

ULTIMATE ELECTRONIC APPLICATION FIELD GUIDE

GETTING STARTED

- I. The Electronic Application
 - a. New Member Applications only currently. No Member Supplementals
- II. Tools for the Applicant and at least two Chapter Officers
 - a. Access to a personal computer
 - b. Scanner (optional for Chapter Officers but recommended)
 - c. Personal email account
 - d. High-Speed Internet
- III. Skill Set
 - a. Must be comfortable working with a multi-section web-based Application form with scanning and uploading documentation, including vital records
 - b. Applicant must be comfortable submitting her application fee by credit card via our payment portal
- IV. Chapter Officers
 - a. Must have e-Membership privileges
 - i. Regent, Vice Regent, Treasurer, Registrar and Recording Secretary
- V. Before sending an Electronic Application Invitation:
 - a. Meet with the applicant to review lineage and ancestor's service
 - b. **DO NOT AUTOMATICALLY SEND AN EAPP INVITATION TO EVERY PROSPECTIVE MEMBER IN YOUR PMD**
- VI. Ineligible for the Electronic Application Process:
 - a. New Ancestors
 - b. Analysis for lineage (includes DNA)
 - c. Service Study
 - d. Ancestor coded as Treat As New Ancestor (TRNWAN)
- VII. Use with Caution:
 - a. Large number of documents
 - b. Ancestor coded as Error
 - c. Proving a New Child

TIP: The same criteria for formatting of date, places and citation, and proving lineage and service applied to PDF paper application also apply to the Electronic Application.

- VIII. Best Candidates are those whose lineage or part of their lineage has already been verified
- IX. Always search the Descendant's list before beginning the eAPP process
- X. Only when it has been determined the applicant has a viable lineage and ancestor with service, and meets all technical requirements should you consider sending an invitation to complete her DAR application electronically

USING BUILD-AN-APP WITH THE ELECTRONIC APPLICATION

- I. Using Build-an-App with an electronic application is done the same way as for PDF paper applications, except for two important steps:
 - a. First, you must login to e-Membership, and then click on RESEARCH-GRS at the top of the screen to get into the Ancestor Database
 - b. Second, instead of saving the built application to your home computer as a file, you will save it to your LOCKER
 - c. For more instructions, please see Genie Clip: [How To Use Build-an-App](#)
 - d. The goal is to have the generations in your built application match the generations in your applicant's lineage
 - i. Adding and deleting a generation is possible when utilizing the Electronic Application
 - ii. Editing the BAA sent through an Electronic Application invitation is permitted

TIP: If the applicant's generation has been verified through a daughter or granddaughter, delete her generation from BAA, otherwise it will be duplicated.

- e. Saving the Build-an-App
 - i. Instead of clicking BUILD APPLICATION, click SAVE LOCKER
 - ii. Enter a Locker Description, such as Susie's BAA, and click SAVE
 - iii. When you login to e-Membership and go the GRS, you can review the files in your Locker by clicking Show Locker List

TIP: Although there does not seem to be any limit to the number of BAA's you can save in your locker, it is best to only have the one BAA being used for your applicant in your locker when using it for eAPPS.

SENDING AN INVITATION FOR ELECTRONIC APPLICATIONS

- I. Please review GETTING STARTED prior to sending an invitation
- II. Invitations may be sent to those eligible applicants, using Build-an-App, or not using Build-an-App.
- III. Any Chapter Officer with e-Membership privileges may send an invitation.
- IV. DO NOT SEND INVITATIONS TO:
 - a. Applicants with a New Ancestor
 - b. Applicants who are applying through an Ancestor coded as Treat as New Ancestor
 - c. Applicants who are applying through an Ancestor that will require a Service Study
 - d. Applicants whose lineage requires an Analysis, including DNA
 - e. Applicants who have already submitted a paper application form that is currently in the review process at National
 - f. Applicants who are already working with a different DAR Chapter
 - g. Former members who wish to be reinstated
- V. The Invitation
 - a. Login to e-membership and then click on the green Open eAPP button to the right of your screen
 - b. You will be asked to login again. Use your same e-Membership username and password
 - c. Click on Applications
 - d. Review ALL instructions on this page before proceeding
 - e. From the right-side menu, click on App Invite
 - f. Read carefully the instructions. When you are ready to proceed, click on Create Invitation
 - g. An Online App Invite will appear
 - i. You must complete all blanks
 1. Prospective First Name

2. Prospective Last Name
3. Prospective Email Address

TIP: A Note about email addresses. Some people are very creative with their emails. The systems will not accept any email considered to be spam. If your applicant has a description email address, consider asking them to create a simple email using Gmail or some other free site for this purpose.

4. BAA Locker List: This field automatically defaults to (None)
 - a. If you have no BAA in your locker for your applicant, you do not need to do anything more with this field
 - b. If you have a BAA in your locker for your application, you must click on the down arrow and select the BAA you created
5. Carefully proof the invitation
6. If you cannot complete it in one sitting, you may Click on SAVE to save your work.
7. If you made an error and listed the incorrect applicant, you can select DELETE
- h. After you have proofed your invitation, click on Review and Submit
 - i. A new screen will come up, giving you a final option to edit, delete or send
 - ii. If you are ready, click on Send Invitation
- i. A confirmation screen will immediately appear, giving the name of the person sending the invitation, the date and time it was sent and the invitation reference number.
- j. Both the Chapter Officer and the Applicant will receive an email for the DAR Membership team. This should happen within the first minute of sending the invitation. Contact your applicant to make sure they received the email. If they did not receive it after thirty (30) minutes, check to make sure you have the correct email address (it will be listed in the Chapter email). If it is correct, contact eApplications@dar.org for technical assistance.

THE APPLICANT

- I. Once the applicant has received her email invitation, she should read it carefully and click on the link provided to create her login account
 - a. A Prospective Signup screen will appear
 - b. She will be required to complete all fields
 - c. When she has completed the form, she will click on Submit
 - d. She will receive an email confirming she has set up an account but only her username will be listed

TIP: Make sure she writes down her eAPP username AND password!

- a. If she does not have time to complete the form, she can click on Save and go back later to complete the form
- e. A new screen will pop-up, showing her username and a new link to click on to begin filling out her eAPP
- f. A new login box will appear, in which she will enter her username and password
- g. A new screen, APPLICATION FOR MEMBERSHIP, will appear
 - a. She must read the Terms and Conditions, and then check the acknowledgment box
- h. She can now click on Open/Edit Application

COMPLETING THE EAPP

- I. The applicant will need to fill out the appropriate fields

- II. Her Electronic Signature for the application is her entering her name in the appropriate box.
- III. When using BAA for eAPP, the application will not immediately populate. If after two minutes, the completed information does not appear, she will need to refresh the screen. If BAA was not used, all generations and the required fields for the Ancestor's service will need to be manually entered

II. The Electronic Application has nine (9) sections

- I. Contact Information
- II. Applicant Information
- III. Marriage Details of Applicant
- IV. Lineage
 - i. If using BAA, the generations from the built application will automatically populate in the eAPP
 - ii. To edit an existing generation, go to the Lineage Section, and click on Select next to the generation number in question

TIP: Instruct the applicant to click SAVE on each screen before moving to the next section

TIP: The same lineage and documentation requirements for PDF paper applications also apply to eAPPs

- V. Ancestor Service
- VI. Ancestor Marriages
- VII. Ancestor Children
- VIII. Supporting Documentation
 - i. All documents must be uploaded in .jpg format
 - ii. Pertinent information should be underlined in red
- IX. Complete Application and Submit

- III. In order to navigate through the eAPP, each section must be selected from a drop-down menu and then click on Go. If any required fields have not been completed, the screen will not advance, and the missing field will have red instructions next to them

TIP: The Source citations for each generation is directly below the generation in questions, instead of listed on a separate page. All citations must meet current standards, including internet citations

TIP: PROOF, PROOF, PROOF!

TIP: Chapter Officer: look at your Chapter List in e-Membership under eAPP. You should see your applicant's name, her ID and your Chapter code. You should also see Open/Edit App and View App. Clicking on View App will allow you to see the progress your applicant is making. Clicking on Open/Edit app will allow you to edit the eAPP.

REVIEW

- I. Once the applicant has completed her application and submitted it, the eAPP will undergo three reviews:
 - a. Two reviews at the Chapter level by two different Chapter Officers with e-Membership privileges.
 - b. Chapter Reviews are accessed from the Chapter Review queue
 - c. A chapter review is NOT just an endorsement, or an automatic send-through. It is a complete review to make sure there are no errors, the formatting and citations are correct, the ancestor has service and the documents are uploaded in .jpg format

- i. Carefully review the documentation for duplicates, and unnecessary docs. Question if a DC, obit and TS photo are submitted. Question excessive use of census records
 - ii. Make sure the documents are legible, and if needed, pertinent information is underlined in red.
- d. After the review, the Chapter Officer will either Accept it, or Return it. If Returning the eAPP to the applicant, give specific reasons why
- e. Only when TWO Chapter Officers have reviewed and accepted an eAPP will it be forwarded to State or Midlevel Review. These acceptances will be their electronic signatures on the eAPP, and their endorsement of the applicant.

TIP: Unlike paper applications, every document submitted via eAPP is an image on the computer. The verifying genealogist is required to view and index the type of these documents. This is very time consuming and can increase the review time if unnecessary documents are submitted. If a document is not needed, have it removed from file upload, and the citation removed from the generation.

TIP: Once a Chapter Officer has completed a review, they will no longer see the eAPP in their Chapter Review Queue

TIP: If you have multiple applicants using the eAPP process, monitor this queue frequently so their Chapter reviews are done in a timely manner

- f. The State or Midlevel reviewer will make sure the eAPP meets all standards of formatting and citations, that the eAPP is being used appropriately (i.e. no New Ancestor, Analysis, etc.), that there are no blanks in required fields.
 - i. If the eAPP is returned for editing, the eAPP will be back in Open/Edit APP, and the applicant or the Chapter Registrar can make the required changes.
 - ii. If the eAPP is accepted, the applicant will receive an email, giving her instructions on how to make her applicant payment.

TIP: Whether the eAPP is accepted or returned by the State reviewer, ONLY THE APPLICANT will receive the email. Instruct your applicants to notify you of all email they receive pertaining to eAPPs.

REVIEW AT NATIONAL

- I. Once the payment has been processed, the eAPP is sent to our Staff database Review queue.
- II. eAPPS are reviewed in the order received, following the current processing dates for paper applications

INSTRUCTIONS

- I. Instructions and a video for Electronic Applications are located on the Electronic Application Help page found when logging in to e-Membership
- II. New Tools available:
 - a. Electronic Applicant Checklist
 - b. Electronic Application Chapter Review Checklist
 - i. Both are available on the [Electronic Applications](#) webpage and the [Forms & Checklists](#) webpage