TRAINING GUIDE · WARD LEADERSHIP

Bishop

The bishop sees the whole ward site plus the confidential bishopric workspace: who needs attention, callings and releases, interviews, visits, meeting agendas and the conducting sheet. He approves the ward site, decides which modules the executive secretary and clerk may use, and can review every access in the audit log.

Demo sign-in (Demo accounts → Sign in with email and password):
`bishop@steepl.test` · password `bishop`

What you can do

- See **What needs you this week** on the bishopric **Home**: the coming Sundays, this week's interviews and visits, stale follow-ups and open assignments
- Keep a short, dated **Needs attention** list with an owner for every entry
- Move callings and releases from discussing to set apart, put them on Sunday's program, and clear them once recorded in LCR
- Schedule interviews (including tithing declaration), plan visits, and run meetings from Handbook agendas
- Conduct sacrament meeting from the **Conducting sheet** on your phone
- Grant modules to the executive secretary and ward clerk (only the bishop can) and review the **Audit log**
- Record the bishop's approval of the ward site and share the ward's join code
- Let parents into any group calendar (youth, Primary) under **Calendars**

Before you start

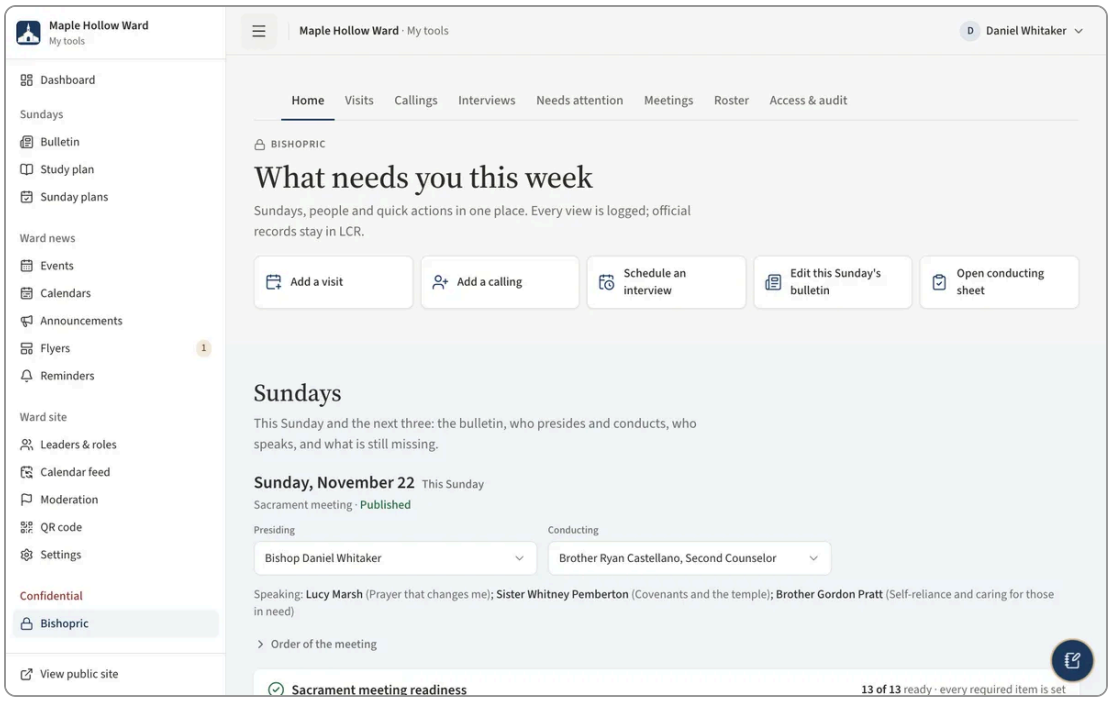
- To sign in, tap **Sign in** at the top right. Choose **Sign in with Google**, or type your e-mail address and choose **Email me a sign-in code**, then type the 6-digit code from the e-mail and choose **Sign in**. Use the e-mail address the ward clerk has for you. Use the account the stake or a platform administrator granted. Trying the demo: on the sign-in page open **Demo accounts** and choose **Sign in with email and password**. Enter the test account e-mail and its demo password (the start of the e-mail address — see **Demo accounts** on the Instructions page), then choose **Sign in**.
- After sign-in you land on the ward's **This week**. The ward menu now also shows **Admin** and **Bishopric** (with a lock).

- Open the confidential workspace from **Bishopric** in the ward menu (or the **Confidential** group in the admin sidebar). The tabs are **Home · Visits · Callings · Interviews · Needs attention · Meetings · Roster · Access & audit** — you see only the ones your calling or grant covers. The conducting sheet is not a tab: open it from **Home** or from **This week**. The tabs carry no lock icons; one lock sits in the **Bishopric** kicker above each page title.
- A muted line at the bottom of every page in the workspace repeats the Handbook reminder (GH 38.8.32) and who can open the area.
- General Handbook 38.8.32: confidential Church information — membership status, temporal needs, other non-public personal information — is not stored outside Church-provided systems. Keep notes here to a few words, never record worthiness, tithing or welfare details, and record official information in LCR.
- The Saturday afternoon digest e-mail (counts only, never names) is turned on or off under **My account → Bishopric digest**. For now My Ward Info sends only sign-in codes, so the digest starts once e-mail is switched on.

01 Start from the bishopric Home

Home gathers what needs you this Sunday and this week.

1. Open **Bishopric**. The **Home** tab is titled **What needs you this week**, with the lock and **Bishopric** above it.
2. The quick actions come first: **Add a visit**, **Add a calling**, **Schedule an interview**, **Edit this Sunday's bulletin** and **Open conducting sheet**.
3. The navy **Sundays** band shows this Sunday and the next three: who presides and conducts, who speaks, and **Sacrament meeting readiness**.
4. **People** shows **Visits**, **Callings & releases**, **Interviews this week**, **Needs attention** and **Follow-ups from meetings** — the counts, then the next three of each.
5. **Coming up (60 days)** lists Sunday plans and yearly events that still need an owner.



The bishopric Home for the fictional demo ward, Maple Hollow Ward — all names are sample data.

> **Confidential.** Every view in this workspace is logged. Stake leaders and platform administrators cannot open it.

> **Tip.** When the ward's LCR reports are getting old (about every three months), or hold no e-mail addresses, a notice appears at the top of the **Dashboard** and the bishopric **Home**. Choose **Upload LCR reports** to open **Roster** and upload fresh ones, or **Remind me later** to hide it for two weeks.

> **Tip.** Parents ask to join group calendars such as Young Women or Primary. The **Calendars** item in the admin menu shows a number when someone is waiting: open the calendar and choose **Approve** or **Decline** under **Waiting to join**. Leaders of that organization can do the same.

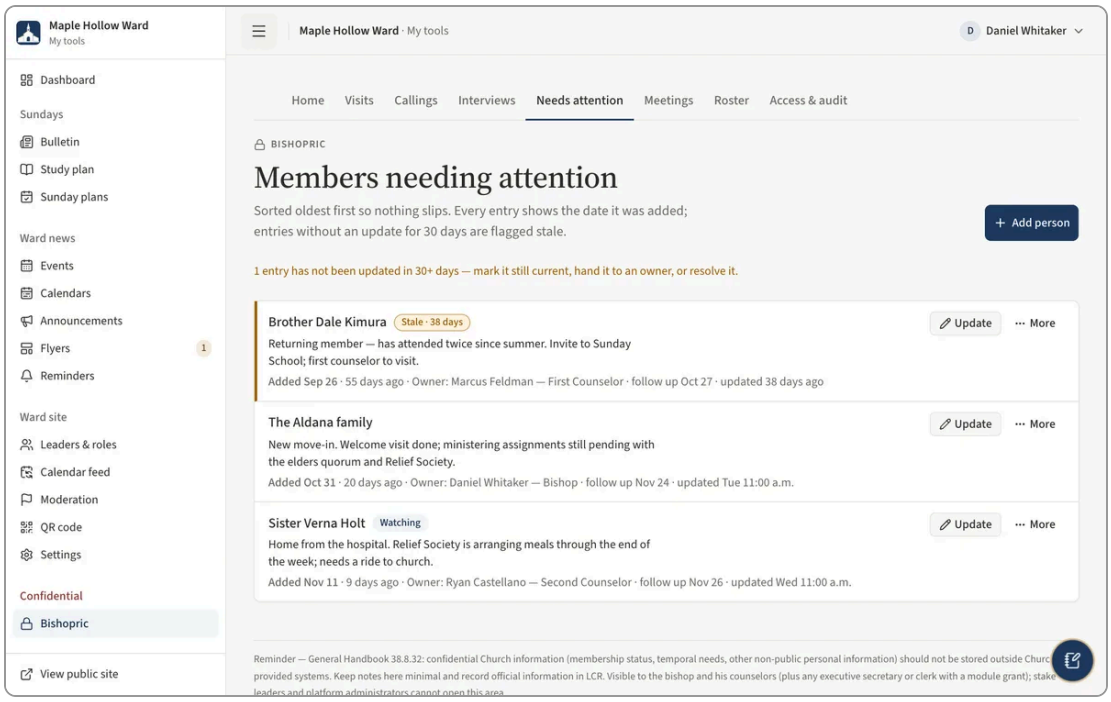
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02 Keep the Needs attention list current

1. Open **Needs attention** and choose **Add person**.
2. Enter the **Person or household (confidential)** and a few words under **Situation (confidential)** — for example “New baby — meals this week”.
3. Pick an **Owner** (a bishopric member, or the Relief Society or Elders Quorum president) and a **Follow up on** date, then **Add — dated today**.

4. To keep an entry current, use **Update**, or open **More** on the row and choose **Still current**, **Keep watching**, **Plan a visit** or **Resolve** (**Remove** is there too, for mistakes).

5. Entries with no update for 30 days are marked **Stale** and listed first — update, hand to an owner, or resolve them.



The demo attention list: one entry is deliberately stale.

> **Confidential.** A few words, no record data. Welfare details stay with the bishop (GH 22.4.5). This list is never grantable to the executive secretary or clerk.

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03 Move a calling from discussing to set apart

Callings go discussing → approved → extended → accepted → sustained → set apart; releases go discussing → approved → member informed → accepted → released in meeting.

1. Open **Callings** and choose **Add position**. Choose **Calling** or **Release**, enter the **Position**, **Organization**, **Candidates (confidential)**, an **Owner** and the **Next step** with a **By** date, then **Add to pipeline**.

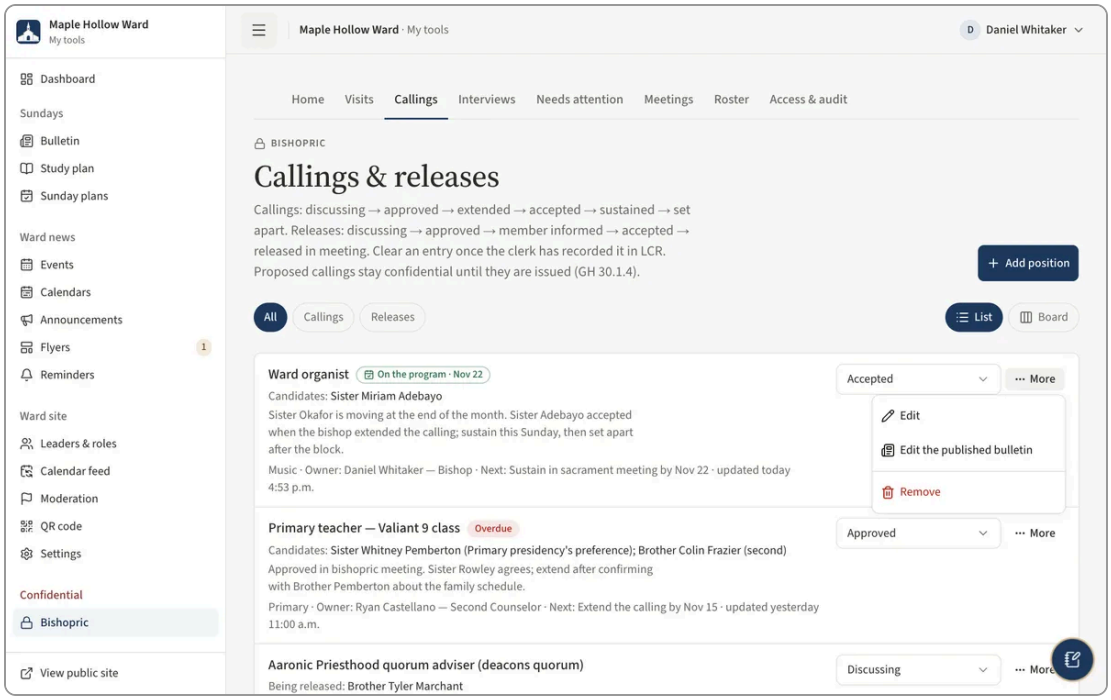
2. Change the stage with the status list on the row; it saves straight away. Use **List** or **Board** to switch views.

3. Everything else for a row is in its **More** menu: **Edit**, **Add to Sunday business**, **Set apart**, **Recorded in LCR** and **Remove** (only the steps that fit the stage are listed).

4 Once accepted, open **More** and choose **Add to Sunday business**. Pick the **Sunday**, check the **Name as it will be read**, tick the confirmation box and choose **Add to program**.

5 After the sustaining, open **More**, choose **Set apart**, enter the **Date** and **Mark set apart**.

6 When the clerk has recorded it, open **More** and choose **Recorded in LCR**. The entry moves to **Cleared — recorded in LCR**.



The demo callings pipeline for Maple Hollow Ward, with a row's More menu open.

> **Handbook note.** Proposed callings stay confidential until they are issued, and ward business is not public until the meeting begins (GH 30.1.4). The members' program never lists the names — it shows a bare **Ward business** line, and the names are read from the conducting sheet.

> **Tip.** Remove an entry only if it was a mistake — the official record stays in LCR either way.

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04 Schedule interviews

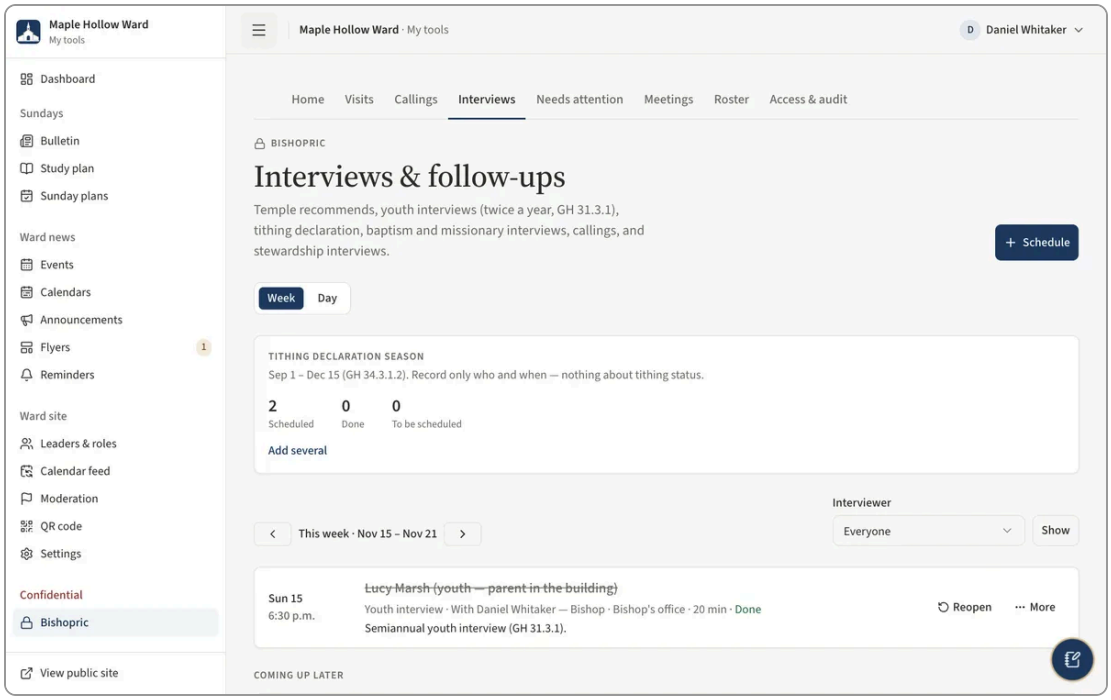
1 Open **Interviews** and choose **Schedule**. Enter the **Person (confidential)**, the **Kind**, **When**, **Length** and **With**, then **Schedule**. Leave **When** empty to add it to **To be scheduled**.

2 Switch between **Week** and **Day**. The day view shows one column per interviewer; **Overlaps another interview** warns of a clash.

3 In tithing season, the **Tithing declaration season** panel shows progress. Open **Add several** to add a list of families at once.

4 After an interview, choose **Done** on the row, add an optional **Outcome note** and **Schedule a follow-up (optional)**, then **Mark done**. **Edit** and **Remove** are in the row's **More** menu.

5 Choose **Print sheet** on the day view for a one-page schedule (notes are never printed).



A week of interviews in the demo ward; switch to Day for one column per interviewer and Print sheet.

> **Confidential.** Worthiness matters stay with the bishop and are never written here (GH 9.3.2.2). For tithing declaration, record only who and when — never amounts or status. Record recommends in LCR.

> **Handbook note.** Youth interviews are twice a year (GH 31.3.1); marking one done suggests a follow-up six months out.

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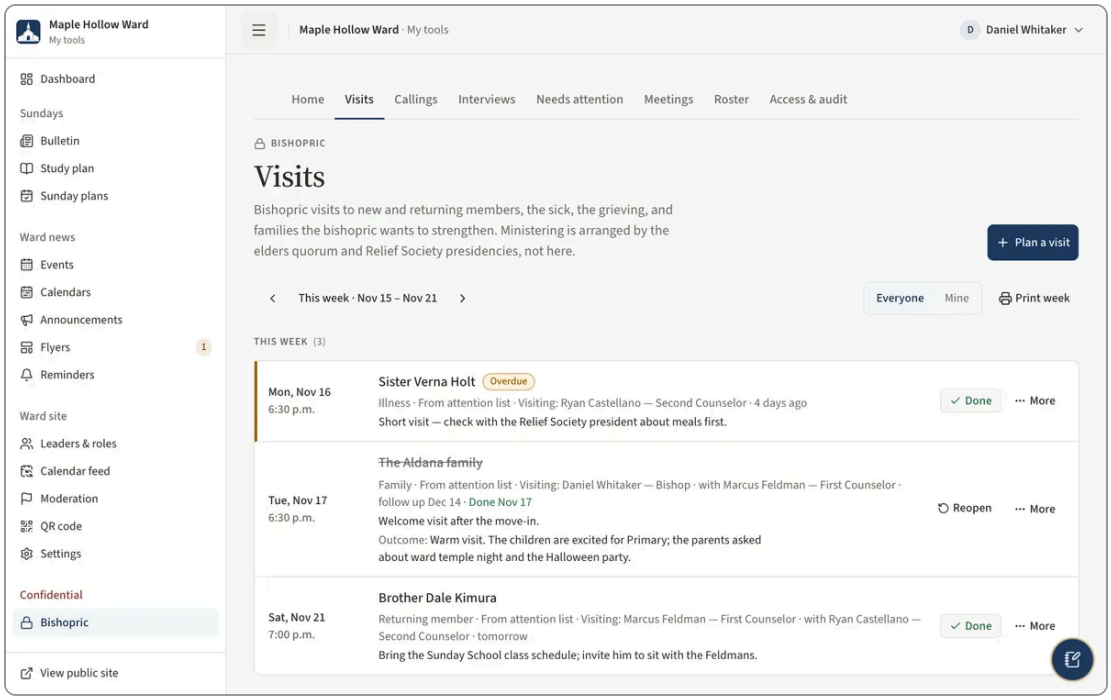
05 Plan and record visits

1 Open **Visits** and choose **Plan a visit**. Enter the **Person or household (confidential)**, **Kind**, **When** and **Who visits**, then **Plan visit**.

2 Link it to an entry under **From the attention list (optional)** so a follow-up date carries over.

3 Use **Everyone** or **Mine** and the week arrows; sections are **This week**, **Coming up** and **To schedule**. Missed visits show **Overdue**.

4. After the visit, choose **Done**, add an **Outcome (confidential)** if needed, and **Mark done**. **Edit**, **Cancel visit** and **Remove** are in the row's **More** menu.
5. Choose **Print week** for a printable list.



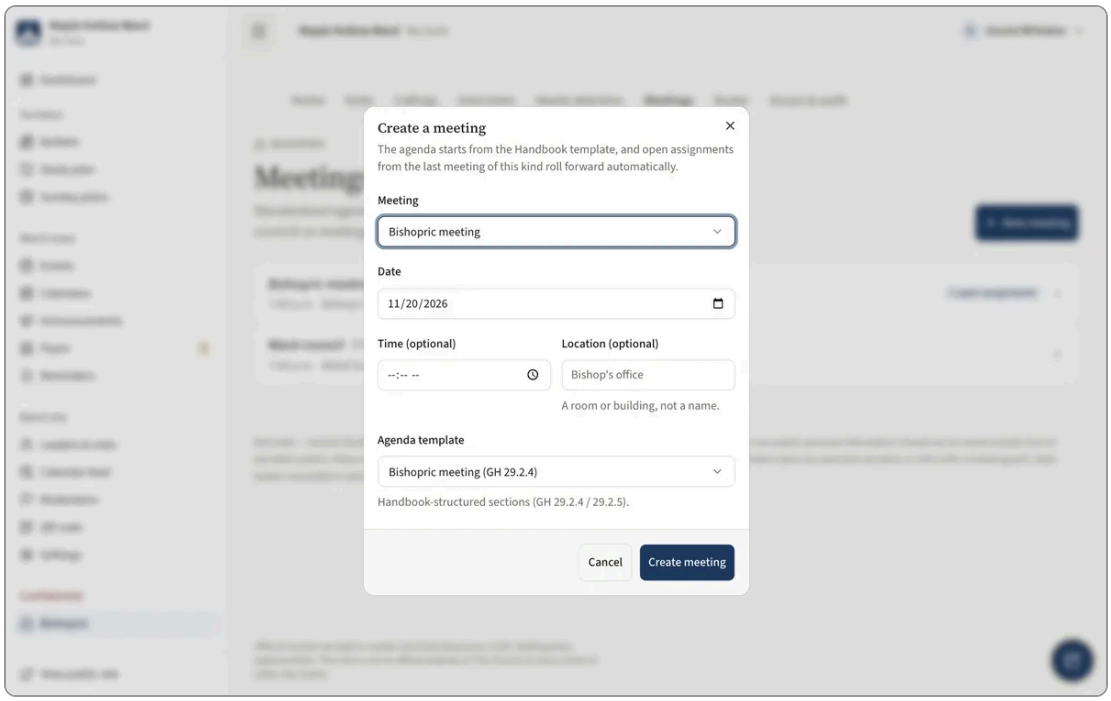
The demo ward's visits this week.

> 📖 **Handbook note.** These are bishopric visits. Ministering is arranged by the elders quorum and Relief Society presidencies, not here.

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06 Run a meeting from a Handbook agenda

1. Open **Meetings** and choose **New meeting**. Pick the **Meeting** (for example **Bishopric meeting**), the **Date** and an **Agenda template**, then **Create meeting**.
2. Open assignments from the last meeting of that kind roll forward automatically.
3. In **Agenda**, tick items as they are covered and use **Add item** or **Add section**.
4. Under **Assignments**, choose **Add assignment**, enter the assignment, owner and due date, and **Add**.
5. Open **Reference (not part of the agenda)** to glance at attention, callings, interviews and visits. Choose **Add minutes** for encrypted minutes, and **Print agenda** to print.



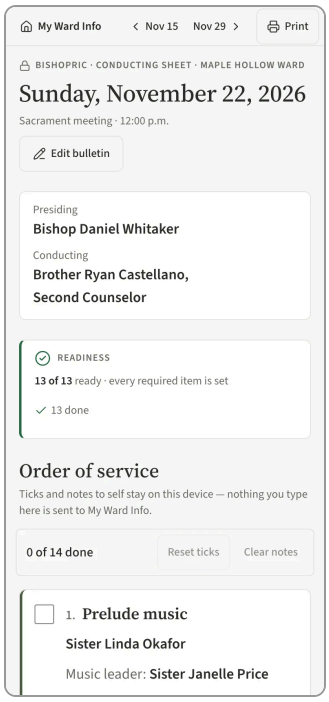
Creating a bishopric meeting from the Handbook template in the demo ward.

> **Confidential.** Names are never written into the agenda text (GH 38.8.32) — refer to people in the reference panel instead. Minutes are left out of the printed agenda unless you include them.

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07 Conduct sacrament meeting from your phone

1. Open **Conducting sheet** — the big button at the top of your ward's **This week** page, or **Open conducting sheet** on the bishopric **Home**. It opens on this Sunday (next Sunday once the meeting is over); use the arrows for another week. Only the sheet shows — **My Ward Info** at the top left returns to the full app.
2. Check **Readiness** at the top. Missing required items link straight to the bulletin field, and **Edit bulletin** opens the editor.
3. Follow the **Order of service** — one list, each step marked with a coloured edge. Tick each step as you go; it collapses to its title — choose **Show** to look again.
4. **Ward business** lists the names to read. Members' programs show only a bare **Ward business** line, so the names are here and nowhere else.
5. At the sacrament, use the **Bread** and **Water** tiles (see the next task).
6. Choose **Print** at the top for a paper copy. Ticks and notes to self stay on your device only.



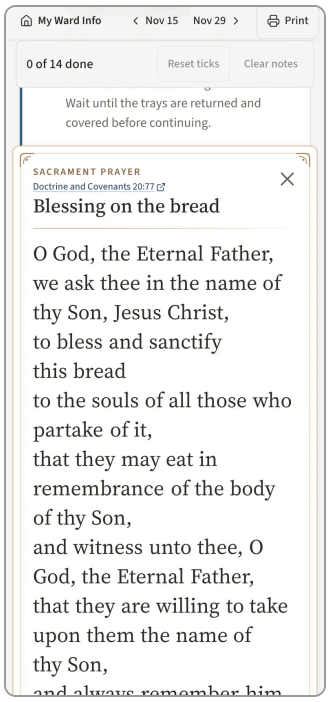
The conducting sheet for this Sunday in the demo ward.

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08 Follow the sacrament prayers

The sacrament step on the conducting sheet carries the two prayers, so you can follow the words as they are read.

1. On the conducting sheet, find **Administration of the sacrament**. It shows two square tiles, **Bread** and **Water**.
2. Tap **Bread** or **Water**. The box flips over into a prayer card with the prayer in large type, one phrase per line.
3. If the browser asks to use the microphone, allow it. The chip reads **Listening…** and each word lights up as the priest reads it.
4. Tap the card or the X to flip back to the sheet. The microphone stops.



The prayer card for the bread, opened from the demo conducting sheet.

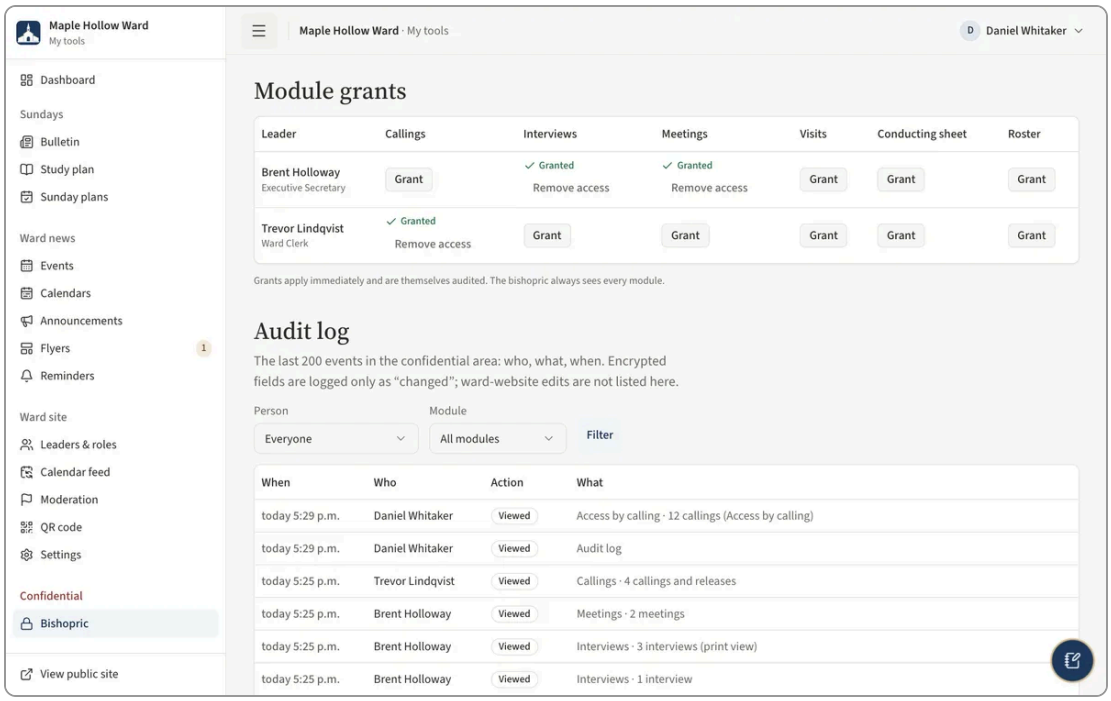
> ⓘ **Tip.** Nothing is recorded or saved — listening happens on your device or in the browser's speech service, and only while the card is open. Without a microphone the card still shows the whole prayer.

> 🕮 **Handbook note.** If a sacrament prayer wording error is not corrected by the person praying, the bishop kindly asks for it to be repeated (GH 18.9.4).

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09 Grant modules and review the audit log

1. Open **Access & audit**. Under **Module grants**, find the executive secretary or ward clerk.
2. Choose **Grant** under the module they need — **Callings**, **Interviews**, **Meetings**, **Visits** or **Conducting sheet**. Choose **Remove access** to take it back.
3. Under **Audit log**, filter by **Person** or **Module** and choose **Filter** to see who viewed or changed what, and when.



Module grants and the audit log in the demo ward.

> **Tip.** Grants apply immediately and are themselves audited. The attention list is never grantable (GH 22.4.5).

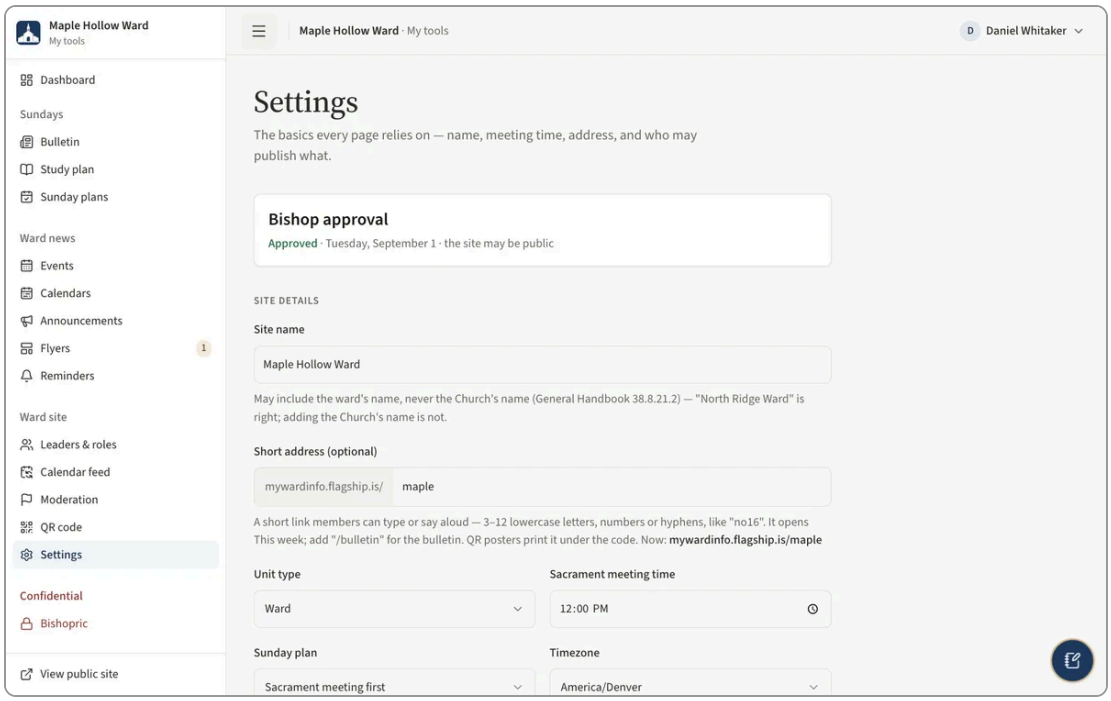
> **Tip.** Module grants are the bishop's to give. Counselors see the same grants and audit log read-only, with the note **The bishop manages module access.**

> **Tip.** Use the buttons on **Access & audit** to grant modules (not the switches under **Leaders & roles**).

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10 Approve the site and share the join code

1. Open **Admin**, then **Settings**.
2. Under **Bishop approval**, tick **As bishop, I approve this site for the ward** and choose **Record approval**. Only then can the site be made public.
3. Under **Join code**, choose **Copy** to share the code in person or in ward meetings. **Rotate code** makes a new one; the old code stops working.



Ward settings in the demo ward (the join code is not shown here).

> 🕮 **Handbook note.** A ward website must first be approved by the bishop (GH 38.8.21.2). Members who join with the code become members only — never leaders.

UAT checklist

Tick each flow once you have confirmed it works as described. Note anything unexpected — a wrong label, a missing button, an error — under “What did you see?” and send it to your UAT coordinator.

- [ ] **Home** shows the stale attention entry, the overdue calling step and the past-due assignment
- [ ] **Add person** adds an entry dated today; **Still current** clears **Stale**
- [ ] A calling moves through its stages; **Add to Sunday business** (in the row's **More** menu) puts it on a draft program
- [ ] **Set apart** and **Recorded in LCR** (in **More**) move the calling to the cleared section
- [ ] **Schedule** adds an interview; the day view shows the overlap warning; **Add several** fills **To be scheduled**
- [ ] **Plan a visit** and **Mark done** work; the linked attention entry gets the follow-up date
- [ ] **New meeting** creates an agenda from the template with carried-forward assignments
- [ ] The conducting sheet ticks collapse steps and **Show** peeks; ward business names appear on the sheet but not on the public program
- [ ] **Bread** and **Water** flip the box into the prayer card; tapping the card or the X flips it back
- [ ] **Grant** on **Access & audit** gives the executive secretary a module; the grant appears in the **Audit log**
- [ ] **Bishopric digest** on **My account** turns off and on

What did you see?

Account used, date, device, and anything that did not match this guide.

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