

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.

UAT test account: `bishop@steep1.test` — password from your UAT coordinator.

What you can do

- See **On track**: this Sunday's readiness, 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

Before you start

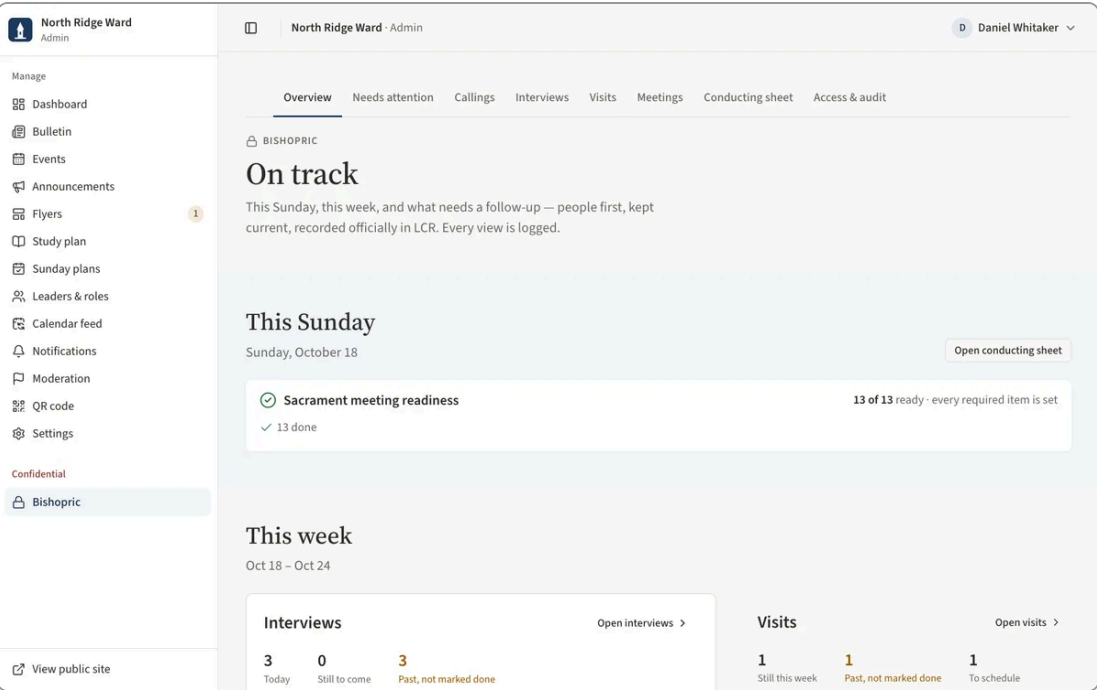
- In your ward, choose **Sign in with Google** and use the Google account the stake or a platform administrator granted. UAT testers: on **Sign in to steep1** choose **Sign in with email**, enter the test account e-mail and the password from your UAT coordinator, then **Sign in**.
- After sign-in you 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 **Overview** · **Needs attention** · **Callings** · **Interviews** · **Visits** · **Meetings** · **Conducting sheet** · **Access & audit** — you see only the ones your calling or grant covers. 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 on by default. Turn it off or on under **My account** → **Bishopric digest**.

01 Start from “On track”

The overview gathers what needs you this Sunday and this week.

- 1 Open **Bishopric**. The page title is **On track**, with the lock and **Bishopric** above it.
- 2 The navy **This Sunday** band shows **Sacrament meeting readiness**; choose **Open conducting sheet** to see the details.
- 3 **This week** puts **Interviews** and **Visits** side by side, each with a row of counts. Anything **Past, not marked done** is counted in amber.
- 4 Below, **Needs attention**, **Callings & releases** and **Meetings** show stale entries, overdue steps and past-due assignments, each with a link to the full list.
- 5 **Season** shows tithing declaration progress; **Coming up (60 days)** lists Sunday plans and yearly events that still need an owner.

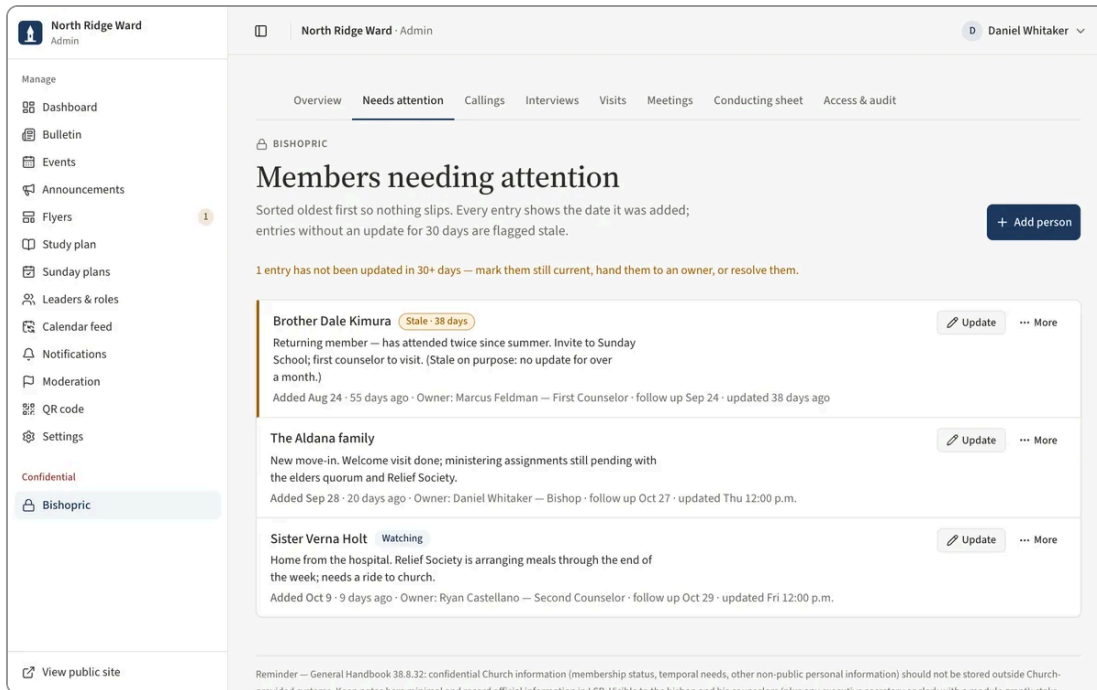


On track for the fictional demo ward, North Ridge Ward — all names are sample data.

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

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 screenshot shows the 'Members needing attention' page within the 'North Ridge Ward - Admin' workspace. The page has a sidebar with navigation options like Dashboard, Bulletin, Events, Announcements, Flyers, Study plan, Sunday plans, Leaders & roles, Calendar feed, Notifications, Moderation, QR code, and Settings. The main content area shows a list of members needing attention, sorted oldest first. The first entry is 'Brother Dale Kimura', marked as 'Stale - 38 days'. The second entry is 'The Aldana family', marked as 'New move-in'. The third entry is 'Sister Verna Holt', marked as 'Watching'. Each entry includes a description of the situation, the date it was added, the owner, and the follow-up date. There are 'Update' and 'More' buttons for each entry. A warning message at the top states: '1 entry has not been updated in 30+ days — mark them still current, hand them 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.

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 screenshot displays the 'North Ridge Ward Admin' interface. The left sidebar contains a 'Manage' section with links to Dashboard, Bulletin, Events, Announcements, Flyers, Study plan, Sunday plans, Leaders & roles, Calendar feed, Notifications, Moderation, QR code, and Settings. Below this is a 'Confidential' section with a link to Bishopric. The main content area is titled 'Callings & releases' and includes a sub-header 'BISHOPRIC'. It provides a pipeline overview: 'Callings: discussing → approved → extended → accepted → sustained → set apart. Releases: discussing → approved → member informed → accepted → released in meeting. Clear an entry once the clerk has recorded it in LCR. Proposed callings stay confidential until they are issued (GH 30.1.4)'. There are tabs for 'All', 'Callings', and 'Releases', and buttons for '+ Add position', 'List', and 'Board'. A table lists three items: 'Ward organist' (On the program - Oct 18), 'Primary teacher — Valiant 9 class' (Overdue), and 'Aaronic Priesthood quorum adviser (deacons quorum)'. The 'Ward organist' row has a 'More' menu open, showing options: 'Accepted' (selected), 'Edit', 'Edit the published bulletin', and 'Remove'. The 'Primary teacher' row has a status of 'Overdue' and a 'More' menu with 'Approved' selected. The 'Aaronic Priesthood' row has a status of 'Discussing' and a 'More' menu.

The demo callings pipeline for North Ridge 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.

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).

The screenshot shows the 'North Ridge Ward Admin' interface. The sidebar on the left contains a 'Manage' section with various tools like Dashboard, Bulletin, Events, Announcements, Flyers, Study plan, Sunday plans, Leaders & roles, Calendar feed, Notifications, Moderation, QR code, and Settings. Below this is a 'Confidential' section with 'Bishopric'. The main content area is titled 'North Ridge Ward - Admin' and shows the 'Interviews & follow-ups' section. It includes a 'TITHING DECLARATION SEASON' panel with a progress bar showing 2 Scheduled, 0 Done, and 0 To be scheduled. Below this, there is a list of interviews for 'This week · Oct 18 - Oct 24'. The first entry is for Brother Kevin Tanaka on Sun 18 at 11:15 a.m., with details about the stewardship and quarterly interview. The second entry is for Brother and Sister Pemberton on Sun 18. Each entry has a 'Done' button and a 'More' menu.

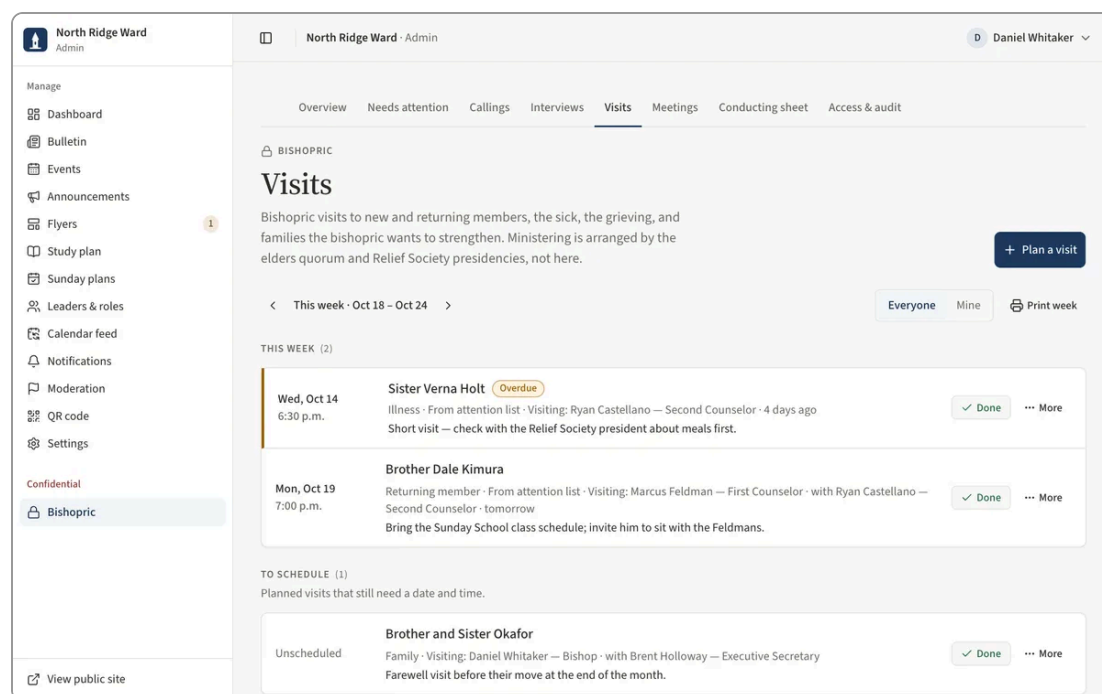
A week of interviews in the demo ward; switch to Day for one column per interviewer and Print sheet.

 **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.

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.



North Ridge Ward Admin

Overview Needs attention Callings Interviews **Visits** Meetings Conducting sheet Access & audit

BISHOPRIC

Visits

Bishopric visits to new and returning members, the sick, the grieving, and families the bishopric wants to strengthen. Ministering is arranged by the elders quorum and Relief Society presidencies, not here.

+ Plan a visit

< This week · Oct 18 – Oct 24 >

Everyone Mine Print week

THIS WEEK (2)

Wed, Oct 14 6:30 p.m.	Sister Verna Holt Overdue Illness · From attention list · Visiting: Ryan Castellano — Second Counselor · 4 days ago Short visit — check with the Relief Society president about meals first.	✓ Done ... More
Mon, Oct 19 7:00 p.m.	Brother Dale Kimura Returning member · From attention list · Visiting: Marcus Feldman — First Counselor · with Ryan Castellano — Second Counselor · tomorrow Bring the Sunday School class schedule; invite him to sit with the Feldmans.	✓ Done ... More

TO SCHEDULE (1)

Planned visits that still need a date and time.

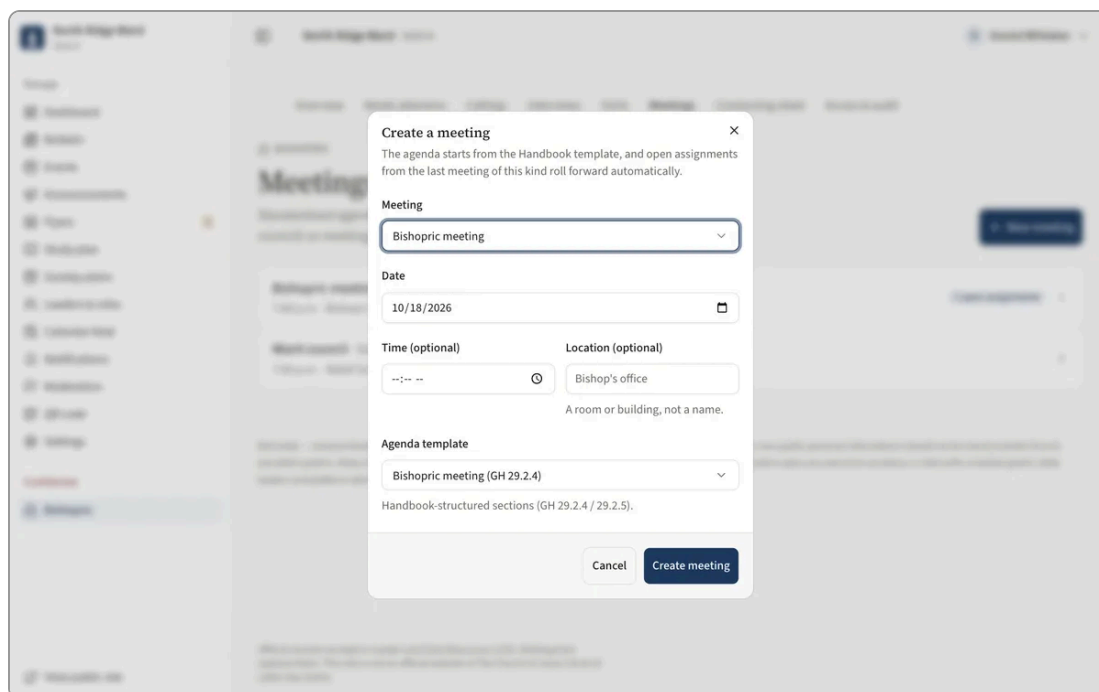
Unscheduled	Brother and Sister Okafor Family · Visiting: Daniel Whitaker — Bishop · with Brent Holloway — Executive Secretary Farewell visit before their move at the end of the month.	✓ Done ... More
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The demo ward's visits this week.

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

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.



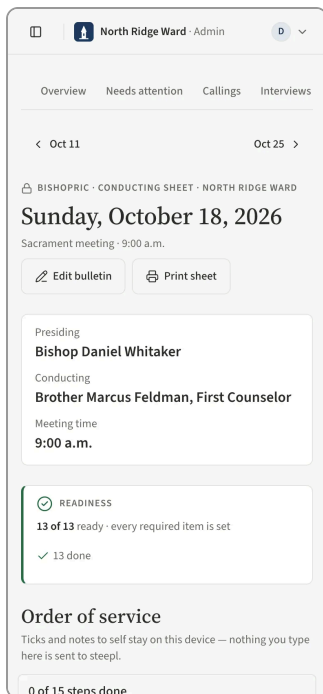
Creating a bishopric meeting from the Handbook template in the demo ward.

- 🔒 **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.

07 Conduct sacrament meeting from your phone

- 1 Open **Conducting sheet**. It opens on this Sunday; use the arrows for another week.

- 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 sheet** for a paper copy. Ticks and notes to self stay on your device only.



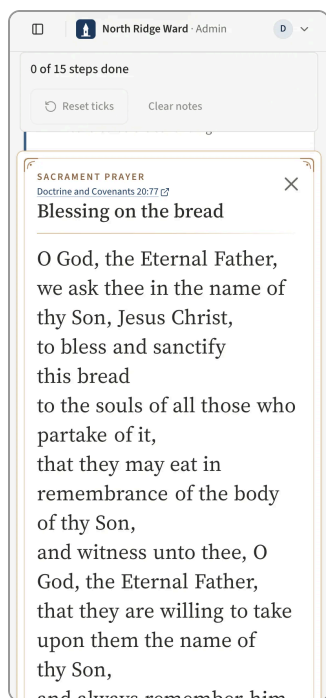
The conducting sheet for this Sunday in the demo ward.

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).

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.

North Ridge Ward Admin

Overview Needs attention Callings Interviews Visits Meetings Conducting sheet **Access & audit**

BISHOPRIC

Access & audit

Grant the executive secretary or ward clerk specific modules. The attention list is never grantable (GH 22.4.5).

Module grants

Leader	Callings	Interviews	Meetings	Visits	Conducting sheet
Brent Holloway Executive Secretary	<button>Grant</button>	✓ Granted <button>Remove access</button>	✓ Granted <button>Remove access</button>	<button>Grant</button>	<button>Grant</button>
Trevor Lindqvist Ward Clerk	✓ Granted <button>Remove access</button>	<button>Grant</button>	<button>Grant</button>	<button>Grant</button>	<button>Grant</button>

Grants apply immediately and are themselves audited. The bishopric always sees every module.

Audit log

The last 200 events in the confidential area: who, what, when. Encrypted fields are logged only as "changed"; ward-website edits are not listed here.

Person: Everyone Module: All modules Filter

When	Who	Action	What
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Module grants and the audit log in the demo ward.

- ❶ **Tip.** Grants apply immediately and are themselves audited. The attention list is never grantable (GH 22.4.5).
- ❷ **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.**
- ❸ **Tip.** Use the buttons on **Access & audit** to grant modules (not the switches under **Leaders & roles**).

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.

North Ridge Ward
Admin

Manage

- Dashboard
- Bulletin
- Events
- Announcements
- Flyers
- Study plan
- Sunday plans
- Leaders & roles
- Calendar feed
- Notifications
- Moderation
- QR code
- Settings

Confidential

- Bishopric

North Ridge Ward · Admin
Daniel Whitaker

ADMIN

Settings

The basics every page relies on — name, meeting time, address, and who may publish what.

Visible to ward editors and the bishopric. Stake leaders see the ward read-only from their stake pages.

Bishop approval

Approved · Tuesday, September 1 · the site may be public

SITE DETAILS

Site name

May include the ward's name, never the Church's name (General Handbook 38.8.21.2) — "North Ridge Ward" is right; adding the Church's name is not.

Unit type

Sacrament meeting time

Sunday plan

Timezone

GH 29.2.8 — which hour comes first.

Meetinghouse address

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.

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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.

- ☐ **On track** 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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