

# Training on Digital New Member Baptism Form (CDE Replacement)

September 29, 2021

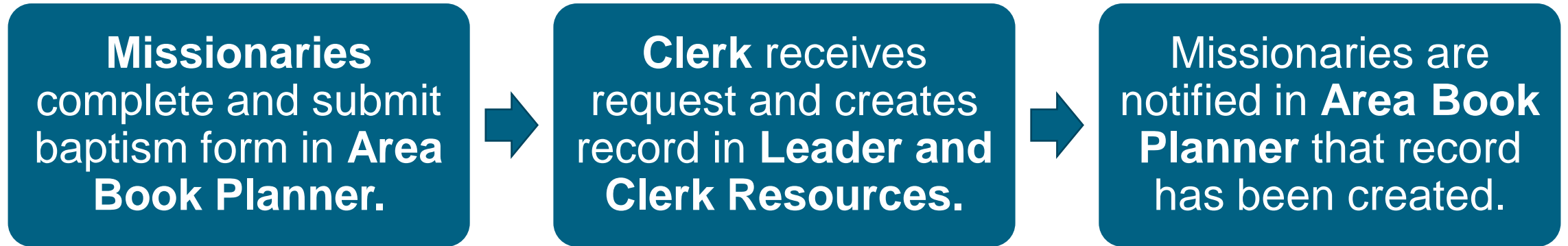
# Introduction

**A letter from the First Presidency dated August 31, 2018, provided the following instruction:**

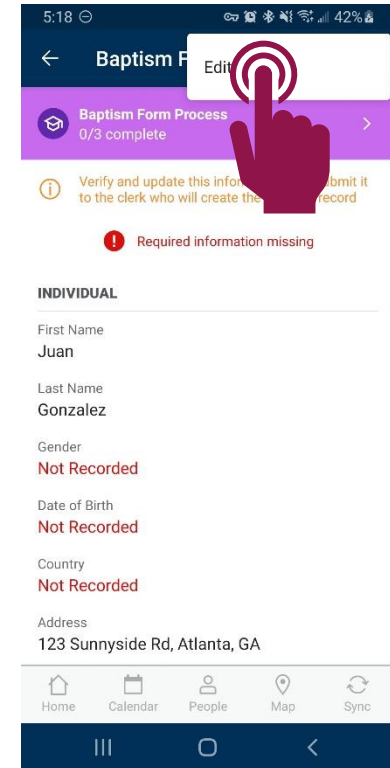
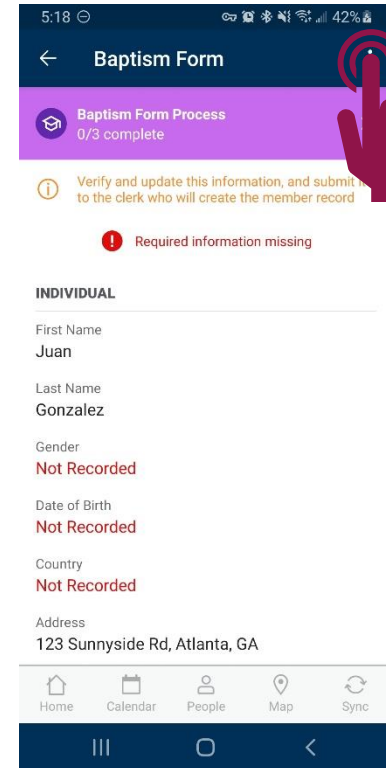
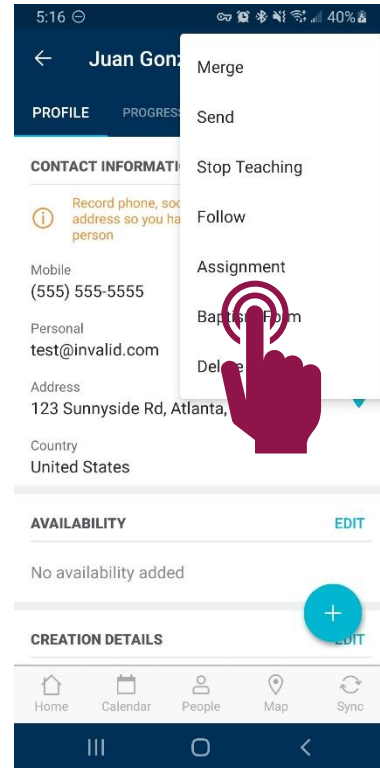
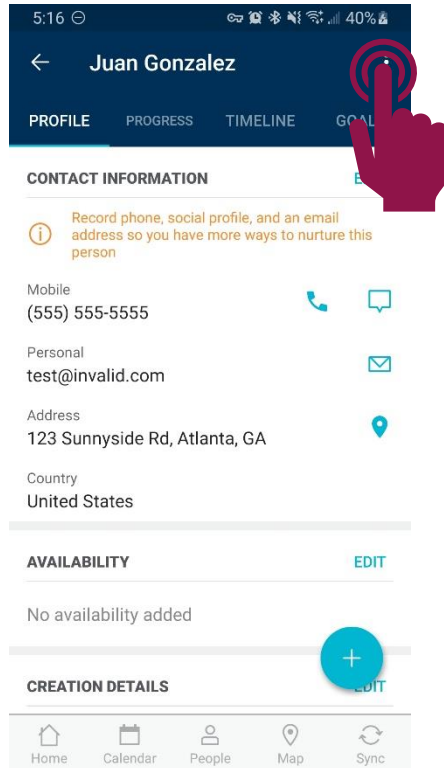
“All new members age twelve and older should be interviewed by the bishop to receive a limited-use temple recommend soon after their confirmation, normally within a week. The interview for adult and young men should also be for ordination to the Aaronic Priesthood. A man or young man who is worthy to be baptized and confirmed is worthy to receive the Aaronic Priesthood” (First Presidency Letter, August 31, 2018).

**In order to support this instruction, it is essential to create a new member record promptly.**

# High-Level Process Flow



# Missionaries Complete and Submit Baptism Form



When a new member is baptized and confirmed, the full-time missionaries submit the new member information using the Area Book Planner app.

# Missionaries Complete and Submit Baptism Form

5:32 52%

× Edit

INDIVIDUAL

First Name  
Juan

Last Name  
Gonzalez

Gender  
Male

Date of Birth  
Tuesday, January 6, 2009

Signature Recorded  
CLEAR SIGNATURE

Birth Place

Birth Country  
United States

5:32 52%

← Baptism Form

Baptism Form Process  
0/3 complete

Verify and update this information, and submit it to the clerk who will create the member record

INDIVIDUAL

First Name  
Juan

Last Name  
Gonzalez

Gender  
Male

Date of Birth  
Tuesday, January 6, 2009

Signature  
Signature Recorded

Country

SUBMIT

Home Calendar Map Sync

5:33 53%

← Baptism Form

Baptism Form Process  
0/3 complete

Verify and update this information, and submit it to the clerk who will create the member record

INDIVIDUAL

Confirm Send  
Are you sure you want to submit this form to the clerk? You cannot edit it after submitting.

CANCEL SEND

Tuesday, January 6, 2009

Signature  
Signature Recorded

Country

SUBMIT

Home Calendar People Map Sync

5:33 53%

← Baptism Form

Baptism Form Process  
0/3 complete

The baptism form has been submitted to the clerk. Follow-up with the clerk as needed.

INDIVIDUAL

Success  
The form was submitted successfully!

Tuesday, January 6, 2009

Signature  
Signature Recorded

Country  
United States

Address  
123 Sunnyside Rd, Atlanta, GA

Home Calendar People Map Sync

4:59 96%

← Juan Gonzalez

PROFILE PROGRESS TIMELINE GOALS

Member Record Creation Pending

SHOW ON PROGRESS RECORD

Show on Progress Record

New Members always show on the Progress Record

COVENANT PATH EDIT DATE

Member today

SACRAMENT MEETING VIEW ALL

Attended 3 times

Sep 26 Sep 19 Sep 12 Sep 5 Aug 2

Home Calendar People Map Sync

# Clerk Receives Request and Creates Record

Leader and Clerk Resources

Home Membership Organizations Reports Ministering

Communications

- Confidential Records
- Pending New Records **2**
- Photos to Improve
- Official Communications
- Messages **3**
- General Handbook: Serving in The Church of Jesus Christ of Latter-day Saints

Units and Leaders

Recording

Ward and branch record attendance at meeting, priest

Leader and Clerk Resources

Home Membership Organizations Reports Ministering Finance Applications Other Help **Beta** **Stage**

Herriman Utah Blackridge Stake (2157128) | Alpine View Ward (2038552)

Find Individuals and Pages

## Create Record

New Record **1** Pending New Records

To record the baptism of a person who is already a member of record, go to the [Ordinances](#) page.

Pending New Records

Name	Birth Date	Date Initiated	Initiated By	Action
Gonzalez, Juan		22 Sep 2021	Missionaries	Complete Pending Record Print Create Record Form

Bishops and clerks receive an email and a notification alert in Leader and Clerk Resources (LCR) indicating there is a pending new member record. If the record hasn't been created after seven days, they receive a reminder email.

# Clerk Receives Request and Creates Record

## Create Record

The information below was submitted by the missionaries. Please verify that it is correct before creating a new membership record.

<b>Family Name</b> Gonzalez	<b>Birth Date</b> 6 Jan 2009
<b>Given Name(s)</b> Juan	<b>Birthplace</b>
<b>Gender</b> Male	<b>Birth Country</b> United States

Member Name

Gonzalez

Juan

Suffix

Steps to Create a New Record for  
Juan Gonzalez

Individual

Family

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Upload Signed Form

Signed Form

[signature from missionaries.png](#)

Create Record



Print the Baptism and Confirmation Form

**Note:** Parents or guardians of new members who are minors give consent to create the membership record by signing the screen of the missionaries' phone. Ward clerks do not need to ask the parents to sign another consent form.

When all information has been verified, the clerk clicks the Create Record button at the bottom of the Summary page.

# Clerk Receives Request and Creates Record

The screenshot shows a web application interface. At the top, there is a dark blue header with the text "Leader and Clerk Resources". Below this is a navigation bar with a home icon and several menu items: "Membership", "Organizations", "Reports", "Ministering", "Finance", and "Applications". The main content area has a breadcrumb trail: "Pending New Records / Create Record". A large heading "Create Record" is displayed. Below the heading is a green success message: "A membership record has successfully been created for Juan Gonzalez." At the bottom of the success message, there are two buttons with PDF icons: "Baptism and Confirmation Certificate" and "Individual Ordinance Summary". Two purple hand icons are shown pointing at these buttons, indicating they are being clicked.



The Church of Jesus Christ of Latter-day Saints  
Individual Ordinance Summary - 4 Nov 2021

**Juan Gonzalez**  
Record number: 003-0537-5831

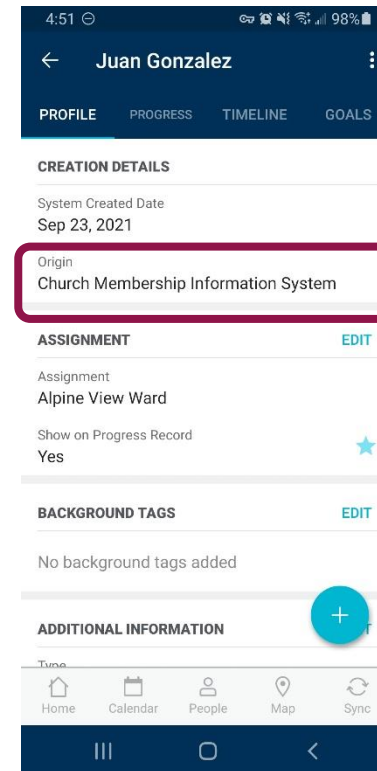
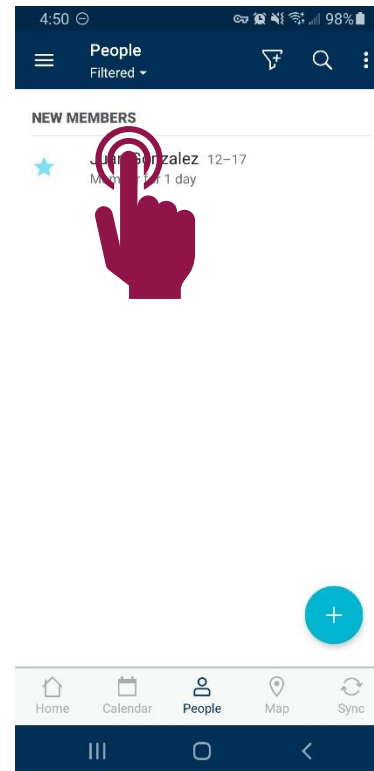
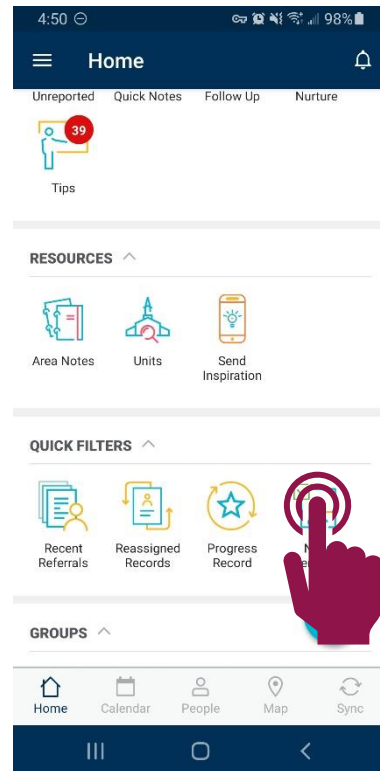
## Personal and Ordinance Information

Full name: Juan Gonzalez  
Birth date: 6 Jan 2009  
Birthplace:  
Birth country: United States  
Gender: Male  
Baptism date: 4 Nov 2021  
Confirmation date: 4 Nov 2021  
Sealed to parents date and temple or BIC:

The clerk prints the Baptism and Confirmation Certificate, has the bishop sign it, and gives it to the new member. He also prints a copy of the Individual Ordinance Summary, gives it to the new member to review for accuracy, and makes any necessary changes to the record.



# Missionaries Are Notified That Record Has Been Created



# FAQs – Missionaries

- **Do we still complete the paper copy of the baptism form? If so, what do we do with it?**
  - With this new process, we no longer use the paper version of the form.
- **Where do we indicate who conducted the baptismal interview?**
  - With this new process, we no longer record who conducted the baptismal interview.
- **Why can I only see future baptisms in my mission on the Convert Baptisms and Submitted Forms Report?**
  - If you don't see baptisms in your mission right now, it's because no baptisms have happened since your mission started using this new process. This is to help avoid confusion on which baptisms need to have the Baptism form submitted by the missionaries through Area Book.
- **Why don't we see the baptism form action item even after we've synced Area Book after this feature was enabled?**
  - The "Baptism Form" Action Item will only show up if you have a baptism and confirmation date recorded in your Area Book for a new member and the form hasn't been submitted. On all potential member records, you can tap the three vertical dots in the upper-right-hand corner on the teaching record and select "Baptism Form" to see and fill out the form.
- **How can people who can't read or write sign the baptism form?**
  - If necessary, people can just write an "X" for their signature.

# FAQs – Missionaries

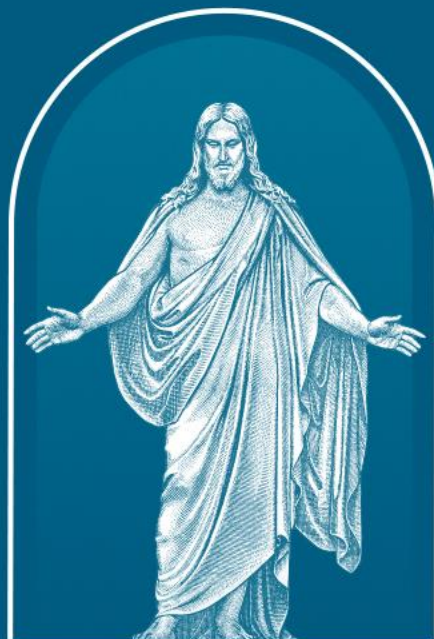
- **Why are baptism forms going back to before we started using this new process?**
  - You will see baptism forms from before the new process started if missionaries need to merge the teaching record with the member record as part of the old process. [Here's a video](#) that explains how to do that. Note that this new process no longer requires missionaries to manually merge the teaching and member record.
- **The baptism form requires the membership record number or the name and birthdate of the brother who officiated at the baptism and confirmation, but the member feels uncomfortable providing this info to the missionaries. What do we do?**
  - Reassure the member that their information will be confidential and only used to record the baptism and confirmation of the new member and create their membership record.

# FAQs – Mission President

- **How can the mission president view the progress of submitted baptism forms in the mission?**
  - The mission president can track baptism form submissions for the mission using the [Convert Baptisms and Submitted Forms Report](#).
- **What is the role of the office staff that used to create the records?**
  - Make sure the zone and district leaders are following up with missionaries in their zones and districts to ensure the baptism form is submitted as soon as the baptism and confirmation dates have been added in Area Book Planner.
  - Help missionaries understand the importance of collecting and recording complete and accurate data on the baptism form.

# FAQs – Local Leaders

- **What if the newly baptized member is already a member of record within the ward or branch?**
  - In these cases, the clerk should still use the Complete Pending Record option to record the baptism and confirmation information submitted by the missionaries. If the system detects there may already be a membership record for the person, a warning message will appear, and the potential duplicate record will be shown. Follow the on-screen instructions.



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