Updating Out-of-Unit Leaders in MLS

Instructions for Ward Clerks and Assistant Clerks

Leaders called from another unit to serve in a YSA ward or stake are considered "out-of-unit" members. Instead of transferring their records from the ward where they live, a temporary out-of-unit membership record is made for each of these leaders in MLS. These records allow callings to be assigned to them in their unit of service.

Out-of-unit records link to a member's "real" records so they can appear on the LDS.org directory and access the tools necessary for their callings, while remaining under the stewardship of their home ward priesthood leaders. When a person is released from his out-of-unit calling, his out-of-unit membership record is removed.

Adding out-of-unit leaders in the ward MLS

1. **Necessary member info received**. The following information must be gathered: name, gender, birth date, birth location, membership record number, baptism and confirmation dates, priesthood office (if applicable), and most recent ordination date.

   Stake clerks can collect this information for you on a detailed information sheet, or an Individual Ordinance Summary (IOS) can be obtained from the member's home ward clerk. Clerks in other wards can be contacted using information from the Church Directory of Organizations and Leaders (cdol.lds.org).

2. **Out-of-unit record created in MLS.** Using the menus, go to *Membership > Records > Out of Unit Member Record.* Fill in the necessary fields based on the information gathered. Not all fields are required. You should mark each leader as "head of household."

   Enter contact information if you use MLS to print directories. Enter the name of the spouse and whether or not the spouse is LDS if you use MLS to generate reports (this will keep the leader from showing up in lists of singles or part-member families), but don't enter a membership record number for the spouse or try to link it to another out-of-unit record, as this can cause problems.

3. **Person assigned to calling in MLS.** Make sure a calling is assigned in the proper organization. To be able to access online tools, an out-of-unit member must be assigned to a standard calling (custom callings won't work).

4. **Submit a change request for new bishops.** After a new bishop is entered into MLS on the ward level, a stake clerk will need to enter him in on the stake level using the leader change request form. This step is only needed for bishops (other callings can be entered completely on the ward level).

5. **User login account created in MLS.** Bishopric members and clerks need MLS user accounts so they can log in to MLS or authorize donation batches. MLS user accounts are created in System Options. Click "Add User." Select "Member of unit," enter their name, and give them the proper access rights.

6. **Contact info correct on LDS.org.** Verify that the leader's contact information is complete and up-to-date. Contact information that shows up on the LDS.org directory for out-of-unit members is pulled from the "real" record and must be updated by the member himself or by the member's home ward clerk.

7. **Person can access LDS.org tools.** Once an out-of-unit member has been assigned to a standard calling in MLS, they should receive access to the LDS.org tools within 24 hours. Bishops receive access within 2–3 days after the stake sends a change request.

Removing out-of-unit leaders

When a person is released from their calling in the ward, be sure to remove their out-of-unit record and delete their MLS user account. You can remove an out-of-unit member under the menu *Membership > Records > Remove Out of Unit Member.* You can delete MLS user accounts in System Options. Members who have worked with financial records cannot be deleted right away; their accounts will be deactivated instead of deleted.

Updating Out-of-Unit Leaders in MLS

Instructions for Stake Clerks and Assistant Clerks

Changing out-of-unit leaders in the stake MLS

Adding out-of-unit leaders on the stake level follows the same process as on the ward level. After the necessary information is received, an out-of-unit record is created and a calling is assigned. Stake presidency members and clerks need user login accounts on the stake MLS. A change request form needs to be submitted for "Tier 1" callings (stake presidency members, the stake clerk, the stake executive secretary, and the patriarch).

Just like out-of-unit leaders on the ward level, be sure to remove out-of-unit membership records and delete MLS user accounts for members who are no longer serving in the stake.

Ward Leader and Unit Change Request Form

- This form needs to be submitted after a new bishop is called. Ward clerks will need to first create an out-of-unit record for the bishop on the ward level.
- You will need the date the bishop was set apart and the name of the person who set him apart.
- Fill in complete contact information. What is entered here will show up on the Church Directory of Organizations and Leaders.
- The "Active date" is usually the same as "Date set apart." The fields "Date ordained to the office of bishop" and "Person who performed the ordination" refer to the first time he was a bishop, which may have been in another ward. If you don't have the exact information, they may be able to fill it in at church headquarters.
- Before you submit the form, check the unit information as well to make sure it is up-to-date.
- The request for a new bishop is reviewed manually at church headquarters. When it has been reviewed and verified, information about your ward will be updated on CDOL and on the LDS.org tools.
- After the form is submitted, you may want to print or save a copy so you can have it for reference, as a backup in case any information needs to be re-entered.

Stake Leader and Unit Request Form

- This form needs to be submitted after any of the following leaders are called: stake president, stake presidency members, stake clerk, stake executive secretary, and patriarch.
- You will need the date the new leader was set apart and the name of the person who set him apart.
- Fill in complete contact information. What is entered here will show up on the Church Directory of Organizations and Leaders.
- Before you submit the form, check the unit information as well to make sure it is up-to-date.
- After the form is submitted, you may want to print or save a copy so you can have it for reference, as a backup in case any information needs to be re-entered.