Instructions for Ward Clerks

Provo Utah YSA 9th Stake

Under the direction of the bishop, the ward clerk is responsible for all record-keeping in the ward. This document summarizes some of your specific responsibilities. It should be used to help you prioritize and organize the work.

This is not a comprehensive instruction manual – you will learn your duty best by referring to official training resources, asking others for help, and following the Spirit. Prayerfully learn what the Lord expects of you, work to strengthen your testimony of this important work, and continually seek for ways to improve.

PART 1: Resources

Bishopric
In questions of Church policy, ask the bishop for guidance. He has the authority to interpret Church policy in the handbooks as it applies to his ward. The bishopric can also give you guidance to help in specific areas.

Ward Assistant Clerks
As the ward clerk, you may make recommendations to the bishopric for the calling of ward assistant clerks. You should assign specific duties to the assistant clerks and make sure they receive proper training. Work together with them, and follow up with them on their assignments.

Ward Record-Keepers
You will also work closely with other record-keepers in the ward, such as executive secretaries, organization secretaries, ward history specialists, and ward website administrators.

Stake Clerks
The stake clerk and assistant clerks can provide training and instruction. They should also be able to direct you to other resources that will help you in your calling.

Policies and Training
Official Church policies are found in Handbooks 1 and 2. Instructional training and videos are available on the LDS.org Help Center (Help.LDS.org). Some of the calling-specific training is only visible when you're logged in.

Other Resources

- **LDSTech forum.** Peer-to-peer support from other clerks and members around the world. Great for asking specific questions or troubleshooting problems. You can search the LDSTech forum in Google by adding "site:tech.lds.org" to your query.
- **Local Unit Support.** 801-240-3500 / mlssupport@ldschurch.org. Local unit support (within the Global Service Center) is open 6:00 AM to 9:00 PM Monday through Friday, with extended hours (until 10:00 PM) on Tuesday, Wednesday, and Thursday.

PART 2: Periodic Duties

EVERY SUNDAY

1. **Attend Meetings**
   a. **Sacrament Meeting.** Attend sacrament meeting weekly and renew your covenants there. Count attendance and record it in a place you can reference later.
   b. **Sunday School and Priesthood.** Be an example to other members by attending all of your regular church meetings. Do not use this sacred time to do tasks that could be done later in the day or throughout the week.

c. **Bishopric Meeting, Ward Council, and PEC.** Record assignments and decisions. Provide reports and give input as an active participant. As the expert on membership and financial information in the ward, you are a valuable resource.
d. **Disciplinary Councils.** These meetings are not held often, but as assigned by the bishop, you may be asked to take minutes and prepare a report of any decisions made.

2. **Membership Records**
   a. **Move-ins.** Check the report of members moved in so that new members can be welcomed.
   b. **Callings.** Update callings each week as members are released, sustained, or set apart.
3. **Financial Records**
   a. **Tithes and Offerings.** A clerk and bishopric member work together each week to enter donations into MLS, print reports, and take the deposit to the bank.
   b. **Expenses and Reimbursements.** Enter authorized expenses, print welfare and reimbursement checks and reports, and make sure a member of the bishopric signs each check before it goes out. File check stubs, receipts, and signed authorization for each expense.

EVERY MONTH

1. **Provide Reports**
   a. **Quarterly Reports.** Membership statistics for the last month of each quarter (March, June, September, and December) are gathered and submitted, via Leader and Clerk Resources, to Church headquarters by the 15th of the following month. The quarterly report can be a useful resource for the ward council and bishopric.
   b. **Other Reports.** Provide other reports that may be useful to the bishopric – for example, a report on the current ward budget, lists of prospective elders, members without a temple recommend, members not enrolled in institute, members without a calling, members who haven't been attending church, members who haven't been home taught, birthday lists, etc.
2. **Assist Secretaries**
   a. **Attendance.** Ensure that Sunday School, Relief Society, and Elders Quorum secretaries have the resources they need to track class attendance. Organization leaders can print rolls from Leader and Clerk Resources, or you can print rolls on their behalf.
   b. **Home and Visiting Teaching.** Make sure that Relief Society and Elders Quorum presidencies have the tools they need to keep track of home and visiting teaching each month.
3. **Review Finances**
   a. **Unit Financial Statement.** The Unit Financial Statement is received through MLS. It should be reviewed with the bishop each month.

EVERY YEAR

1. **Annual Audits**
   a. **Review Training.** You should periodically review the training resources at Help.LDS.org, especially the financial training lessons, and record-keeping policies in the Handbook.
   b. **Financial Audit.** Financial audits are conducted twice a year, once between January and March, and once between July and September. A stake auditor schedules an appointment with the bishop and the clerk who has been helping with finances. Any exceptions should be corrected as needed.
   c. **Membership Audit.** Membership audits are conducted once a year, in June. The ward clerk or an assistant clerk completes the membership audit on Leader and Clerk Resources. After the audit, any exceptions are printed and submitted to the stake clerks. Stake clerks follow up to make sure that exceptions are resolved within 30 days.
2. **Ward Conference**
   a. **Sustaining List.** Print an Officers Sustained list and give it to the person who will be conducting ward conference (ward conference is held twice a year).
3. **Tithing Settlement**
   a. **Provide Records.** Each member should review their Donor Statement and Individual Ordinance Summary before tithing settlement. The Donor Statement can be reviewed by the member at LDS.org donations, or printed by the clerk. A clerk should be available at tithing settlement to make any corrections needed.

   b. **Submit Report.** The Tithing Declaration Report is submitted to headquarters after tithing settlement has been completed.
4. **Clean Office**
   a. **Financial Records.** Financial records that have been printed should be kept for three years. At the end of each year, printed records older than three years should be shredded. Old records in MLS will be removed automatically as part of the process for closing out the financial year.
   b. **Membership Records.** Most membership information is now available at Leader and Clerk Resources and in LDS Tools, so it doesn't need to be printed. Old membership data that has been printed should be shredded after one year.

WHEN THE SEMESTER CHANGES

1. **Move Records**
   a. **Members Moving.** Before the end of a semester, figure out who will be moving and where they will be moving. You will need their new address. Move restrictions can be placed on records that need to be kept in the ward while in the process of disciplinary action or for other reasons.
   b. **Move Records Out.** Send out the records for members who have moved. Try your best to figure out where each person has moved instead of sending members to Address Unknown.
   c. **Move Records In.** For BYU on-campus housing wards, you can get an import file from a stake clerk and use the BYU module in MLS to request records. For other wards, personally contact the members in each apartment (you can enlist the help of the ward council) and get the full name and birthdate of each new move-in so you can request their records.
2. **Update Member Info**
   a. **Addresses.** Make sure the address and apartment number of each new member is correct.
   b. **Apartment Changes.** Update the apartment numbers of any members who have moved to different apartments within the ward.
   c. **Emails and Phone Numbers.** Make sure the email address and phone number for each new member is correct in the LDS.org directory. Remove parents' phone numbers and email addresses.
   d. **Member Photos.** Invite members to upload a photo of themselves to the LDS.org directory, or, with their permission, take and upload a photo for them. Photos and contact information are essential to the bishopric and ward council as they get to know new ward members.
3. **Online Resources**
   a. **LDS.org Calendar.** Create an outline schedule for the semester by putting in repeating events, such as church meetings, and any other upcoming events that have been planned. You may wish to add ward council members or others as calendar editors.
   b. **Social Media.** If your ward has a Facebook group, invite ward members and their roommates to join. To protect members' privacy, you should periodically go through and make sure that members who are no longer in your ward are removed.
4. **Update Organizations**
   a. **Quorums and Auxiliaries.** Depending on how many members are in the ward, there may be one or two Elders quorums or Relief Societies. Make sure each organization is set up in Leader and Clerk Resources, and make sure each member is in the correct organization.
   b. **Update Callings.** Add and remove people from their callings. There are always a lot of changes to callings during the first few weeks of the semester. Keeping the callings continually updated is helpful to the bishopric and ward council.
   c. **Home and Visiting Teaching.** Help the Elders Quorum presidency and Relief Society presidency record any changes to home and visiting teaching assignments. Show them how to record visits.
5. **Unit Settings**
   a. **Remove MLS Users.** Remove or deactivate user accounts for members who have moved out of the ward (such as assistant clerks or organization secretaries).
   b. **Add MLS Users.** Create a user account for anyone who receives a calling with access to MLS.
   c. **Signature Card.** Update the ward's signature card if there is a new clerk or assistant clerk who will sign checks (this is under the Finances menu in MLS).
   d. **Meeting Times.** Update your unit meeting time, if it has changed. This can be done on Leader and Clerk Resources. The meeting time shows up on the LDS.org maps and in LDS Tools.

PART 3: Continual Maintenance

MEMBERSHIP RECORDS

1. **Members of Unit**
    a. **Transfer Records.** Make sure that you have membership records for everyone who is currently in your ward, and move out the records of people who have moved.
2. **Organizations**
    a. **Priesthood Quorums.** Make sure that each person is assigned to the correct quorum. Members listed as being in Aaronic priesthood quorums should be reassigned to an elders quorum unless an Aaronic priesthood quorum is organized in your ward.
    b. **Relief Societies.** Make sure that each person is assigned to the correct Relief Society. Members listed as being in Young Women should be reassigned to a Relief Society.
    c. **Sunday School Classes.** Help the Sunday School presidency set up and manage classes in Leader and Clerk Resources. Ward members can be assigned to classes, or all members can be placed in a single class and a copy of the combined roll can be printed for each class.
    d. **Home and Visiting Teaching.** Help the elders quorum presidency and Relief Society presidency enter home and visiting teaching assignments when there are changes, and record who has been home and visit taught. This will make it easier to gather quarterly reports.
3. **Member Info**
    a. **Preferred Name.** This is the name that will show up on the LDS.org directory, in LDS Tools, and on class and organization rolls. Some members go by a name other than their first name. Some might prefer that their middle name not be shown as part of their preferred name.
    b. **Address.** Make sure each member's address and apartment number is recorded. Make sure each address uses the same format (for sorting and readability).
    c. **Email and Phone.** Make sure each email address and phone number is filled in and formatted in a standard way. If old contact information for the member's home or parents appears, it should be removed. Record each member's correct email address and phone number twice – in both the individual and household fields (since young single adults are their own households). Some places on LDS.org and in LDS Tools show individual information and other places show household information, so make sure that both fields are filled in.
    d. **Photo.** Photos are uploaded and managed either on the LDS.org directory, or in the LDS Tools app. Upload a photo for each member who gives permission for their photo to be uploaded. Like emails and phone numbers, each photo should be uploaded twice (for individual and household).
    e. **Verify Location.** Make sure that each member's household location is verified on LDS.org maps.
    f. **Out-of-Unit Members.** Encourage each current out-of-unit member to update their own email addresses, phone numbers, and photos on the LDS.org directory. You can't edit contact info that appears online for out-of-unit members because it is being pulled from their membership records in their home wards. Remove out-of-unit membership records for old bishopric members who are no longer serving in the ward.
4. **Updating Ordinances**
    a. **Record Ordinances.** Help with the process of priesthood advancement and follow up with the stake to make sure that priesthood ordinations are recorded soon after they are performed. The mission office records baptisms and confirmations for converts.
    b. **Print Certificates.** When a person advances in the Aaronic priesthood or is baptized and confirmed, a certificate should be printed from Leader and Clerk Resources, signed, and given to the member. Melchizedek priesthood certificates are printed by the stake.
5. **Updating Callings**
    a. **Add and Remove Callings.** Whenever someone is called, their calling and the date they were sustained needs to be recorded in Leader and Clerk Resources. You will also record whether they were set apart. When someone is released, they should be removed from their calling.
    b. **Use Standard Callings.** Some custom callings will need to be created in Leader and Clerk Resources, but whenever possible use a standard calling name. Some standard callings grant access to online resources that aren't available to the public. Also, there are useful training

resources on LDS.org that reference specific callings by their standard name. In Leader and Clerk Resources, custom callings are marked with an asterisk.

FINANCIAL RECORDS

1. **Budget**
    a. **Update Subcategories.** Deactivate any categories that are no longer needed and make sure that the categories being used are organized.
    b. **Update Allocations.** Make sure each budget category allocation is correct.
    c. **"Other" Subcategories.** Make sure any "Other" subcategories that are no longer being used have been zeroed out.
    d. **Missionary Accounts.** If your ward has financial responsibility for a missionary, make sure their account doesn't have a negative balance. If a missionary has already returned, make sure their account is zeroed out. Usually, financial responsibility is in home wards.
2. **Donors and Payees**
    a. **Member Donor Records.** Make sure the donor record for each member who donates is tied to their membership record number, so they can see donations on LDS.org.
    b. **Members Moved.** Set donors and payees who have moved to "Hidden." MLS retains financial records for three years plus the current year, but old records can be hidden to reduce clutter.
3. **Expenses**
    a. **Record Expenses.** Make sure all expenses have been recorded in the correct budget category.
    b. **Distribution Center Charges.** Purchases through Store.LDS.org or BYU that are billed directly to the ward need to be re-categorized into the appropriate budget category.
    c. **Outstanding Checks.** Make sure that all reimbursement and welfare checks are deposited in a reasonable time frame to avoid them being lost or escheated.

OTHER RECORDS

1. **Ward History**
    a. **Stories and Events.** The history can include information about things that happened in the various ward organizations throughout the year, including stories, photos, and events. The ward calendar can be printed as part of the ward history.
    b. **Officers Sustained Form.** This can be printed as part of the ward history.
    c. **Member Information.** Confidential and specific membership information should not be kept as part of the public ward history.
    d. **Submitting History.** Ward histories are gathered by the stake and submitted to the Church History Department. More information is available on LDS.org.
2. **LDS.org Tools**
    a. **Directory.** The LDS.org directory should be kept up-to-date – most of the information, with the exception of photos, is pulled automatically from Leader and Clerk Resources.
    b. **Calendar.** It is recommended that wards take advantage of the LDS.org calendar; however, use of the calendar is not requred. By default, clerks and bishopric members are administrators of the calendar. Ward website administrators have administrative access, as well.
    c. **Donations.** Encouraging members to pay their tithing and fast offerings on LDS.org reduces the administrative burden for clerks.

CLERK'S OFFICE

1. **Confidentiality**
    a. **Access to Office.** Only those who the bishop authorizes should have the code to the clerk's office. The clerk's office should be closed and locked when nobody is there.
    b. **Processing Donations.** Donations should be processed in a private setting.
    c. **Confidential Records.** These should always be filed in a locked cabinet and destroyed after one year (for membership records) or three years (for financial records).
    d. **MLS Backup.** A backup of the MLS data should be kept in a secure location.
2. **Organization**

   a. **Cleanliness.** Keep the desks, counters, cabinets, and floors organized and clean. File confidential records away in a locked cabinet or drawer when they are not being used.

3. **Computer.**
   a. **Authorized Users.** Only bishopric members, clerks, and others who the bishop authorizes have permission to use the clerk computer unattended. Only authorized users should have MLS accounts. There should also be a stake administrator account on MLS, which is used if MLS needs to be moved to a different computer or as a backup if ward leaders get locked out.
   b. **Church Purposes.** Clerk computers should only be used for Church purposes, such as using MLS, visiting Church web sites, printing talks, or preparing sacrament meeting programs. Additional software should not be installed without permission from the stake.
   c. **Printer.** The clerk printer should only be used for Church purposes.