

Introduction to the Member and Leader Services (MLS) Software

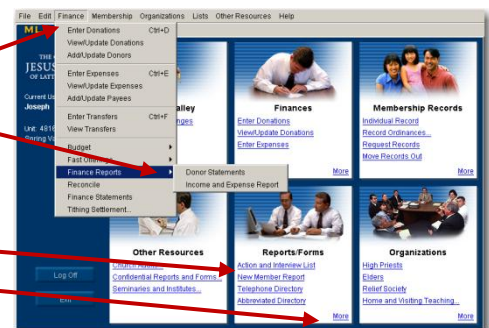
MLS basics

- MLS has been developed to make Church record-keeping easier and more efficient.
- Ward and stake clerks should learn how to use all MLS functions.
- Assistant clerks should become specialists in MLS functions related to their responsibilities.
- Clerks and assistant clerks should teach quorum, group, and auxiliary secretaries to use MLS functions specifically related to their callings.
- Ward clerks should contact the stake clerk if they have questions or need help using MLS.
- Each MLS user must log in to the system using his or her own username and password.
- Always remember to log off MLS when you have completed your work. Click **Log Off** or **Exit**.
- All users should understand that the information found in MLS is confidential and may be used only for official Church business.
- Depending on your access rights, you may not see all of the panels and links shown in this training when you log in to MLS.



There are two ways to navigate MLS:

1. Use the menu bar at the top of the screen. Menu items with arrows to the right contain submenus with additional options.
2. Click the underlined text on the screen. Click **More** to view additional options.



For more training about record-keeping and auditing, please to go www.lds.org.

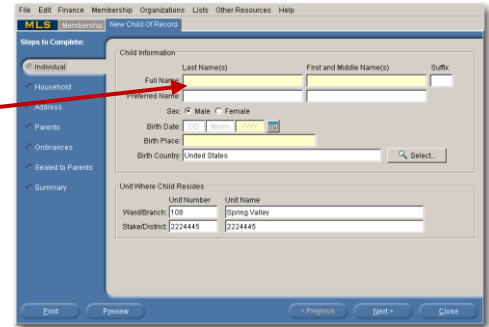
The Unit panel has a number of options including:

- **Send/Receive Changes.** Allows you to send data to and receive data from the administration office electronically.
- **Urgent Tasks.** Identifies tasks that are normally part of a clerk's duties that haven't been completed yet.
- **Messages.** Allows you to communicate easily with the administration office and with your stake leaders.
- **Change Password.** Allows you to change your MLS password.
- **System Options.** Allows you to configure MLS for use in your ward.



When entering information in MLS, use the **Tab** key to move between fields.

Some fields are highlighted. This means that the information requested in these fields is required. However, you should enter information in every field if the information is available.



MLS helps you with the following tasks:

- Record changes to membership records.
- Move membership records from one ward to another.
- Record ordinances and print certificates.
- Print reports, directories, and action lists.
- Keep track of temple recommends.
- Send membership data to the stake electronically.
- Print and transmit the Quarterly Report.
- Manage information about callings and classes for auxiliaries and quorums.
- Organize and keep track of home and visiting teaching.
- Communicate with the stake and administration office.
- Record donation information.
- Record expenses and print checks (in some areas).
- Establish budget categories and track budget expenses against the budget allocation.
- Record tithing declarations, and print and transmit the Tithing Declaration Report.
- Print official year-end donation receipts.