Updating Your Congregation's Membership, Leaders, and Staff Information with my.UUA.org

Documentation revised 04/2023

Thank you for using the my.UUA.org system to update your congregation membership's contact information online! If you have any questions, please contact Nick Rafeal at nrafeal@uua.org (617/948-4654).

Table of Contents

1. Overview of the System

The UUA stores the names and addresses of congregation members so that we can mail them *UU World* magazine and other mailings. We also keep contact information for staff and leaders for publication in the annual directory. The my.UUA.org system allows congregation leaders to view and update information about their congregation's members online, instead of using paper printouts and email.

As the UUA moves away from paper mailings to congregation leaders, we'd like to encourage you to include email addresses in your updates. Our privacy policy forbids sharing these email addresses with other organizations without express permission.

Every UUA member congregation has a my.UUA.org account to log in and manage this information. The username for that account is the congregation's 4-digit UUA ID number. Each congregation may also authorize up to four individuals to create personal usernames for logging in, with **Data Services Updaters** permissions enabled on their personal accounts. This would allow these users to view and update the congregation's membership list in their own user account. The congregation controls who its Data Services Updaters are – your church administrator, minister, congregation president, membership committee chair, or someone else. If you are a Data Services Updater for a congregation, then when you log in to my.UUA.org, you see links for updating that congregation.

Updating Congregation Membership, Leaders, and Staff with my.UUA.org

This first version of the system includes only the following:

- Viewing your list of members
- Adding new members (single people or couples)
- Editing names, addresses, phone numbers, and email addresses
- Connecting two members as partners (marriage)
- Separating a couple (divorce)
- Adding and removing people as leaders and staff

There are a lot of features yet to come, like:

- Allowing congregations to offer an online directory for their members
- Uploading lists of new members
- Updating your congregation's contact information, accessibility information, and statistics

For updates that the system doesn't handle yet, please email them to data_services@uua.org, or fax or mail them. You will continue to use the Online Certification system at dyn.uua.org/congregation for submitting your membership numbers and other updates.

Figure 1: Logging into my.UUA.org.

2. Logging In and Out

To use the my.UUA.org system, follow these steps:

1. Go to **my.uua.org/contactinfo** in your web browser (Figure 1). (The address myuua.org/contactinfo is another name for the same web site.)

2. Enter your username and password, and click Login. You see your my.UUA.org home page (Figure 2), with your main menu of options.

To return to this page, click the "Home" link at the top of any page. When you are done working, click the "Logout" link at the top of any page.

Figure 2: Your my.UUA.org main menu.

3. Overview of the Main Menu

What your my.UUA.org main menu (Figure 2) includes depends on which congregation you are a member or Data Services Updater of. The main menu has two sections:

- **Your Personal Account:** This allows you to update your own name and address (by clicking "Update Your Personal Information") or change your password (by clicking "Update Your my.UUA.org Password").

- **Congregation Links:** For each congregation for which you are a Data Services Updater, you see the name of the congregation, followed by "Members" and "Administration" sections for maintaining your membership list and managing system settings for your congregation. The "View Membership Directory" link appears only if your congregation has enabled this feature.

4. Updating Your Membership List

To see the membership list for your congregation, click the "Manage Members" link in the section for the congregation. You see the Managing Members page (Figure 3), which lists all the members of your congregation. The left-hand column shows the last and first names grouped as couples, with a link to click if the couple separates. The middle column shows name, phone number, and email address for each person. The right-hand column shows the address, notes, and date last updated.

Figure 3: Managing Members page.

Above the listing is a row of letter links, so that you can see only members whose last names start with that letter (useful if your congregation is large). Click "All" to see the whole listing again.

Note about who appears: Your membership list includes the most current household address we have for each member. In addition to your edits, we receive updated address information from a variety of sources including individual members contacting the UUA and USPS mail-forwarding orders. Mailing addresses are routinely audited, and the data is updated to comply with USPS mailing standards. If you see an unfamiliar address, please verify it with the member before

making changes. Your membership list includes only members, not non-member friends or spouses. It also excludes anyone we think is under 18.

5. Updating Your Membership List

From the Managing Members page, you can edit, remove, and add members, as well as separating couples.

5a. Adding a Member

To add a member, follow these steps:

1. Search your membership list to make sure that the person isn't already on it. Press Ctrl-F to use your browser's Find On Page feature to search for the person's last or first name. (For partners, search for both last names.)

2. Click the "Add a New Member" link at the top of the page. You see the Add Person page (Figure 4).

3. Fill in the information about the member(s). To enter a single person, just leave the partner's information blank. Enter the person's street or mailing address, city, state, ZIP code or postcode, country, phone number, email address, and seasonal address (if any, at the bottom of the form). Phone number and email address are optional. For the phone number, you can use any format. We encourage you to enter email addresses for leaders and staff; enter the address at which they would like to receive newsletters and other information from the UUA.

4. We need to know whether each person is and adult (18 or older) or a child or youth (under 18). You can click the "Member is 18 or older" or "Member is under 18" radio button or enter a birth date (or both). One or the other – radio button or birth date – is required. If you don't know the exact birth date, you can type "DD" in place of the day or "MM" in place of the month.

5. In the UU World Options section (Figure 5), you can check or uncheck checkboxes to control whether the household receives *UU World* on audiotape, and whether the household receives the print magazine at all.

6. In the Directory Options section (Figure 5), you can control whether the person is included in your congregation's online membership directory, and if so, which information is shown. (You also control whether your congregation has an online membership directory at all, using the "Set Congregation Directory Settings" link from your home page.) *Note*: Online membership directories for congregations are not yet available, because so far, we offer my.UUA.org accounts only to Data Services Updaters.

Figure 4: Adding a new member.

7. Click Save Person to add this person to your membership list, or Cancel to discard your entry. You return to the Managing Members page.

If there were problems with your entry – like a missing address, bad postcode, etc. – the page redisplays after you try to save it, with error messages indicating what you need to fix.

Figure 5: UU World and Directory options when adding or editing a member.

You can add a new member as a partner of an existing member; see "5e. Adding a Member Partner" later in this document.

5b. Editing a Member

From the Managing Members page, you can edit information about any of your members:

1. Click the person's name. You see the Edit Person page, which is similar to the page for adding members. However, it displays only one member, rather than a couple (if the member has a partner).

2. Make changes as needed.

3. If neither the "Member is 18 or older" nor the "Member is under 18" radio button is selected and the birth date is blank, the system requires you to click one of these buttons or enter a birth date (or both). If you don't know the exact birth date, you can type "DD" in place of the day or "MM" in place of the month.

4. Click Save Person to add this person to your membership list, or Cancel to discard your entry. You return to the Managing Members page.

If there were problems with your entry – like a missing address, bad postcode, etc. – the page will redisplay after you try to save it, with error messages indicating what you need to fix.

Here are some edits you might want to make:

- *Editing the address for a member of a couple:* If you are editing the address for a person with a partner, and the partner has the same address, you see the message "Changing this

address will also change the partner's address." If they have different addresses, the message says, "Changing this address will not change the partner's address." If the partners have the same address but you need them to be different, email data_services@uua.org with the information.
Note: If you see someone with a message about a partner's address, but there doesn't appear to be a partner, this means that there's a partner who isn't a member of your congregation.

- *Unknown address:* If you no longer have an address for this person, check the Unknown Address checkbox. The person remains a member of your congregation. We may receive an address correction for the person from the US Postal Service; if so, the address will be corrected on your listing automatically.

- *Marking someone as a youth:* Many congregations allow people to join before they are 18. However, because of our data security policy, we do not display information about minors online. If a minor appears on your membership list, please edit their entry, select the "Member is under 18" checkbox, and (optionally) enter their birth date. The youth will disappear off your online membership list, but we'll retain them in the database, and when they turn 18, they will reappear.

Note: Online membership directories for congregations are not yet available, because so far, we offer my.UUA.org accounts only to Data Services Updaters. Don't worry (yet) about the Directory Options checkboxes when editing information about a member.

5c. Removing a Member

When someone leaves the congregation or dies, follow these steps:

1. Click the person's name to see the Edit Person page.

2. Click "Deceased or Left Congregation" link. You see the page shown in Figure 6. If the person has a partner, you see both partners.

Figure 6: When an individual or couple is no longer a member of the congregation.

3. For the person, or each partner, choose whether the person is still at the existing address (as far as you know) but has left the congregation; has moved away (so the address shown to the right is no longer good); or has died (and the date, if known).

4. If only one member of a couple left, moved, or died, leave the other person with "No Change" selected.

5. Click Save Changes. On the Managing Members page, the ex-member(s) no longer appear.

5d. Separating a Couple

If a couple separates or divorces, follow these steps so that they are no longer considered as a single household:

1. Click the "No Longer Partners" link below their names. A popup window appears, asking you to confirm the separation.

2. Click OK. Now the partners appear as separate households.

3. Update both entries with any new address information.

5e. Adding a Member Partner

If two members are now partners (married or unmarried), you can connect them. If one partner isn't on your membership list yet, you can add him or her as a partner.

Follow these steps if both partners are already on your membership list:

1. Click the "Add a Member Partner" link below a member's name. You see the Add a Member Partner page, shown in Figure 7. The member's name appears as Person 1.

2. Pick the partner's name from the Person 2 dropdown list.

3. Click Add Partner.

4. Update the mailing address(es) of the household as needed.

To add the partner as a member, follow these steps:

1. Click the "Add a Member Partner" link below a member's name. You see the Add a Member Partner page, shown in Figure 7. The member's name appears as Person 1.

2. Leave Person 2 set to "Add a New Member Partner" and click Add Partner. You see the Add Member Partner page, on which you can enter the person's name and address.

Figure 7: Connecting to members.

The "Add a Member Partner" link doesn't appear for people who already have partners, or whom you have just separated from a partner. (Note that a person's partner doesn't appear on your Managing Members page if s/he isn't a member of your congregation.) If you separate a couple, you will need to wait until your following visit to connect either partner to a new partner, because our system needs to process the separation first.

6. Membership Do's and Don'ts

Who to add: Don't add anyone who isn't a member of your congregation, unless they are a leader (e.g., committee chair, board member or other lay leader, or paid staff). Currently, the UUA doesn't store information about "friends" of the congregation.

Changing names: If we have the wrong person on your list, don't change someone's name to someone else. Instead, remove the wrong person and add the right person.

Birthdates: If you enter a youth (under 18 years old), please enter a birth date. The youth will be stored in the UUA's database but won't appear on your membership list until s/he turns 18. You can substitute "DD" for the day or "MM" for the month if you don't know the exact date.

7. Setting Default Entries for New Members

If most people in congregation have the same country, city, state, ZIP code, or phone area code, you can set it as the "default" value that is pre-entered when you add a new member. You can always change the value for individual members. Follow these steps:

1. From the main menu, click "Set Data Entry Defaults" from the Administration links. You see the Data Defaults page (Figure 8).

2. Enter the values that you want pre-entered whenever you add a member. You can leave entries blank.

3. Click "Save Data Defaults". You return to the main menu.

Figure 8: Entering information to pre-enter for new members.

8. Updating Your Congregation's Leaders and Staff

You can update your congregation's list of elected leaders, committee chairs, board members, and staff. It's important to keep this list up to date so that the correct people appear in the *UUA Directory* on our web site, and the correct leaders receive timely email communications from the UUA. Your congregation may not have people in all the positions that the system can store, or you may have more that one person in a position (e.g., co-chairs of a committee).

From your main menu, or from the Managing Members page, click "Manage Leaders and Staff." You see the Managing Leaders and Staff page for your congregation (Figure 9). The list is organized by position (e.g., President/Chair or Board Member).

8a. Removing a Person from a Leadership Position

To remove a person from a position, find him/her on the list and click the "Remove from This Position" button. This doesn't change the person's membership or other leader/staff positions in the congregation.

Figure 9: Updating the leaders and staff for your congregation.

8b. Appointing a Person to a Leadership Position

To add a congregation member to a position, follow these steps:

1. Make sure that the person is on your Managing Members page. Click the "Manage Members" link to check. If not, add the member as usual.

2. Click the "Add a Leader/Staff from Membership" link. You see the Add Leader/Staff page (Figure 10).

3. Choose the person from the first dropdown list.

4. Choose the position from the second dropdown list.

5. Click the "Add Leader/Staff" button. You return to the Managing Leaders and Staff page.

Figure 10: Designating a congregation member as a leader or staff.

If you need to add a non-member as a leader or staff member, follow these steps:

1. Click the "Add a Non-member Leader/Staff" link. You see the Add Non-member Leader/Staff page.

2. Choose the position from the dropdown list and click "Continue." You see the same "Add Person" page you use when adding a member.

3. Follow the steps under "Adding a Member" above. When you click "Save Person," you return to the Managing Leaders and Staff page.

8c. Printing a Leadership List

You can print a list of your leaders and staff, in the format that has been used for sending updates to the UUA. Click "View and Print Leaders and Staff List" from the main menu.
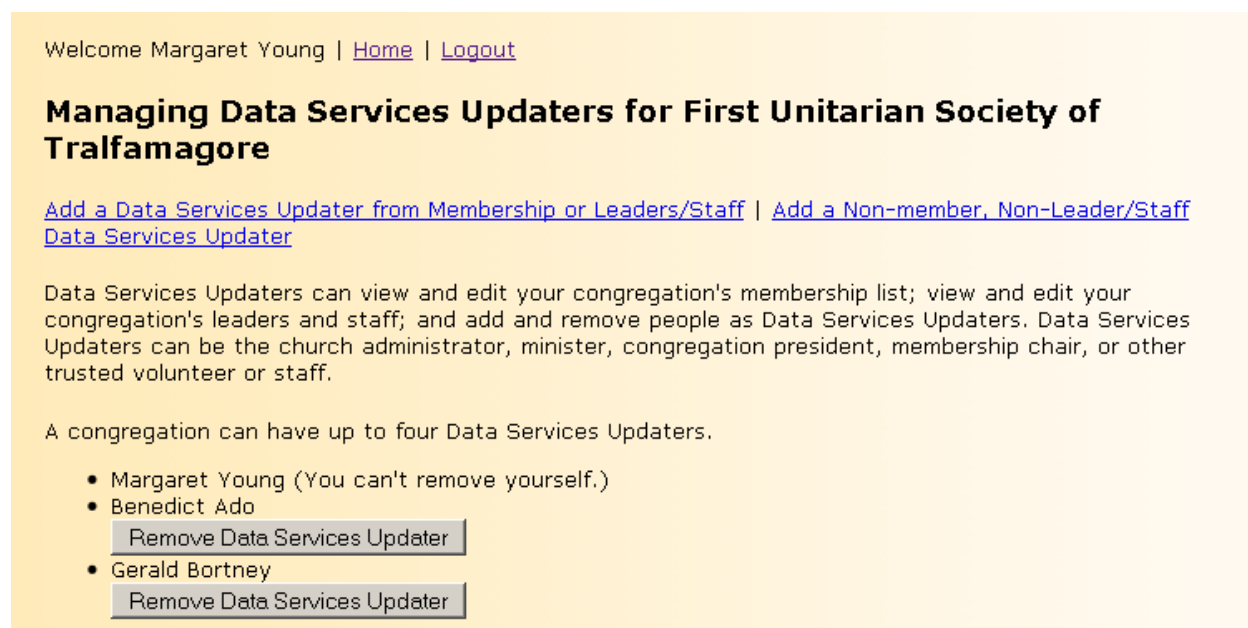
9. Designating Who Can Update Your Congregation's Information

Each congregation can have up to three Data Services Updaters. Any Data Services Updater for your congregation can add or remove another person as a Data Services Updater for that congregation, so authorize people with care.

Note: You can grant Data Services Updater permissions to other people, but they won't be able to use my.UUA.org without an account. The new Data Service Updater must go to my.uua.org/account to create an account..

From the main menu, click the "Manage Data Services Updaters" link in the Administration section. You see the Managing Data Services Updaters page for your congregation (Figure 11).

Updating Congregation Membership, Leaders, and Staff with my.UUA.org

Figure 11: Who can update your congregation's information online?

9a. Removing a Data Services Updater

To remove a person as a Data Services Updater, find him/her on the list and click the "Remove Data Services Updater" button. This doesn't change the person's membership or leader/staff position in the congregation.

9b. Adding a Data Services Updater

To enable a congregation member to be a Data Services Updater, follow these steps:

1. Make sure that the person is on your Managing Members page. If not, add the member, and then return to the Managing Data Services Updaters page.

2. Click the "Add a Data Services Updater from Membership or Leaders/Staff" link. You see the Add a Data Services Updater page.

3. Choose the person from the dropdown list of members.

4. Click the "Add Data Services Updater" button. You return to the Managing Data Services Updaters page.

5. Tell the person to go to my.UUA.org/account to create an account. When s/he has created an account, confirmed the email address for the account, and logged in, s/he will see the Data Services Updater links for your congregation.

If you need to add a non-member as a Data Services Updater, follow these steps:

1. Click the "Add a Non-member, Non-Leader/Staff as a Data Services Updater" link. You see the same Add Person page you use when adding a member.

2. Follow the steps under "Adding a Member" above. When you click "Save Person", you return to the Managing Data Services Updaters page.

10. What If There's a Problem?

Please email data_services@uua.org with your name; the congregation's name; the person whose record you were trying to add, edit, or remove; and what happened. We may get back to you with more questions.