sure the address is correct and USPS still says it's **Not Valid**, you can uncheck the Auto-certify box and it will quit alerting you
9. Click box to keep details from being included in directories
10. You can remove the designation **Delivery Stopped** from the address field by using the drop-down box and selecting **--Not Stopped--**. Only do this if you have the correct address to add.



# KEY to

## Sample Person Page Editing View - 2

11. Optional – just specifies what person gave the address
12. Different phone numbers; RMC uses this field as the landline, but there is room for other numbers as well
13. If someone doesn't wish to receive a specific mailing, uncheck the box
14. You can specify which address is the default address, if needed
15. You can specify which phone number is the default
16. If the person doesn't want to be included in the directory, "uncheck" the appropriate box
17. Type in the names or caption that you'd like to have under the photo in the directory





# Recording a Baptism or Profession of Faith

1. Add person as a nonmember, if they're not already in eAdventist
2. If they are already in eAdventist, go to their **PERSON** page
3. Click on **Change Status**
4. Choose **Baptism** or **Profession of Faith** from the drop-down menu
5. Click **Save**
6. In the field **Baptized by:**, enter the name of the pastor who baptized the person.
7. In the field **Event:**, enter the name of the event at which the baptism occurred (Optional; it could be *Camp* or *Youth Rally* or something like that)
8. In the field **Place:**, enter the location of the baptism (Optional)

*TIP: if you click on the arrow to the right of the pastor's or church's name, it will automatically fill in the appropriate field (see illustration)*

## BAPTISM INFORMATION

Name:	John Brown	Pastor(s):	Walt Disney (Pastor) ↕
Baptized by:	Walt Disney	Church:	Denver West SDA Church ↕
Event:		Status:	Member · by Baptism · since 11/25/1982
Place:			
<div>Save</div>			

# Updating Personal or Family Information

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **search**
3. On the **PERSON SEARCH** page, enter the name (or first few letters of the name) and click **Search**
4. When a name or names pop up, click on the underlined name of the person you want & it will take you to the **PERSON** page
5. Click on the **Edit Person** button
6. Update any field necessary
7. Click **Save**

# Change of Family (Marriage, Divorce, etc.)

1. Go to the person's **PERSON** page
2. Select **Change Family**
3. Select either **Create a new Family** or **Join an existing Family**
4. Click **Save**
5. If you choose **Create a new Family**, the person's personal information (the info above the gray line on the person page) will move over to a new file, and there will be nothing in the fields below the gray line, and they will be the primary
6. If you choose **Join an existing Family**, the person's personal information (the info above the gray line on the person page) will move over to a new file, and they will be added to the list of family members at the bottom of the page. Their address will now be the same as the existing family's.



# Recording a Death

1. Go to the person's **PERSON** page
2. Click on **Change Status**
3. Choose **Deceased** from the drop-down menu
4. Enter the date of death in the blank field to the right of the drop-down
5. Click **Save**

Note: You can only record the death of a member. A nonmember record should be deleted at death.





# Missing and Removed

1. Go to the person's **PERSON** page
2. Click on **Change Status**
3. Choose **Missing** or **Removed** from the drop-down menu
4. Enter the date of the Church Business Meeting vote to record them as missing or removed in the blank field to the right of the drop-down
5. Click **Save**

**IMPORTANT!**

*Do not record anyone as **Missing** or **Removed** without following proper procedure!*

*See next page for details.*

# MISSING vs. REMOVED

When you discover that you have people on your books that no longer attend, your first thought may be to get them off of your records, but there is a procedure that needs to be followed.

A member is *removed* for one of 2 reasons:

- 1. Disciplinary actions
- 2. Member requested removal from the SDA Church in general.

According to the SDA Church Manual, a member can be listed as *missing* only when they have been out of contact with the church for 2 years. The church needs to make a reasonable effort, via letters, phone calls, or visits, to locate the member. If there is no response and they cannot be located, they can be moved to *missing* status.

MISSING	vs	REMOVED
1. Has not attended in at least 2 years		1. Disciplinary Action
<u>AND</u>		<u>OR</u>
1. No contact information; any attempt to contact has been unsuccessful		1. Member requests to be removed from SDA World Church
**This action is easily reversed if the member regains contact with the church.**		**This action requires evidence of repentance and a return to a life consistent with SDA standards, as well as in-depth conversation with the pastor. It is not to be taken lightly.**
Must be voted in church business meeting and specific names of those members (to be moved to “missing” status) recorded in the minutes.		Must be voted in church business meeting and specific names of those members (to be moved to “removed” status) recorded in the minutes.



# Deleting a Nonmember

1. Go to the person's **PERSON** page
2. Click on **Change Status**
3. Click the circle to the left of **to Deleted on**
4. Enter the date
5. Click **Save**



# Adding a Person – to eAdventist

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **new family** – even if you're only adding one person
3. Fill in all information that you can – they will automatically be considered a nonmember
4. Click **Save**

# Adding a Person – to a Family

(person is already in eAdventist)

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **search**
3. On the **PERSON SEARCH** page, enter the name of a family member (or first few letters of the name) and click **Search**
4. When a name or names pop up, click on the underlined name of the person you want & it will take you to the **PERSON** page
5. Click **New Person** – eAdventist assumes that the last name is the same as the Primary, but you can change it; simply click in that field
6. Fill in all information that you can - they will automatically be considered a nonmember
7. Click **Save**



# Membership Transfers – Submitting a Request for a Transfer INTO Your Church

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **transfers**
3. On the **TRANSFERS** page, click **Request Transfer**
4. On the **REQUEST TRANSFER** page, click **select** to the right of the field for **To clerk of:**
5. In the field next to **Search for:** type in the name of the church the member is coming from
6. Click **Search**
7. Click the circle to the left of the correct church's name
8. Click **Ok**
9. Using the drop-down box, click on your church in the field **To join:**
10. Enter the member information – **Middle name, suffix,** and **birth date** are not required, but they are helpful in making sure that the correct member is transferred
11. Click **Save**

# REQUESTING a TRANSFER

## REQUEST TRANSFER

help ▾

Transfer member

☒ to my church **1**  
☐ to an Offsystem church (from my church)

To clerk of:

Denver West SDA Church (Denver, CO) **2** ▸ Select

To join:

Brighton SDA Church (Brighton, CO) **3** ▾

Last name:

Mermaid

First name:

Ariel **4**

Middle name:

Suffix:

**5**

Birth date:

m/d/yyyy

m/d/yyyy

Save

## REQUEST TRANSFER

help ▾

Transfer member

☒ to my church  
☐ to an Offsystem church (from my church)

To clerk of:

Denver West SDA Church (Denver, CO) ▸ Select

To join:

Brighton SDA Church (Brighton, CO) **7** ▾

Last name:

Mermaid

First name:

Middle name:

Suffix:

Birth date:

m/d/yyyy

m/d/yyyy

Save

Last request:

Denver West SDA Church (Denver, CO)  
Brighton SDA Church  
Mermaid **6**  
▸ Repeat



# Requesting a Transfer

1. The system defaults to “**to my church.**” The other option, “**to an Offsystem church**” is for international transfers, which should be processed through the RMC Membership Clerk.
2. Name of the church the person is coming from. You will need to click on **select** to do a search for the church name
3. Name of the church the person is transferring into – YOUR church
4. First & last name of person transferring
5. Middle name, suffix, and birthdate are optional, but help in verifying that the correct person is transferred
6. If you are doing several transfer requests at the same time, the system assumes that you’re transferring a family and remembers the church names and the member last name. If you click on **Repeat**....
7. ....The system automatically fills in the church names and member last name. If members of a family have different last names, that can be changed simply by typing in the field





# Membership Transfers – ACCEPTING a Transfer INTO Your Church

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **transfers**
3. On the **TRANSFERS** page, click **To accept** in the gray line across the page
4. From the list under **To accept**, find the person transferring out
5. Click on **view** to the left of their name
6. Click on **Accept/Decline**
7. Enter the date of the 2<sup>nd</sup> reading
8. Click **Save**

SAMPLE  
TRANSFER PAGE

TRANSFER

help

Kelly Waller

Logout

Request

Member

Name: Mermaid, Ariel

Born on: 11/17/1989 m/d/yyyy

From: Denver West SDA Church  
Denver, CO

To: Brighton SDA Church  
Brighton, CO

Status: 11

Back to transfers

12

Accept/Decline

Name: Mermaid, Ariel Ocean

Born on:

10

Actions & Comments

Email

	VOTED ON	ACTION		ENTERED ON	BY	PRINTED ON
Request	—	Requested	<a href="#">withdraw</a>	08/17/2023	Kelly Waller (Rocky Mountain Conference)	
Grant	08/12/2023	Granted	<a href="#">undo granted</a>	08/17/2023	Kelly Waller (Rocky Mountain Conference)	
Accept	13↑	14↑	15↑	16↑		

COMMENTS

Add a comment

ACCEPTING the  
TRANSFER

# KEY to

## Transfer Page

### ACCEPTING A TRANSFER

10. The member's information as it is in eAdventist
11. If the dot is green, that means there's something that you need to do. If it's yellow/orange, that means that you can't proceed until someone else (the other church) does something.
12. Click when ready to accept or decline the transfer. You will need the date of the vote
13. Date that the transfer was voted to be granted or denied
14. Action that was taken (transfers are very rarely denied)
15. Click to undo the action (**only the person who granted the transfer can undo it! (Or their Conference Clerk)**)
16. Date that the action was entered into eAdventist



# Membership Transfers – GRANTING a Transfer OUT OF Your Church

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **transfers**
3. On the **TRANSFERS** page, click **To grant** in the gray line across the page
4. From the list under **To grant**, find the person transferring out
5. Click on **view** to the left of their name
6. Click on **Grant/Deny**
7. Click on the circle to the left of the correct name
8. Click **Select**
9. Enter the date of the 2<sup>nd</sup> reading
10. Click **Save**

Note: If the correct name doesn't come up after you click **Grant/Deny**, check the spelling of the name for which it's searching. If it still doesn't come up, the person is either not a member in your church or is in eAdventist under a different name.  
**PLEASE DO NOT IGNORE IT!**  
Contact the RMC Membership Clerk for help.

SAMPLE  
TRANSFER PAGE

TRANSFER

help ▾

Kelly Waller

Logout

Request

Member

Name: Mermaid, Ariel

Born on: 11/17/1989 m/d/yyyy

From: ▸ Denver West SDA Church  
Denver, CO

To: ▸ Brighton SDA Church  
Brighton, CO

Status: ●

1

▸ Back to transfers

Grant/Deny 3

Actions & Comments

Email 4

5↓

VOTED ON

ACTION 6

ENTERED ON

BY

PRINTED ON 7

Request

—

Requested

[withdraw](#)

08/17/2023

Kelly Waller (Rocky Mountain Conference) 8

Grant

Accept

9

COMMENTS ▸ Add a comment

TRANSFER HAS BEEN  
REQUESTED  
OUT OF YOUR CHURCH

# KEY to Transfer Page

## Transfer Has Been REQUESTED OUT OF YOUR CHURCH

1. Member information as entered by requesting clerk. **It might not be accurate!** Many people forget what churches they've been at and what names they've used.
2. This section will remain empty until further along in the process
3. Click when ready to grant or deny the transfer out of your church. You will need the date of the vote
4. Click to see what email messages have been automatically sent regarding this transfer. (This isn't information that you will usually need)
5. These are the 3 basic steps of a transfer. These lines show the progress of the transfer.
6. Click to withdraw the transfer. **Only the person who requested the transfer can withdraw it! (Or their Conference Clerk)**
7. This shows when the Conference Clerk printed the request to mail to an offline church.
8. Shows who entered the transfer request
9. This is where you can ask questions of or send messages to the clerk of the other church. The Conference Clerk of both churches, as well as the clerk of the other church will receive an email, alerting you that there's a message.



# GRANTING a TRANSFER

## Step One

### TRANSFER

help

Request

Member

Name: Mermaid, Ariel

Born on: 11/17/1989 m/d/yyyy

From: Denver West SDA Church  
Denver, CO

To: Brighton SDA Church  
Brighton, CO

Status:

Back to transfers

Name:

Born on:

Grant/Deny

Actions & Comments

Email

	VOTED ON	ACTION		ENTERED ON	BY
Request	—	Requested	<a href="#">withdraw</a>	08/17/2023	Kelly Waller (Rocky Mountain Conference)
Grant					
Accept					

COMMENTS

Add a comment

## Step Two

### PROCESS TRANSFER REQUEST

help

Name requested: Mermaid, Ariel  
— 11/17/1989

Transfer from: Denver West SDA Church  
Denver, CO

Transfer to: Brighton SDA Church  
Brighton, CO

Requested: 08/17/2023 - Kelly Waller (Rocky Mountain Conference)

Select Person

Name:

Born on:

Select

Enter Vote

Voted to: ☒ Grant

2 Select person

Searching for: Mermaid, Ariel  
— 11/17/1989 in Denver West SDA Church

Last name: Mer

First name: Ar

Search again

Select

5

SELECT	NAME	ADDRESS	LOCATION	BORN
<input type="radio"/>	Mermaid, Ariel Ocean			11/17/1989

## Step Three

### PROCESS TRANSFER REQUEST

Name requested: Mermaid, Ariel  
— 11/17/1989

Transfer from: Denver West SDA Church  
Denver, CO

Transfer to: Brighton SDA Church  
Brighton, CO

Requested: 08/17/2023 - Kelly Waller (Rocky Mountain Conference)  
email  
Offline Offsystem

Select Person

Name: Mermaid, Ariel Ocean

Born on: 11/17/1989

Select

Enter Vote

Voted to: ☒ Grant  
☐ Deny

Voted on: m/d/yyyy m/d/yyyy

Save

# GRANTING a TRANSFER

— No Matches

**PROCESS TRANSFER REQUEST** help ▾

Name requested: Mermaid, King Triton  
Transfer from: ▶ Denver West SDA Church  
                  Denver, CO  
Transfer to: ▶ Brighton SDA Church  
                  Brighton, CO  
Requested: 08/17/2023 - Kelly Waller (Rocky Mountain Conference)  
                  ▶ email

Select Person  
Name:  
Born on: Select

Enter Vote  
Voted to: ☒ Grant

**Select person** ✕

Searching for: Mermaid, King Triton in Denver West SDA Church  
Last name:   
First name:   
Search again Select

SELECT	NAME	ADDRESS	LOCATION	BORN
Couldn't find any matches. You can search again with a different name or spelling.				

9

**PROCESS TRANSFER REQUEST**

Name requested: Mermaid, King Triton  
Transfer from: ▶ Denver West SDA Church  
                  Denver, CO  
Transfer to: ▶ Brighton SDA Church  
                  Brighton, CO  
Requested: 08/17/2023 - Kelly Waller (Rocky Mountain Conference)  
                  ▶ email

Select Person  
Name:  
Born on: Select

Enter Vote  
Voted to: ☒ Grant

**Select person** ✕

Searching for: Mermaid, King Triton in Denver West SDA Church  
Last name:   
First name:   
Search again Select

SELECT	NAME	ADDRESS	LOCATION	BORN
<input type="radio"/>	Triton, King of the Ocean			01/25/1961

10

11



Note: If the correct name doesn't come up after you click **Grant/Deny**, check the spelling of the name for which it's searching. If it still doesn't come up, the person is either not a member in your church or is in eAdventist under a different name.  
**PLEASE DO NOT IGNORE IT!**  
Contact the RMC Membership Clerk for help.



1. This is what the **TRANSFER** page will look like when you are ready to grant the outgoing transfer from your church.
2. This window will pop up when you click **Grant/Deny**
3. Member name, as entered by the requesting clerk
4. What the system is searching for. Notice it's not the entire name – only the first few letters
5. Names that meet the search criteria will be displayed here.
6. This window pops up when the member has been selected. The information as entered by the requesting clerk is displayed
7. Member information as it is found in eAdventist, the official record. Going forward, this is how the name will be displayed
8. Enter the date of the vote
9. This window pops up if the system can't find the member with the provided information
10. Change the information entered. Try variations of the name to see what pops up
11. Member information, as it is found in eAdventist, the official record. Going forward, this is how the name will be displayed

# Membership Transfers – INTERNATIONAL TRANSFER

1. Add person to eAdventist as a nonmember
2. Ask the person if they have one of the following:
  - a) A letter from their former church, granting their transfer
  - b) Their baptismal certificate
  - c) A specific person from their previous church that they can call or email
- If the incoming person does NOT have a letter or their baptismal certificate, then they need to get a written document (email or letter) from the pastor, clerk, or an elder from their previous church.
  1. Once you have the certificate, letter, or email, send a copy to the RMC Membership Clerk. They will process it and enter it into eAdventist.
  2. You will receive notification that the transfer has been ***granted***, and you proceed with the transfer just like any other.



# Membership Transfers – MOVING A NONMEMBER

Contact the RMC Membership Clerk. While a nonmember cannot be officially transferred, the Conference Membership Clerk can move a record.



# Submitting Attendance

1. Click on the orange rectangle on the left of the page marked **ORGANIZATIONS**. More options will drop down
2. Choose **attendance**
3. Click **Add Attendance**
4. Select the service – either *Church's Name – Weekly Church Service* or *Church's Name – Weekly Sabbath School* (you will have to submit 2 separate entries for each week)
5. Enter the date – either type it into the box or click on the calendar icon
6. Enter the total number of in-person attendees for that meeting
7. Enter the total number of online attendees for that meeting
8. Click **Save**



# Organization Information

1. Click on the orange rectangle on the left of the page marked **ORGANIZATIONS**. More options will drop down
2. Choose **search**
3. On the **ORGANIZATION SEARCH** page, enter the name of the church (or first few letters of the name) and click **Search**
4. When a name or names pop up, click on the underlined name of the church you want & it will take you to the **ORGANIZATION** page
5. Click on the **Edit Organization** button
6. Update any field necessary
7. Click **Save**

## ORGANIZATION

help ▾ Kelly Waller Logout

Name: Brighton SDA Church

Alternate name: **1**

Parent: ▶ Rocky Mountain Conference

Type: Church **2**

Status: **3** Active/Online

Ethnicity: **4**

Languages: **5**

Region: **5**

People: 573 members • 229 nonmembers **6**

myEADVENTIST: ✖ - 0 accounts **7**

Email: **8** [secretary@brightonsda.org](mailto:secretary@brightonsda.org)

Web site: **8**

Addresses **9**

Street Mail/PO Box Shipping

Valid?

**10** 567 E Bromley Ln  
Brighton CO 80601-3249 ⓘ  
USA  
[Google Maps](#)

Phones 303-659-1999 (main)  
303-659-9684 (fax) **11**

Updated: 04/13/2005 07:00 PM ()

Created: -

**12** ▶ Church admin **13** ▶ History **14** Print Envelope **15** Edit Organization

**16** Need Photo Image  
160 wide X 120 high JPG  
▶ add

**17**

Officers **18** Settings **19** Directory Contacts Mission Groups Schools Notes Graphs Reports Giving

New Office ▶ Officers list

#	<b>20</b> OFFICE/CUSTOM TITLE	<b>21</b>	<b>22</b> NAME	<b>23</b> MEMBER OF	<b>24</b> STATUS	<b>25</b> CHANGED	<b>26</b>	<b>27</b>
1	<a href="#">Pastor</a>		<a href="#">Bell, Rex</a>	Brighton SDA Church	Member	06/03/2004	<a href="#">renew</a>	
2	<a href="#">Elder - 1st</a>		<a href="#">Schlisner, Gary R</a>	Brighton SDA Church	Member	10/01/2004	<a href="#">renew</a>	
3	<a href="#">Clerk</a>		<a href="#">Bell, Ginger</a>	Brighton SDA Church	Member	06/03/2004	<a href="#">renew</a>	
4	<a href="#">Treasurer</a>		<a href="#">Taylor, Carolyn M</a>	Brighton SDA Church	Member	06/03/2004	<a href="#">renew</a>	
5	<a href="#">Deacon - Head</a>		<a href="#">Cizek, Scott</a>	Brighton SDA Church	Member	10/01/2004	<a href="#">renew</a>	
6	<a href="#">Deaconess - Head</a>		<a href="#">Bartley, Winnie</a>	Brighton SDA Church	Member	06/03/2004	<a href="#">renew</a>	
7	<a href="#">Pathfinder Dir</a>		<a href="#">Belleau, Jill A</a>	Brighton SDA Church	Member	10/01/2004	<a href="#">renew</a>	
8	<a href="#">Personal Min Dir</a>		<a href="#">Smith, Camille Lynne</a>	Brighton SDA Church	Member	06/03/2004	<a href="#">renew</a>	
9	<a href="#">Prayer Min Coord</a>		<a href="#">Defreece, Diane</a>	Brighton SDA Church	Member	07/03/2023		
10	<a href="#">Women's Min Ldr</a>		<a href="#">Bell, Ginger</a>	Brighton SDA Church	Member	06/03/2004	<a href="#">renew</a>	

# KEY to

## Sample Organization Page

### Initial View - 1

1. Current name of organization, as well as a previously used name (there is a space elsewhere for additional previous names)\*\*
2. Specifies church, company, or group
3. This covers 2 areas:
  - a. Is the church active/open or inactive/closed?\*\*
  - b. Does the church actively use eAdventist?
4. What is the basic ethnic makeup of the church? What languages are used?\*\*
5. Most conferences are broken into regions; this is where it's recorded
6. Quick view to see membership stats
7. How many active myEADVENTIST accounts there are in this church
8. These fields are used to update the website and basic email information\*\*
9. For use if the mailing address is different from the street address; used mostly by small churches\*\*
10. Street address – location where the church actually meets\*\*
11. Phone numbers \*\*
12. Click here to initialize and manage myEADVENTIST
13. View the previous changes made on this page. It's a new addition, so it's not comprehensive
14. Downloads a pdf of the address, formatted to be printed on a #10 envelope



# KEY to Sample Organization Page Initial View - 2

15. Click to make changes to the displayed information
16. Photo of church – displayed in NAD database\*\*
17. Map information\*\*
18. Click to add a new church officer
19. Downloads a pdf of the church officers
20. Officer roles; clicking on the underlined role will allow you to put a new person into that role
21. Clicking on this give you the contact information of that officer
22. Name of officer. Clicking on the underlined name will take you to their **PERSON** page
23. Church in which the person's membership is held
24. Specifies Member or Nonmember
25. Date of the last time the officer was updated
26. Click this to renew the person's role as the listed officer so that it's obvious that they are still doing the same role
27. Deletes the role and the officer name. Will still show on the screen until you refresh your screen or go to a different screen and come back

\*\* indicates information that is published on the church's website, the RMC website, and the NAD search engine/directory





**ORGANIZATION (EDIT)**

help ▾

8

Kelly Waller

Logout

Name: 

1

Brighton SDA Church

Alternate name:

Parent: 

▶ Rocky Mountain Conference

Type: 

Church

Mother church: 

2

Status: 

3

Active/Online ☐

Ethnicity: 

4

Languages: 

5

- 1st Language -

- 2nd Language -

Region: 

6

People: 

573 members • 229 nonmembers

Email: 

7

secretary@brightonsda.org

Web site - https://:

Addresses

Street

8

Mail/PO Box

Shipping

Optional line:

9 Address: 

567 E Bromley Ln

City/StateProv: 

Brighton

CO

Postal code: 

80601-3249

Country: 

USA

Clear address

10 Auto-certify: 

☒

 ??

Phone (main): 

303-659-1999

11 Phone (alt):

Fax: 

303-659-9684

Updated: 

04/13/2005 -

Created: 

-

▶ Cancel

Save

Settings

Directory

Contacts

Geocoding

Org code: 

12

ANGMCL

Active?: 

☒

13

Previous name: 

14

Previous name 2:

Legal 

15

Legal name:

IRS Tax# (EIN):

Church/Company/Group

Online transfers?: 

☒

16

Group started: 

m/d/yyyy

m/d/yyyy

Company organized: 

m/d/yyyy

m/d/yyyy

Church organized: 

m/d/yyyy

m/d/yyyy

17

Disbanded date: 

m/d/yyyy

m/d/yyyy

Search

Searchable?: 

☒

Office hours: 

18

Comments:

**ORGANIZATION (EDIT)**

help ▾ Kelly Waller Logout

Name: Brighton SDA Church

Alternate name:

Parent: ▶ Rocky Mountain Conference

Type: Church ▾

Mother church:

Status: Active/Online ☐

Ethnicity:

Languages: - 1st Language - ▾ - 2nd Language - ▾

Region:

People: 573 members • 229 nonmembers

Email: secretary@brightonsda.org

Web site - https://:

Addresses

Street Mail/PO Box Shipping

Optional line:

Address: 567 E Bromley Ln

City/StateProv: Brighton CO

Postal code: 80601-3249

Country: USA ▾

Auto-certify: ☒ ??

Clear address

Phone (main): 303-659-1999

Phone (alt):

Fax: 303-659-9684

Updated: 04/13/2005 -

Created: -

▶ Cancel Save

Settings Directory Contacts Geocoding

Short name:

Streaming - https://:

Facebook: 19 facebook.com/ (no spaces)

Twitter: 21 twitter.com/ (no spaces)

Instagram: instagram.com/ (no spaces)

County:

District: 20

Service times::

- Sabbath school: 09:30A

- Church: 11:00A

- Church 2nd:

- Streaming:

- Prayer Meeting: 07:00P Wed

Avg attendance: 22

Bulletins:

Driving directions: 23

# KEY to

## Sample Organization Page

### Editing View 1

1. Current name of organization, as well as a previously used name (there is a space elsewhere for additional previous names)\*\*
2. For use if the organization is a **group** or a **company**: this is the church that “planted” the new organization
3. This covers 2 areas:
  - a. Is the church active/open or inactive/closed?\*\*
  - b. Does the church actively use eAdventist?
4. What is the basic ethnic makeup of the church? \*\*
5. What languages are used?\*\*
6. Most conferences are broken into regions; this is where it’s recorded
7. Update the email and website information here\*\*
8. For use if the mailing address is different from the street address; used mostly by small churches\*\*
9. Street address – location where the church actually meets\*\*
10. eAdventist automatically checks the address entered against the USPS database and will alert you if the address is not valid
11. Phone numbers\*\*
12. This is the official Organization Code used in the NAD.
13. Indicates if the church is still meeting or has closed\*\*
14. More previous names (in addition to those listed in #1)\*\*
15. Legal information – the EIN is needed in many financial situations



# KEY to

## Sample Organization Page

### Editing View 1 & 2

16. Whether or not the church is signed up for membership transfers through eAdventist or if they send everything to the RMC Membership Clerk to be processed
17. Pertinent dates for the organization
18. Hours that the church office is open to the public\*\*
19. All of the social media addresses\*\*
20. For churches without a dedicated pastor; this is the name of the area the pastor covers
21. Service times and information\*\*
22. Basic information
23. Written directions on how to get to your church from local major highways\*\*

\*\* indicates information that is published on the church's website, the RMC website, and the NAD search engine/directory



# Updating Church Officers – Renewing an Officer

1. Go to your church's **ORGANIZATION** page
2. On the far-right side the line of each officer's information is renew
3. Click on renew

*Renewing an office is important because it lets me know that the information is accurate and updated*



# Updating Church Officers – Reassigning an Office

1. Go to your church's **ORGANIZATION** page
2. Click on the **office** that you need to reassign, not the person's name
3. Click **Select Person** to choose the person
4. Enter the information into the fields for **Last name** and **First name**, or just a few letters
5. Click the circle to the left of the correct name
6. Click **Select**
7. Click **Save**



# Updating Church Officers – Adding a New Office

1. Go to your church's **ORGANIZATION** page
2. Click **New Office**
3. Select the **Office Title** from the drop-down box
4. Click on the correct title
5. Click **Select Person** to choose the person
6. Enter the information into the fields for **Last name** and **First name**, or just a few letters
7. Click the circle to the left of the correct name
8. Click **Select**
9. Click **Save**



# Updating Church Officers – Deleting an Office

1. Go to your church's **ORGANIZATION** page
2. On the far-right side the line of each officer's information is a trash can icon
3. Click on the icon

Note: The name and office will not disappear until you either refresh your page or navigate away from the page and come back





# Printing Member List

1. Click on the blue rectangle on the left of the page marked **REPORTS & TOOLS**. More options will drop down
2. Choose **reports**
3. Across the screen, there is a gray line with tabs: **people, statistics, labels, other**
4. **People** will come up automatically
5. Click on **member list**
6. Choose (via the drop-down menus) how you would like the list formatted
7. Click **View Report**
8. It will download the report to your computer, and you can print or email it as needed



# Printing a Church Directory

1. Click on the blue rectangle on the left of the page marked REPORTS & TOOLS. More options will drop down
2. Choose directories
3. Click on [Family info](#)
4. Click the boxes to the left of each option to choose how you would like the list formatted
5. Click **Print**

Note: You can click **Export CSV** instead of **Print** and it will download an Excel-compatible spreadsheet of information for use in mail merges, etc.

# Printing Member Labels

1. Click on the blue rectangle on the left of the page marked **REPORTS & TOOLS**. More options will drop down
2. Choose **reports**
3. Across the screen, there is a gray line with tabs: **people, statistics, labels, other**
4. **People** will come up automatically
5. Click on **Labels**
6. Click on **Person Labels** under the **Church** heading
7. Choose (via the drop-down menus) how you would like the list formatted
8. Click **Print Labels**
9. It will download the report to your computer, and you can print or email it as needed

## Notes:

- If you want 1 label per family, choose **one per family** from the drop-down menu next to **recipients**:
- You can click **Export CSV** instead of **Print Labels** and it will download an Excel-compatible spreadsheet of information for use in mail merges, etc.
- The pdf is formatted to fit Avery labels 5160, or you can choose another format in **Label type**

# PERSON LABELS/EXPORT

help ▾ Kelly as a clerk Waller Logout

Organization: Littleton SDA Church 1

Mission group: ▾

Member status: Member/Nonmember 3 ▾

Postal codes: e.g. 986 98623 986..989 5

Last name: 7 to

Born: on 9 dd/yyyy

Gender: ▾

Marital status: 11 ▾

Occupations: Select Some Options 13

Retired: ▾ 13

Ethnic class: ▾

Language: 16 ▾

Ethnicity (church): is ▾ 18

Language (church): is ▾

Region (church): ▾

Member by: 22 ▾

Membership date: on ▾ m/dd/yyyy 24

Grade: 2 ▾ to ▾

Tag(s): 4 any of ▾ Select tags

Involvement: 6 ▾

Has email?: 8 ▾

In directory?: 10 ▾

Label options

Recipients: Matching people 12 ▾

Problem addresses: 14 Exclude "Stopped & Empty" ▾ ?

Address type: Default (for mail) ▾ 15

Include: 17  
19 ☐ Confidential addresses  
☒ 'No promo mail' addresses  
☐ Organization name ?

Additional info: 19

Sort by: Name 20 ▾

Export data: Address 21 ▾

Label type: Avery 5160 23 ▾

Email list separator: 25 Semi-colon (Microsoft Outlook) ▾

26 ↓ Export CSV

27 Print Labels

Export Email

28 ↑

29 Search

# KEY TO SAMPLE:

## Printing Member Labels - 1

1. Name of the organization from which you're pulling names
2. Set a range of grades
3. Select what status – member, nonmember, missing, etc.
4. Which tags should be included? This is a drop-down box
5. If you only want to send to a certain area – enter the Zip codes
6. Level of involvement to be included in list. This is a drop-down box
7. Range of last names to be included – if you're going through a list alphabetically and sending a portion at a time
8. Send to only those with or without email. This is a drop-down box
9. Can either set a range of birthdates or one specific birthdate
10. Send to those who are included or omitted from the church directory. This is a drop-down box
11. Choose gender and marital status to include. This is a drop-down box
12. If you want 1 label per family, choose **one per family** from the drop-down menu next to **recipients:.** This is a drop-down box
13. Send to specific Occupations or retirees. This is a drop-down box
14. Choose to exclude those labels without a complete address or with a **“Stopped Delivery”** designation. This is a drop-down box
15. Send to street address or mailing address (if there's a difference). This is a drop-down box

# KEY TO SAMPLE:

## Printing Member Labels - 2

16. Focus list based on ethnicity and/or language. This is a drop-down box
17. Include **Confidential Address** or those addresses not wanting promo mail? *Be very careful with the use of confidential addresses – they are confidential for a reason!*
18. Mostly used at the Conference level – choosing to include members based on the language and ethnicity of their church. This is a drop-down box
19. Do you need to include the **organization** (your church) name?
20. How do you want the list sorted? This is a drop-down box
21. What data should be exported? This is a drop-down box
22. Define list by those who became members by baptism vs. Profession of Faith. This is a drop-down box
23. What style labels should the PDF be formatted to fit? This is a drop-down box
24. Narrow list by when a person became a member. This is a drop-down box
25. How to format the list of email addresses. This is a drop-down box
26. Export data into a spreadsheet
27. Download a PDF to your computer for printing
28. Create a list of email addresses ready to insert into an email
29. Show a list of members matching your criteria on the screen before downloading



# Printing Statistical Reports

1. Click on the blue rectangle on the left of the page marked **REPORTS & TOOLS**. More options will drop down
2. Choose **reports**
3. Across the screen, there is a gray line with tabs: **people, statistics, labels, other**
4. **People** will come up automatically
5. Click on **Statistics**
6. Click on **Membership Statistics** under the **Church** heading
7. Choose (via the drop-down menus) how you would like the list formatted
8. Click the box to the left of your church's name
9. Click **View Report**
10. It will download the report to your computer, and you can print or email it as needed



# Setting Up the myEADVENTIST app, 1

1. Click on the gray rectangle on the left of the page marked **ADMIN**. More options will drop down
2. Choose **churches**
3. This takes you to the **CHURCH ADMIN** page
4. Under **settings**, you will see options for the myEADVENTIST app
5. Click the box next to **Enable** in order to enable the myEADVENTIST to work
6. Choose which **Features** you want to allow. **Church directory** allows the contact information for members to be shared, if the member chooses. **Profile update** allows the members to update their own contact information
7. Click **Save**






# Setting Up the myEADVENTIST app, 2

8. Next to **Invitation**, click **Customize** ⚙️
9. This is the email that will be sent to each member with an email address in eAdventist, inviting them to begin using the myEADVENTIST app **OR**
10. You can customize parts of the letter. Click on the ⚙️ next to the
  - beginning paragraph
  - signature, or
  - email address
11. After making the desired changes, click **Back to Church** at the bottom right of the letter
12. To send the invitation, click To Invite
13. Select the members you'd like to receive the email
14. Click **Invite selected** to send the invitations

# Creating Tags & Tagging People

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **Tags** ; Click **New Tag**
3. Add the name of the Tag; Click **Save**
4. To add people to this Tag, go to each person's **PERSON** page
5. On the gray line bisecting the page, toward the right side, click on the tab **Tags**
6. Choose a tag from the drop-down box on the right side of the screen, under the gray line
7. Click **Add**

## ***OR, to add multiple people quickly.....***

1. On the **Advanced Search** page, enter the search options for the tag OR just click **Search** to see a list of members
2. Click the small box to the left of each name to be added to the new tag
3. This picture  will pop up above the list of names
4. Click on the icon of a tag on the left side of the picture, which will give you a drop-down box of tags available
5. Click on the appropriate tag. The picture will disappear; the member is now tagged

# Accessing Tag Lists

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **Tags**
3. The tags to which you have access will be listed here
4. Click on the underlined name of the tag you wish to access
5. This is a list of the members with this tag. From here you can print labels, export data, and print a list of members' contact information



# Email & Text Messaging Lists

## Setting Up a List

1. Click on the blue rectangle on the left of the page marked **REPORTS & TOOLS**. More options will drop down
2. Choose **messaging lists**
3. Click **New list**
4. Name the list and add a description for yourself. It can be the same name
5. Choose the audience – people of the church or officers
6. Edit the **From name** and **From email** as needed
7. Click **Save**
8. In the box on the righthand side of the page, titled **Audience**, click **Add subscribers** above the **People** heading.
9. This is a list of people who have an email address, cell phone number, or both listed in eAdventist
10. To add someone to the list, click the **+** to the right of their name. They are now on the list
11. In the **Audience** box, under the **People** heading, click on the underlined Subscribers to see the people on the list
12. Click the **x** to the right of the name to remove someone from the list
13. To add Interests/Contacts, follow steps 8-12, using the options under the **Contacts** heading



# Email & Text Messaging Lists

## Using a List & Sending an EMAIL

1. Click on the blue rectangle on the left of the page marked **REPORTS & TOOLS**; choose **messaging lists**
2. You will see all of the lists owned by your church. The underlined names are the lists to which you have access
3. Click on the list you need
4. Near the bottom of the page, the default tab is **@ Emails**. A number beside it indicates how many messages have been sent out
5. Click on **New Email** to compose a new email message
6. The **Description** is the title that will be listed in the list of emails
7. Enter the **Subject** and customize the **Title** and **Body** of the email; click **Save**
8. Review the email and the recipients. You can enter an email address at the bottom of the page to send a test email and make sure it's what you want to send
9. Click **Send**; a smaller window will pop up, verifying it's going to the whom you'd like
10. Click **Send It**
11. In the list of email messages, you can click on the number under Recipients and see to whom the email went. It will also show you who opened the message

# Email & Text Messaging Lists

## Using a List & Sending a TEXT

1. Click on the blue rectangle on the left of the page marked **REPORTS & TOOLS**; choose **messaging lists**
2. You will see all of the lists owned by your church. The underlined names are the lists to which you have access
3. Click on the list you need
4. You will need to request an SMS number. This will provide you with a number to use to text members **at no cost to the church or the conference** and
5. Once you have the number, you are required to set up an **Invitation (opt-in)** message. Click on the ⚙️ to customize the message that the **People** [members/nonmembers in eAdventist] and **Contacts** [Interested people in the Contacts section of eAdventist] will receive with they are added as subscribers
6. Click on the ⚙️ to customize the **Welcome** message that the **People** [members/nonmembers in eAdventist] and **Contacts** [Interested people in the Contacts section of eAdventist] will receive with they accept the invitation or opt in to receive messages
7. Click Texts at the bottom of the page
8. Follow the steps (similar to those of creating an email) to send a text message to those on the list.

# SAMPLE

## Email & Text Messaging Setup

LIST

help

Kelly as a clerk Waller

Logout

1↓

2↓

List: Cradle Roll Parents – CR Parents

4▶

Owner: Littleton SDA Church

5

Church(es): Littleton SDA Church

6

Users: Kelly as a clerk Waller @

7↓

Edit Churches

8↑

Edit Users

@ Email

9

Welcome: People ▶ Contacts

Text (opt-in required)

10▶

SMS phone: request an SMS number

Invitation (opt-in): ▶ People ▶ Contacts

Welcome: ▶ People ▶ Contacts

11

12

Edit List

13↓

14↓

15↓

16↓

17

18

19

20

21

22

23

24

25

26

290 potential subscribers

Add subscribers

People	Total	Email	Text
Invited	—	—	0
Subscribers	5	4	0
Bounced	—	0	0
Unsubscribed	0	—	—

Add subscribers

Contacts	Total	Email	Text
Invited	—	—	0
Subscribers	2	2	0
Bounced	—	0	0
Unsubscribed	0	—	—

Total

7

6

0

@ Emails 4

Texts 0

Templates 0

vCard

New Email

EMAIL MESSAGE	VER	TO	SENT	RECIPIENTS	DELIVERED	OPENED	REPLICATE	CREATED
<a href="#">COPY: testing</a>	3	list	10/11/2023	2	100%	50%		10/11/2023 Kelly as a clerk Waller
<a href="#">hmm</a>	3	list	10/11/2023	1	100%	100%		10/11/2023 Kelly as a clerk Waller
<a href="#">Bring_your_coins!</a>	3	list	10/11/2023	1	100%	100%		10/11/2023 Kelly as a clerk Waller
<a href="#">testing</a>	3	list	10/11/2023	1	100%	100%		10/11/2023 Kelly as a clerk Waller

Displaying all 4 email messages

# KEY


## Email & Text Messaging Setup

1. Name of list
2. Description of list
3. Audience Box
4. Organization that owns the list
5. Churches with members on the list (for pastors with multiple churches)
6. Authorized users of the list
7. Edit which churches are associated with the list (for pastors with multiple churches)
8. Edit who within the church can use the list
9. Edit the email that Contacts receive when they're subscribed to a list
10. Click to request an SMS number at no charge to the church
11. Use the X to customize the Invitation (opt-in) and Welcome for texts
12. Edit the list name, description, or email signature
13. Tab for Emails
14. Tab for texts
15. Tab for templates
16. Tab for vCard
17. To create a new email
18. Name of the email that was sent
19. Version of eAdventist used to create email
20. Not quite sure
21. Date email was sent
22. Number of recipients (click on number to see who opened the email)
23. Percentage of emails successfully received
24. Percentage of emails opened
25. Copy the email to send the information again
26. Who created the email and when





# Creating Committees

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **more** then click **Committees**
3. Click **New Committee**
4. Add the name of the committee
5. Check the appropriate boxes
6. Click **Save**
7. Click **Add Members**
8. On the **Advanced Search** page, enter the search options for the committee OR just click **Search** to see a list of members
9. Click the small box to the left of each name to be added to the new committee
10. This picture  will pop up above the list of names
11. Click on the icon of people on the right side of the picture, which will give you a drop-down box of committees available
12. Click on the appropriate committee. The picture will disappear; the member is now on the committee list

# Accessing Committees

1. Click on the purple rectangle on the left of the page marked **PEOPLE**. More options will drop down
2. Choose **more** then click **Committees**
3. The committees to which you have access will be listed here
4. Click on the underlined name of the committee you wish to access
5. This is a list of the members on the committee. From here you can print labels, export data, print a list of members' contact information, and add or delete members

# SAMPLE COMMITTEE PAGE

## COMMITTEE

help ▾ Kelly Waller Logout

Committee name: Fairy Tale Outreach Committee

Organization: Rocky Mountain Conference

Public? N

Archived?

Export for directory? Y

Owner: Kelly Waller

Created: 10/05/2023 -

Updated: 10/05/2023 -

Problem addresses: Exclude "Stopped & Empty" ▾

Label type: Avery 5160 ▾

Export data: Address only ▾

Email separator: Semi-colon (Microsoft Outlook) ▾

List type: 8 Name/address/phone/email ▾

Back to committees

Add members

Edit Committee

3 ▾

Print Labels

Export as CSV

Export Email 6

Print list 9

#	NAME	LOCATION	ORGANIZATION	STATUS	ADDED	13 ▾
1	<u>Fitzherbert, Eugene</u>	Denver, CO	Denver West SDA Church	Member	10/05/2023	
2	<u>Fitzherbert, Max</u>	Denver, CO	Denver West SDA Church	Member	10/05/2023	
3	<u>Fitzherbert, Pascal</u>	Denver, CO	Denver West SDA Church	Nonmember	10/05/2023	
4	<u>Fitzherbert, Rapunzel Disney</u>	Denver, CO	Denver West SDA Church	Member	10/05/2023	
5	<u>Mermaid, Ariel Ocean</u>		Denver West SDA Church	Member	10/05/2023	
6	<u>Triton, King of the Ocean</u>		Denver West SDA Church	Member	10/05/2023	

1. Name of the Committee and the Organization that its under
2. Choose which addresses to include
3. **Print Labels** will download a PDF formatted for labels. **Export as CSV** will download a spreadsheet of information
4. If the committee is **Public**, it is accessible to everyone in the organization
5. **Label Type** gives you options for label size and type. **Export Data** gives you options for what data to export
6. Gives you a list of email addresses for committee members to cut and paste into an email
7. Who created the committee and when
8. What information will be included in the list
9. Downloads a list of the members and their contact details
10. An easy way add members
11. Change the name or **Public** status
12. List of members and their information. You can click on an underlined name to go to their **Person Page**
13. Click on the trash can to delete a member






# INTERESTS/CONTACTS

You can keep track of nonmembers who are interested in your church, programs, and/or Bible studies on eAdventist. These are in a completely separate section – they *do not affect your membership numbers.*

1. Click on the light purple rectangle on the left of the page marked **CONTACTS**.
2. Choose **New Contact** to add a person's information
3. Once a contact is created, you can save

## NEW CONTACT

[help](#) 

**Name:**

**Address:**

☐ Auto-certify

☐ Auto-certify

**Phone:**

(home)

(mobile)

**Email:**

**Owner:**

**Share with:**

**Status:**

Active (new)

**Type:**

**Interest level:**

**Source:**

**Gender:**

**Marital status:**

**Heart language:**

**Birth country:**

**Ethnic class:**

**Birth date:**

**Age group:**

**Last change:**

-

[Cancel](#)

[Save](#)

1

2

3

4

5

6

7

8

9

1. Contact information for the interested party
2. Drop-down box of options to categorize type of contact
3. Drop-down box of options to indicate interest level
4. Drop-down box of options to specify how this person came into contact with this church
5. Drop-down boxes of options regarding gender and marital status
6. Drop-down boxes of options for first language spoken country of origin, and ethnicity
7. If no date of birth is available, use **Age group** drop-down box to choose an assumed age range
8. Which organization (usually your church) first created this contact file
9. How to share the contact with someone else



# SAMPLE & KEY CONTACT Page

CONTACT

help ▾ Kelly Waller Logout

Name: Gaston Hunter

Address:

Owner: ▶ Rocky Mountain Conference

Share with:

Status: Active **1**

Type: Event Attendee

Interest level: B - Good

Source: Health Seminar

Gender: Male

Marital status: Divorced

Heart language:

Birth country:

Ethnic class:

Birth date:

Age group: 30-39

Last change: 10/09/2023 - Kelly Waller

**2** Migrate to People

Timeline

Note added – about 1 hour ago

Tag added – about 1 hour ago

Created – about 1 hour ago

▶ History ▶ Back to Contacts

Delete

Edit contact

**5**↓

**6**↓

**7**↓

Tags

Lists (1)

Notes (1)

Tag: Anger Management Workshop ▾

Add

▶ create tags

**8**↑

TAG

ADDED

BY

Anger Management Workshop

10/09/2023

Kelly Waller

**9**

1. Status of contact – can be changed in Edit Contact
2. Moves the record from Contacts to the regular eAdventist database
3. Delete the contact
4. Make changes to contact
5. List of tags assigned to contact
6. Messaging lists contact receives
7. Notes about contact
8. Add contact to other tags
9. Remove tag from contact



# SAMPLE & KEY CONTACT

CONTACT SEARCH

help ▾ Kelly Waller Logout

Search for:

Search in: ☒ Name ☐ Notes

Owner: Rocky Mountain Conference - Denver, CO (Conference) ▾

Tags: Choose tags...

Status: Active ▾

Type: - Any type - ▾

Source: - Any source - ▾

3↓

Print List

4

Search

Show 50 ▾ entries

#	5↓ NAME	ADDRESS	LOCATION	6↓ TYPE	7↓ TAGS	8↓ SHARED?	LAST ACTIVITY
1	<a href="#">Frozen, Elsa</a>			Member elsewhere	Grief Recovery Seminar		10/09/2023
2	<a href="#">Hunter, Gaston</a>			Event Attendee	Anger Management Workshop		10/09/2023
3	<a href="#">Island, Moana</a>			Church Attendee	Youth Group Participant		10/09/2023
4	<a href="#">Lion, Simba</a>			Event Attendee	Men's SSAttendee		10/09/2023

Showing 1 to 4 of 4 entries

Previous

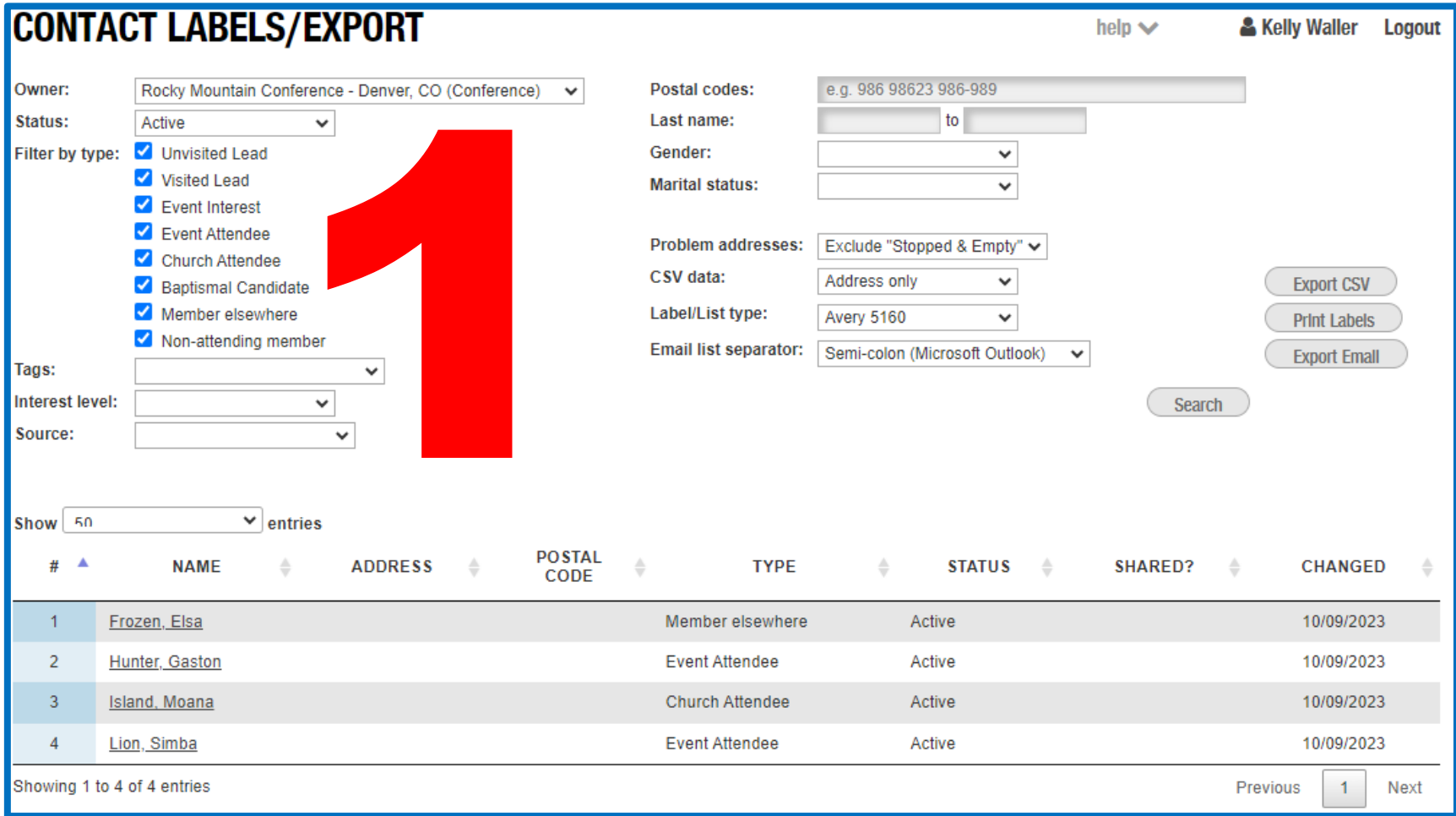
1

Next

1. Basic search criteria AND if you are searching in the **NAME** or **NOTES** fields
2. Drop-down boxes provide options to narrow the search
3. Downloads a PDF of the names and their contact information
4. Click after specifying search criteria
5. Names meeting the search criteria
6. Type of Contact
7. What tags have been assigned – these tags are unique to the **CONTACT** section
8. If this contact has been shared

# SAMPLE CONTACT LABELS

- You can click **Export CSV** instead of **Print Labels** and it will download an Excel-compatible spreadsheet of information for use in mail merges, etc.
- The pdf is formatted to fit Avery labels 5160, or you can choose another format in **Label type**



**CONTACT LABELS/EXPORT** help ▾ Kelly Waller Logout

Owner: Rocky Mountain Conference - Denver, CO (Conference) ▾

Status: Active ▾

Filter by type:

- ☒ Unvisited Lead
- ☒ Visited Lead
- ☒ Event Interest
- ☒ Event Attendee
- ☒ Church Attendee
- ☒ Baptismal Candidate
- ☒ Member elsewhere
- ☒ Non-attending member

Tags: ▾

Interest level: ▾

Source: ▾

Postal codes: e.g. 986 98623 986-989

Last name: ▾ to ▾

Gender: ▾

Marital status: ▾

Problem addresses: Exclude "Stopped & Empty" ▾

CSV data: Address only ▾

Label/List type: Avery 5160 ▾

Email list separator: Semi-colon (Microsoft Outlook) ▾

Export CSV

Print Labels

Export Email

Search

Show 50 ▾ entries

#	NAME	ADDRESS	POSTAL CODE	TYPE	STATUS	SHARED?	CHANGED
1	<a href="#">Frozen, Elsa</a>			Member elsewhere	Active		10/09/2023
2	<a href="#">Hunter, Gaston</a>			Event Attendee	Active		10/09/2023
3	<a href="#">Island, Moana</a>			Church Attendee	Active		10/09/2023
4	<a href="#">Lion, Simba</a>			Event Attendee	Active		10/09/2023

Showing 1 to 4 of 4 entries

Previous 1 Next

1. Use the filters to include/exclude Interest contacts. This page works like printing **Member Labels**



As of October, 2023,  
**Kelly Waller**  
is the RMC Membership Clerk

You may contact her at [kellyw@rmcsda.org](mailto:kellyw@rmcsda.org) or 303-282-3635

The RMC Office is closed on Fridays

Dear Clerk -

I hope that this document has been helpful as you work on keeping your church records in order!

There are also some "How-To" videos on the conference website - <https://www.rmcsda.org/departments/membership-clerks/> that might be helpful, as well.

But there are times when you need specific help - that's where I come in! Please feel free to call or email me when you need assistance...I am glad to work with you.

If you've got a quick question, give me a ring and I should be able to help immediately. If you need more detailed assistance or training, contact me and we can set up a time to work together in person, over the phone, or via Zoom.

Thank you for your ministry!

~ Kelly