My.UUA.org "Cheat Sheet" for Data Services Updaters at UU Congregations

Create an account: my.uua.org/accounts
Log in: my.uua.org/contactinfo

We strongly urge Data Services Updaters to read the my.UUA.org Instruction Manual. This "Cheat Sheet" is a quick overview for using the system.

Manage Members for your congregation's membership list:

- Click the person's name (from the middle column) to **edit information about the person**. You can change the address, fix spelling errors, edit email/phone, etc. After you make these changes, click "Save Person."

- To **remove a former member**, click the person's name on the *Manage Members* page, then click "Deceased or Left Congregation" from the top of this page. You will be asked which of these two scenarios is appropriate, then click "Save Person" to remove them.

- **To add a new member household** that does not already appear on the list, click "Add a New Member" from the *Manage Members* page. Enter the required information and click "Save Person" at the bottom. When **adding a two-person household**, enter the second person's information in the "Partner" fields. Do not add two separate listings for one household, or they will receive separate mailings from the UUA!

- In the case of **a divorce/separation**, click "Separate These Partners" next to the household information on the *Manage Members* page. You can then turn the one household entry into two unique entries. You can update the addresses, and also determine if one, both, or neither person remains a member of the congregation.

- To **add a spouse/partner** name to a one-person listing, click "Add Member Partner" next to that person's name information on the *Manage Members* page. If you do not see this option, and instead see a note to "Email Data Services" with the partner information, you must follow those instructions for the listing to be updated with the partner's name. Email the information to Data Services and we will add the partner's name for you. Allow a day or two for the spouse name to appear on your page.

Manage Leaders and Staff for your congregation's board members, elected positions, and staff list, including ministers:

- To **remove and add individuals from these positions**, click "Remove From This Position" next to person's name, or the "Add Leader/Staff" links at the top of the *Manage Leaders and Staff* page.

- Minister(s) associated with your congregation appear on this page as well. You may **update your minister's mailing address** by clicking the person's name.

- To **remove a minister or add a new minister**, contact transitions@uua.org. Minister positions cannot be edited using my.UUA.org.

More information: www.uua.org/leaders/dataservices