TRAINING GUIDE · WARD LEADERSHIP

Counselor in the bishopric

Counselors work in the same confidential bishopric workspace as the bishop: the attention list, callings, interviews, visits and agendas. On the Sundays you conduct, the conducting sheet walks you through the meeting, and the Visits page shows the visits assigned to you.

Demo sign-in (Demo accounts → Sign in with email and password):

`counselor1@steepl.test` · password `counselor`
`counselor2@steepl.test` · password `counselor`

What you can do

- See the bishopric **Home** and every bishopric module, the same as the bishop (**Access & audit** is read-only for you)
- Conduct sacrament meeting from the **Conducting sheet** on the Sundays you are assigned
- See the visits assigned to you with **Mine** and mark them done
- Schedule the interviews you hold and keep callings moving through their stages
- Edit everything on the ward site (bulletin, calendar, announcements), as all bishopric members can

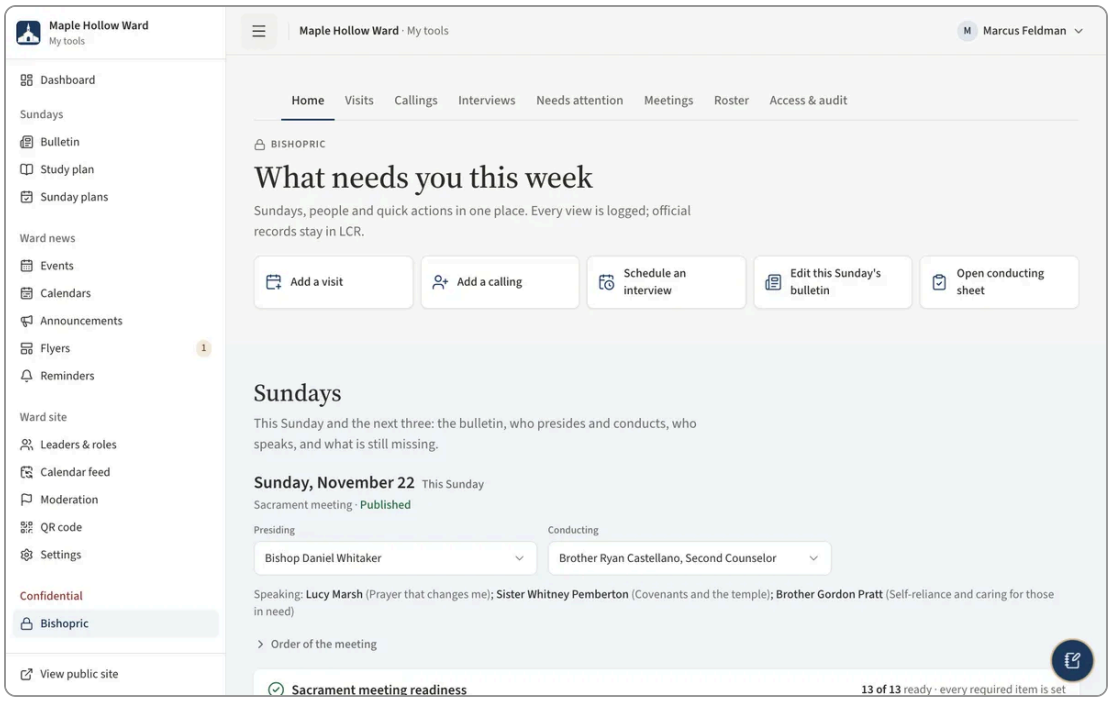
Before you start

- 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. 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**, with **Admin** and **Bishopric** in the ward menu.
- 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.

- 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.
- Only the bishop's account can record the site approval in **Settings**. **Access & audit** is read-only for counselors: you can see which modules the executive secretary and clerk have and read the **Audit log**, and the page notes **The bishop manages module access.** The module switches under **Leaders & roles** are turned off for you as well.

01 Check Home before bishopric meeting

1. Open **Bishopric**; **Home** is titled **What needs you this week**.
2. Under **Sundays**, check the Sundays you conduct and who speaks.
3. Under **People**, find the interviews you hold in **Interviews this week**, your visits in **Visits**, stale entries you own in **Needs attention** and past-due **Follow-ups from meetings**.



The bishopric Home for the demo ward, signed in as the first counselor (sample data).

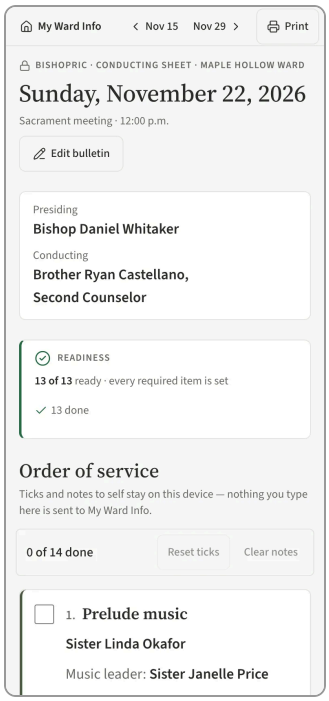
> ⓘ **Tip.** When the ward's LCR reports are getting old (about every three months), or hold no e-mail addresses, a notice appears at the top of the **Dashboard** and the bishopric **Home**. Choose **Upload LCR reports** to open **Roster** and upload fresh ones, or **Remind me later** to hide it for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

1. Open **Conducting sheet** on your phone before the meeting — 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; **My Ward Info** at the top left returns to the full app.
2. Read **Readiness**. Anything missing links to the bulletin field — fix it there or tell the editor.
3. Follow the **Order of service** — one list, each step marked with a coloured edge. **Suggested wording** gives a script for the welcome and business. Tick each step as you go; it collapses — choose **Show** to look again.
4. **Ward business** lists the names to read; members' programs show only a bare **Ward business** line.
5. At the sacrament, use the **Bread** and **Water** tiles (see the next task).
6. Prefer paper? Choose **Print** at the top — your notes to self stay on your phone and are not printed.



The conducting sheet in the demo ward, signed in as a counselor.

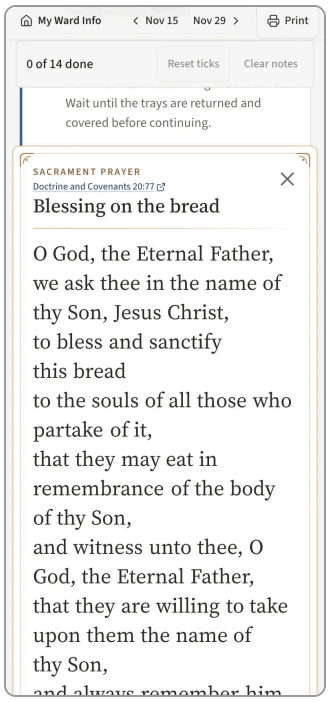
> **Handbook note.** Callings are confidential until the person is presented (GH 30.1.4). Releases are read before sustainings.

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03 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 by the demo first counselor.

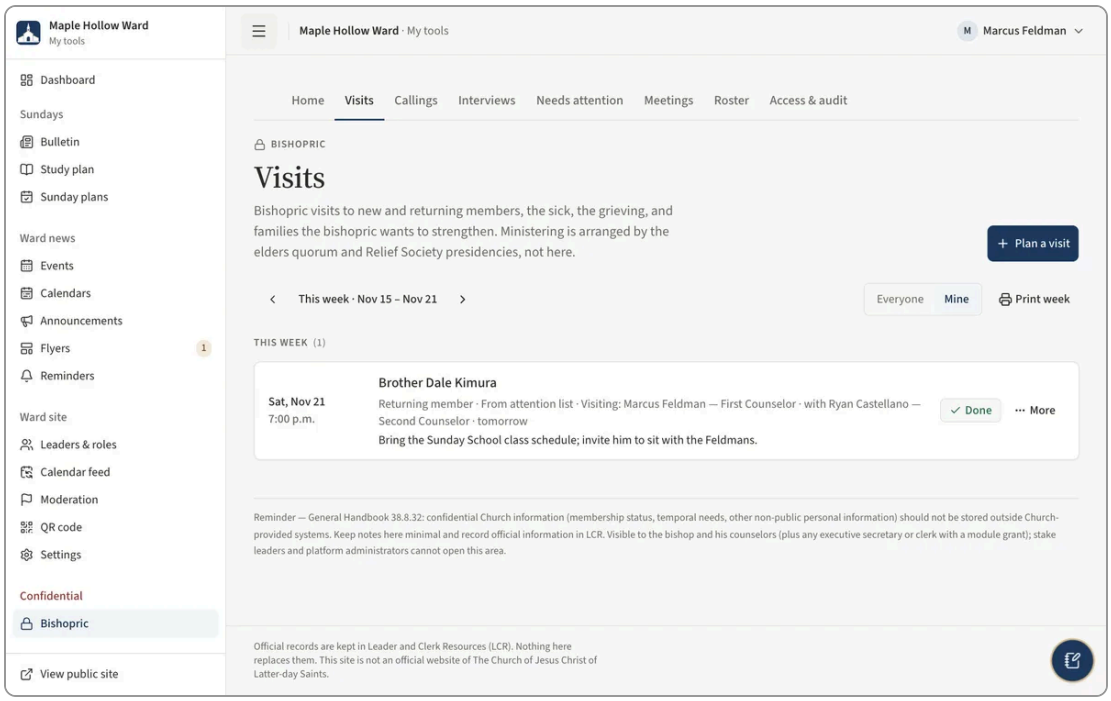
> ⓘ **Tip.** Nothing is recorded or saved — listening happens on your device or in the browser's speech service, and only while the card is open. Without a microphone the card still shows the whole prayer.

> 🕮 **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) — follow along so you can tell him.

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04 See and record the visits assigned to you

1. Open **Visits** and choose **Mine** under **Whose visits**.
2. Visits for this week are under **This week**; missed ones show **Overdue**.
3. After a visit, choose **Done**, add a short **Outcome (confidential)** if needed, and **Mark done**.
4. Choose **Print week** with **Only mine** for a list to take with you.



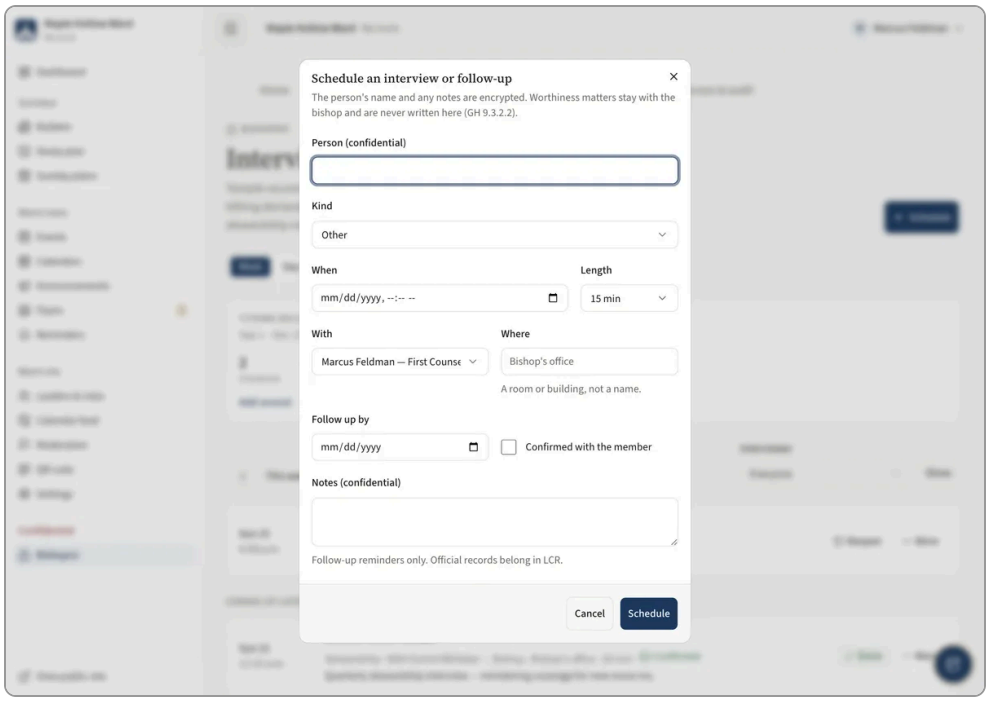
Visits assigned to the demo first counselor.

> **Tip.** If **Mine** shows nothing, your calling may not be linked in **Leaders & roles** yet — ask the clerk.

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05 Schedule the interviews you hold

1. Open **Interviews** and choose **Schedule**.
2. Enter the **Person (confidential)** and **Kind**, choose **When**, and pick yourself under **With**, then **Schedule**.
3. Use **Day** to see your column for a Sunday; the **Interviewer** filter on **Week** shows only yours.
4. After the interview, choose **Done** and **Mark done**; add a follow-up date if one is needed.



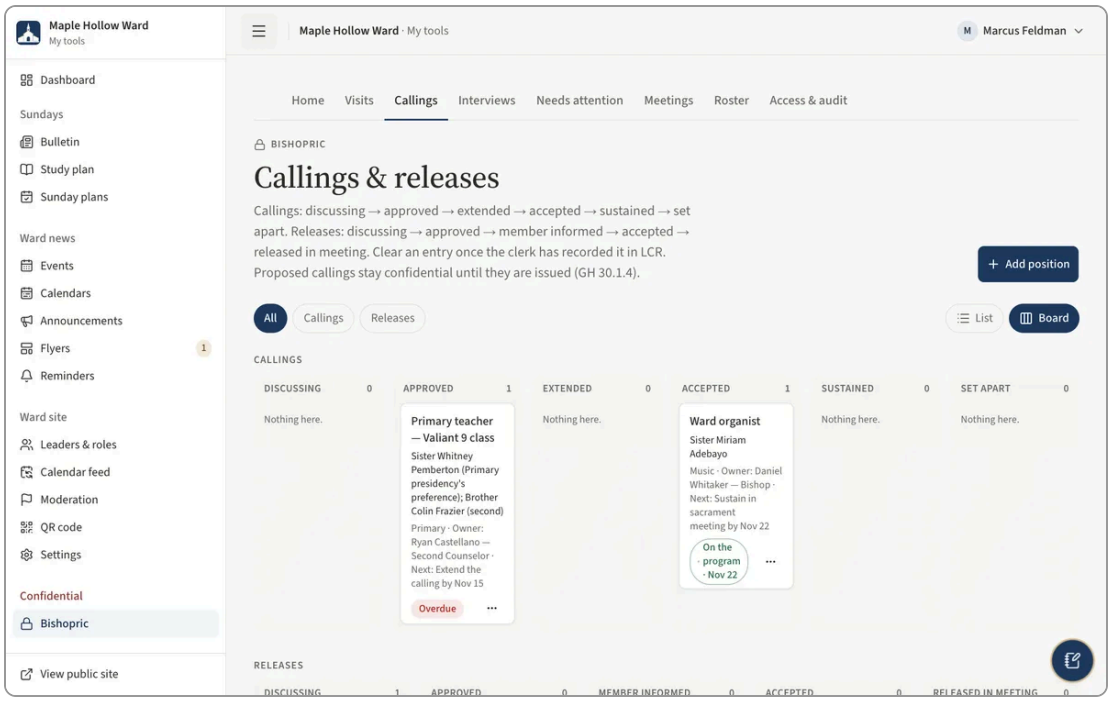
Scheduling an interview in the demo ward.

> **Confidential.** Worthiness matters are never written here (GH 9.3.2.2). Record nothing about tithing status.

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06 Move the callings you own

1. Open **Callings**. Your entries show **Owner:** with your name and the next step.
2. Change the stage with the status list on the row, or open the card and update the next step and its **By** date (in list view, **Edit** is in the row's **More** menu).
3. An overdue next step shows **Overdue**. Update it after you extend a calling.



The demo callings pipeline in board view.

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.

- [ ] Signed in as a counselor, **Bishopric** opens **Home** (**What needs you this week**)
- [ ] The conducting sheet opens on this Sunday; ticks collapse steps and **Show** peeks
- [ ] **Bread** and **Water** flip the box into the prayer card; tapping the card or the X flips it back
- [ ] **Mine** on **Visits** lists only your visits; **Mark done** records one
- [ ] **Schedule** adds an interview with you as interviewer
- [ ] Changing a calling's status saves with **Status updated.**
- [ ] In **Settings**, the approval card says only the bishop's account can record it
- [ ] **Access & audit** shows the module grants without **Grant** buttons and says **The bishop manages module access.**

What did you see?

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

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