

<b>NORTHWOODS UNITARIAN UNIVERSALIST CHURCH</b>	<b>TITLE: Electronic Records (Database)</b>		
	DOCUMENT No.	<b>P016</b>	REVISION: B
	ORIGINATOR	David Shontz/Sheryl Schuster	PAGE 1 OF 2
	COMMITTEE	Church Administrator/Finance	APPROVED DATE:

**1. POLICY**

The records in the Database will be considered the official records in matters pertaining to membership and finance. Any other databases, spreadsheets or lists being maintained outside the Database are for convenience only. If other lists reveal incorrect data in the Database, the Database records will be corrected.

**2. REFERENCED DOCUMENTS:**

- **P001** – Bylaws Section V, VII 6 D6,

**3. DEFINITIONS:**

- The “Database” herein refers to all software packages tracking membership and financial information at Northwoods UU Church. These may or may not be integrated into one system.
- The Database will be networked between the Church Administrator, Minister and DRE.
- DRE – Director of Religious Education.

**4. PROCEDURE STEPS:**

<b>Step</b>	<b>Activity:</b>	<b>Responsibility</b>
A	Each type of record—membership, pledges, contacts, etc.—will be maintained in one place or subsystem in the database.	Church Administrator
B	Individuals will be granted access to the Database appropriate to their role. Enforcement may be via software restrictions or policy.	Church Administrator
C	<b>Pledge Records</b> The Treasurer, Minister and Church Administrator only will have access to Pledge records (See By-Laws, VII6D6). <ul style="list-style-type: none"> <li>▪ The Church Administrator will be the only person to maintain pledge records.</li> </ul>	Church Administrator
D	<b>Membership Records</b> The Treasurer, Church Administrator and Membership Committee will have access to membership records (By-Laws, Article V). <ul style="list-style-type: none"> <li>▪ The Church Administrator will be the only person to maintain membership records.</li> <li>▪ DRE and Minister will be able to maintain their own applicable membership records per their application (i.e. RE class attendance, counseling sessions, etc.)</li> </ul>	Church Administrator

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Step	Activity:	Responsibility
E	<p><b>Financial Records</b></p> <p>The Treasurer, , Minister and Church Administrator only will have access to financial records (See By-Laws, VII6).</p> <ul style="list-style-type: none"> <li>▪ The Church Administrator will be the only person to maintain the financial records.</li> </ul>	Church Administrator
F.	Members may receive an individual copy of only their personal financial information.	Membership & Church Administrator

**5. OTHER INFORMATION - (Attachments, records, other comments as needed):**

None