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 specific tasks to focus on.

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.
- **LDSTech wiki.** Basic instructions for common clerk duties. Much of this information is being migrated to ClerkSupport.LDS.org. You can search the LDSTech forum and wiki in Google by adding "site:tech.lds.org" to your query.
- **Local Unit Support.** 801-240-3500 / mlssupport@ldschurch.org. The tech support offices are open 6:00 AM to 9:00 PM Monday through Friday, with extended hours (until midnight) 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. **Record Finances**
   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 expenses into MLS, print checks and reports, and make sure a member of the bishopric signs each check before it goes out.

EVERY MONTH

1. **Provide Reports**
   a. **Monthly Reports.** Our stake president has requested that each ward submit a monthly report with membership statistics. This should be emailed to a stake clerk. It should also be shared with your ward council.
   b. **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.
   c. **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, and birthday lists.
2. **Print Rolls**
   a. **Attendance Rolls.** Print rolls for each class in the Sunday School, Relief Society, and Priesthood organizations and give them to the secretaries so they can record attendance. Alternatively, you can invite organization leaders to print their own rolls from Leader and Clerk Resources.

EVERY YEAR

1. **Annual Audits**
   a. **Review Training.** Every year you should review the training resources at ClerkSupport.LDS.org.
   b. **Financial Audit.** Financial audits are held twice a year, in February and August. A stake auditor schedules an appointment with the bishop and the clerk who has been helping with finances.
   c. **Membership Audit.** Membership audits are held once a year, in June. A stake clerk schedules an appointment with the bishop and the ward clerk or an assistant clerk assigned to membership records. After the audit, any exceptions are printed so they can be corrected 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 will need to 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 Reports.** Financial reports that have been printed should be kept for three years. At the end of each year, records older than three years should be shredded.
   b. **Membership Reports.** 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 reports that have 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. Their new ward name is also helpful.
    b. **Move Records Out.** Send out the records for members who have moved. Try your best to figure out where each person has moved – don't just send everyone 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.** Upload a photo of each member who gives permission to the LDS.org directory. Photos and contact information are essential to the bishopric and ward council as they get to know new ward members.
3. **LDS.org Tools**
    a. **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. **Lesson Schedules.** Help the Sunday School presidency set up the classes and lessons for each week of the semester in the Lesson Schedules tool, if they haven't already been set up.
    c. **Newsletter.** If your ward uses the Newsletter tool, you may want to add ward council members or others as newsletter publishers.
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 person 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 and keeping the callings up-to-date 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 expense 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 LDS.org maps and in LDS Tools.

PART 3: Continual Maintenance

MEMBERSHIP RECORDS

1. **Members of Unit**
    a. **Move Records in and Out.** 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. If your ward has assigned Sunday School classes, make sure each member is in the correct class. Otherwise, all members can be placed in a single class and multiple copies can be printed. When you print rolls, print one for each class that is being held.
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 monthly and 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 part of 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
(This section needs to be expanded.)

1. **Budget**
   a. **Update Subcategories.** Inactivate 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.

2. **Donors and Payees**
   a. **Members Moved.** Set donors and payees who have moved to "Hidden." MLS retains financial records for three years plus the current year.
3. **Expenses**
   a. **Record Expenses.** Make sure all expenses have been recorded and appear in the right budget category.
   b. **Outstanding Checks.** Make sure that all checks that have been printed and given to payees have been cashed and cleared.

OTHER RECORDS

1. **Ward History**
   a. **Photos, Stories, and Calendar.** The history can include information about things that happened in the ward throughout the year. 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.
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. **Other Tools.** It is recommended that each ward take advantage of the other LDS.org tools, such as the calendar, lesson schedules, donations, and newsletter; however, they are not required. By default, clerks and bishopric members are administrators of these tools. Ward website administrators have administrative access to some of the tools by default, as well.

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.
   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.