Record Keeping Training

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Overview of this Presentation

- Your sacred responsibility
- Recording ordinances, life events, and callings
- Online tools for leaders, clerks, and members
- Training for leaders and clerks
- Tech forum and wiki
- Sending checks to the stake and other units
- Missionary funds
- Young Women's camp
- Budgets

A Sacred Responsibility

- "Whatsoever you do not record on earth shall not be recorded in heaven" D&C 128:8
- Clerks and members have a sacred and important responsibility to make sure ordinances and other information are accurately recorded on the permanent records of the Church.
- Even though an ordinance has been approved by those with the proper keys and performed by the proper authority, it is **not valid** unless it is properly recorded.
- A membership record must be accurate and complete if it is to be of the greatest value to priesthood leaders.
- All members, including clerks, home teachers, and ward leaders, have responsibilities to help make sure records are correct.

Recording Ordinances

- "When saving ordinances or priesthood ordinations are performed, the appropriate Church representative should attend and ensure that the ordinance or ordination is recorded. In the case of civil marriage or other civil events, the ward clerk is responsible to obtain the necessary information to record these significant events if he or the bishop is not in attendance." – Presiding Bishopric
  - Baptism of convert: Missionary is responsible to record
  - Confirmation of convert: Ward clerk (provides a copy of the Baptism and Confirmation Record to the missionary, who ensures both ordinances are recorded)
  - Blessing of an infant: Ward clerk or assistant ward clerk
  - Baptism and confirmation of members of record: Ward clerk or assistant ward clerk
  - Aaronic Priesthood ordination: Ward clerk or assistant ward clerk
  - Melchizedek Priesthood ordination: Stake clerk or a designee (records the ordination in stake MLS or ensures that the ward clerk records it in ward MLS)
- An ordinance tracking log (as well as a calling tracking log) greatly increases your ability to ensure nothing is forgotten.

Ordinances Not Recorded?

- Priesthood ordinations, births and deaths, baptisms of children of record, marriages, and other changes can build up over time, and information vital to recording these events properly can be lost, if the event wasn't recorded soon after it occurred, when the memories of those present are fresh.
- In the case of ordinations to the priesthood, the failure to record the ordinance correctly can have a ripple effect, as uncertainty about if and when the ordination happened leads to uncertainty about ordinances performed by that priesthood holder.
- If a member's ordinance information is not recorded on his records or appears to be recorded incorrectly, the Handbook is quite specific about what to do. If proper witnesses can be found, the ordinance can be recorded. But if a member can't prove that an ordinance occurred, **it must be performed again**. If the member has received other ordinances after this invalid ordinance, they must be ratified by the First Presidency.

Recording Life Events

- It is important to record the life events for all individuals within the unit boundaries. These events are not recorded as ordinances in MLS, but they still fall under the responsibilities of the ward clerk to be recorded on the membership record.
  - Births
  - Born in the covenant (BIC)
  - Adoptions
  - Full-time missions
  - Civil and common law marriages
  - Divorce
  - Deaths
- While the clerk is responsible for recording these events, the assistance of all members in the unit is vital to keeping the records accurate. Home and visiting teachers are crucial in this respect, and need to be reminded on occasion that major events in the lives of those that they visit need to be passed on to their priesthood leaders, who will inform the clerks of any events that need to be recorded.

Members

- Members should notify the clerk of the following:
  - Change of residential address, phone numbers, and e-mail addresses
  - Marriage
  - Divorce
- They should also review their IOS (Individual Ordinance Summary) during tithing settlement and provide updates and corrections to the clerk.

Home Teachers

- Home teachers should notify the clerk of the following for families they are assigned:
  - Change of residential address
  - Marriage
  - Divorce

Ward/Branch Leaders

- Ward leaders should make sure the clerk receives copies of:
  - Child blessing records.
  - Baptism and confirmation records.
  - Priesthood ordination records.

Recording Callings

- Ward clerks are responsible to ensure changes in callings are recorded accurately and timely. However, this task may be delegated to membership clerks.
- When recording callings in MLS, whenever possible, select Standard Positions from lists provided by MLS. Access to information on LDS.org that is specific to a position is determined by the Standard Positions in MLS.
- It is therefore important to record all callings in MLS. Other benefits include:
  - It allows priesthood leaders to run various reports that will show the callings for an organization
  - You can see a list of members without callings
  - Entering callings for converts will cause the New Member Report to be updated automatically
  - Leadership callings will automatically be populated on the Officers Sustained Form used at ward conference and stake conference
  - Calling information will be sent to the stake and be listed in the Church Directory
- There is now a Custom Position Review tool in MLS to review existing custom positions to see if there are standard positions that can be used in place of each custom position.

Online Tools (lds.org)

- LDS.org provides a number of useful online tools.
- Leader and Clerk Resources (LCR): Tools and applications to help local leaders minister in their callings.
- Missionary Online Recommendation System.
- Facility Issue Reporting (FIR): *Bishopric members and clerks have access to submit facilities issues.*
- Church Directory of Organizations and Leaders (CDOL)
- LUFAS (Local Unit Financial Auditing System)

Online Tools for Members

- Tools for the general membership include:
  - Notes and Journal
  - Calendar
  - Directory
  - Newsletter
  - Lesson Schedules
  - Maps: meetinghouse locator, ward and stake maps, meeting times, assigned leaders, and more.
  - Mobile Applications: Apple, Android, BlackBerry, and webOS devices.
  - Patriarchal Blessing: Request a copy.

Leader and Clerk Resources

- The this portal on lds.org provides stake presidencies, bishoprics, executive secretaries, clerks, and organizational leaders access to helpful resources for their leadership callings.

- The resources include links to relevant applications, reports from MLS, calling lists, and tools for focusing on members.
  - Member Lookup
  - Communications
  - Leadership Training Resources
  - Welfare Tools
  - Church Handbooks
  - Directory of Leaders

Leader and Clerk Resources

- The **Applications** menu lists applications relevant to leaders and clerks:
  - Missionary Online Recommendation System
  - Church Directory of Organizations and Leaders
  - Employment Resource Services
  - Purchase Materials from http://store.lds.org
  - Order Office Supplies (from Staples)
  - Action and Interview List: children approaching baptism age, unbaptized members, overdue Aaronic priesthood ordinations, young men approaching mission age, men who have not served a mission, and potential missionary couples.
  - Official Communications Library
  - Seminary Registration
  - Tools to send messages
  - Request patriarchal blessings

Leader and Clerk Resources

- The **Membership** menu provides various tools to access and update membership records and information.
- The **Organizations** menu shows reports about callings by organization, members without callings, etc.
- The **Reports** menu shows many of the reports that were previously only available in MLS.
  - Action and Interview List
  - Unit Statistics
  - Without Recommend
  - Members Moved In
  - Not Endowed
  - Birthday List
  - Quarterly Report
  - New Member
  - Key Indicators
  - Temple Recommend Status
  - Attendance Rolls
  - Seminary and Institute Enrollment
  - And many others...
- The **Help** menu provides leaders access to information on various subjects.
- Under the **Other** menu, the Access table shows which portal resources are available to each standard position. It also includes a link to the "**Missionary Progress Record**" and access to other church resources valuable to leaders..

Clerk Resources

- Note that Leader and Clerk Resources contains links to
  - Order church supplies from the Distribution Center
  - Order office supplies from Staples
  - Church Handbooks
    - Handbook 1
    - Handbook 2

Record-Keeping Training

- "Record Keeping" contains lessons for Finance, Membership, and Annual History Instructions
  https://www.lds.org/help/support/record-keeping?lang=eng
- Review of material on this site pertinent to Bishoprics and Clerks specific responsibilities is required by unit financial and membership audits.
- To access Record Keeping training on lds.org:
  - Click "Resources", "Melchizedek Priesthood", "Record Keeping", and then click the "Record Keeping" topic
  - This is the link: https://www.lds.org/help/support/record-keeping?lang=eng

Tech Forum and Wiki

- LDSTech Forum: https://tech.lds.org/forum/
- LDSTech Wiki: https://tech.lds.org/wiki/Main_Page
- ***If you can't find an answer in the "Record Keeping" training pages, in the LDSTech Wiki, or on the LDSTech Forum, then post your question to the LDSTech Forum.***

Sending Checks to Other Units

- There are many circumstances that require you to send checks to other units.
- After you print and sign the check (two signatures!), fill out a donation slip. Include the white copy with the check, and file the yellow copy with your financial receipts.
- Do NOT hand checks to clerks. Checks must be mailed or handed to authorized priesthood leaders.

Remitting Surplus Missionary Funds

- The funds in the Ward Missionary account may accumulate through donations and interest added on the Unit Financial Statement. It is suggested that a unit only have 2 - 3 months of payment surplus in the Ward Missionary fund for each missionary in the field. When reviewing Ward Missionary funds for surplus make sure that funds donated in advance for a missionary are not sent in as surplus funds.
- After reviewing the Ward Missionary funds, if you have more money than is needed to fund your current ward missionaries, please remit the surplus to the stake.
- To do this, write a check from the Ward Missionary account making the stake the payee.
- The stake will then deposit this money as a donation into their Ward Missionary account. The stake will review the needs of the units in the stake and determine the amount of funds to hold in the stake's Ward Missionary account. Money held in the stake's Ward Missionary account can be used to help other units in the stake in need of additional funds to support their missionaries.
- When a mission is complete, zero out the account. If the balance is negative, ask the missionary's family if they can pay the remaining balance. If the balance is positive, it cannot be refunded, so transfer the balance to the Ward Missionary fund so it is available for redistribution.

Transferring Missionary Funding to Another Ward

- When the family of a currently serving missionary moves to a different ward or branch, financial responsibility for the missionary is not automatically transferred to the new ward.
- The bishops of the wards involved need to discuss the transfer of financial responsibility. Note that the bishop of the former ward cannot transfer financial responsibility for the missionary's support to the new ward unless the bishop of the new ward agrees and willingly accepts responsibility for the support. Once they have agreed on the transfer of support and the timing, either one of the bishops or their designated representative who knows the necessary details should contact the Church to make the arrangements.
- The Missionary Department will need the new contact information for the missionary's parents so they can keep their records up to date. Call the Missionary Department and they will update the unit and address for the missionary. They will also create a Ward Missionary subcategory for the missionary in the new ward's MLS.
- Contact Local Unit Support about the transfer of financial responsibility through a phone call (the Missionary Department can transfer the phone call for you) or an MLS message and provide the following information:
  - Full name of the missionary
  - Unit number and name of the new unit
  - Effective date of the change (may be a past date)
  - Indication that the two bishops have agreed upon the change

Young Women's Camp

- Each girl attending camp pays the same amount (e.g., $75) to the unit's Other account using a donation slip and envelope.

  [Details here are specific to the Council Bluffs Iowa Stake.]

- Each unit sends one check to the stake for all girls planning to attend. The stake camp directors then base their whole camp on what they estimate it will cost. They have not increased this $75 in about 5 years, but it may change this year.
- Each unit then does a fund raiser for the girls specifically for camp. If the unit does not raise enough money, then they usually send money from their budget to the stake in addition to the amount raised in the Other account.

Budgets

- The fundamental principles of the Budget Allowance program are found in Handbook 1, section 14.7.2:
  - All local unit activities are to be funded from the Budget Allowance
  - Members are not to pay any funds out of pocket to participate in activities (there are exceptions for funding a single camp for youth)
  - Members are to submit receipts for reimbursement for all expenses they incur as they serve in their callings
  - Activities are to be simplified to fit within the Budget Allowance
- In 2004, the Budget Allowance was increased to fund activities more effectively and relieve the financial burden on families. With this increase, units were instructed that fund-raising activities should be substantially reduced or eliminated.

Budgets (continued)

- The Church allocates funds to the stake for the next quarter, based on attendance figures from the previous quarter. For example, the allocation for the first quarter of 2013 was based on attendance reported on the Quarterly Report for the third quarter of 2012. The allocations are calculated on the following metrics:
  - Average Sacrament Meeting Attendance listed on the Quarterly Report (which comes from the last month of the quarter only).
  - Young Men and Young Women attending meetings, as reported on the Quarterly Report
  - Primary children ages 8-11 attending meetings. Since this exact figure is not available on the Quarterly Report, it is estimated by taking the percentage of Primary attendance from the Quarterly Report, and multiplying that percentage by the actual number of Primary children aged 8-11.
  - Young Single Adults attending meetings. Since this exact figure is not available on the Quarterly Report, it is estimated by taking the percentage of Sacrament Meeting attendance from the Quarterly Report, and multiplying that percentage by the actual number of Young Single Adults aged 18-30.

Budget Reports

- Ward and stake financial clerks should give regular budget reports to their priesthood leaders. When the clerk obtains the required signature for the monthly review of the Action Items, it is a good opportunity to review the current status of the Budget and other financial categories. The Summary version of the Budget Report in MLS is a helpful starting point for this discussion.
- Auxiliary presidents and other leaders responsible for Budget subcategories should receive periodic reports of their year-to-date budget allowance, expenditures, and remaining balance. This is conveniently done in a ward or stake council meeting. Generally, the Detail version of the Budget Report in MLS provides the necessary information.

Questions?