

Online Candidacy Application System (OCAS) v.2

Prepared by: Paula Gardner-Porter
in collaboration with Kelly McDonald, KY Annual Conference

2009

USERS MANUAL

This page left blank intentionally.

Table of Contents

(To jump to a specific section, hold your Control Key down and then click on the item)

Using OCASv.2: General Information.....	5
Security Settings.....	5
Screen Display and Definitions	7
Invitations & Editing.....	7
Candidacy Registrar and District Superintendent Invitation	7
Candidate Invitation & Editing.....	8
The Candidates Task List.....	9
Candidacy Application.....	10
District Superintendent and Mentor: Signing an application	11
Leaving a Comment	13
Viewing Candidate Information	15
Viewing Candidate Profile.....	17
Paying the Candidacy Fee and Requesting a Guidebook.....	18
Completing the Inventory of Religious Activities and Interests.....	19
Personal Data Inventory (PDI) & Personal and Professional Reference List (PPRL)	21
Release of Information Form	22
Mentor Reviews IRAI with Candidate (Pending IRAI)	22
Complete Form 112 (Mentor's Request for Psychological Assessment Packet)	23
Send Psychological Assessment Testing Packet to Mentor	24
Administer Psychological Assessment Testing to Candidate.....	24
Send Psychological File to Ministerial Assessment Specialist.....	24
Psychological Assessment Interview Completed.....	24
Who to contact with problems	25
Process Completion and Form 113	25

Using OCASv.2: General Information

In September 2009, GBHEM rolled out a new Candidacy Website. The new URL to the candidacy website is [CanApply.gbhem.org](https://public.gbhem.org). Please Bookmark or add this site to your Favorites.

Continuing Users who Already have a Password

You may login to the new system using the same username and password in the previous system. If you don't remember which email address you used, your Candidacy Registrar, Mentor and DS can look up your record and verify it with you. You MUST the email address in the system to use the "request/reset your password" feature.

New Candidates, Mentors, Registrars, DS's You will receive an email invitation containing a link to create your password. After creating your password be sure to complete and/or verify the information on your Personal Information page.

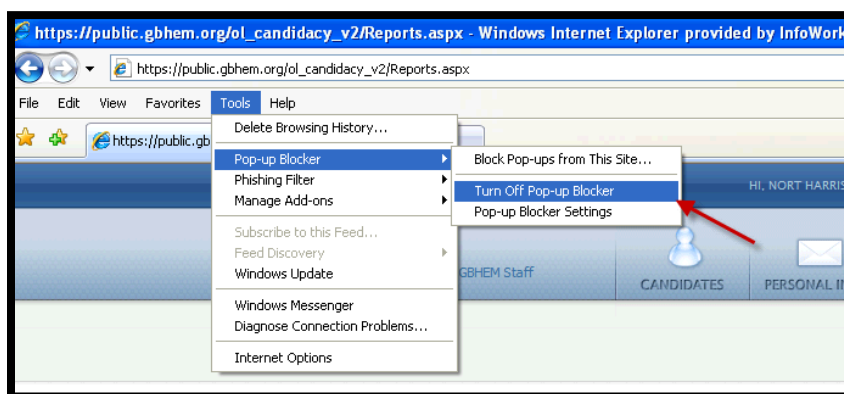
The candidacy coordinator will no longer know or be able to furnish your password.

The new online candidacy site is intuitive and is designed to keep everyone moving through the process using system-generated emails. All emails will come from the "Online Candidacy Application System". Make sure they are not going into the junk or spam folder by adding GBHEM (@gbhem.org or specifically, candidacycoordinator@gbhem.org and assessmentcoordinator@gbhem.org) to the **Safe Senders** List. For many popular email programs this is as simple as adding these two emails to your contact list.

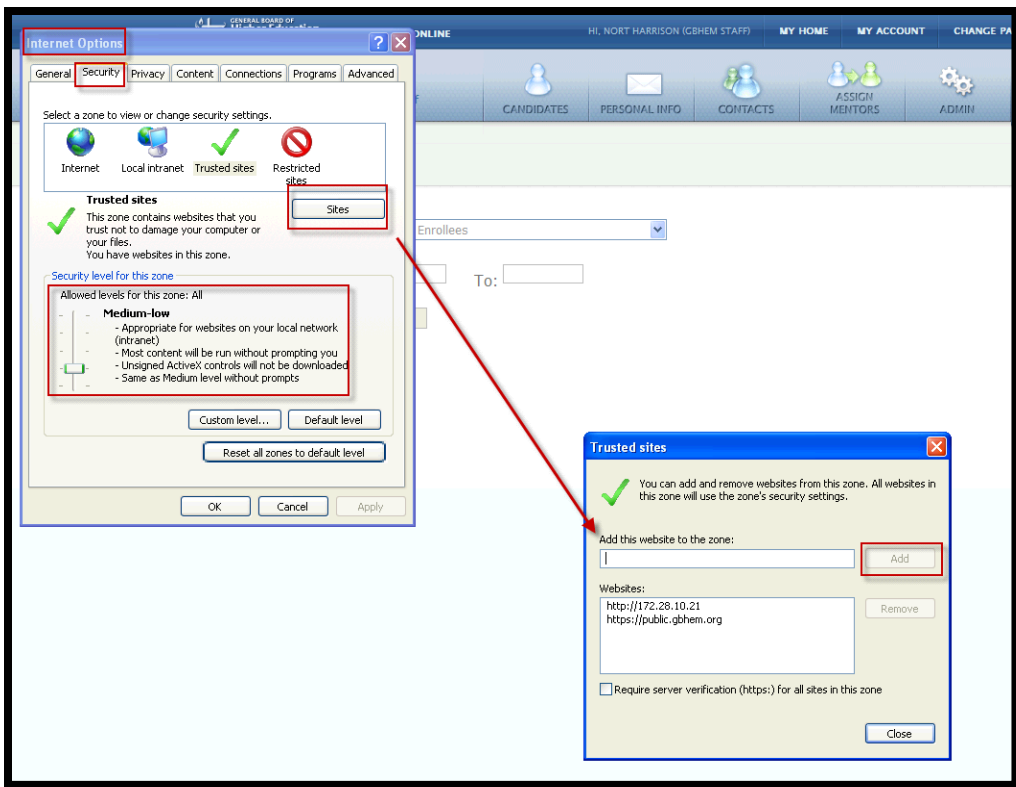
Security Settings

Most of you will be using Windows Internet Explorer (IE) version 7 or above. Please set your security settings as follows in order to view reports or print them out:

1. Make sure pop-up blocker is OFF. (see illustration)



2. In Internet Explorer, go to Internet Options/Security/Trusted Sites and move the slider to Med-Low. Click on sites and add: "https://public.gbhem.org" in the box and click "Add" (in some cases the browser may add the website on its own). This should show up in the larger "websites" box. Click close. (see illustration)



Screen Display and Definitions

Here is how the application looks and some quick pointers to help get you oriented:

The screenshot shows the 'Candidacy Online' interface for a user named 'Bat Man'. The interface includes a top navigation bar with links like 'MY HOME', 'MY ACCOUNT', 'CHANGE PASSWORD', and 'LOGOUT'. Below this is a user profile section with 'Bat Man' and 'Candidate (Active)'. A 'TASKS' section is highlighted with a green checkmark. The main content area is titled 'Candidate Tasks' and contains a table of tasks. The table has columns for 'HELP', 'TASK', 'PRINT', 'RESPONSIBLE', 'STATUS', 'PROJECTED', 'COMPLETED', and 'COMMENTS'. The tasks listed include 'Read "Christian as Minister"', 'Read "Ministry Inquiry Process"', 'Candidacy Application (Form 101, Part 1)', 'District Superintendent Signature', 'Mentor Signature', 'Online Candidacy Payment', 'Complete Inventory of Religious Activities and Interests (IRAI)', 'Personal Data Inventory (PDI) & Personal/Professional Reference List (PPRL)', 'Release of Information', and 'Mentor Reviews IRAI w/ Candidate'. The 'Personal Data Inventory (PDI) & Personal/Professional Reference List (PPRL)' task is highlighted in yellow. Callouts provide additional information: 'This dark blue banner is about you, the user logged in.'; 'Who you are looking at.'; 'This light blue bar and everything below it is about the person you are researching or taking action on. In this case, it's the user logged in, "Bat Man". Note that for candidates, the "My Account" menu choice and the Personal Info menu choice are the same.'; 'Whom to call for help!'; 'Active Links for the person responsible to take action. Note the green check marks at left show completion.'; 'Print Task List'; 'Print Form 101'; 'Click on these icons to write comments to DS or Mentor'; 'Get Help Here!'; and 'This yellow banner shows the next task to be accomplished.'

HELP	TASK	PRINT	RESPONSIBLE	STATUS	PROJECTED	COMPLETED	COMMENTS
<input checked="" type="checkbox"/>	Read "Christian as Minister"		Candidate	Accomplished	07/15/09	07/08/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Read "Ministry Inquiry Process"		Candidate	Accomplished	07/15/09	07/08/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Candidacy Application (Form 101, Part 1)	<input type="checkbox"/>	Candidate	Accomplished	07/22/09	07/08/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	District Superintendent Signature		District Superintendent	Accomplished	07/29/09	07/08/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Mentor Signature		Mentor	Accomplished	07/29/09	07/08/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Online Candidacy Payment		Candidate	Accomplished	07/22/09	07/13/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Complete Inventory of Religious Activities and Interests (IRAI)		Candidate	Accomplished	07/27/09	07/13/09	<input type="checkbox"/>
<input type="checkbox"/>	Personal Data Inventory (PDI) & Personal/Professional Reference List (PPRL)		Candidate	Pending	08/10/09		<input type="checkbox"/>
<input type="checkbox"/>	Release of Information		Candidate	Pending	08/17/09		<input type="checkbox"/>
<input type="checkbox"/>	Mentor Reviews IRAI w/ Candidate		Mentor	Pending	09/14/09		<input type="checkbox"/>

Invitations & Editing

Candidacy Registrar and District Superintendent Invitation

The conference candidacy registrar (CR) and District Superintendent (DS) are both invite by GBHEM. If there is a new CR in your conference please call 615-340-7374 with updated information. If a district in your conference has changed DS's please call Lindsay Buchanan at 615-340-7373 or email her at lbuchanan@gbhem.org.

Mentor Invitation & Editing

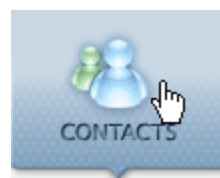


New candidacy mentors are invited by the conference candidacy registrar (CR) by clicking the INVITE MENTORS tab, shown here, and entering the information on the screen. Clicking SAVE/INVITE on the screen will prompt the system to send the new mentor an email invitation. Once the mentor accepts the invitation (by following the link in their invitation to OCAS and creating a password) they will be asked to set up their profile page which includes contact information and other pertinent data. From then on, they will be able to track their mentee's progress through to certification. Candidacy mentor invitation must be maintained by the mentor.

Editing mentor information:

To edit a mentor's information:

3. Click the CONTACTS tab (shown here)
4. manually search for that particular mentor
5. Click on the mentors name
6. Click on the PERSONAL INFO tab (shown to the right)

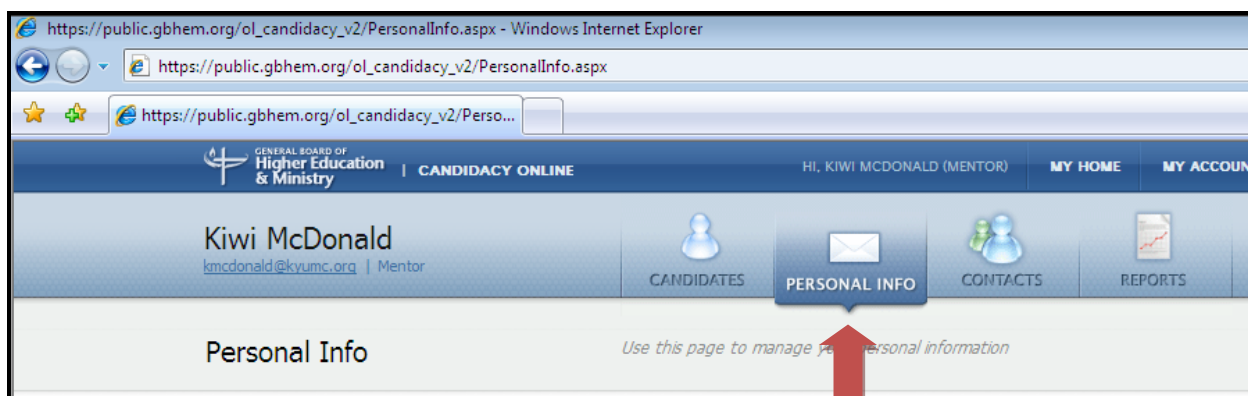


Candidate Invitation & Editing



New candidates are invited by the District Superintendent (DS) by clicking the INVITE CANDIDATES tab, shown here, and entering the information on the screen. Clicking SAVE/INVITE on the screen will prompt the system to send the new candidate an email invitation. Once the candidate accepts the invitation (by following the link in their invitation to OCAS and creating a password) they will be asked to set up their profile page which includes contact information and other pertinent data. From then on, they will be able to follow their task list to complete the candidacy process.

Please note: It is VERY important that all users keep their information updated on this website, especially your EMAIL address. Because this website relies on emails for communication, if your email address is not current you will not receive notification from this system. You can change your contact information at any time by going to the Personal Info tab.



The Candidates Task List

(Note: If the candidate has not set up his browser using the security setting information in their invitation email, the information to follow will not work).



Once the Candidate completes, and submits, their profile page the first screen they see will be their "Task List". If they do not see this screen they should click the TASK tab shown here. This list will show them the steps in their candidacy process that must be completed in sequential order.

Read "Christian as Minister" and "Ministry Inquiry Process" is a conference specific task. If the candidates conference does not require the reading of these two books, the candidate should simply click the link and choose the "NO" radio button. This will not affect the candidate's candidacy process.

HELP	TASK	PRINT	RESPONSIBLE	STATUS	PROJECTED	COMPLETED
<input checked="" type="checkbox"/>	Read "Christian as Minister"		Candidate	Accomplished		11/30/07
<input checked="" type="checkbox"/>	Read "Ministry Inquiry Process"		Candidate	Accomplished		11/30/07
<input checked="" type="checkbox"/>	Candidacy Application (Form 101, Part 1)		Candidate	Accomplished		11/30/07
<input checked="" type="checkbox"/>	District Superintendent Signature		District Superintendent	Accomplished		12/04/07
<input checked="" type="checkbox"/>	Mentor Signature		Mentor	Accomplished		09/10/09
<input type="checkbox"/>	Online Candidacy Payment/Guidebook Request		Candidate	Pending	09/24/09	

The picture above is a screen shot of the first six tasks on the candidate's task list. An explanation of each header row and icons is as follows:

- Clicking the **BLUE** link in the "Task" column of the task list will give them directions on completing that step.
- The person required to complete a step is listed in the RESPONSIBLE column. Only the person designated can complete this step.

- Once a candidate completes a step, a GREEN check mark will show up on the left side of the screen and the STATUS column will change from “Pending” to “Accomplished.”
- A date of completion will also appear in the COMPLETED column.
- The print icon in the top left hand corner of the task list will allow anyone to print the task list for a candidate.
- The print icon beside the Candidacy Application link will allow designated roles to print a candidate’s application in pdf form.
- The PROJECTED column is the date the system will mark the task as ‘overdue task’. On that date, the system will send another email to the responsible party requesting their completion of this task. It will continue to send emails until the task is completed. This is a preventative measure to keep a candidates progressing through the process.



If, for any reason, a candidate will not be progressing through the process for an extended amount of time, the DS should change the candidate’s status to SUSPENDED (using the STATUS tab shown here), until the candidate returns. Once the candidate returns, the DS should change the candidate’s status back to ACTIVE.

Candidacy Application

When the application is submitted, four emails are released by OCASv2 automatically to the email address currently in the system:

1. The District Superintendent (DS) is notified that the application is ready for an e-signature.
2. The Candidacy Registrar (CR) is notified that there is a new candidate in their conference.
3. The mentor receives an email alerting them they have a new candidate and that the candidate has completed an application and is awaiting DS signature.
4. The candidate is notified that their application was submitted successfully and that they must now wait for signatures from their DS and Mentor but may log in at anytime to learn of the progress of their application.

Once the DS e-signs, OCAS sends notification to the Mentor requesting signature. (Note: In the event the email does not reach the mentor, the mentor should access OCAS to see where their candidate is in the process and take action if necessary before contacting GBHEM.)

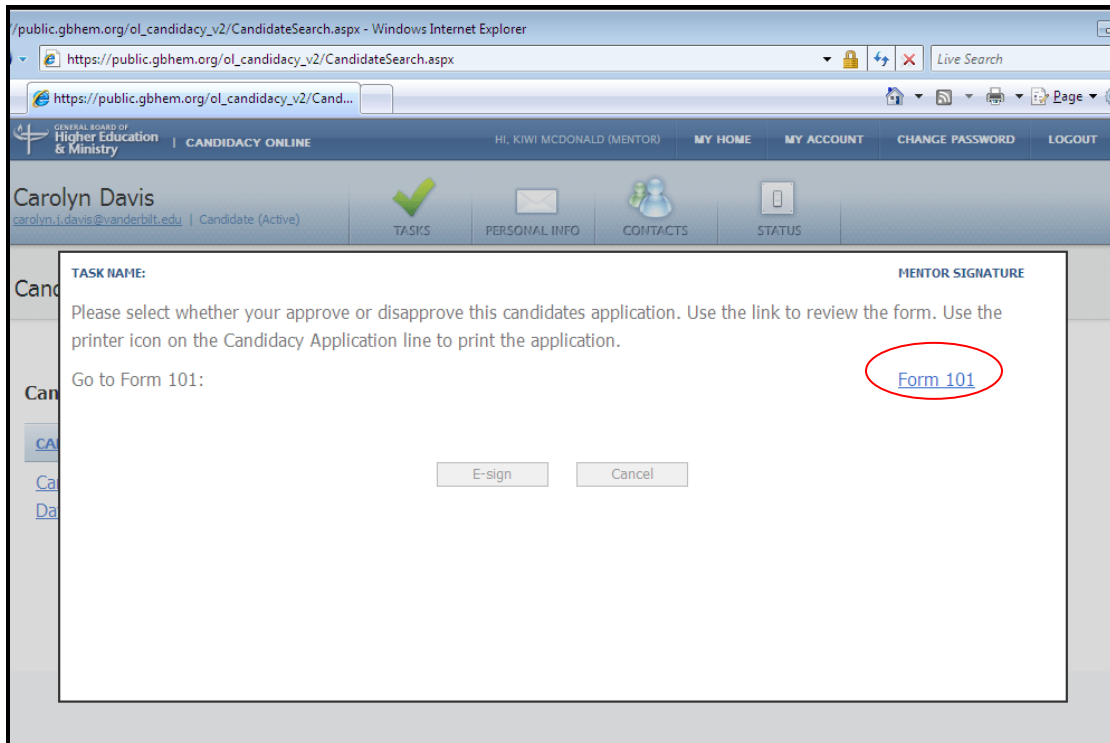
District Superintendent and Mentor: Signing an application

Once you have logged in, you will be taken directly to the “Waiting on Me” page. On the main page, the name(s) of the Candidate(s) that require action is (are) listed. If you do not see your candidates’ name, this means that the candidate is not waiting on you at this time. However, you can search for your candidate by clicking the drop down menu and choosing “manual search”. Below is a screenshot of a “Waiting on Me” page.

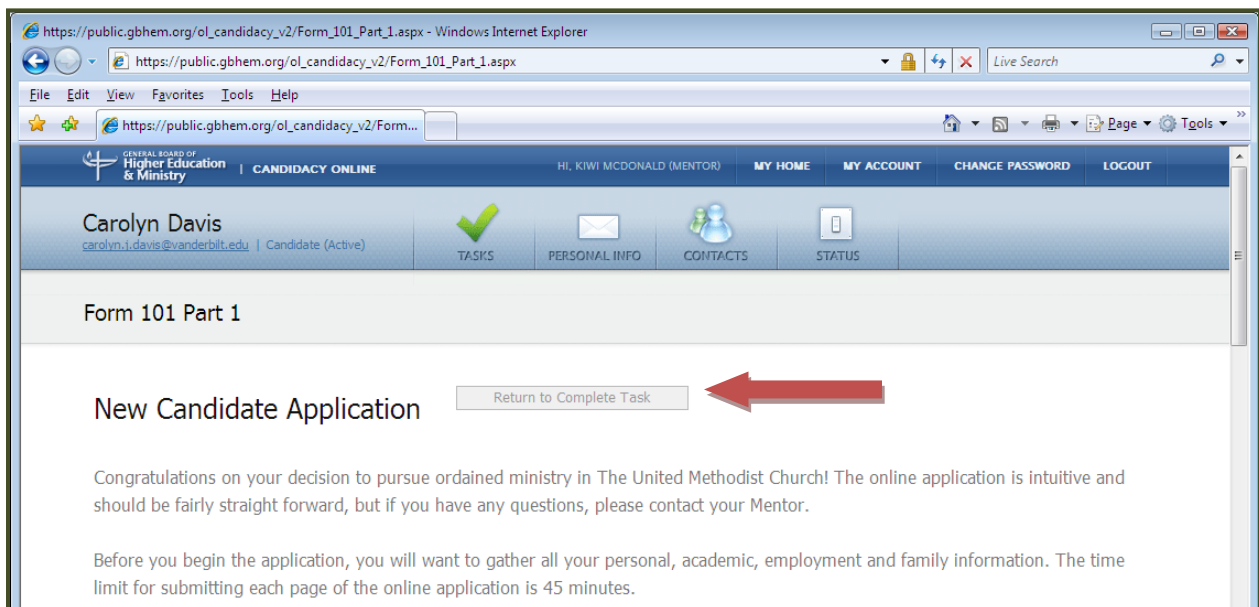
The screenshot shows the 'Candidate Search' page for Kiwi McDonald, a Mentor. The page displays a table of candidates with the following data:

CANDIDATE	CONFERENCE	DISTRICT	MENTOR	TASK	RESPONSIBLE	COMMENTS	STATUS	RETEST
Carolyn Davis	Alabama-West Florida	Baypines	Kiwi McDonald	Mentor Signature (Pending)	Mentor		Active	Retest

After clicking on the “Task” that is to be completed a signature pop-up screen (see below) will appear. Follow the directions on the screen. You can view the document you are agreeing to by click on the link (circled below) in the signature screen. **[Note: Make sure that your pop-up blocker is turned OFF while in OCASv.2.]**



The document to be reviewed is defaulted to open in another window. Once you have finished reviewing, return to the top of the document, and click on the “Return to Complete Task” button.



When you are ready to sign the application, click on the E-Sign Button on the signature screen. You will then be asked to confirm that you want to complete this task. If you feel that the document is unacceptable click cancel. DS's can change the status of a candidate. Mentors must contact their DS if they choose not to sign an application.

The screenshot shows the OCAS Candidacy Online interface. At the top, there is a navigation bar with the logo of the Central Board of Higher Education & Ministry, the text 'CANDIDACY ONLINE', and user information 'HI, KIWI MCDONALD (MENTOR)'. There are links for 'MY HOME', 'MY ACCOUNT', 'CHANGE PASSWORD', and 'LOGOUT'. Below the navigation bar, the user's name 'Carolyn Davis' and email 'carolyn.i.davis@vanderbilt.edu' are displayed, along with the role 'Candidate (Active)'. There are four tabs: 'TASKS' (with a green checkmark), 'PERSONAL INFO', 'CONTACTS', and 'STATUS'. The main content area shows a task titled 'TASK NAME:' with instructions: 'Please select whether you approve or disapprove this candidates application. Use the link to review the form. Use the printer icon on the Candidacy Application line to print the application.' Below this, it says 'Go to Form 101:' with a blue link 'Form 101'. At the bottom of the task area, there are two buttons: 'E-sign' and 'Cancel'. Two red arrows point from the 'E-sign' button towards the 'Cancel' button.

Once you have signed off, the next person in the process will receive an email notification letting them know that there is action to be taken on OCAS. This process will go back and forth until all steps have been completed.

DS & Mentor NOTE: You are encouraged to log in regularly to check to see if your candidate is waiting on you to complete a task for them. This is a good way to stay up to date with your candidates progress in the event that you do not receive, or unknowingly delete, an email sent from the system.

Leaving a Comment

OCAS offers a Comments Feature which allows users to leave messages for anyone viewing this candidates record. When any user pulls up a record with a comment, it will appear as ORANGE when it is New/Unread and YELLOW if it has been viewed.

The screenshot shows a web browser window displaying the 'Candidate Search' page. The user is logged in as Kiwi McDonald (Mentor). The page features a navigation menu with options like 'CANDIDATES', 'PERSONAL INFO', 'CONTACTS', and 'REPORTS'. Below the navigation, there is a 'Candidate Search' section with a filter criteria dropdown set to 'Waiting On Me'. A table lists candidates with columns for Candidate, Conference, District, Mentor, Task, Responsible, Comments, Status, and Retest. The 'Comments' column for the first candidate, Carolyn Davis, shows a paper icon. A callout box points to this icon with the text 'Click here to leave a comment'.

CANDIDATE	CONFERENCE	DISTRICT	MENTOR	TASK	RESPONSIBLE	COMMENTS	STATUS	RETEST
Carolyn Davis	Alabama-West Florida	Baypines	Kiwi McDonald	Mentor Signature (Pending)	Mentor		Active	Retest

To leave a comment associated with a step, click on the paper icon under the Comments header. You will then have the opportunity to enter a new comment or view all of the previously posted comments on this step. You also have the option of sending your comment* to the Candidate via email.

The NOTES icon will appear orange when it is new and yellow when it has been read. To see the contents of the note, either hover your mouse over the icon OR click on the icon itself. **Be careful, comments are viewed by everyone and cannot be deleted once they are entered!!**

*Candidates will have the option of sending comments to their Mentor/DS via email.

ps://public.gbhem.org/ol_candidacy_v2/CandidateSearch.aspx - Windows Internet Explorer

https://public.gbhem.org/ol_candidacy_v2/CandidateSearch.aspx

Facebook | Your Photos

GENERAL BOARD OF Higher Education & Ministry | CANDIDACY ONLINE

HI, KIWI MCDONALD (MENTOR) MY HOME MY ACCOUNT CHANGE PASSWORD LOGOUT

Kiwi McDonald
kmcdonald@kyumc.org | Mentor

CANDIDATES PERSONAL INFO CONTACTS REPORTS

Candidate Search *Use this page to search for candidates*

ENTER COMMENTS

COMMENT HISTORY

Enter a new comment here.

View previous comments here.

Send this comment via email to Candidate

Save Comment

Click save when you are done.

Close

Viewing Candidate Information

To view information for a Candidate that is not showing on your main page, click on the drop down box for Candidate Filter Criteria. Select Manual Search from the drop down menu.

GENERAL BOARD OF Higher Education & Ministry | CANDIDACY ONLINE

HI, KIWI MCDONALD (MENTOR) MY HOME MY ACCOUNT

Kiwi McDonald
kmcdonald@kyumc.org | Mentor

CANDIDATES PERSONAL INFO CONTACTS REPORTS

Candidate Search *Use this page to search for candidates*

Candidate Filter Criteria:

No Candidates match the search criteria

Waiting On Me

(Please Select)

Waiting On Me

Awaiting Mentor signature of Form 101, Part 1

Awaiting review of IRAI

Awaiting submission of Form 112

Awaiting submission of Form 113

Manual Search

A search criteria screen will appear. If you want to see a list of all the Candidates that are assigned to you, click on search (do not enter any criteria in the boxes). If you want to locate a specific candidate, type the information into the boxes and click on the search button.

GENERAL BOARD OF Higher Education & Ministry | CANDIDACY ONLINE | HI, KIWI McDONALD (MENTOR) | MY HOME | MY ACCOUNT | CHANGE PASSWORD | LOGOUT

Kiwi McDonald
kmcdonald@kyumc.org | Mentor

CANDIDATES PERSONAL INFO CONTACTS REPORTS

Candidate Search *Use this page to search for candidates*

Candidate Filter Criteria: Manual Search

First: Last: Search

Status: (Please Select)
 (Please Select)
 Active
 Certified
 Deferred
 Denied
 Suspended
 Withdrawn

No Candidates ma

A list of your candidates will appear. This list will show you pertinent information for the candidate including who their mentor is, the current task that needs to be completed and their status. (See screenshot below)

Carolyn Davis
carolyn.l.davis@vanderbilt.edu | Candidate (Certified)

TASKS PERSONAL INFO CONTACTS STATUS

Candidate Search *Use this page to search for candidates*

Candidate Filter Criteria: Manual Search

First: Last: Conference: Alabama-West Florida Search

Status: (Please Select) District: (Please Select)

CANDIDATE	CONFERENCE	DISTRICT	MENTOR	TASK	RESPONSIBLE	COMMENTS	STATUS	RETEST
Carolyn Davis	Alabama-West Florida	Baypines	Kiwi McDonald	Complete Form 113 (Report of Completion) (Accomplished)	Mentor	<input type="checkbox"/>	Certified	Retest
Lizyliz O'neal	Alabama-West Florida	Baypines	Kiwi McDonald	District Superintendent Signature (Pending)	District Superintendent	<input type="checkbox"/>	Active	Retest

To view all of the steps associated with a Candidate, click on the Candidate's name. This will display the candidates TaskList. Note: You cannot click on a task out of sequence and/or an uncompleted task that is not your responsibility.

GENERAL BOARD OF Higher Education & Ministry | CANDIDACY ONLINE | HI, KIWI MCDONALD (MENTOR) | MY HOME | MY ACCOUNT | CHANGE PASSWORD | LOGOUT

Carolyn Davis
carolyn.i.davis@vanderbilt.edu | Candidate (Certified)

TASKS PERSONAL INFO CONTACTS STATUS

Candidate Tasks Use this page to view and complete tasks. Tasks must be completed in order.

HELP	TASK	PRINT	RESPONSIBLE	STATUS	PROJECTED	COMPLETED	COMMENTS
✓	Read "Christian as Minister"		Candidate	Accomplished	07/28/09	07/21/09	
✓	Read "Ministry Inquiry Process"		Candidate	Accomplished	07/28/09	07/21/09	
✓	Candidacy Application (Form 101, Part 1)		Candidate	Accomplished	08/04/09	07/21/09	
✓	District Superintendent Signature		District Superintendent	Accomp			Test Comment ---- by Kiwi McDonald on 8/4/2009 2:48:12 PM
✓	Mentor Signature		Mentor	Accomplished	08/11/09	07/21/09	
✓	Online Candidacy Payment		Candidate	Accomplished	08/04/09	07/21/09	
✓	Complete Inventory of Religious Activities and Interests (IRAI)		Candidate	Accomplished	08/04/09	07/21/09	

Viewing Candidate Profile

From the task list you can also view the Candidate's personal information. To view a Candidate's information (address, phone numbers, etc.), click on the Personal Info tab at the top of the page. Although, you have access to change candidates contact information this feature has been made available for emergency purposes only. It may be a good idea to check with your candidate before making changes.

GENERAL BOARD OF Higher Education & Ministry | CANDIDACY ONLINE | HI, KIWI MCDONALD (MENTOR) | **MY HOME** | MY ACCOUNT | CHANGE PASSWORD | LOGOUT

Carolyn Davis
carolyn.i.davis@vanderbilt.edu | Candidate (Certified)

TASKS PERSONAL INFO CONTACTS STATUS

Candidate Tasks Use this page to view and complete tasks. Tasks must be completed in order.

To return back to the main page, click on "My Home" at the top of the screen.

Once you have finished working in the Candidacy website, click on the LOGOUT button in the top right corner of the screen.

Paying the Candidacy Fee and Requesting a Guidebook

When the candidate has received all of their signatures they will receive an email with instructions to log in to pay their fees. Candidates can check their task list to determine where they are in the process at anytime.

On the log in screen, click the [ONLINE PAYMENT GUIDEBOOK REQUEST](#) link.

HELP	TASK	PRINT	RESPONSIBLE	STATUS	PROJECTED	COMPLETED	COMMENTS
<input checked="" type="checkbox"/>	Read "Christian as Minister"		Candidate	Accomplished		05/02/08	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Read "Ministry Inquiry Process"		Candidate	Accomplished		05/02/08	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Candidacy Application (Form 101, Part 1)		Candidate	Accomplished		05/02/08	<input type="checkbox"/>
<input checked="" type="checkbox"/>	District Superintendent Signature		District Superintendent	Accomplished		05/28/08	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Mentor Signature		Mentor	Accomplished		11/13/08	<input type="checkbox"/>
<input type="checkbox"/>	Online Candidacy Payment/Guidebook Request		Candidate	Pending			<input type="checkbox"/>

*Note: The current task is always highlighted in canary yellow.

The candidate will see a screen which will allow them to enter their credit/debit card information.

Once they have successfully paid their candidacy fee the candidate will be asked if they would like to request a hardcopy or the pdf version. You must have Adobe Reader on your computer to download the guidebook. It can be downloaded to your computer for free at www.adobe.com. Please make sure that a *physical address* is entered when requesting a guidebook and allow 7-14 business days for your guidebook to arrive.

Completing the Inventory of Religious Activities and Interests

Once you have paid your fees, your next task is to complete your Inventory of Religious Activities and Interests (IRAI). Click on this task on your task list and you will see the pop up box below:

TASK NAME:	COMPLETE INVENTORY OF RELIGIOUS ACTIVITIES AND INTERESTS (IRAI)
Click the link below to complete your Inventory of Religious Activities and Interests (IRAI). It should take you approximately 60 minutes to complete this inventory.	
Link to IRAI:	http://www.CareerMarriage.org/welcome.aspx

To begin your IRAI follow the directions on the screen. When you have finished it, the candidate must go back to the link on the task list and mark that task complete in order to move forward. (The mentor will officially mark the task complete and reviewed later on in the process).

Psychological Assessment Process Online Candidacy Application System (OCASv2)

For Conferences Using the Nashville Battery of Testing

Below is a screenshot of the psychological portion of the task list. An explanation of each task follows.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Personal Data Inventory (PDI) & Personal/Professional Reference List (PPRL)	 	Candidate	Accomplished	11/04/09	10/08/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Release of Information		Candidate	Accomplished	10/15/09	10/08/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mentor Reviews IRAI w/ Candidate		Mentor	Accomplished	11/05/09	10/09/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Complete Form 112 (Mentor's Request for Psychological Assessment Packet)		Mentor	Accomplished	10/16/09	10/09/09	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Send Psychological Assessment Testing Packet to Mentor		GBHEM Staff	Accomplished	10/30/09	10/09/09	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Administer Psychological Testing to Candidate		Mentor	Pending	01/29/10		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Send Psychological File to Ministerial Assessment Specialist (MAS)		GBHEM Staff	Pending	02/19/10		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Psychological Assessment Interview Completed		Mentor	Pending	04/02/10		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Meeting Completed with Local P/SPRC or Equivalent		Mentor	Pending	05/14/10		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Meeting Completed with Charge Conference or Equivalent		Mentor	Pending	07/09/10		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Appearance Before District Committee (dCOM) Completed		Mentor	Pending	01/07/11		<input type="checkbox"/>

Personal Data Inventory (PDI) & Personal and Professional Reference List (PPRL)

Once the candidate has successfully completed and submitted the Inventory of Religious Activities and Interests (IRAI), their next task is to complete the **Personal Data Inventory (PDI)**. Click on this task link and you be taken to a screen to begin completing your autobiographical statement.

□ Before beginning this step, it will be important for you to gather your personal, academic, employment, family and, if applicable, military service record information.

□ There will also be questions regarding your spouse's support of your ministry.

The time limit between page submission is 45 minutes. Because of this, if you delay submitting a page while you are gathering the above-mentioned materials, your session will time out and you will have to begin the process following the last complete page submitted.

Note: Personal information can only be changed on your *Personal Information* page. **If you need to make an email, address or phone number change, you will do this on your Personal Information page and the information will change on your PDI.**

- If after you have submitted your PDI and realize you have made a mistake, you can print a copy of your PDI by clicking on the printer icon next to this step from your task list.
- Type a paragraph of explanation and bring with you to add as an addendum along with the copy of your printed PDI directly to the psychologist when you have your interview appointment.

Once the PDI has been successfully submitted, the **Personal and Professional Reference List (PPRL)** will appear on your screen and will be the next task for you to complete.

You will be asked to obtain the full mailing address of each reference, street, city, state and zip code. Please do not list as a reference anyone outside the continental United States. We will not mail outside the continental United States.

A **required** reference will be your most recent local church pastor. If you are serving a church yourself and do not have a pastor, please list a former pastor, preferably the one who knows you the best and could best comment on your potential for service as a member of the licensed or ordained clergy. If your most recent local pastor is your parent or close relative, please list another pastor who knows you well.

Recommendation letters are not mailed until the mentor has submitted Form 112 requesting a psychological assessment testing packet for the candidate.

- It is the candidate's responsibility to contact the person's they named on their PPRL, advising them that they will receive a Recommendation Form from the Division of Ordained Ministry of The United Methodist Church in Nashville, TN, and that they should return the completed form immediately to the psychologist using the enclosed addressed envelope.
- Follow up on your references to confirm that they have received the form, have completed the form, and have returned it to the appropriate psychologist. Recommendation letters will not be re-mailed if the candidate's file has been forwarded to the psychologist.

Release of Information Form

Once the candidate has successfully completed and submitted the PDI and PPRL, their next task is to print the Release of Information form (from printer icon next to this task on the Task List) and give to your mentor for inclusion in your psychological assessment testing packet.

Mentor Reviews IRAI with Candidate (Pending IRAI)

The mentor will view the candidate's IRAI by clicking on this task and click on the link to

download and print a copy.

After viewing the IRAI, the mentor must go back to the task list and mark this task completed by clicking on the task and clicking on the TASK COMPLETED button in order to move forward.

A Mentor's Guide for Interpreting the Inventory of Religious Activities and Interests begins on page 4 at the following website:

[http://www.gbhem.org/site/c.lsKSL3POLvF/b.3813207/k.F286/Navigating the Online Candidacy Process.htm](http://www.gbhem.org/site/c.lsKSL3POLvF/b.3813207/k.F286/Navigating_the_Online_Candidacy_Process.htm)

At this time, new mentors will not be able to take the IRAI themselves so pages 1-3 do not apply. Skip that section and begin on page 4.

Complete Form 112 (Mentor's Request for Psychological Assessment Packet)

The candidacy mentor is asked to serve as the monitor/proctor and administer the inventories in the candidacy assessment packet and will request the psychological assessment testing packet for their candidate('s) by logging into the Online Candidacy Application System (OCASv2) using their username and password.

Note: Before the mentor can submit Form 112 for their candidate, the following online tasks must be completed by the candidate and mentor:

1. Candidate has taken the IRAI and has indicated on task list that this step has been completed.
2. Candidate has completed the Personal Data Inventory and Personal and Professional Reference list and has indicated on task list that these steps are completed.
3. Candidate has printed the Release of Information Form.
4. Mentor has viewed the IRAI and has gone over the results with the candidate and has indicated on task list that this step has been completed.

Mentor will submit Form 112 by clicking on that task and completes the Form by filling in the Ministerial Assessment Specialist's name and the proposed date of testing.

Note: If your mailing address is incorrect on the Form 112, update your mailing address information on your Personal Information page **before** you submit Form 112.

Once you update your Personal Information page, the Form 112 information will be corrected.

Submit Form 112.

Send Psychological Assessment Testing Packet to Mentor

A testing packet will be mailed to the mentor at the address listed on the Form 112. The mentor can expect the testing packet within 4-6 weeks from the date submitted.

The mentor should allow three to four hours of testing time for the candidate to complete the packet.

Instructions to the mentor on how to administer the assessment's are included in the packet when mailed. A computer will need to be provided for the candidate to take one of the assessments online. The rest of the assessments will be administered by paper. Return all testing booklets, do not keep.

The mentor will return all materials in testing packet to the Candidacy Assessment Office using the return envelope in the testing packet.

Administer Psychological Assessment Testing to Candidate

After the mentor has administered the psychological assessment testing to the candidate, the mentor's next task will be to mark this task complete on the candidate's task list. Click on this task on your task list and click on the TASK COMPLETE button. When you have done this, the task list will move forward.

Send Psychological File to Ministerial Assessment Specialist

Once the testing packet has been returned to the assessment office from the mentor, the testing will be scored and the file will be mailed to the Ministerial Assessment Specialist. The mentor can check the candidate's status by viewing the task list. Allow 4-6 weeks processing time before contacting the psychologist for your candidate's interview appointment.

Psychological Assessment Interview Completed

After the candidate has had the appointment with the Ministerial Assessment Specialist, the mentor's next task will be to mark this task complete on the candidate's task list. Click on this task on your task list and click on the TASK COMPLETED button. When you have done this, the task list will move forward.

Who to contact with problems

As you work with a new candidate, you may run into problems with the website or questions about the process. If you have any problems please call your candidacy registrar and discuss the issue with them. If they cannot assist you with the problem, they will call GBHEM on your behalf.

If you have a candidate who needs to be re-tested in psychological assessment, and who has been assigned to you but you are not the original mentor assigned to this candidate, please contact Debbe Howe in the candidacy assessment office for assistance. She can be reached by emailing her at dhowe@gbhem.org.

Process Completion and Form 113

After a candidate has completed the psychological steps, the mentor is responsible for returning to the candidate's task list to mark the remainder of the tasks complete. (See screen shot below).

<input type="checkbox"/>	③	Meeting Completed with Local P/SPRC or Equivalent	Mentor	Pending	05/14/10
<input type="checkbox"/>	③	Meeting Completed with Charge Conference or Equivalent	Mentor	Pending	07/09/10
<input type="checkbox"/>	③	Appearance Before District Committee (dCOM) Completed	Mentor	Pending	01/07/11
<input type="checkbox"/>	③	Complete Form 113 (Report of Completion)	Mentor	Pending	01/14/11

Form 113 is the final documents to be completed for the candidate. This document tells the system pertinent information about the candidate and whether or not has been certified. This must be completed by the mentor. GBHEM no longer accepts paper Form 113's from online candidates. These forms will be returned to the Mentor's office. After completing this form, the candidate's status will be changed to Certified, Denied, Withdrawn after they meet with dCOM.