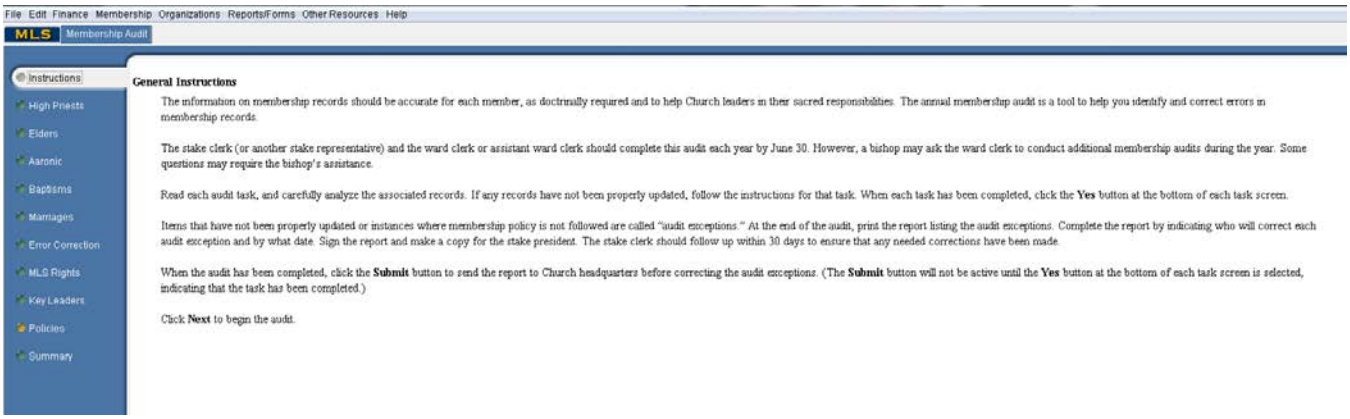
Membership Audit training packet
For ward clerks

What is the Membership Audit?



The yearly Membership Audit is an examination of your record-keeping processes and the policies that insure accuracy and protect privacy in your ward. Church policy requires each ward to complete this and submit it by June 30th of each year. The stake Clerks and Assistants oversee the audit, which each ward clerk performs through an MLS software "wizard." The wizard leads the ward clerk through a step-by-step process to review categories: priesthood ordinations, baptisms, marriages, error correction, MLS user rights, key leaders, and policies.

At the end of the audit, MLS will prepare to submit the audit to Church Headquarters (via your next MLS send/receive) and you will be asked to print a copy for signatures and for submission to the Stake President. Exceptions will be checked by a stake clerk or assistant.

We advise each Ward Clerk to review this document and perform preliminary record checks before your audit!

To begin the **Membership Audit** wizard, on the MLS menu bar, click **Other Resources**. Click **Church Audits.** Then click **Membership Audit.**

We know the proper recording of priesthood ordinances and other vital information is a sacred responsibility, and should be undertaken with great care, as recorded in Moroni 6:4:

> *"And after they had been received unto baptism, and were wrought upon and cleansed by the power of the Holy Ghost, they were numbered among the people of the church of Christ; and their names were taken, that they might be remembered and nourished by the good word of God, to keep them in the right way, to keep them continually watchful unto prayer, relying alone upon the merits of Christ, who was the author and the finisher of their faith."*

Again, as emphasized in D&C 128, when Joseph Smith essentially established the calling of a ward clerk to record ordinances, he further hinted that those doing the recording do so very carefully:

> *128:7 ...consequently, the books spoken of must be the books which contained the record of their works, and refer to the records which are kept on the earth...*
> *128:8 ...wherein it is granted that whatsoever you bind on earth shall be bound in heaven, and whatsoever you loose on earth shall be loosed in heaven...* ***...Or, in other words, taking a different view of the translation, whatsoever you record on earth shall be recorded in heaven, and whatsoever you do not record on earth shall not be recorded in heaven; for out of the books shall your dead be judged, according to their own works…***

Please do not wait!

We hope you have been preparing for this audit all year long! In general, the prompt and correct handling of membership records issues throughout the year will make your ward well-prepared for your membership audit.

This audit will take some advance preparation, as the clerks will not know the answers to all questions nearly as well as organizational leaders. Some of this preparation might take place in bishopric meeting, Ward Council or by private contacts with organization leaders or the members themselves. We encourage you to complete your advanced preparations as soon as possible, leaving time for the difficult issues to be resolved before your audit.

Techniques that keep records accurate

1) *Promptly move-in and out records, and record deaths, births, marriages, ordinances and callings without delay!*

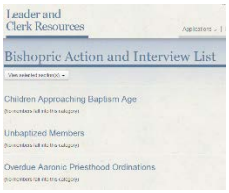
2) *Perform a **"Membership validation report"** at regular intervals throughout the year, and immediately correct any issues found.*

3) *Regularly discuss appropriate sections of your **"Action and Interview List"** and the **"Members Moved In"** and **"Members Moved Out"** lists in Ward Council and in Bishopric interviews with organization heads.*

4) *Allow each member an opportunity to view his/her **Individual Ordinance Summary** each year and promptly correct issues. This includes all members, not just those that attend Tithing Settlement!*

See the sidebar above for on-going techniques that will keep your records up-to-date, and circle those techniques you and your assistants perform regularly. Policies that keep your records current involve every clerk and bishopric member. The audit is a chance to see what improvements can be made in your processes.

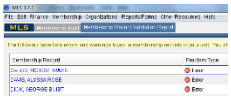
"Key" items to do BEFORE your audit!



Bishopric Action and Interview List *(LDS.org "Leader and Clerk Resources")*

Print, and ask leaders to make sure the baptisms or ordination status is correct as listed, and correct any unrecorded baptisms and ordinations that WERE preformed, but not recorded.

- *Children Approaching Baptism Age (checked by Primary president)*
- *Unbaptized Members (checked by Primary, Young Men and Young Women presidents)*
- *Overdue Aaronic Priesthood Ordinations (checked by Young Men's president)*



Membership Validation Report,

*(On the MLS menu bar, click **Membership**. Click **Membership Validation Report**.)*

While clerks may use the report separate from the audit, the audit uses this data as one of its categories. This tool performs some internal checks on membership data to catch many issues, such as missing names, incorrect dates, etc., and these you should try to correct before the audit. WARNING: These problems can be stubborn to fix, and may take a call to Salt Lake City. Don't delay running this report in advance of your audit!



Membership Audit Wizard: "Dry Run"only!

*(On the MLS menu bar, click **Other Resources**. Click **Church Audits**. Then click **Membership Audit**.)*

You are also encouraged to run the audit wizard now, doing a "dry run," so to speak. This will allow you to print off the lists and consult with ward leaders about them. Please print only, do not ***save*** or ***submit on any screen or section*** of the audit, until you are actually ready to do the Audit. Please read the following pages before doing a "dry run" of the audit so you fully understand the audit wizard and the process.

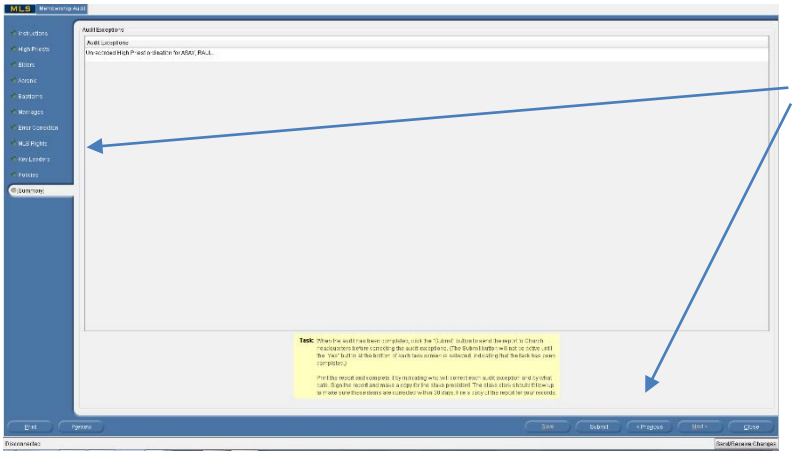


Use the Print key (bottom left) to print your lists of each section. Don't mark complete! These lists can then be reviewed with the bishopric / ward council members.

Doing the actual Audit

Consult with your stake clerk BEFORE performing the audit and follow his instructions. Remember the deadline for completion: June 30th.

1. On the MLS menu bar, click **Other Resources**. Click **Church Audits**. Then click **Membership Audit**.
2. Read the instructions on the screen, and click **Next**.
3. The High Priests screen lists priesthood holders who might be eligible to be ordained high priests. Examine the list, looking for anyone who has been ordained a high priest. Click the box beside the name of anyone listed who has been ordained a high priest. When you have finished this task, click **Yes**. Click **Next**.
4. The Elders screen lists brethren who could be eligible to receive the Melchizedek Priesthood. Examine the list, looking for anyone who holds the Melchizedek Priesthood. Click the box beside the name of anyone who has received the Melchizedek Priesthood and been ordained an elder. When you have finished this task, click **Yes**. Click **Next**.
5. The Aaronic screen lists young men who, according to their age, have not been ordained to the expected Aaronic Priesthood office. Examine the list, looking for anyone with an incorrect priesthood office. Click the box beside the name of any young man showing an incorrect priesthood office. When you have finished this task, click **Yes**. Click **Next**.
6. The Baptisms screen lists children who are eligible to be baptized but whose records indicate they have not been. Examine the list for children who have actually been baptized and confirmed. Click the check box next to the name of each child who has been baptized and confirmed. When you have completed this task, click **Yes**. Click **Next**.
7. The Marriages screen lists adults who are age 18 and older and whose records indicate they are not married. For each of these adults who actually are married, click the box next to the name. When you have completed this task, click **Yes**. Click **Next**.
8. The Error Correction screen is a list of items found on the **Membership Validation Report**, including any items that have been hidden using the Ignore button. Click the check box next to each item that can be corrected. When you have completed this task, click **Yes**. Click **Next**.
9. The MLS Rights screen lists each MLS user name and the rights granted to that member in MLS. Review the list. If there are any users who are no longer using MLS or whose rights need to change, click the check box beside that user's name. Click **Yes** to indicate you have finished. Click **Next**.
10. The Key Leaders screen displays the names of members of the bishopric and other key leaders in the ward. If there is anyone who is no longer serving in the indicated calling, click the box beside his or her name. When you have completed this task, click **Yes** to indicate you have finished. Click **Next**.
11. On the Policies screen, answer each statement by clicking either **Yes** or **No**. Then click **Yes** to indicate that you are finished. Click **Next**.



You have now finished all the sections of the Membership Audit, and you will find yourself on the summary screen. Before you "submit" the Audit, you can now do several things: You can "re-visit" any section by clicking the tab on the left for that section, or using the "next" and "Pervious" buttons at the bottom. You may do this if you wish to change information, or toggle the designation on a task between "finished" and "not finished." You can save your audit to check information, and return to it later. Click the "Summary" tab to return here.

IMPORTANT: This **Summary screen** is where you will "print" (bottom left) and "submit" (bottom right) your audit. Both actions are necessary, as submitting it sends it to Church Headquarters, and printing is necessary for your signatures on the form you will submit to the stake president. You cannot change a submitted audit, so be careful!

Submitting your Audit: Due by June 30th!

Once every section is complete (and the task is marked "completed,") follow the instructions EXACTLY as listed on the summary tab to properly submit your audit to the church and to the stake president:

Task: When the audit has been completed, click the "Submit" button to send the report to Church headquarters before correcting the audit exceptions. (The Submit button will not be active until the "Yes" button at the bottom of each task screen is selected, indicating that the task has been completed.)

Print the report and complete it by indicating who will correct each audit exception and by what date. Sign the report and make a copy for the stake president. The stake clerk should follow up to make sure these items are corrected within 30 days. File a copy of the report for your records.

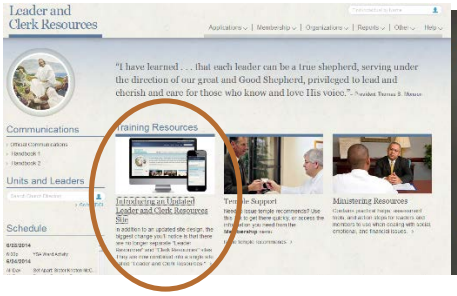
Once you hit the submit button, it is queued to be sent to Church Headquarters on the next send/receive command you do. Please make sure you print, complete and sign the report and deliver it to the stake offices, even if you have no exceptions.

Remember, once submitted, we cannot change or update your audit!

Stake clerks are required to check up on all exceptions.

Finding help!

Ask your stake clerks or assistants if you have questions.
And look at the newly redesigned Leader and clerk Resources on LDS.org! Make sure you sign in so it recognizes your clerk calling, and use Tech.lds.org, the church's technology site for user forums for specific questions. As a last resort, and for stubborn problems, contact membership support, open Monday – Friday!







More advanced preparation on each category

Here is a checklist to help you prepare in advance for the sections of the Membership Audit.

Membership Audit Category & Description of Action	Specific Steps to Prepare in Advance	Preparations Completed On
The **High Priests screen** lists priesthood holders who might be eligible to be ordained high priests, but who have not been, according to MLS. Examine the list, looking for anyone **who has been** ordained a high priest.	Print the names from this section, and review the list with ward leaders and High Priest group leaders. Properly record into MLS any ordinances that should have been entered but were not.	
The **Elders screen** lists brethren who could be eligible to receive the Melchizedek Priesthood, but have not, according to MLS. Examine the list, looking for anyone **who holds** the Melchizedek Priesthood.	Print the names from this section, and review the list with ward leaders and Elders Quorum leaders. Properly record into MLS any ordinances that should have been entered but were not.	
The **Aaronic screen** lists young men who, according to their age, have not been ordained to the expected Aaronic Priesthood office. Examine the list, looking for anyone with an incorrectly listed section priesthood office.	Print the names from this section, and review the list with ward and Young Men leaders. Additionally, check the **Action and Interview List, Overdue Aaronic Priesthood ordinations section** for possible mistakes. Properly record into MLS any ordinances that should have been entered but were not.	
The **Baptisms screen** lists children who are eligible to be baptized but whose records indicate they have not been. Examine the list for children who have actually been baptized and confirmed.	Print the names from this section, and review the list with ward or Primary leaders. Additionally, check the **Action and Interview List, Unbaptized Member section.** (From *MLS: CTRL A*, or *Membership tab>Action and Interview list*, or on LDS.org leaders tool) Properly record into MLS any baptisms that should have been entered but were not.	
The **Marriages screen** lists adults whose records indicate they are not married. Examine the list for adults who actually are married.	Print the names from this section, and review the list with ward leaders. Properly record into MLS any marriages that should have been entered, but were not. *In the case of part-member families when the member is married to a non-member spouse, the member may be listed as not married. You could correct this by creating a non-member spouse record (see MLS help) and correctly record the marriage.*	
The **Error Correction screen** is a list of items found on the **Membership Validation Report**, including any items that have been hidden using the Ignore button.	Run the **MLS Membership Record Validation report** tool (From *MLS: Membership >Membership Validation Report*) in advance of the **Membership Audit.** Correct all **errors** and **warnings** whenever possible, including those you have previously marked "ignore." It may help to assure all records have been transferred from your ward to other wards, or the Church Headquarters for those whose addresses you do not know, if appropriate. *Important: Those "problems" you marked "ignore" on this report still must be fixed at some time. They will be shown during the M**embership Audit**, so selecting the "ignore" option does not hide them permanently, or fix them.*	

Membership Audit Category & Description of Action	Specific Steps to Prepare in Advance	Preparations Completed On
The **MLS Rights screen** lists each MLS username and the rights granted to that member for MLS. Check for any users who are no longer using MLS or whose rights need to change	Examine the rights granted to MLS users, under ***Edit>System Options>Users.*** Check for members no longer needing rights, and those granted rights. Use this "suggested" list from the *MLS help manual* for indications of appropriate rights granted, although individual wards may have assignments differing from this list, and these will not be noted as exceptions. • *Admin*—Bishop and ward clerk • *Finance*—Clerk assigned to finances, bishopric members • *Edit Membership*—clerk assigned to membership records • *View Membership*—Bishopric members • *Organization*—Bishopric members, auxiliary and quorum leaders, and secretaries. • *View Recommends*—Bishopric members and ward clerk Change the User Rights to reflect the appropriate rights as currently needed by those allowed MLS access.	
The **Key Leaders screen** displays the names of members of the bishopric and other key leaders in the ward. Check to see if there is anyone who is no longer serving in the indicated callings, or new members that have been called to those callings.	Print the names from this section, and preview the list with ward leaders, and your MLS callings list. Properly record into MLS any callings or releases that should have been entered, but were not.	
The **Policies screen** will ask question about policies for you to answer Yes or No. **Question 1:** *During the last year, members of the ward had the opportunity to review their Individual Ordinance Summary (IOS) for accuracy, and all errors identified have been corrected.* **Question 2:** *All disciplinary council and administrative action documents have been submitted to the stake president as instructed in "Handbook 1: Stake Presidents and Bishops."* **Question 3:** *All records, either paper or electronic, are properly protected, retained, or disposed of in accordance with directions in "Handbook 1: Stake Presidents and Bishops."*	Discuss the policy questions in advance with the bishop, and the expanded bishopric members (clerks and secretaries) who share the responsibilities of the clerk's office and the records. **Question 1:** Ponder the two parts. **Members had the opportunity to review their IOS**, *and* **all errors identified have been corrected.** **Question 2:** Review the appropriate Handbook 1 sections **Question 3:** Records security- review Handbook 1 and LDS.org • Are temple recommend books ALWAYS regularly locked in a cabinet? • Have you properly disposed of all older membership and financial records properly? Are current records archived in a locked cabinet? • Is your clerk's office secure at all times? Even on Sundays? • Do you have a procedure to properly backup MLS data to your hard drive, a portable drive, and maintain an off-site back-up as instructed?	