

Ward executive secretary

The executive secretary keeps the bishopric's calendar: interview appointments (including tithing declaration), the Sunday interview sheet, and meeting agendas with their assignments. He sees only the bishopric modules the bishop grants, and can edit the whole ward site like any site editor.

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

What you can do

- Schedule interviews in a week or day view and print the Sunday interview sheet
- Add a list of tithing declaration appointments at once with **Add several**
- Create bishopric and council meetings from Handbook templates and track assignments
- Use **Visits** or the **Conducting** sheet only when the bishop grants them
- Edit the bulletin, calendar, announcements and the rest of the ward site

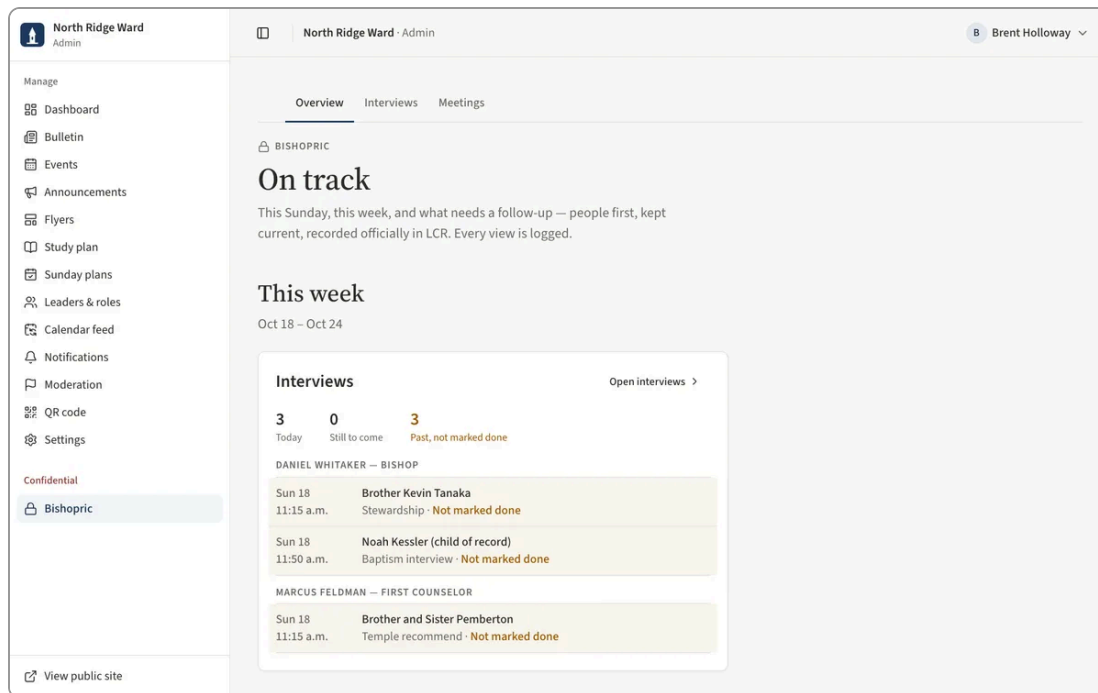
Before you start

- To sign in, choose **Sign in with Google**. 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**.
- In the admin sidebar, the **Confidential** group shows **Bishopric** once the bishop has granted you at least one module. Inside, you see **Overview** plus your granted tabs (the demo account has **Interviews** and **Meetings**).
- **Needs attention** and **Access & audit** are for the bishop and his counselors only and are never granted.
- 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.

01 Know what your grants show

- 1 Open **Admin**, then **Bishopric** under **Confidential**.
- 2 The tabs show only the modules the bishop has granted you; the line at the bottom of each page says the area is visible to you for those modules.

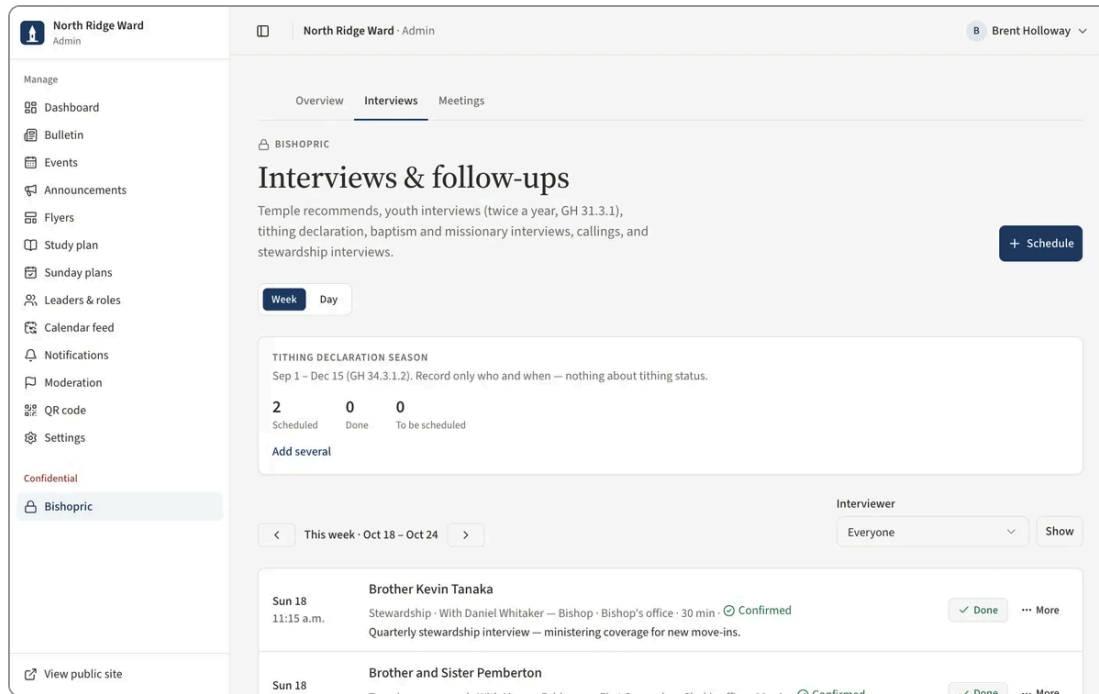
- 3 **On track** shows only the sections for your modules — for example **This week** interviews and **Meetings**.



The demo executive secretary's view, with the interviews and meetings grants.

02 Schedule interviews

- 1 Open **Interviews** and choose **Schedule**.
- 2 Enter the **Person (confidential)**, choose the **Kind**, **When**, **Length** (15 min by default) and **With**.
- 3 Add **Where** (a room, not a name), tick **Confirmed with the member** once they agree, and choose **Schedule**.
- 4 Use **Week** with the **Previous week** / **Next week** arrows, or **Day** for one Sunday with a column per interviewer.
- 5 Requests without a time go to **To be scheduled** — choose **Schedule** on the row when you have one. To change or remove an appointment, open the row's **More** menu and choose **Edit** or **Remove**.



The demo ward's interviews this week.

- ❗ **Tip.** A save that clashes with the same interviewer's appointment warns **It overlaps another interview with the same interviewer.** — back-to-back is fine.

03 Add tithing declaration appointments in bulk

- 1 On Interviews, find Tithing declaration season and open Add several.
- 2 Type one family or person per line under **Names (confidential)**, one per line (up to 40).
- 3 Pick **With** and choose **Add to To be scheduled**.
- 4 Give each one a time from **To be scheduled** with **Schedule**.

North Ridge Ward Admin

TITHING DECLARATION SEASON
Sep 1 – Dec 15 (GH 34.3.1.2). Record only who and when — nothing about tithing status.

2 Scheduled **0** Done **0** To be scheduled

Add several

Names (confidential), one per line

The Pemberton family
Brother and Sister Aldana

Up to 40 lines. Names are encrypted. Never record amounts or tithing status.

With

—

Add to To be scheduled

Interviewer
Everyone

This week · Oct 18 – Oct 24

Date	Person	Details	Status	Actions
Sun 18 11:15 a.m.	Brother Kevin Tanaka	Stewardship · With Daniel Whitaker — Bishop · Bishop's office · 30 min · ☑ Confirmed Quarterly stewardship interview — ministering coverage for new move-ins.	Confirmed	Done More
Sun 18 11:15 a.m.	Brother and Sister Pemberton	Temple recommend · With Marcus Feldman — First Counselor · Clerk's office · 20 min · ☑ Confirmed Recommend renewal interviews; recommends recorded in LCR.	Confirmed	Done More

Tithing declaration season in the demo ward.

Confidential. Record only who and when (GH 34.3.1.2). Never amounts or tithing status.

04 Print the Sunday interview sheet

- 1 On Interviews, choose Day. It opens on next Sunday; Next Sunday jumps back to it.
- 2 Choose Print sheet.
- 3 Check the sheet — time, person, kind, with, location and confirmed — and choose Print.

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

View public site

North Ridge Ward - Admin

Brent Holloway

Overview

Interviews

Meetings

← Back to the day

Print

NORTH RIDGE WARD

Interview schedule

Sunday, October 18, 2026

TIME	PERSON	KIND	WITH	LOCATION	CONFIRMED
11:15 a.m. 30 min	Brother Kevin Tanaka	Stewardship	Daniel Whitaker	Bishop's office	✓
11:15 a.m. 20 min	Brother and Sister Pemberton	Temple recommend	Marcus Feldman	Clerk's office	✓
11:50 a.m. 15 min	Noah Kessler (child of record)	Baptism interview	Daniel Whitaker	Bishop's office	✓

Confidential — do not post. For the executive secretary and the bishopric. Official records are kept in LCR.

Reminder — General Handbook 38.8.32: confidential Church information (membership status, temporal needs, other non-public personal information) should not be stored outside Church-provided systems. Keep notes here minimal and record official information in LCR. Visible to you for the modules the bishop has granted; stake leaders and platform administrators cannot open this area.

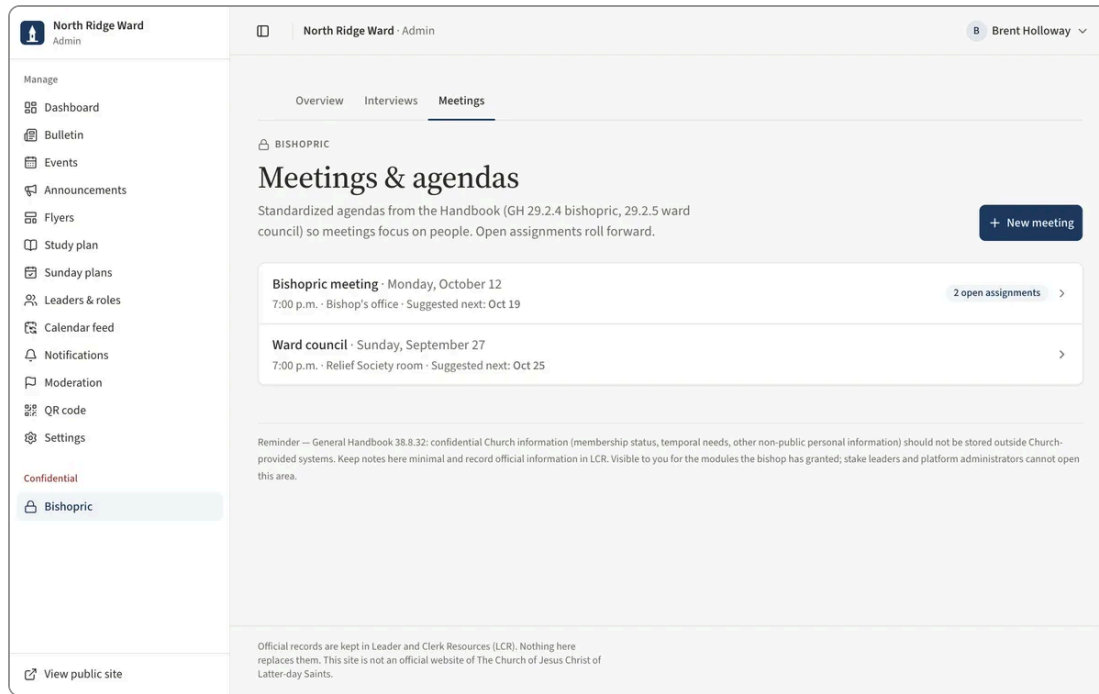
Official records are kept in Leader and Clerk Resources (LCR). Nothing here replaces them. This site is not an official website of The Church of Jesus Christ of

The demo ward's Sunday interview sheet, ready to print.

 **Confidential.** The sheet says **Confidential — do not post**. Notes are never printed; shred it after Sunday.

05 Prepare agendas and track assignments

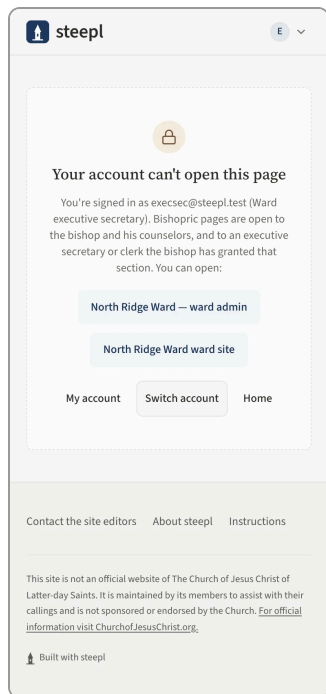
- 1 Open Meetings and choose **New meeting**. Pick **Bishopric meeting**, **Ward council** or **Ward youth council**, the **Date**, and the **Handbook Agenda template**, then **Create meeting**.
- 2 Open assignments from the last meeting of that kind are carried forward automatically.
- 3 During the meeting, choose **Add assignment**, enter the assignment, owner and due date, and **Add**. Tick it when done.
- 4 Choose **Print agenda** for paper copies. Back on **Meetings**, the latest meeting of each kind shows **Suggested next**: with a date — use **New meeting** to set it up.



Meetings in the demo ward.

06 When a page needs a grant

- 1 Visits and the Conducting sheet open only if the bishop grants them on Access & audit.
- 2 Without the grant, the page says Your account can't open this page and explains who can.
- 3 Ask the bishop; a grant takes effect immediately.

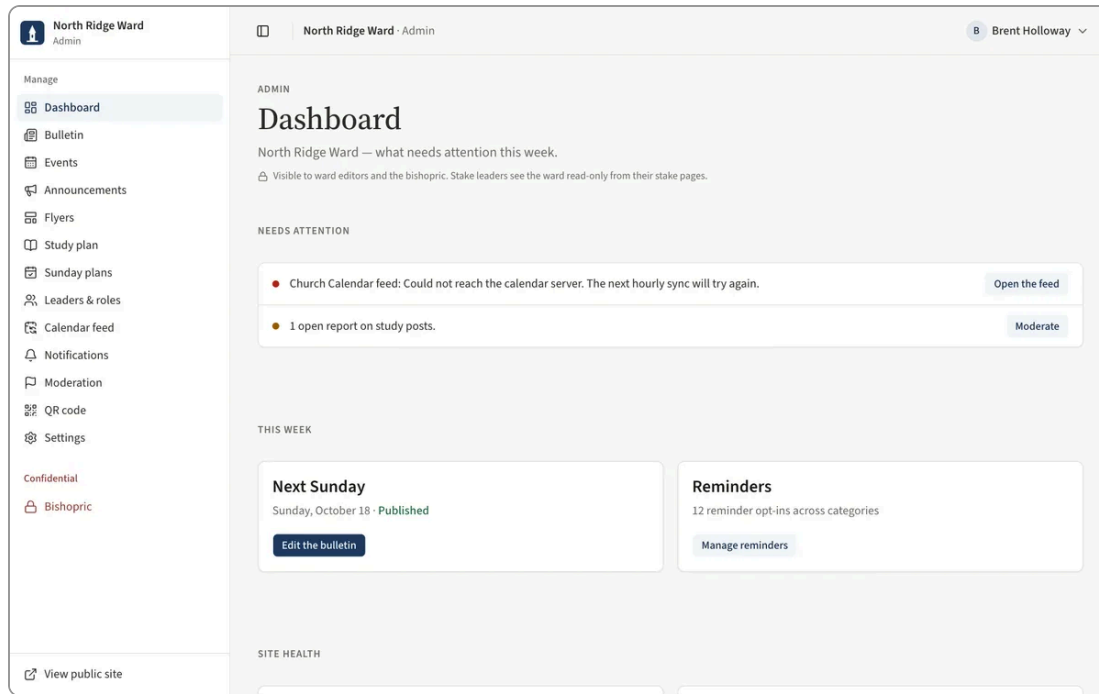


Opening Visits without the visits grant (demo executive secretary).

07 Edit the ward site

As executive secretary you are a full ward editor. The site editor guide covers each page in detail.

- 1 Open **Admin**. The sidebar lists **Dashboard**, **Bulletin**, **Events**, **Announcements** and the other ward pages. On a phone or a tablet held upright, open it with the menu button at the top left.
- 2 The **Dashboard** lists what needs attention this week — a missing program, announcements waiting for approval.
- 3 Open **Bulletin** and choose a Sunday's date to fill in or publish its program.



The demo ward's admin dashboard.

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.

- ☐ **Bishopric** shows only **Overview**, **Interviews** and **Meetings** for the demo account
- ☐ **Schedule** adds an interview; leaving **When** empty puts it under **To be scheduled**
- ☐ **Add several** adds tithing declaration rows to **To be scheduled**
- ☐ **Print sheet** opens the Sunday interview schedule without notes
- ☐ **New meeting** creates an agenda; **Add assignment** adds an owner and due date
- ☐ Opening **Visits** without a grant shows **Your account can't open this page**
- ☐ After the bishop grants **Visits**, the tab appears and opens

What did you see?

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

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