

# Documenting Elections

1. The Steps to document an election are the same for National, Regions and Fraternities. However, the person doing the documentation changes. Regional elections will be documented by the national admin, (usually NEC Secretary), Fraternity elections will be documented by the Regional Admin. Elections of the National Executive Council can be documented by the Super Admin users or the NEC Secretary if that person is re-elected. Until the election is documented no one else should modify the officers. Recording an election has 3 steps: Register an election, Record the persons filling the positions (and adjust the positions as needed) and take a Snapshot of the election Below are the details.
2. The system maintains a list of the persons currently elected to positions and a record of those elected to prior elections. If a person changes position, for example a vice minister resigns and an elected councilor takes their place, this change is by *appointment*, and this does not affect the number of times the new vice minister can be elected to an office. A user with Admin privileges for an organization is required to record the initial election. After this is done, any user with edit privileges for an organization can make changes by editing the **View/Edit** link for any currently active position on the organization summary page or to add a new optional position by clicking on the **Create New Position** link below the list of existing positions on the organization summary page. This document is primarily for Admin users. **If you see in the notes section for an organization “\*\*\*ELECTION RESULTS BEING ENTERED \*\* do not make any changes to the positions, an election is being recorded. Admin users remember to remove this note when you have taken the ‘snapshot’.**
3. **Warning** When an election has just occurred the steps in ‘4’ below need to be performed by the appropriate **Admin** user. Changes to the positions by other users with permission should not be made during this process. It is up to the admin user to coordinate with any other users. This can be handled by adding a temporary note using the **Edit/View Fraternity** function and entering a new 1<sup>st</sup> line **“\*\*\*ELECTION RESULTS BEING ENTERED \*\* “**. The Admin user should remove it after the snapshot has been taken. See ‘b’ below for how to do this.

- a. When an **election** occurs the Regional Amin User needs to record the election. The 1<sup>st</sup> step is to note that the election happened by clicking on the **Register Election** link.
  - i. Fill out the form that opens. Normally this is the Current election (see

**REGISTER ELECTION**

**RETURN TO ORG SUMMARY**

Organization: Saint Padre Pio-Moreno Valley-CA

Org\_Unit: 10134

place of election: olic Church Moreno Valley, CA

election date: 06/11/2023

next election year: 06/2026

presider name: Caroline Yandrell

ecclesial witness: William Mussatto

current election:

notes: Election after 2 years to return to the normal cycle.

**SUBMIT**

another help file on how to record past elections). The next election date will be calculated to be three years from the date of this election. Include any notes. In this case the election occurred 2 years after the prior election in order to get the organization back on the normal schedule. Click on

[RETURN TO ORG SUMMARY](#)

to abandon the entry. Click on [SUBMIT](#) to record the result.



Will be displayed to confirm the success. (see next page)

- ii. The Organization Admin User needs to **Immediately** go to the positions and click on the **Details** link on each position. If there is a new person in the position, select them from the **Select New Name** drop down menu. Only Active Professed should appear in this list. If the same person was reelected to the same position confirm that the **Elected/Appointed** is set to *Elected* and then Click on the **UPDATE** button. If the position becomes vacant (say 2<sup>nd</sup> councilor) use the **Vacant Position Flag** drop down to signal this and then click on the **UPDATE** button. In both cases you will be returned to the Organization Summary Page.

- iii. Scroll down to the positions list and you will see that the Last Election and Next Election dates for that position have been updated. Repeat for all the *elected* positions. If a position is vacant it will remain in the list but Vacant will show up in the position list. If the position is no longer needed (for instance, an appointed committee chair) **The Position Active for this Org** flag should be clicked off. If the position is a required position, the system will not be able to change this field.

- iv. If you need to add a new position that is optional, below the positions table there is a **CREATE NEW POSITION** link. Click on it and the Create New Fraternity/Region page will open. This form is similar to the form above. Note if you select Elected the current election date and estimated next election date will be populated.

Since this is a new position you can't mark it as vacant. Again, only the active professed are available for assignment. Click on when you have completed the form. The new position will appear in the positions table. If replacing an appointed with an elected person, 1<sup>st</sup> remove the appointed date and save the change then go back and put in the newly elected person and mark it as elected (vs. appointed). This is necessary to remove the date of appointment which it NOT automatically removed when you make the position filled as elected.

- v. When you have updated/added all the positions, scroll down to the **Create Council Snapshot** link to record the election. And then Click **SUBMIT** to record the Snapshot.

- b. When the Admin user has completed taking the snap shot click on the **Edit/View Fraternity link** on the organization summary page and scroll down to the **Notes:** section and remove the **\*\*\*\*ELECTION RESULTS BEING ENTERED \*\*\*\*** line. Scroll down and click **UPDATE** to note that others can edit the positions table.

- 4. If you scroll down on the summary page and click on the **View Council History** link you will see a record of this election at the top as well as any prior elections the system has recorded.
- 5. If you need to change information about an election, click on **Edit Election Details**. This function requires admin permissions. This will open a list of all the elections the system knows about.

Fraternity Name	Org Unit ID	Election ID	Election Date	Held Election Year	Current	Election Date
City Spirit Covenant-GA	10149	1528	4/1/2023	04/2023	Yes	5/25/2023 12:44:18 AM
City Spirit Covenant-GA	10149	823	8/14/2022	08/2022	No	8/15/2022 3:08:11 AM

One of the elections should always be marked current. To edit details about the election, click on the **View Details** link. You can change Events about an election. You can also change which election is current, when the election was held, and by whom. **Note:** changing the date of the current election will not automatically change the next election dates or when a person was elected. You will need to update each of the positions for this to happen. If you do this, retake the snapshot. You can also delete an election by clicking on the X **Delete link**, but under normal situations *don't do that*. Click on **RETURN TO ORG SUMMARY** when you are done with editing election details.