"STEP-BY-STEPS"

FREQUENTLY ASKED QUESTIONS

Basic Questions

How do I update my personal information?

1. Log in to UMCARES.
2. Click on your name and role in the gray Main Menu bar at the top of the page.
3. Select the **Edit** hyperlink in the teal table header on the Profile page.
4. When the table opens, update the needed information.
5. When finished, click **Save**.

How do I reset or change my password?

1. Click the **Forgot Password** hyperlink on the UMCARES login page.
2. Enter the email address that you use to log in to the system.
3. Check your email.
4. Click on the link included in the email.
5. Enter and confirm the new password.
6. Log in to UMCARES.

OR

1. Log in to UMCARES.
2. Click on your name and role on the gray menu bar at the top of the page.
3. Go to **Profile Sections** > **Login**.
4. Select **Reset Password**.
5. Enter and confirm the new password.
6. Click **Change**.

My account is locked, what now?

1. Once the account is locked it will remain locked for 2 hours
2. If you attempt to login before the 2 hours has passed it will reset the timer and you will need to wait 2 more hours.
3. Once the time has passed follow the instructions above on *How do I reset or change my password?*

Candidate Specific Questions

I'm a candidate. How do I find my track?

1. Log in to UMCARES.
2. Select the desired track listed under the **Active Tracks** side panel on the home page.

OR

1. Log in to UMCARES.
2. Go to your user profile.
3. Go to **Profile Sections** > **Mentors & Tracks**.
4. Click the **Open** button on the desired track row.

BOM, Conference, and District Specific Questions

How do I search for a user?

Simple Search

Clicking the **Search** hyperlink on the Main Menu bar opens the Simple Search feature, which allows the user to search by name for a specific person. A user's search will return and display all matching results. A user might not be able to access all of the returned results due to individual security settings.

Performing a Simple Search:

1. Click the **Search** hyperlink on the Main Menu bar.
2. Enter the person's name, then click **Search**.
3. Review the search results.

Advanced Personal Search

Advanced Search allows the user to search UMCARES using personal information, assigned tracks, or a user's role in the system. The results can also be filtered by conference, role, or track.

Performing an Advanced Search:

1. Click the **Search** hyperlink on the Main Menu bar.
2. Click **Advanced**.
3. Select a tab.
4. Select or enter the search parameters, then click **Search**.
5. Review the search results.

Candidate Search

The following instructions are specific to searching for candidates within UMCARES.

Performing a candidate search:

1. Click **Search** on the gray Main Menu bar.
2. Click **Advanced**.
3. Select the **Role** tab.
4. Select **Candidate** from the drop-down menu.
5. Select the conference and district.
6. Click **Search.**

How do I access my candidate's task list

1. Open the candidate's user profile.
2. Go to **Profile Sections** > **Mentors & Tracks**.
3. Click the **Open** button on the desired track row.
4. The track page will open.

How do I approve my candidate's application? How do I check off a completed step?

1. Open the candidate's user profile.
2. Go to **Profile Sections** > **Mentors & Tracks**.
3. Click the **Open** button on the desired track row.
4. When the **Tasks** page opens, scroll down to the step for which you are responsible.
5. Click **Save**, **Submit**, or **Approve** (varies based on step).
6. Exit the candidate's track.

OR

1. Select a step from the **Responsible Steps** side panel on the home page.
2. Complete the open step.
3. Close the track.

How do I create a new user?

Creating a New User (Administrative)

1. Go to **Administration** > **New User Wizard**.
2. Select the user type you would like to create.
3. Enter the new user's name and email address.
4. Select **Access Level** > **Conference** > **Main Role**.
5. Select **Mentor**.
6. Review the information.
7. Select an email template.
8. Select a finishing option.

Creating a New User (Candidate)

1. Go to **Administration** > **New User Wizard**.
2. Select the desired user type to be created, then click **Next**.
3. Enter the new user's name and email address, then click **Next**.
4. Choose the user's location, then click **Next**.
5. Select the desired track from the drop-down menu then click **Next**. (Note: The Candidacy and Psychological Assessment tracks are automatically added to the user. Click the **Delete** button next to the assigned track to remove it.)
6. Set a geographic district, then select a mentor and mentor type.
7. Review the information.
8. Select an email template.
9. Select a finishing option.

How do I review, update, and re-invite current mentors?

Reviewing/Updating Mentor Records

1. Log in to UMCARES.
2. Click the **Search** button on the main menu bar.
3. Select **Advanced Search** > **Roles**.
4. When the **Roles** tab opens, select **Mentors** from the drop-down menu under **Roles**.
5. Select your conference and district.
6. Click **Search**, then click the **Profile** button on the mentor's row.
7. Click the **Edit** button on the user's profile page to edit needed information.
8. Click **Save**, then close.

Continue to Step 9 to re-invite a mentor.

9. Once updated, click **Search** on the Main Menu bar to return to your search results and repeat steps 7–8 until the list is complete.
10. After editing the users' profiles, close the Search page.
11. Then, from the home page, go to **Administration** > **User Invitations**.
12. In the **List Filter** panel, select your Conference, All Accessible Districts, and then select **Mentor**.
13. Click **Refresh List**.
14. A list of mentors that have not been invited will be generated, select the checkbox next to the name of each mentors you want to invite. (Note: if no checkbox is available, there is no email address found in the user's profile.)
15. Click **Invite Selected**.
16. When the Invitation Selection window opens, select the appropriate email template from the drop-down menu, then click **Continue**.
17. The emails will be sent.

How do I change a candidate's mentor?

1. Use Search or an available distribution list to find the candidate.
2. Open the candidate's profile page.
3. Go to **Profile Sections** > **Mentors & Tracks.**
4. Click **Assign Mentor**.
5. Select the desired location, mentor, and mentor type from the **Mentor and Type** window.
6. Click **Add**.
7. Click **Unassign** on the previous mentor's row.

How do I change a user's district or conference?

Changing a User's Location – Add Location

1. Search for the user.
2. Select the **Profile** button on the **Search Results** table.
3. Go to **Profile Sections** > **Location Information**.
4. Select **Add Location**.
5. Select the desired location from the drop-down menu.
6. Click **Add**.

Changing a User's Location: Extend Location
These instructions allow users to add an additional district or conference to a current user (e.g. a district superintendent active in two conferences or districts).

1. Search for the person.
2. Select **Profile** on the **Search Results** table.
3. Go to **Profile Sections** > **Location Information**.
4. Click **Extend Location**.
5. Select the desired location.
6. Click **Add**.

Changing a User's Location: Request Transfer
These instructions allow you to request a transfer from one conference to another for a candidate **who is still in the candidacy process.** A transfer request is initiated by the receiving conference and approved by the home conference.

1. Search for the person.
2. Select the **Profile** button on the **Search Results** table.
3. Go to **Profile Sections** > **Location Information**.
4. Click **Request Transfer**.
5. Select the desired location, then click **Request**.
6. The BOM Staff or conference appointee in the home conference will receive your request and either approve or deny it. Please be in contact with the home conference prior to requesting a transfer to avoid any delays.

Why do my codes for the 16PF not work?

1. Check the **code expires** date on the second page of the assessment packet folder next to the 16PF Log-In information. If the date has passed contact the Candidacy office for new access codes.
2. Check to make sure that you have entered the https://www. before netassess.ipat.com or it will direct you to the incorrect webpage. **Note:** 16PF.com is not the new webpage.
3. If you have logged in using the codes previously or started but did not complete the 16PF the account will be locked. The Candidacy office can reset and unlock the assessment, however all previous work will be lost.