Church-Service Missionary Program

How to use the Church-Service Missionary & Volunteer Management System (CSM system) To Accomplish Specific Tasks

Instructional Aids for:
Ecclesiastical Leaders
Operation Managers
CSM Group Coordinators

Updated as of 6/02/2014
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I-A: Approve a New Release Date
(Early Releases and Extensions)

Overview

At some point during their service Church-service Missionaries (CSMs) or Long-term Volunteers (LTVs) may have occasion either to be released early (due to medical or other concerns), or to extend the term of their service. This should be done with the agreement of the stake president and the operation manager where they serve. Missions may be extended for up to two years at a time with the approval of the stake president with no limit to the times an extension may be granted. The operation manager is primarily responsible for requesting an early release or an extension for any CSMs in his operation. The stake president must indicate agreement for the CSM system to register the change of a release date.

To initiate a request for a New Release date, the operation manager submits a request for a New Release Date in the CSM system (see instructional aid “Request a New Release Date (Early Releases and Extensions”). Once the request has been registered in the system, a stake leader or other person authorized by the stake president, may enter the CSM system and indicate agreement with the request, or indicate that the matter needs further discussion.

This instructional aid describes how to accomplish this procedure in the CSM system.
To access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on MY ORGANIZATION.

Follow the instructions below.

1a

Under My Organization, click on the Approve Early Releases & Extensions tab.

1b

First, make sure your stake is selected.
To select a request for a specific Church-service Missionary, check the box to the left of their Missionary ID. Alternatively, to select all requests, check Select All.

(Note: If the list of names is long, be sure to scroll down to see all of the names.)

To approve the selected request(s), click Agree.

If you do not agree with the New Release Date(s), click Needs Further Discussion.

If you select this option, an email notice will be sent to notify the operation manager asking him to contact you. If he does not contact you first, you should call or email the manager to discuss your concerns. If agreement is reached on a New Release Date, the operation manager will need to make a new request in the CSM system and you will again receive an email notifying you of the proposed (agreed upon) date. To register your approval of the New Release Date, you would follow these instructions and agree to the date.

This ends the procedure:” Approve Early Releases and Extensions.”
I-B: Review Current CSMs, YCSMs, and LTVs

Overview

Ecclesiastical Leaders may use the CSM system to view the members of their stake currently serving as Church-service Missionaries (CSMs), Long-term Volunteers (LTVs) and Young Church-service Missionaries (YCSMs). These lists can be useful to help monitor who is coming up for release, who may need to be asked to extend their mission, what assignments have been filled, etc. Ecclesiastical Leaders may also use these lists to access information about specific individuals.

This instructional aid describes how ecclesiastical leaders may access these lists in the CSM system.

To access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on MY ORGANIZATION.

Follow the instructions below.
Click on the **Missionaries & Volunteers** tab (if it does not open automatically). Your stake name and number should already be listed. If not, type the name in the box or use the magnifying glass to search for your stake name and number. Then specify the status of the missionaries you want to view.

If you want to see more than just the list of those currently serving, Use the **Status** dropdown menu to select the list you desire.

- **All** means you will see everyone who has ever served,
- **Current** means you will see only those currently serving,
- **New** means the people are entered into the system but their start date has not yet come.
- **Overdue** means the system has not taken an action yet to release the person even though the release date has passed.
- **Released** lists only those who have been released.

Select **View Details** next to the **Service Type** you desire to see -- **Church Service Missionary**, **Volunteer**, **Young Church-Service Missionary**, or **Full-Time Missionary**. A list of those serving in that service type will appear below.

When the list of those in the selected **Service Type** appears, you may click on the title above each column to sort this list alphabetically or by lowest to highest number by the data in that column (**Name**, **Service Type**, **Status**, **Operation**, **Hours per Week**, **Call Length**, **Release Date**, or **Ward/Branch**, **Stake**). Click again to reverse the order.

If the list is long, click and drag the scrollbar downward to see all of the names.
1c You can click on the small table icon at the top right corner above the titles to produce a sortable spreadsheet that includes all the data in the chart.

You may save and use this spreadsheet as an Excel file. See below for an example.

1d **Individual Details.** The system keeps track of individual details, such as contact information, job title, and stake and ward information for each person serving. To see more detailed information about a current CSM, YCSM, or LTV, click **Search** or **Edit** at the far right of each name.
The following is an example of the page that comes up when you click on **Edit**. A more summarized page appears when you click on **Search**.

If your list is long, it may be easier to search for the person. To search for a particular CSM, YCSM, or LTV, click on the magnifying glass icon or down arrow to the right of the **ID** box under **Find Missionary/Volunteer**.

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Send suggestions to csm-iaidfeedback@ldschurch.org

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Click here to return to index
1f  Select the "contains" option from the Name drop-down menu. Type the last name of the person, followed by a comma and then part of the first name, with no space after the comma. Then click Look Up. A list of possible people you may be searching for will appear.

1g  Click on the name of the person for whom you are searching.

1h  The ID number of the selected person appears in the Find Missionary/Volunteer box. Click Go to obtain a detailed page of information about the person and their current and prior assignments (see 1d. above).

This ends the procedure: “Review Current CSMs and LTVs.”
I-C: Find and Download CSM/LTV Reports

Overview

Ecclesiastical leaders may access a series of reports on the CSM system. These reports provide useful information about assignments to stakes to provide Church-service Missionaries (CSMs), Long-term Volunteers (LTVs), Young Church-service missionaries (YCSMs) and daily volunteer shift labor at Church operations. They also provide information about those members from their stakes currently serving as CSMs, YCSMs, and LTVs and the contacts at the operations that the stake supports. Any member of the stake presidency, high council, the stake clerk or his assistants or the stake executive secretary may access these reports with a current LDS Account username and password.

This instructional aid tells how to access these reports in the CSM system.

To access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on REPORTS.

Follow the instructions below.
## Summary of Actions

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### Select a Report:

On the REPORTS page, you will see an icon bar for each available report. Click on the icon bar and follow the instructions below to access each report.

### Run Report: “Operation Contacts”:

Click on the icon to see how to download contact information about the manager at an operation where your stake members serve or will serve. On the page that appears:

1. Click on the small circle next to **All, Area, Group or Organization** to indicate the scope of the list you desire (click on the magnifying glass icon or down arrow to refine your search for the desired organization).
2. Check to make sure your stake number and name are correct.
3. Ensure that the email address box contains the email address to which you want the report sent. If not, type in the desired address. **(Note: This should be an email address that you can open on the computer you are currently using.)**
4. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to PDF and selecting the desired option.
5. Then click **RUN**. The report will be prepared in a short time and sent to the email address you indicated.

**Click here to return to index**
6. Open the email. Download and print/save the report.

Run Report: “Stake Contacts”:

Click on the icon to see whom to contact in a stake regarding CSM/LTV or shift callings or assignments. On the page that appears:

1. Click on the small circle next to **All, Area, Group, or Coordinating Council** to indicate the scope of the list you desire (click on the magnifying glass icon or down arrow to refine your search).
2. Check to make sure your stake number and name are correct.
3. Ensure that the email address box contains the email address to which you want the report sent. If not, type in the desired address. (*Note: This should be an email address that you can open on the computer you are currently using.)*
4. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to **PDF** and selecting the desired option.
5. Then click **RUN**. The report will be prepared in a short time and sent to the email address you indicated.
6. Open the email. Download and print/save the report.
Run Report: “Stake CSM Position Detail (Assignments)”: 

Click on the icon to find a list of assignments your stake has received to fill positions with members serving as CSMs or LTVs. On the page that appears:

1. Fill in the desired year in the **YEAR** box.
2. Check to make sure your stake number and name are correct.
3. Ensure that the email address box contains the email address to which you want the report sent. If not, type in the desired address. (Note: This should be an email address that you can open on the computer you are currently using.)
4. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to **PDF** and selecting the desired option.
5. Then click **RUN**. The report will be prepared in a short time and sent to the email address you indicated.
6. Open the email. Download and print/save the report.
Run Report: “Stake CSM Shift Detail (Assignments)"

Click on the icon to find a list of shifts that your stake is assigned to staff for the year. On the page that appears:

1. Fill in the desired year in the **YEAR** box.
2. Check to make sure your stake number and name are correct.
3. Ensure that the email address box contains the email address to which you want the report sent. If not, type in the desired address. (Note: This should be an email address that you can open on the computer you are currently using.)
4. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to PDF and selecting the desired option.
5. Then click **RUN**. The report will be prepared in a short time and sent to the email address you indicated.
6. Open the email. Download and print/save the report.
Run Report: “Missionary & LTV List by Stake”

Click on the icon to see a list of the members of your stake currently serving as CSMs or LTVs, including detailed information related to their assignment. On the page that appears:

1. Check to make sure your stake number and name are correct
2. Leave the Church Area box blank.
3. Ensure that the email address box contains the email address to which you want the report sent. If not, type in the desired address. (Note: This should be an email address that you can open on the computer you are currently using.)
4. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to PDF and selecting the desired option.
5. Then click RUN. The report will be prepared in a short time and sent to the email address you indicated.
6. Open the email. Download and print/save the report.
Run Report: “CSM Position Descriptions”

Click on the CSM Position Descriptions icon to see a list of all positions in the CSM system. You may search and find the description of a position assigned to your stake or currently filled by a stake member.

1. When you click on the icon, the full list of positions and descriptions for all operations in the CSM system will appear.
2. Hold down the Ctrl key on your keyboard and simultaneously press the F key. A search box will appear in the upper right hand corner of the page.
3. Type a key word contained in the position in the search box (e.g. “administrative”). All positions that contain that word will be highlighted.
4. Continue clicking on the words down arrow or up arrow in the search box until you find the position you seek.
5. You can select and copy the desired job description to another program or Print/Save the entire document.

This ends the procedure “Find and Download CSM/LTV reports.”
I-D: Enter/Update email address, phone:

- Stake Presidency in CDOL
- High Councilor in MLS/CMIS

Overview

Stake presidents often assign a councilor, executive secretary, stake clerk, or high councilor to be the primary contact for the stake for the Church-Service Missionary Program. In order to be able to receive notification and reminder email addresses, it is important that the stake president’s and the stake contact’s email address and phone numbers are correctly recorded in Church records and systems so that they can be accessed by those who administer the CSM Program.

To facilitate important communication with members of the stake presidency (clerk or executive secretary), their email addresses, and phones must be entered in the Church Directory of Organizations and Leaders (CDOL). The Stake president, his counselors, executive secretary or clerk, may enter and change their own email address or phone number within CDOL. High Councilors must have their contact information entered into the MLS (aka CMIS) system. High Councilors may have their ward clerk enter or change their email address and phone number in the MLS (aka CMIS) system.

This instructional aid describes how to accomplish this procedure.

To access the CDOL Software:

Enter the Internet at: cdol.lds.org

Login using your LDS Account username and password.

Follow the instructions below.
Update/record Stake Presidency email addresses and phone:

Within CDOL, type your name into the search box and click **SEARCH**.

Click on your name to bring up your record.

Click on the **Edit Assignment** link at the top left of your record page.

The following page will appear with your personal information.

Enter your email address in the Email Address box at the bottom of the General page.

Note: do not click **Private** next to your name or the email address will be hidden.
Next, click on the **Phone Numbers** tab.
Enter your phone number in the space provided.

Click on the **Save** button located at the lower right portion of the page.

**Update/record High Councilor Email Address and phone:**

The entry or modification of a high councilor's email address and phone number is done by him asking his **ward clerk** to enter the correct information in the MLS (aka CMIS) system. He should ask that the phone and email address be recorded as his personal email address and personal phone number. That email address and phone number then flow from there into the CSM system.

This ends the procedure: “Update Stake Presidency and High Councilor email and phone number.”
II-A: Request a New Release Date
(Early Releases and Extensions)

Overview

At some point during their service, Church-service Missionaries (CSMs) or Long-term Volunteers (LTVs) may have occasion either to be released early (due to medical or other concerns), or to extend the term of their service. This should be done with the prior agreement of the stake president and the operation manager where they serve. Missions may be extended for up to two years at a time with the approval of the stake president with no limit to the times an extension may be granted. The operation manager is primarily responsible for requesting an early release or an extension for any CSMs/LTVs in their operation. The stake president must indicate agreement in the CSM system for the system to register the change in release date.

To initiate a request for an extension or early release, the operation manager submits a request for a New Release Date in the CSM system. Once the request has been registered in the system, a stake leader or other person authorized by the stake president, may enter the CSM system and indicate agreement with the request, or indicate that the matter needs further discussion. (See instructional aid “Approve a New Release Date (Early Releases and Extensions”).) A confirming email is sent to the operation manager with instructions on how to proceed.

This instructional aid describes how to accomplish this procedure in the CSM system.
Click on the **Missionaries & Volunteers** tab.

Use the magnifying glass to select your operation from the search results.
Select **View Details** next to the **Service Type** you desire to see -- **Church Service Missionary, Volunteer, Young Church-Service Missionary**, or **Full-Time Missionary**. A list of those serving in that service type will appear below.

Click on **Name** at the top of the list to put the names in alphabetical order. Alternatively, you can sort by release date by clicking on the label **Release Date**. Scroll down the inside scroll bar, if needed, to find the person’s name in the list.

Select the **Extend/Release** link next to the CSM or Volunteer's name for which you would like to request a **New Release Date**.

In the **Extend/Release Request** window, fill in the **New Release Date**. Use the magnifying glass icon or down arrow to select the date. Make sure you select the correct year. Press the enter key to register the date.

**Note:** Anything you type into the comment box is not stored at this time. If you need to explain to the stake the reason for the requested change in release date, call or email them.

Then, click on **Submit**.
Once this is done, an email is sent to the stake president asking for him to agree with the **New Release Date**. For the **New Release Date** to be recorded in the CSM system, the stake president must record his agreement in the system. He may also indicate that the matter needs further discussion. An email is sent to the operation to confirm his choice.

**This ends the procedure: “Request a New Release Date.”**
II-B: Review Current CSMs, YCSMs, and LTVs

Overview

Operation managers may use the CSM system to view the Church-service Missionaries (CSMs), Long-term Volunteers (LTVs) and Young Church-service Missionaries (YCSMs) currently serving in their operations. These lists can be useful to help monitor who is coming up for release, who may need to be asked to extend their mission, what assignments have been filled, etc. Operation managers may also use these lists to access information about specific individuals.

To access the CSM system:

Enter the Internet at csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on MY ORGANIZATION.

Follow the instructions below.

Click on the Missionaries & Volunteers tab. On the page that appears, your operation name and number should already be listed. If not, type the name in the box. Use the magnifying glass icon, or down arrow to search for your operation and number. Then specify the status of the missionaries you want to view. The list will show those currently serving (see the status box).

If you want to see more than just the list of those currently serving, Use the Status dropdown menu to select the list you desire.

- All means you will see everyone who has ever served,
- Current means you will see only those currently serving,
- New means the people are entered into the system but their start date has
not yet come.

- **Overdue** means the system has not taken an action yet to release the person even though the release date has passed.
- **Released** lists only those who have been released.

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1b Click on the **View Details** button next to the desired service type to see a list of CSMs, Volunteers, or YCSMs in your operation.

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1c When the list appears below, you may click on the column title above each column to sort this list alphabetically or by lowest to highest number by the data in that column (**Name**, **Service Type**, **Status**, **Operation**, **Hours per Week**, **Call Length**, **Release Date**, **Position Number**, or **Stake**). Click again to reverse the order.
If the list is long, click and drag the inside scrollbar downward to see all of the names.

You can click on the small table icon at the top right corner above the titles to produce a sortable spreadsheet that includes all the data in the chart.

You may save and use this spreadsheet as an Excel file. See below for an example.

**Individual Details.** The system keeps track of individual details, such as contact information, job title, and stake and ward information. To see more detailed information about a current CSM, LTV, or YCSM, click **Search** or **Edit** at the far right of each name.
FOR OPERATION MANAGERS

REVIEW CURRENT CSMs, YCSMs, AND LTVs

The following is an example of the page that comes up when you click on **Edit**. A similar but more summarized page appears when you click on **Search**.

If your list is long, it may be easier to search for the person. To search for a particular CSM or LTV, click on the magnifying glass icon to the right of the **ID** box under **Find Missionary/Volunteer**.

Send suggestions to csm-iaidfeedback@ldschurch.org
Select the "contains" option from the Name drop-down menu. Type the last name of the person, followed by a comma and then part of the first name, with no space after the comma. Then click Look Up. A list of possible people you may be searching for will appear.

Click on the name of the person for whom you are searching.
Once the ID number of the selected person appears in the **Find Missionary/Volunteer** box, click **Go** to obtain a detailed page of information about the person and their current and prior assignments (see example in 1e above).

This ends the procedure: “Review Current CSMs and LTVS.”
II-C: Find and Download CSM/LTV Reports

Overview

Operation managers may access a series of reports on the Church-service Missionary (CSM) System. These reports provide useful information about assignments to stakes to provide Church-service Missionaries (CSMs), Long-term Volunteers (LTVs) and daily volunteer shift labor at Church operations. They also provide lists of members serving as CSMs, LTVs, and Young Church-service Missionaries (YCSMs) currently at the operation. The Operation manager and others he/she designates may access these reports with a current LDS Account username and password.

This instructional aid describes how to accomplish this procedure in the CSM system.

To access the CSM system:

Enter the Internet at csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on REPORTS.

Follow the instructions below.

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Send suggestions to csm-laidfeedback@ldschurch.org

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Select a Report:

On the REPORTS page, you will see an icon bar for each available report. Click on the icon bar and follow the instructions below to access each report.

(Note: Reports will take a few moments to process, first showing “Queued,” then “Processing,” and finally “Success” before they appear. Be aware that the report may display behind other open windows on your computer screen.)

Run Report: “Operation Contacts”

Click on the Operation Contacts icon to see the designated contact at an operation site. On the page that appears:

1. Click on the small circle next to All, Area, Group or Organization, as desired to indicate the scope of the list you want to see (click on the magnifying glass icon to refine your search of the organization).
2. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to PDF and selecting the desired option.
3. Then click RUN.
4. The report will process and appear on your screen.
5. Print/save the report.
Run Report: “Stake Contacts”

Click on the **Stake Contacts** icon to see contact information for a stake. On the page that appears:

1. Click on the small circle next to **All, Area, Group** or **Coordinating Council**, as desired to indicate the scope of the list you want to see (click on the magnifying glass icon or down arrow to refine your search for a coordinating council).
2. Make sure the correct name and number of the stake is displayed.
3. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to **PDF** and selecting the desired option.
4. Then click **RUN**.
5. The report will process and appear on your screen.
6. Print/save the report.
Run Report: “Operation CSM Position Detail (Assignments)”

Click on the icon to find a list of assignments in your operation that stakes have been assigned to fill with CSMs or LTVs.

1. Fill in the current year in the **YEAR** box
2. Find and fill in your operation number, use the magnifying glass to facilitate the search
3. Make sure the correct name and number of your operation is displayed.
4. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to **PDF** and selecting the desired option.
5. Then click **RUN**.
6. The report will process and appear on your screen.
7. Print/save the report.

---

Run Report: “Operation CSM Shift Detail (Assignments)”

Click on the icon to find a list of shifts that your operation has and the stakes assigned to staff them.

1. Fill in the current year in the **YEAR** box
2. Find and fill in your operation number. You may click on the magnifying glass to facilitate your search
3. Make sure the correct name and number of your operation is displayed.
4. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to **PDF** and selecting the desired option.
5. Then click **RUN**.
6. The report will process and appear on your screen.
Run Report: Missionary & LTV List by Operation

Click on the icon to see a list of those currently serving as CSMs or LTVs in your operation, including detailed information related to their assignment.

1. Fill in the number of one of the three levels of organization offered (Head Department, CSM Group or Operation). Click on the magnifying glass icon or down arrow to facilitate your search.
2. Make sure the correct name and number of the department, group, or operation is displayed.
3. You may choose to have the report prepared in PDF (fixed) or CSV (spreadsheet compatible) format by clicking on the down arrow next to PDF and selecting the desired option.
4. Then click RUN.
5. The report will process and appear on your screen.
6. Print/save the report.
Run Report: “CSM Position Descriptions”

Click on the [CSM Position Descriptions] icon to see a list of all positions in the CSM system. You may search and find the description of a position in your operation that stakes may be assigned to fill.

1. When you click on the icon, the full list of positions and descriptions for all operations in the CSM system will appear.
2. Hold down the Ctrl key on your keyboard and simultaneously press the F key. A search box will appear in the upper right hand corner of the page.
3. Type a key word contained in the position in the search box (e.g. “storehouse”). All positions that contain that word will be highlighted.
4. Continue clicking on the words down arrow or up arrow in the search box until you find the position you seek.
5. You can select and copy the desired job description to another program or Print/Save the entire document.

This ends the procedure: Find and download CSM/LTV Reports.
II-D: Coordination: Update Operation Setup

Overview

Each operation needs to be set up within the CSM system with a general description of the operation and the position. This includes an “About Us” description and Additional Information to be included in each job description for opportunity postings. It also includes updating normal operating days and hours, and recognized holidays on which it is closed for each new year.

The operation Setup page allows the operation manager to record that information for view by potential Church-service Missionaries when they look at opportunities within a specific operation and by stakes as they call/assign their members to serve in assigned positions or for shift labor.

This instructional aid describes how to accomplish this procedure in the CSM system.

To access the CSM system:

Enter the Internet at csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on SETUP.

Follow the instructions below.
1a The Operation SETUP page will appear. Click on Operation

On the My Operations page that appears, click the icon located to the right of the Operation Name.

1b In the About Us box, you may enter a new, or edit an existing, general description about your operation – what your operation does its days and hours of operation, etc. This information will appear as the first item on all CSM/LTV opportunity postings for that operation that members will review to decide if they want to serve there.
1c Click on the **Normal Operation Days** boxes for the days of the week when you are open for business. Then, using the dropdown arrows for each day checked, select the opening and closing time, along with either AM or PM, as applicable, for each day of the week you are open.

Enter any **Additional Info** about your operation in the space provided, such as seasonal times when your operation is closed.

1d

1. Make sure the correct year is chosen from the dropdown menu.
2. Enter the closures for your operation for a given year. For example, click on the dropdown arrow and select “Christmas Day (CAN & US)”, and the date for Christmas that year will populate the Description and Date fields.
3. To add another closure, click on the **Add Closure** button and follow step 1 again. To delete a selection, click on the red icon on the lower right hand portion of the selection.
4. Continue to follow steps 1 and 2 until all of your closures are entered.

Send suggestions to csm-laidfeedback@ldschurch.org
Click the **Save** button to save the changes you have made or the **Cancel** button to discard the changes you have made.

This ends the instructional aid: “Update Operation Setup.”
II-E: Coordination: Request CSMs and LTVs

Overview

Each year, operation managers are asked to identify their staffing requirements for the following year for Church-service Missionaries (CSMs), Long-Term Volunteers (LTVs), and short-term volunteer shift labor. Stakes are assigned to call members to serve in those positions, or to recruit short-term volunteers to perform shift work. This is called the annual coordination process. It is administered by the CSM Office under the direction of the Presidency of the Seventy.

Throughout the U.S. and Canada, local CSM group coordinators (usually a couple) work with operations to request needed CSMs, LTVs and short-term shift volunteers. They then prepare recommendations for stake assignments to fill those positions, and consult with local and area priesthood leaders to ensure they can handle the proposed assignments. The CSM area seventy and CSM agent stake president then approve the final recommendations. The resultant staffing recommendations and proposed stake assignments are presented for the approval of the member of the Presidency of the Seventy that presides over the Area where the stakes are located. Approved assignments are sent to stakes and operations and posted on the CSM system. Stakes can then begin fulfilling assignments for the new year.

The CSM system is an online software tool used to manage this process. Operation managers make requests for CSM and LTV positions and register them in the CSM system so that assignments to stakes can be proposed by CSM group coordinators. CSM group coordinators may help operation managers input the requests into the CSM system, or they may do it on their behalf, as requested.

Other instructional aides, accessible from the home page of the CSM system, describe how to set up and request daily shift assignments for stakes to fill and how CSM group coordinators prepare the requests and proposed stake assignments for final approval by the member of the Presidency of the Seventy who presides over the Area.

This instructional aid describes how to accomplish this procedure in the CSM system.

The following terms are used in this instructional aid:

**Coordination Year:** This is the calendar year for which requests and assignments for CSMs, LTVs and shift labor are being made. The coordination process begins May 15 and concludes September 30 of the year prior to the coordination year (e.g. coordination for 2015 is done between May and September of 2014).
**Job Title:** The name of the job that a CSM or LTV will do for an operation. A job title can be **Standard** (applicable to many positions), or **Custom** (chosen to be more specific about what a job does).

**Job description:** A description of duties, responsibilities, location of service, for each job is included in the CSM system (see “Job Descriptions” on the REPORTS page.)

**Position Number:** In a given operation, several or even hundreds of positions may have the same job title. However, each position has a unique number. A position number is associated with a job title and an operation (e.g., Position Number 00317214 is one of twenty-three Family History Specialists (job title) at the BYU Idaho Family History Center (operation). Positions may be **Active** (filled, **Vacant**, or a **Future Vacancy**), or **Inactive**.

**Active:** A position that is in a status in the CSM system that it can be filled, requested, submitted, or made inactive.

**Vacant:** An active position that has no one currently serving in it and does not have a scheduled start date is not scheduled to have anyone fill it for the rest of the year. It may have been submitted for the upcoming coordination year, however.

**Future Vacancy:** An active position that has no one currently serving in it, but does have a start date scheduled in the future. It may have been submitted for either the current year or the upcoming coordination year.

**Inactive:** A position that has been put in a status that no action can be taken on it in the CSM system (e.g. filled, requested, submitted) until it is reactivated.

**Start Date:** The date selected in the CSM system by which a position is to be filled.

**Effective Date:** The date chosen as a position is created or activated in the CSM system on which actions can be taken upon it to request it, fill it, submit it, etc.
To access the CSM system:

Enter the Internet at csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on COORDINATION.

Follow the instructions below.

<table>
<thead>
<tr>
<th>Section</th>
<th>Summary of Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine how many and what kind of positions to request</td>
</tr>
<tr>
<td>2</td>
<td>Request CSM and LTV Positions in the CSM system</td>
</tr>
<tr>
<td>3</td>
<td>Check your Work</td>
</tr>
<tr>
<td>4</td>
<td>Save your Requests for Later or Submit Them</td>
</tr>
</tbody>
</table>

Determine how many and what kind of positions to request: Operation managers should begin with a clear idea of how many CSMs and LTVs are needed to staff the operation for the upcoming coordination year. First, include in your count all those needed to replace all CSMs and LTVs scheduled for release during the year. Second, include those needed for any growth in staff. If you anticipate a reduction in staff you will need to decide which positions currently listed in your operation not to request for the coordination year.

When calculating the replacement number, do not anticipate or try to project if or when CSMs or LTVs currently serving will extend their term of service. Formulate your request assuming they all will be released as scheduled and include them in the count of those requested for the upcoming coordination year. When the time comes to fill the position, stakes may do so by either finding new people or by extending those who are already serving.
The following is a simplified example of how you may determine how many CSMs and LTVs to request for the coordination year.

<table>
<thead>
<tr>
<th>Example Position</th>
<th>a. Total of all CSMs, LTVs scheduled for Release during 2015</th>
<th>b. Desired growth in staff for 2015*</th>
<th>c. Total CSMs, LTVs to be requested for 2015 (a+b)</th>
<th>d. Hours per week per person</th>
<th>e. Total hours per week for all positions requested (c X d)</th>
<th>Dates needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Storehouse worker – 2 day</td>
<td>3</td>
<td>3</td>
<td>6</td>
<td>16</td>
<td>96</td>
<td>Jun 1</td>
</tr>
<tr>
<td>Storehouse worker – 3 day</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>24</td>
<td>72</td>
<td>Jul 1</td>
</tr>
<tr>
<td>Scheduler/receptionist</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>32</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Floor supervisor</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>32</td>
<td>32</td>
<td>Apr 15</td>
</tr>
<tr>
<td>Total Operation</td>
<td>6</td>
<td>4</td>
<td>10</td>
<td>N/A</td>
<td>200</td>
<td></td>
</tr>
</tbody>
</table>

* Note: To calculate those needed for growth (see column b above), determine the maximum number needed to operate during the year and subtract those already in place.

In making your request, please ask only for the total number of positions needed to staff fully your operation in the coordination year. **Do not request more positions to be filled than are needed.** Carefully planned and realistic requests for CSMs and LTVs reduce confusion and engender confidence among the stakes.

2a Request CSM and LTV Positions in the CSM system: To begin requesting CSMs and LTVs in the CSM system, click the **COORDINATION** tab on the main menu; then click **Request CSM & Volunteer Positions**.

The page that appears displays a table that is used to request and submit positions for your operation.

The name for the operation for which you are requesting positions should be displayed in the field above the left side of the table. If it is not, click the down-arrow to find the correct operation.
2b Select the coordination year in the field to the right of the word “For”. If desired, you can use the drop-down list to select the correct coordination year (the year following the current year).

(Note: The box to the left of Include Current Year CSM/LTV should be checked for this procedure.)

Click on the Search button to update the data.

2c In general, it is best to enter requests according to the following order:

1. **First** request all positions that have someone serving in them that are scheduled for release in the coordination year (e.g., 2015) need to be replaced. These are listed as a “Future Vacancy” under the Name column of the table-header. Requesting all Future Vacancies first ensures that stakes will be assigned to replace all incumbent missionaries and volunteers. (Note: we do this in spite of the fact that many may extend their service. When that time comes, the extension is counted as filling the requested position).

2. **Next**, request the number of positions desired for growth. For this, use positions that are listed as Vacant (i.e. active positions that are not assigned to be filled in the current year). You may need to modify the position details to fit a Vacant position to the need. To do so, follow the instructional aid “Coordination: Modify, Activate, Add, or Pair Positions” listed in the index to assist you.

(Note: Please do not request Vacant or Future Vacancy positions that are assigned to a stake to be filled before the end of the current calendar year (unless the position, when filled, will have a release date in the coordination year) as this can result in two stakes being assigned to fill the same position.
or the same stake having duplicate assignments.)

3. Finally, if you need to request more positions to fill your staffing requirements than are available in the **Future Vacancy** or **Vacant** positions listed, you can activate and modify an “**Inactive**” position (first choice) or add new positions (last choice). See the instructional aid “**Coordination: Modify, Activate, Add, or Pair Positions**” listed in the index to assist you.

As you proceed to request positions, you will note that, if a position listed in the above table is currently filled and the person is scheduled to be released in the Coordination Year, the position will appear on two lines. One line contains the “**Future Vacancy**” position to be submitted for the upcoming year. It has a check box on the left side. The other line (above or below), contains reference information about the **same position** for the currently serving CSM or LTV, including the scheduled release date. You will notice that it has the **same position number as its Future Vacancy counterpart**, and does not have a check box on the left side. Please note in the image below that the scheduled release date of the currently filled position and the proposed start date of the “**Future Vacancy**” position are the same. That is because the system automatically assumes that the replacement for the person being released will start on the same day as the release of the incumbent. If that is not the case, you can change the date.

---

**Request positions:** To request a position for coordination in the CSM system you:

1. Enter the **Start Date**
2. Enter the **Length of Service**
3. **Submit** it

For each position you wish to request:

Send suggestions to csm-laidfeedback@ldschurch.org
1. Enter the **Start Date** (mm/dd/yyyy) you want the person filling the position to start. The requested **Start Date** must be between January 1 and December 31 of the **Coordination Year**.

If the position is currently filled, the **Start Date** you should choose for the “**Future Vacancy**” replacement should the same date or a little earlier than the **Release Date** of the person occupying the position to allow time for cross-training, if needed.

*(Note: You can change the **Start Date** by typing over the existing data or by clicking on the calendar icon and selecting the desired month, day and year (make sure you select all three). Press the Enter key on your keyboard to register the date.)*

2. Fill in the **Length of Service** field with the number of months you would like the individual to serve (usually 6, 12, 18, or 24).

3. **Continue** to enter the remaining **Start Date** and **Length of Service** fields for the rest of the positions you want to request and submit, first requesting all **Future Vacancies** for replacement of those scheduled for release, then use all available **Vacant** positions for growth before activating or adding new positions.

4. **Submit**: we will discuss submitting your positions later after we cover some important considerations.

If you need more positions than available the **Future Vacancy** and **Vacant** positions to fill your needs, you can activate an “**Inactive**” position (first...
choice) or add a new position following the instructional aid “Coordination: Modify, Activate, Add, or Pair Positions”.

**Paired Positions:** If a position is paired with another position, this means that the position is designed so that two people (usually husband and wife) serve together, each filling one of the two paired positions. You will see the number of the position next to its paired position the column labeled **Paired Position**. Be sure to request both positions, and set the **Start Date** and **Length of Service** the same for each. For more information on how to do that, see the instructional aid: Coordination: Modify, Activate, Add, or Pair Positions

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Name</th>
<th>Release Date</th>
<th>Hours/Week</th>
<th>Position Paired Number:Position Paired Number Position: Start Date</th>
<th>Length of Service (Months)</th>
<th>Status Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bishop Storehouse Worker</td>
<td>Vacant</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bishop Storehouse Worker</td>
<td>Vacant</td>
<td>05/24/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bishop Storehouse Worker</td>
<td>Ford, Bobbi</td>
<td>05/24/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bishop Storehouse Worker</td>
<td>Future, Vacant</td>
<td>05/24/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bishop Storehouse Worker</td>
<td>Ford, Sharon</td>
<td>05/24/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bishop Storehouse Worker</td>
<td>Future, Vacant</td>
<td>05/24/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bishop Storehouse Worker</td>
<td>Vacant</td>
<td>05/24/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Assigned Stakes:** If a position was assigned to a stake in a previous coordination year, that stake’s name will carry over and appear in the **Assigned Stake** column for that position. If you believe the stake assignment should be changed for the upcoming coordination year, ask your CSM group coordinators to assist you.

**Check your work:** After you enter all the requested positions to meet the operation’s staffing needs for replacement and growth, check to make sure that the information is correct. Sometimes requests are duplicated, too few or too many requests have been entered, or there are mistakes with **Start Dates** or **Length of Service**. Click the **Save for Later** button any time you wish to save your work-in-progress.
Save your requests for later or submit them: If you think you may have additional changes and input to do on any requests, click Save for Later.

Submit: When you are satisfied that some of your requests are correct and complete and there will be no more changes to them, you may select (check the box next to) each position that is complete and click Submit Selected.

Note: If you click Submit All you will submit every position listed on the page whether you intend to request it or not. Only use Submit All if all positions on the page are to be requested, otherwise, check the box next to each position that is being requested, and click Submit Selected.

Note: Clicking Submit Selected or Submit All locks down your requests for those positions submitted and does not allow you to make any more requests or changes in the CSM system to those submitted requests. Only do that when you are sure you are all done.

If after clicking Submit, you realize that you need to make further adjustments to your requests, contact your CSM group coordinators for assistance.
Assign stakes after requests are submitted: Submitted requests are reviewed by CSM group coordinators and, along with other operations’ requests, assigned to stakes on a preliminary basis to fill the requested positions. Local and area priesthood leaders then review, recommend changes, and provide concurrence with the recommend assignments. These are then presented to the member of the Presidency of the Seventy that presides over each Area who approves the stake assignments.

Provide information on the reasons for major changes in requests from prior years: During the review and approval process with area priesthood leaders, the operation manager may be asked to provide additional information about their staffing level and the nature of their requests. Please discuss any anomalies or major differences from the previous year (such as large or decreases increases in requests for CSMs/LTVs, or shift hours) with your CSM group coordinators so they can be ready to provide these explanations when asked.

This ends the procedure to “Request Church-service Missionaries (CSMs) and Long-term Volunteers (LTVs).”
II-F: Coordination: Modify, Activate, Add, or Pair Positions

Overview

Positions to be filled with Church-service missionaries (CSMs), Young Church-service missionaries (YCSMs), and Long-term volunteers (LTVs) are described in the CSM system, including the job title, the location (operation), hours per week, qualifications and responsibilities, and so forth. Operation managers may desire to modify some of these descriptions for one or more positions to reflect current needs. An operation manager can modify or add unique position details to the job description, activate an inactive position, and add new positions in the CSM system. He also can pair two positions (e.g., husband/wife teams) to ensure they are kept together when assigned to stakes. CSM group coordinators may assist the operation manager in doing this or do it on his behalf.

This instructional aid describes how to accomplish these procedures in the CSM system.

To access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on MY ORGANIZATION.

Follow the instructions below.
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<tr>
<th>Section</th>
<th>Summary of Actions</th>
</tr>
</thead>
<tbody>
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<tr>
<td>2</td>
<td>Modify/Update or Activate an Inactive Position</td>
</tr>
<tr>
<td>3</td>
<td>Add a New Position</td>
</tr>
<tr>
<td>4</td>
<td>Pair Positions for People Serving Together</td>
</tr>
</tbody>
</table>

### 1a Modify, Add Position Details to a Position

Before positions are submitted in the coordination process, the operation manager can modify or add position details to the job description. These details reflect the unique requirements, responsibilities, or qualifications related to the specific position being requested.

Begin by clicking the **MY ORGANIZATION** tab on the main menu, and then the **CSM & Volunteer Positions** tab below it.

If the correct operation is not shown, type the name in the **Operation** field, or search for the desired operation using the magnifying glass icon or down arrow. Once the operation is selected, a list of job titles for that operation will appear.

Click on **View Details** to the right of the **Job Title** to see a list of positions with that Job Title in your operation.
On the list that appears at the bottom of the page, scroll down to find the specific position number for the position that you want to update with new information. Click the **Posting** button to go to the **Posting Details** page where you can make your changes.

The **Posting Details** page shows five boxes of general information describing the **Job Title**: **About Us, Purpose, Responsibilities, Qualifications**, and **Additional Position Details**. The first four boxes cannot be modified here. Operation managers may update the first box ("**About Us**") on their operation setup page. The remaining three are maintained by the CSM office.

The last box on the page, **Additional Position Details**, is where the operation manager can include other information that someone considering this position should know before accepting the assignment. Priesthood leaders calling members to serve use this information along with the information recorded in boxes one through four to provide all the needed information about the position as they consider whether they are qualified to fill it.

After adding or modifying position details, click **Save** at the bottom of the page.
Modify/Update or Activate an Inactive Position. If there is a “Vacant” position that is active, but the information is not correct, you can modify or update the position information so that it conforms to the position being requested in coordination. In doing that you ensure that, when a member is called to serve in that position, the Priesthood leader may provide a correct and complete description of the position to the member of what they are being called to do.

You can also activate an “Inactive” position and then update it to fit the new requirements.

Begin by clicking the **MY ORGANIZATION** tab on the main menu, and then the **CSM & Volunteer Positions** tab below it.

1. If the correct operation is not shown, type the name in the **Operation** field, or search for the desired operation using the magnifying glass icon or down arrow.

2. Once the operation is selected, a list of job titles for that operation will appear.

3. Click on **View Details** to the right of the **Job Title** to see a list of positions.
4. On the list that appears at the bottom of the page, scroll down to find the specific position number for the Position that you want to update with new information. Click the Update button to the right of the number to go to the Update Position page where you can make your changes.
5. **Create a New Record:** On the **Update Position** page that appears, click on the plus (+) button in the upper right corner to create a new record. Fill in all the relevant information:

   **a. Choose an Effective Date:** The position automatically will be assigned today as the **Effective Date** of the change. If you want to change the **Effective Date**, you can type it in the field or click on the calendar icon and select a different date (make sure you select the correct month, day and year). Press the Enter key on your keyboard to register the selected date.

   (Note: It is preferable to use the current date or an earlier date for the **Effective Date**. You can back-date a position as far back as the date of the previous record (click on the “First” and “Last” arrows in the header to find the most recent position and its **Effective Date**). Although not advisable, you can also make the **Effective Date** a date in the future. However, a position with a future date does not appear on lists and reports in the CSM system until that date arrives.)

   **b. Activate a Position:** In the **Status** field, if the position is “Inactive,” click on the arrow that shows the drop-down list, and select **Active**. The position will now be ready to request for coordination or available for CSM group coordinators to process a call. Note: reactivated positions can only be backdated to the day after the date on which the last prior action was taken on the position (e.g. the date it was inactivated).

   **c. Change the Standard Job Title**, if desired, by selecting one of the available options from the drop-down list.

   **d. Choose a Custom Job Title:** The **Custom Job Title** field will be automatically filled in with the same name as listed in the **Standard Job Title**. However, if desired, you may replace it by typing in a different job title that will show on lists and reports.

   **e. Choose the Location (operation):** Be sure the **Location** (i.e. operation) is correct. If the correct operation is not shown in the **Location** field, search for the desired operation, using the magnifying glass icon or down arrow. If the operation name you seek does not appear as you search, it may be that it is not registered in the CSM system. Call the CSM office at 801-240-4914 to request that it be
registered.

**f. Select Hours per Week:** If needed, you may correct the Hours Per Week to be served.

**g. Choose a special category if relevant:** Check the box next to any of the specialized categories listed that may apply to the position, including:

- **Young Church-Service Missionary:** While requesting positions for coordination it is especially important to click this box for each position that can accommodate these young people who, due to physical or mental limitations, cannot serve a regular proselyting mission. Please consider each position to see if it can qualify and check the box if it can.

- **Couple Only:** Check this box for positions that require two people to serve together (such as a husband and wife). Make sure to type the companion position number in the box provided and write down the two position numbers that you want to pair. To pair the positions, follow the instructions in section 4 of this instructional aid.

- **Specialized Skill: Exclude from Stake Assignment:** You should click this box only if the position is not to be included in the coordination process because its requirements are such that it would be unlikely an assigned stake could find someone with those skills (e.g. hydro-geologist, or a medical doctor with a specific specialty). We use other means to find people that qualify for these specialized positions.

**h. Save:** Click Apply to save what you have done.
**Add a New Position.** If there are no “Future Vacancy”, “Vacant”, or “Inactive” positions that can be activated, you can create a new position. *To avoid cluttering the System, this should be done only if there are no other viable options available. Once positions are created, they cannot be removed, but they can be inactivated.*

To create a new position, click the **Add Position** button on the **CSM & Volunteer Positions** page.

When the **Add Position** page appears, fill in all the relevant information for the new position.

1. Select “**Active**” for Status.

2. Choose a **Standard Job Title** from the drop-down list.
3. If desired, give the position a **Custom Job Title** that will appear on lists and reports.

4. Be sure the **Location** (e.g. operation) is correct. If not, search for the desired operation using the magnifying glass icon or down arrow.

5. Choose the **Hours per Week**.

6. Select the **Effective Date**, which should be the current date or earlier.

7. Check the box to indicate if the position is for a **Young-Church Service Missionary, Couple Only** or a **Specialized Skill** (see Section 2c. above for guidance on these categories).

8. Click **Save**.

---

**3b**

When you click on **SAVE**, at the bottom of the **Add Position** page, a popup message will give you the **Position Number** that is created by the CSM system for the new position. Write the number down for future reference. Click **OK** to remove the popup. The new position will appear on the **Job Title** list of the previous page (**CSM & Volunteer Positions**). You can now request and assign the position in the coordination process and prepare a call letter for a new CSM or Volunteer.
Pair Positions for People Serving Together. If the operation desires two people to serve together (e.g., husband and wife) you can pair the positions so the CSM system assigns them to the same stake and they appear on reports together.

**Pair existing positions:** To pair positions already in the CSM system:

1. First go to **MY ORGANIZATION** on the main menu and click on **CSM & Volunteer Positions**. Click on **View Details** to the right of the desired **Job Title**.

2. On the table that appears at the bottom of the page, find the two position numbers you want to pair and write them down. Click the **Update** button for the first number.

Write this number down and save it for later use.
3. On the **Update Position** page that appears, click on the plus (+) button in the upper right corner.

4. Enter the **Effective date** of the change.

5. Down the page, check the box labeled **Couple Only**.

6. Type the number of the second position in the **Companion Position Number** field.

7. If necessary, you can also make changes to other position information (e.g. **Standard Job Title**, **Custom Job Title**, **Location**, and **Hours per Week**).

8. When done, click **Apply** to return to the previous page.

9. Next, go to **Update Position** page for the second position number you wrote down and follow the same procedure. The paired positions should show identical information (e.g., **Standard Job Title**, **Custom Job Title**, **Hours Per Week**, **Effective Date**, and so forth).

10. Once this is completed, and you click **Apply** for the second position, both positions will appear as paired on lists and reports in the CSM system.

**Pair New Positions:** You can also create two new positions, as described in **Section 3**, above, and pair them following these same instructions.

![Update Position](image)

This ends the procedure: “Modify, Activate, Add, or Pair Positions”
II-G: Coordination: Setup Tasks and Shifts

Overview

During the CSM coordination process, in addition to requesting Church-service Missionaries (CSMs) and Long-term Volunteers (LTVs), the operation manager may request volunteer labor for short-term shifts, which are generally one-time, single-day assignments for several hours (such as at a cannery or a farm).

The operation manager inputs his requests for shift labor in the CSM system by setting up a work plan for his shifts. Based upon that plan the CSM system produces a list of shift labor assignments needed to fulfill it. Note: If shifts have been entered into the CSM system in prior years, they will be preserved in the CSM system. These prior year shifts may be edited to fit the needs of the coordination year.

The CSM group coordinator then enters into the CSM system the recommended assignments to stakes to fulfill identified shift labor needs. The CSM group coordinator then presents the proposed stake shift labor assignments to, and seeks concurrence or comments from, local and area priesthood leaders. Upon receipt of concurrence/comments, CSM group coordinators make the final adjusted submission of approved shift labor assignments in the CSM system. These are then presented to the member of the Presidency of the Seventy who presides over the area for final approval. Once that approval is received (typically in late September, early October), shift labor assignments are distributed to the stakes and operations and the stakes and operations collaborate to fulfill those assignments.

This instructional aid describes how to enter shift labor requests the CSM system.

The following terms are used in this instructional aid:

**Shift:** a temporary volunteer position, usually in a cannery or other similar operation. Stakes will look for people to fill assigned shifts.

**Task:** the specific job a person with a shift will do (for example, Pulling Weeds), and how many people are required to do the job

**Work:** products or projects that may require multiple shifts and/or tasks (for example, Summer Farm Maintenance)
To Access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In top menu bar, Click on COORDINATION.

Follow the instructions below.

<table>
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<tr>
<th>Step</th>
<th>Summary of Actions</th>
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<td>Prepare your annual production plan</td>
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<td>Complete your Annual Work Planning</td>
</tr>
<tr>
<td>5</td>
<td>Assign Shift Work to Stakes (CSM group coordinators)</td>
</tr>
</tbody>
</table>

Prepare your annual production plan: Before you start requesting volunteer shift labor, you should think through the shifts, tasks, and work items you will need to accomplish your assigned production goals for the year. Those goals may be determined in a separate process in consultation with your operation agent stake and operating committee, if you have one, or in consultation with your field or headquarters supervisors.

To request volunteer shift labor in the CSM system, an operation manager:

- Sets up the shifts,
- Adds tasks to the shift, and
- Completes annual work planning.

Having a good idea of how these will look after you enter your plan into the CSM system will simplify the process of requesting them in the system.
Setup Shifts. Click on the Shift Setup tab.

If the name of your operation does not appear automatically, type the name of your operation in the Operation box, or use the magnifying glass to search for the name of your operation, then click Search. If you wait for a while and nothing happens, you can press the tab key on your keyboard to refresh the screen and remind the computer that you have selected the operation.

You may edit, add or delete shifts as you setup your desired shifts.

1. **Edit a Shift**: Shifts that are carried over from the prior year (or newly added shifts) may be edited and updated to meet the coordination year needs. You may do so using the following steps:

   a. Click on the **Edit** link next to the shift and make your edits.

   b. Make any edits, and then click on the **Add/Update Shift** button.
2. **Add a Shift**: Go to the Add/Update Shift section, and enter a **Shift Name** for each shift. This can be any name, but each **Shift Name** must be unique (for example, morning or afternoon shift).

3. Enter the **Start Time** and **End Time** for the shift in an AM/PM format (for example, 8:00 AM).

4. If the shift is to take place overnight, check the **Overnight** box. For example, if the shift lasts from 10 pm to 6 am the next morning, you would check that box.

5. For the **Shift Type**, indicate whether the shift is **Standard** or **Seasonal** by clicking on the down arrow to the right of the **Shift Type** box and selecting the correct type. A **Standard Shift** happens year round, a **Seasonal Shift**, for a defined period during the year (such as just after peach harvest for a month).
6. Click on the **Add/Update Shift** button.

![Add/Update Shift](image)

7. Complete steps 1 through 5 for each shift until you have scheduled all the shifts in your plan.

8. **Delete a Shift:**
   
a. Click on the red [ ] icon to the right of the shift.

![Delete Shift](image)

b. Click the **OK** button when the **Delete Confirmation** window pops up.

![Delete Confirmation](image)

9. Once all additions, edits, and deletions are complete, click on the **Save** button.

![Save button](image)

---

**Add Tasks to Shifts.** Once you have completed the **Shift Setup** page, you are ready to define your tasks and assign the days of the week and shifts to those
tasks. Under the main **Coordination** tab, click on the **Task Setup** tab.

![Task Setup screenshot](image)

3b To add tasks to each of your shifts, complete the following steps:

1. In the Add/Update Task section of the screen, name the task. Each Task Name must be unique from all other Task Names.

2. Input the # of People Needed to fulfill the task

3. Enter a Description (if needed).

![Add/Update Task](image)

4. Click on the checkboxes under Days of the Week to identify on what days of the week the task is to occur.

![Days of Week](image)

5. Select each shift for which this task is to be performed by clicking on the checkboxes next to the Shifts for the Task.

Send suggestions to csm-iaidfeedback@ldschurch.org
6. Click on the Add/Update Task button.

7. Complete steps 1 through 6 until you have defined all your tasks and assigned the days of the week and shifts to them.

8. **Delete a Task**: To delete a task, click on the red icon to the right of the task.

9. Click the OK button on the Delete Confirmation window that pops up.

10. **Edit a Task**: To edit a previously created task, Click on the Edit link next to the task and make your edits.

11. When edits are completed, click on the Add/Update Task button.

12. Before leaving the **Task Setup** page, click on the **Save** button near the top right to save the additions or changes to the tasks.

Send suggestions to csm-aidfeedback@ldschurch.org
Complete your Annual Work Planning. A work item is a product or project that may require multiple shifts and/or tasks. Each work item is identified by a unique Work Name.

To add a Work Item (Name), click on the Annual Work Planning tab.

Note: There could be a lot of input on this item, depending on the size of the operation and its shift load. Please Save your work periodically throughout the input process.

If the name of your operation does not appear automatically, type the name of your operation in the Operation box, or use the magnifying glass to search for the name of your operation, then click Search.

Note: If you wait for a while and nothing happens, you can press the tab key on your keyboard to refresh the screen and remind the computer that you have selected the operation.

Follow these steps below to complete your Annual Work Planning:
1. Enter a **Work Item (Name)** in the **Add/Update Work** section.

   **Note:** Each **Work Item (Name)** must be unique.

2. Enter the **Start Date** and **End Date**.

3. Indicate if the tasks are to be separated into **Daily**, **Weekly**, or **Day of Week** assignments to stakes by clicking on the radio button to the left of the desired option. (See the box below for definitions of these terms)

   If you select **Day of Week**, indicate how many consecutive weeks that **Day-of-Week** assignment is to span for a stake.

4. Enter the number of stakes to be assigned to the **Work Item (Name)**.

5. Select the tasks that will be performed during this work.
6. When finished, click the Add/Update Work button.

7. To continue adding Work Items (Names), the following Copy and Edit functions will help facilitate that. (Remember to click the Add/Update Work button after each.)

   a. **Copy a Work Item (Work Name):** To copy a work item (Work Name), click on the Copy link to the right of the Work Item (Name).

      **Note:** You can do this to avoid having to reenter a lot of information as you add Work Items (Names) to your request. Once copied you can edit the item to conform it to the new Work Item (Name) you want to enter.

   b. **Edit a Work Item (Work Name):** To edit a Work Item (Name), click on the Edit link to the right of the Work Item (Name), and edit the items listed in the steps above.

      Edit the fields needing to be changed on the copied Work Item (Name), and then click on the Add/Update Work button.
4c

Add Holidays or Closures to Work Items: To add closures to Work Items, follow these steps:

1. Click on the Edit Closures link to the right of the Work Item (Name).

2. Input the Date of the closure.

   If you still wish volunteers to show up on this closure date, click the check box located beneath “Schedule on this closure?”

3. Type in comments, such as “Holiday”, to explain the closure.

4. Repeat steps 1 through 3 until you have entered all closures for each Work Item (Name) and then click on the OK button at the bottom of the page to accept the closures you have defined.

5. Before leaving the Annual Work Planning page, click on the Save button.
near the top right to save the additions or changes to the tasks.

4e **Edit Shifts:** Prior to submitting the shift assignments, you may edit the specific shift assignment (date, times, & number of people needed). To edit the shift assignments:

1. Click on the **Edit** link to the right of the shift assignment.

2. On the screen that appears, modify the **Start Time**, **End Time**, and/or the number **(# of People)** needed for the shift assignment, then click on the **OK** button to accept the edits.

3. Once you have completed any editing of shifts, click **OK**.

4. You will be brought back to the shift assignments window.

5. Select those **Shift Assignments** you wish to submit either individually (by clicking the check box on the left of each shift) or if you want to submit all of them, by clicking on the check box to the left of **Select All**.

6. Review your work to ensure all has been done completely and in accordance with the annual coordination guidance. Then click on the **Submit** button.
Assign Shift Work to Stakes.

Note: The task of assigning stakes to fill shift labor assignments is done by the Group Coordinator in collaboration with local and area priesthood leaders.

If you as operation manager have specific stakes you would like to have receive an assignment to support your operation, please tell your CSM group coordinators so that those requests can be accommodated.

This ends the procedure: “Setup Tasks and Shift Assignments.”
III-A: Review Current CSMs, YCSMs, and LTVs

Overview

CSM group coordinators may use the system to view lists of the Church-service Missionaries (CSMs), Long-term Volunteers (LTVs) and Young Church-service Missionaries (YCSMs) currently serving in their operations and stakes. These lists can be useful to help monitor who is coming up for release, who may need to be asked to extend their mission, what assignments have been filled, etc. CSM group coordinators may also use these lists to process calls and releases and to access information about specific individuals.

This instructional aid describes how to access these lists in the CSM system.

To access the CSM system:

Enter the Internet at csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on MY ORGANIZATION.

Follow the instructions below.

Click on the Missionaries & Volunteers tab. On the page that appears, type the name of the operation or stake you are seeking in the Operation or Stake box or use the magnifying glass or down arrow to search for the operation or stake and number. Then specify the status of the missionaries you want to view. The list will show those currently serving (see the status box).

If you want to see more than just the list of those currently serving, use the Status dropdown menu to select the list you desire.
FOR CSM GROUP COORDINATORS

- **All** means you will see everyone who has ever served,
- **Current** means you will see only those currently serving,
- **New** means the people are entered into the system but their start date has not yet come.
- **Overdue** means the system has not taken an action yet to release the person even though the release date has passed.
- **Released** lists only those who have been released.

1b Click on the **View Details** button next to the desired service type to see a list of CSMs, Volunteers, or YCSMs in the requested operation or stake.

Note: Service Type counts and hours are for the entire selected operation and status and do not reflect a stake entered above. Click the “Search” button to see a detailed list of Missionaries below.

1c When the list appears below, you may click on the column title above each column to sort this list alphabetically or by lowest to highest number by the data in that column (Name, Service Type, Status, Operation, Hours per Week, Call Length, Release Date, Position Number, or Stake). Click again to reverse the order.
FOR CSM GROUP COORDINATORS

REVIEW CURRENT CSMs, YCSMs, AND LTVs

- Send suggestions to csm-iaidfeedback@ldschurch.org

If the list is long, click and drag the scrollbar downward to see all of the names.

**1d**

You can click on the small table icon at the top right corner above the titles to produce a sortable spreadsheet that includes all the data in the chart.

You may save and use this spreadsheet as an Excel file. See below for an example.

**1e**

**Individual Details.** The system keeps track of individual details, such as contact information, job title, and stake and ward information. To see more detailed information about a current CSM, YCSM, or LTV, click **Search** or **Edit** at the far right of each name. It may take a minute for the detail page to display.

--

Send suggestions to csm-iaidfeedback@ldschurch.org
The following is an example of the page that comes up when you click on **Edit**. A similar but more summarized page appears when you click on **Search**.

If your list is long, it may be easier to search for the person. To search for a particular CSM, YCSM, or LTV, click on the magnifying glass icon to the right of the ID box under **Find Missionary/Volunteer**.
Select the "contains" option from the Name drop-down menu. Type the last name of the person, followed by a comma and then part of the first name, with no space after the comma. Then click Look Up. A list of possible people you may be searching for will appear.

Click on the name of the person for whom you are searching.
The ID number of the selected person will appear in the **Find Missionary/Volunteer** box. Click **Go** to obtain a detailed page of information about the person and their current and prior assignments (as in 1e above).

This ends the procedure: “Review Current CSMs and LTVS.”
III-B: Find and Download CSM/LTV Reports

Overview

CSM group coordinators may access a series of reports on the Church-service Missionary (CSM) System. These reports provide useful information about stake assignments to provide Church-service Missionaries (CSMs), Long-term Volunteers (LTVs) and assignments for daily volunteer shift labor at Church operations. Reports are also available that provide stake and operation contact information and names of members currently serving as CSMs, YCSMs, and LTVs from stakes or at specific operations.

This instructional aid describes how to access these reports in the CSM system.

To Access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on REPORTS.

Follow the instructions below.
### Steps Summary of Actions

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<th>Steps</th>
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<td>9</td>
<td>Run Report: “Missionary and LTV List by Stake”</td>
</tr>
<tr>
<td>10</td>
<td>Run Report: “CSM Position Descriptions”</td>
</tr>
</tbody>
</table>

**Select a Report:** Click **REPORTS** on the main menu. On the **Reports** page, click on the button with the name of the report you want to run.

(Note 1: Some of the listed reports (e.g., Call Letters) are used to facilitate calls and releases and are covered in the Instructional Aids under that topic.)

(Note 2: Reports will take a few moments to process, first showing “Queued,” then “Processing,” and finally “Success” before they appear. Be aware that the report may display *behind* other open windows on your computer screen.)
2 Run Report: “Operation Contacts”

Click on the icon to see the designated contact at an operation site. On the page that appears:

1. Click on the small circle next to either All, Area, Group or Operation to indicate the scope of the list you want to see. If necessary, search for the desired organization using the magnifying glass icon or down arrow.
2. The report default is in PDF format (fixed). From the drop-down box, you can also choose the CSV format (spreadsheet compatible).
3. Click RUN.
4. The report will process and appear on your computer screen.
5. Print and/or save the report to your computer hard drive.

3 Run Report: “Stake Contacts”

On the Reports page, click on the icon to see contact information for stakes. On the page that appears:

1. Click on the small circle next to either All, Area, Group or Coordinating Council, to indicate the scope of the list you want to see. If necessary, search for the desired organization using the magnifying glass icon.
2. The report default is in PDF format (fixed). From the drop-down box, you can also choose the CSV format (spreadsheet compatible).
3. Click RUN.
4. The report will process and appear on your computer screen.
5. Print and/or save the report to your computer hard drive.
Run Report: “Operation CSM Position Detail (Assignments)" 

On the Reports page, click on the icon to view the list of assignments in your operation that stakes have been assigned to fill with CSMs or LTVs. On the page that appears:

1. Fill in the current year in the YEAR field.
2. Find and fill in the Operation I.D. Number. If necessary, search for the desired operation using the magnifying glass icon or down arrow.
3. Make sure the correct name and number of your operation are displayed.
4. The report default is in PDF format (fixed). From the drop-down box, you can also choose the CSV format (spreadsheet compatible).
5. Click RUN.
6. The report will process and appear on your computer screen.
7. Print and/or save the report to your computer hard drive.
Run Report: “Stake CSM Position Detail (Assignments)"

On the Reports page, click on the icon to view the list of assignments stakes have received to fill positions with members serving as CSMs or LTVs. On the page that appears:

1. Fill in the desired year in the YEAR field.
2. Enter the I.D Number of the Coordinating Council or Stake depending on the scope of the report you wish to run. If necessary, search for the desired organization using the magnifying glass icon.
3. The report default is in PDF format (fixed). From the drop-down box, you can also choose the CSV format (spreadsheet compatible).
4. Click RUN
5. The report will process and appear on your computer screen.
6. Print and/or save the report to your computer hard drive.
Run Report: “Operation CSM Shift Detail (Assignments)”

On the Reports page, click on the icon to find a list of shifts that an operation has and the stakes assigned to staff them. On the page that appears:

1. Fill in the current year in the YEAR field.
2. Enter the Operation I.D. Number. If necessary, search for the desired operation using the magnifying glass icon or down arrow.
3. Make sure the correct name and number of the operation are displayed.
4. The report default is in PDF format (fixed). From the drop-down box, you can also choose the CSV format (spreadsheet compatible).
5. Click RUN.
6. The report will process and appear on your computer screen.
7. Print and/or save the report to your computer hard drive.

![Image of Run Report interface]
Run Report: “Stake CSM Shift Detail (Assignments)”

On the Reports page, click on the icon to view the list of shifts that a stake is assigned to staff for the year. On the page that appears:

1. Fill in the desired year in the YEAR field.
2. Enter the I.D Number of the Coordinating Council or Stake depending on the scope of the report you wish to run. If necessary, search for the desired organization using the magnifying glass icon or down arrow.
3. The report default is in PDF format (fixed). From the drop-down box, you can also choose the CSV format (spreadsheet compatible).
4. Click RUN.
5. The report will process and appear on your computer screen.
6. Print and/or save the report to your computer hard drive.
Run Report: “Missionary and LTV List by Operation”

On the **Reports** page, click on the **Missionary & LTV List by Operation** icon to see a list of those currently serving as CSMs or LTVs in an operation, including detailed information related to their assignments. On the page that appears:

1. Enter the **I.D. Number** of one of the three levels of organization offered (**Head Department**, **CSM Group** or **Operation**). If necessary, search for the desired organization using the magnifying glass icon or down arrow.
2. Make sure the correct name and number of the Department, Group, or Operation are displayed.
3. The report default is in **PDF** format (fixed). From the drop-down box, you can also choose the **CSV** format (spreadsheet compatible).
4. Click **RUN**.
5. The report will process and appear on your computer screen.
6. Print and/or save the report on your computer hard drive.
Run Report: “Missionary and LTV List by Stake”

On the Reports page, click on the icon to see a list of the members of a stake currently serving as CSMs or LTVs, including detailed information related to their assignment. On the page that appears:

1. Select the level at which you wish the report generated (Stake, Church Area, Head Department, CSM Group, Coordinating Council, Operation, or Country.) Choose only one of these options. If necessary, search for the desired organization using the magnifying glass icon or down arrow.
2. Be sure the correct organization name appears after entering the unit ID Number.
3. The report default is in PDF format (fixed). From the drop-down box, you can also choose the CSV format (spreadsheet compatible).
4. Click RUN.
5. The report will process and appear on your computer screen.
6. Print and/or save to your computer hard drive.
Run Report: “CSM Position Descriptions”

Click on the icon to see a list of all positions in the CSM system. You may search and find the description of a position in your operation that stakes may be assigned to fill.

1. When you click on the icon, the full list of positions and descriptions for all operations in the CSM system will appear.
2. Hold down the Ctrl key on your keyboard and simultaneously press the F key. A search box will appear in the upper right hand corner of the page.
3. Type a key word contained in the position in the search box (e.g. “storehouse”). The next position on the list that contains the key word will appear.
4. Continue clicking on the down arrow or up arrow in the search box until you find the position you seek.
5. You can select and copy the desired job description to another program or Print/Save the entire document.

This ends the procedure to “Find and Download CSM/LTV Reports.”
III-C: Coordination: Update Operation and Stake Setup

Overview

On the Operation Setup page, the CSM group coordinator records who the operation reports to, who within the operation has access to the CSM system, and adds or deletes the names of the stakes that can potentially receive assignments to fulfill positions and shift labor assignments requested by the operation in coordination.

On the Stake Setup page, the CSM group coordinator indicates who the primary contacts at the stake are to receive automated emails and may add or delete the names of operations to which the stake can potentially be assigned to fill positions and shift labor assignments requested by the operation in coordination.

The Operation Setup page also allows the operation manager to enter important information that is viewed by potential Church-Service Missionaries (CSMs) when they look at opportunities within a specific operation. This includes a description of what the operation does, its normal operating hours, and its recognized holidays in which it is closed.

Before the annual coordination process begins, the CSM group coordinator completes the Operation Setup that the operation manager has started by completing the two lower sections for each operation. The CSM group coordinator also updates the stake Setup for each stake.

This instructional aid describes how to accomplish these procedures in the CSM system.
To Access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on SETUP.

Follow the instructions below.

<table>
<thead>
<tr>
<th>Section</th>
<th>Summary of Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Update Operation SETUP</strong></td>
</tr>
<tr>
<td>2</td>
<td><strong>Update Stake SETUP</strong></td>
</tr>
</tbody>
</table>

1a **Update Operation SETUP**: After clicking on the SETUP tab, the SETUP page will appear.

Click on **Operation**.

On the **My Operations** page that appears, click on the icon located to the right of the **Operation Name** you desire to SETUP.

Send suggestions to csm-iaidfeedback@ldschurch.org
1b A page appears with options to enter data related to the operation. In the section titled **CSM Complement Hours**, review and update as needed:

1. The total **Target Hours per Week**, is not a required field. If you want to update it, consult the CSM Office.

2. The **Initial Length of Service** (in months) should be the maximum term of a position in this operation (typically 24 months). Consult the CSM Office for any exceptions.

3. The **Type** of operation determines what position titles are presented in the dropdown box when editing a position. Do not change this without consulting with the CSM Office.

4. **Operation Reports to Position**. Enter the **Position Number** (Not the Employee ID) of the person to whom this operation reports. This person will have access to the CSM system.

5. The **Additional Positions to access Operation** section. If additional people within the operation need access to the CSM system, enter their **Position Number** in the box provided. To add or remove one of these additional positions with access, click on the plus (+) or the minus (-) buttons respectively. In the case of adding another person to have access, follow step 4 above.
In the **Department** section of the **Operation Setup** page, you will see all the stakes that have the potential to be assigned to provide CSMs, LTVs and shift labor to the operation.

**Notes:**

- *If a stake does not appear on this list, you will not be able to assign the stake to fill positions for that operation in coordination.*

- *Please ensure that the number of stakes an operation has in its setup aligns well with its capacity to manage that number of stake relationships and is sufficient to provide the needed CSMs and LTVs without creating an undue burden on any stake.*

The boxes under the column titles **CSM/LTV** and **Shift** must be clicked for each stake if you want the stake to be included in any assignments for that operation. Only click the box if you want the stake to be eligible to provide support.

**Notes:**

- *If the CSM/LTV box is not checked for a given stake you will not be able to assign the stake to provide CSMs/LTVs to the operation.*

- *If the Shift box is not checked for a given stake, you will not be able to assign shift work to the stake for that operation. If the operation has no shift requirements, the shift box should not be checked.*
You should ensure that each operation has listed a sufficient number of stakes with capacity to provide the needed people, but not too many stakes that it is burdensome to manage the relationships. Collaborate with your operation manager to achieve a reasonable balance between administrative complexity and adequate capacity.

**Adding or Removing Stakes:** You have the ability to add or remove stakes listed in the **Setup** of this operation.

1. **To remove a stake,** click on the minus (-) button on the row containing the stake to be removed. You will see a message box confirming the deletion. To confirm the deletion click on the **OK** button. To cancel the deletion, click on the **Cancel** button.

2. **To add a stake,** click on any of the plus (+) buttons. Then:
   
   a. Enter the unit number for the coordinating council of the stake. Use the magnifying glass icon or down arrow to help locate the coordinating council.

   b. Enter the unit number for the stake to be assigned to this operation. Use the magnifying glass icon or down arrow to help locate the stake.

   c. If the stake is to provide CSMs/LTVs, then ensure that there is a checkmark in the checkbox under the column CSM/LTV.

3. Click on the **Save** button to save your changes or the **Cancel** button to discard your changes.
<table>
<thead>
<tr>
<th>Coordination Council</th>
<th>Stake</th>
<th>CSMLTV</th>
<th>Shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Mexico Albuquerque</td>
<td>543228</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Mexico Albuquerque</td>
<td>279054</td>
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<tr>
<td>Albuquerque New Mexico</td>
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</tr>
<tr>
<td>New Mexico Albuquerque</td>
<td>538516</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rio Rancho New Mexico</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Identify operations that will not coordinate this year:** In the *About Us* section identify those operations that will not participate in the coordination process this coordination year by clicking the box next to *No Coordination Participation* and selecting the reason from the dropdown box to the right.

**Click on the Save button to save your changes or the Cancel button to discard your changes.**

**Update Stake SETUP:** You may also see and adjust the operations assigned to a particular stake. Go to the *SETUP* tab and click on *STAKE*.

1. On the page that appears, type in the name of the stake you want to review in the *UNIT NAME* box. Then click *SEARCH*.

2. A list of potential stake candidates will appear. Click on the icon to the right of the stake you are looking for.
The Stake Setup page that appears allows you to indicate which of the stake officers will get the automated emails (check the box to the right of their names).

1. Click on the stake president’s box under the PRIMARY column if it is not checked.

2. Click on each box under the PRIMARY column of the person the stake president has designated to be the CSM Specialist or Point of Contact.

3. Click on the box for any others to whom the stake president may have delegated CSM duties and should receive automated emails.

**Note:** It is preferable to have at least one contact other than the stake president receive the automated emails.
4. If a designated primary contact does not have both an email and a phone number listed, contact them or the stake, and ask them to update their phone and email address. See the instructional aid “Enter/Update Stake Presidency or High Council Phone, Email” to accomplish this.

5. In the box labeled **ASSIGNED OPERATIONS**, lower down on that same page, you will see all the operations that have the stake in their respective setup pages. The stake is assigned potentially to provide these operations with CSMs, LTVs and shift labor.

**Note:**

- **If an operation does not appear on this list, you will not be able to assign this stake to fill positions for that operation in coordination.**

- **Please ensure that the number of operations that a stake is assigned to support with CSMs and LTVs aligns well with its capacity.**

6. The boxes under the **CSM/LTV** and **Shift** columns must be checked for each operation for which you want the stake to be included in any assignments for that operation. Only click the **box** if you want the stake to be eligible to provide support.
Notes:

- If the **CSM/LTV** box is not checked you will not be able to assign the stake to provide CSMs/LTVs to the operation. If the operation has no position requirements, the **CSM/LTV** box should not be checked.

- If the **Shift** box is not checked, you will not be able to assign shift work to the stake for that operation. If the operation has no shift requirements, the **Shift** box should not be checked.

To help achieve a more even balance of assignments to stakes, you should ensure that any given stake does not have too many operations to support and that any stake does not have assigned to it too many operations, or too many with high needs for CSMs/LTVs. If an operation has many needs for CSMs/LTVs or a high number of shifts, please ensure that there are enough stakes in **Setup** to cover the assignments without it being a burden for any one stake.

**Adding or Removing Operations:** You have the ability to add or remove operations that this stake is assigned to support.

**To add an operation,** click on the plus (+) sign and select the desired new operation to include by typing its operation ID into the box provided. If needed, use the magnifying glass or down arrow to find the operation.

**To remove an operation,** click on the minus (-) sign next to the operation. A box will pop up with the following message. Click **OK** if you want to proceed or **Cancel** to exit without making a change.
When you are finished making adjustments, click on **SAVE**.

This ends the procedure: “Update Operation and Stake SETUP”.

Send suggestions to csm-iaidfeedback@ldschurch.org
III-D: Coordination:
Review Operation Coordination Status

Overview

In the course of the Coordination Process, CSM group coordinators may periodically review the progress of their operations in submitting their requests for CSMs and LTVs and Shift labor.

This instructional aid describes how to accomplish this procedure in the CSM system.

To Access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on COORDINATION.

Follow the instructions below.

1. Click the Coordination Status tab. On this page you may see, for each operation, how many positions and shift hours have been Submitted and the date the status was last updated.

   Note: the fact that some positions or hours have been submitted does not mean the operation has completed all of its submissions – only that something has been submitted.

   The checkbox under “Does not Use” will be checked if you have indicated on the
operation Setup page that the operation will not participate in coordination this year. You should contact operation manager and offer your assistance if the deadline is approaching and sufficient progress has not been made to complete the work by the calendar deadline.

(Note: The Edit button will take you to MY ORGANIZATION and CSM & Volunteer Positions where you can add or modify positions.

This ends the procedure to “Review Operations’ Coordination Status.”
III-E: Coordination: Assign Stakes to Fill CSM & LTV Positions

Overview

In the course of the coordination process, CSM group coordinators use the CSM system to make preliminary assignments to stakes to fill positions requested by the operations they are assigned to support. Upon approval of the CSM area seventy and CSM agent stake president, they then review the proposed assignments with the stake presidents (or their representatives), the area seventy and any operation agent stake president in their groups to obtain their concurrence/comments. The CSM group coordinators then review those comments with the CSM area seventy and/or CSM agent stake president, and the CSM office, and reflect any approved changes resulting from those reviews in the CSM system. Upon approval of the CSM office they then submit their recommendations in the CSM system for final approvals. The CSM director and CSM area seventy for each area present those recommendations to the member of the Presidency of the Seventy that presides over that area. Upon approval of the member of the Presidency of the Seventy, final assignments are distributed to CSM area seventy, CSM agent stake presidents and all area seventy and stake presidents in each area and to the managers of the affected operations.

This instructional aid describes how to use the CSM system to facilitate this process.
Choose the Correct CSM System Option to Assign Stakes: The first step to assigning stakes to fill the positions requested by a particular operation in the CSM system is to decide which system option you will use to do it. The two options are:

1. **Review & Modify Assignments:** Use the Review & Modify Assignments option if the operation manager has already submitted his coordination requests in the CSM system and you do not need to make any adjustments to the position requests (e.g. start dates, length of service or submission of position) the operation manager has (or, on his behalf, you have), already input into the system. Go to **Coordination: Review & Modify Assignments** and follow the instructions there to compete the proposed assignment of stakes to fill positions submitted by your operations.

2. **Assign Stakes to Fill CSM & LTV Positions (this instructional aid):** Use this instructional aid if you are inputting position requests on behalf of or with the operation manager, or if you need to make any adjustments in the position requests (e.g. start dates, length of service, position descriptions, etc.) the operation manager has already submitted in the system. While doing that you may also make assignments to stakes to fill those positions. To request positions and to make assignments to stakes to fill those positions, follow the steps below.

Entering requests for positions to be filled by CSMs and LTVs: To enter positions requests on behalf of or with the operation or to make adjustments to the requests, go to the instructional aid for operation managers: **Coordination: Request CSMs and LTVs** and follow the instructions there. Then, return to this instructional aid for how to enter assignments to stakes to fill those positions requested.
Prepare to assign stakes to fill requested positions:

**Before you make assignments to stakes to fill the positions you have requested, it is essential to be well prepared. Follow the guidance below as you prepare.**

**Follow guidance from the CSM office:** You will receive guidance from the CSM office regarding key factors you should use to assign stakes. While you may make advance preparations necessary to make the assignments (see below), you should defer the completion of the assignment of stakes until you have received that guidance (for 2015, July 1). The CSM office will let you know when it is appropriate to finalize your stake assignments.

**Operation and stake setup:** Before you begin, make sure the operation and stake setup is complete for the operation whose positions you want to assign stakes to fill and for the stakes to be assigned. This includes ensuring that all the stakes that you want to assign are listed in the Setup page for the operation and that the boxes under the **CSM/LTV** and **Shifts** columns are checked for those stakes, as appropriate. If this is not done, you will not be able to assign the stakes to fill positions. To learn how to update or complete Setup, go to the instructional aid: **Coordination: Update Operation Setup and Stake Setup.**

If there is an agent stake president for the operation, consult with him and the operation manager to see if there are particular stakes that should be included in the list of those stakes you will assign. Consult with your CSM agent stake president and CSM area seventy. They may have some preferences on how to approach the stake assignments.

**Carryover assignments:** Remember, that if a stake was assigned to a position last year, the assignment will carry over to the new coordination year. You are not obligated to continue that assignment with that stake. You can change it if there is a good reason to do so. However, continuity is a good thing and should be the first option. Some of the reasons for which you might consider changing assignments include: the stake may have had too many assignments in the past; the stake may have been divided and the new stake needs to be assigned; the stake may be too far away from the operation to effectively provide people to serve, etc. It is also good to ask the stakes if there is anything that should be taken into consideration as you prepare the preliminary assignments.

**Using the auto assign function:** The CSM system has a function that, when activated, will assign a stake to all unassigned positions that have been requested by an operation for the upcoming coordination year. The purpose of this function
is to make a rough cut at assigning, on an even basis, stakes to positions that have not already been manually assigned or carried over from the prior year. It is a starting point for further refinement and should not be considered the final step in making assignments.

The auto-assign function looks at all the stakes listed in the Setup of a particular operation and assigns to those stakes the remaining unassigned positions requested by that operation based on the proportion of each stake’s members 55-80 who have a current temple recommend compared to that of all other stakes in that operation’s Setup. Starting with the 2015 coordination process, auto-assign will take into account all positions that are currently filled by the stake. It will not consider anything else (like distance from the operation, other assignments for temple or ecclesiastical callings outside the stake, etc.). It only optimizes assignments across the stakes in one particular operation and does not address the balancing of assignments across all operations for which a given stake may be included in those operations’ Setup. So, all else being equal, a stake that is included in the Setup of ten operations would likely get more assignments than a similarly situated stake that is included in the Setup of only five operations. For that reason, you should pay particular attention to not include a stake in the Setup of too many operations and should review the overall assignments after auto-assign runs, to make sure they are reasonable.

The auto-assign function will be turned on at a certain point in the coordination process. The CSM office will notify you when it will be turned on and how frequently it will run (e.g. every night, weekly, etc.). You can request that it not be run for your operations.

After auto assign runs, you should look at your overall assignments and answer the questions included on pages 14-15 of the annual CSM coordination guidance document and follow any further guidance from your area CSM priesthood leaders and the CSM office for more refined adjustments. Make the necessary modifications in assignments so that the desired end result -- that operations have sufficient stakes to meet their needs and stakes receive assignments in line with their capacity and willingness to fill positions -- is achieved.

**Prepare the plan for assignment of all stakes in your group:** Before beginning to assign stakes to specific positions in your operations, you should have made an overall plan regarding which stakes will receive how many assignments. This plan should take into account all factors relevant to your area, including any guidance from local and area priesthood, the CSM office guidance, distance from the operation, capacity of the stake, balance among stakes of those serving, historical
assignments, expressed preferences, etc.

**Manually Assign Stakes to Positions in an Operation:** To manually assign positions to a stake or change a carryover assignment to a different stake, go to the **COORDINATION** tab in the CSM system, click on **Request CSM & Volunteer Positions**.

On the page that appears, review the columns **Stake #** and **Assigned Stake**. All positions requested by the operation for 2015 coordination will be listed with start dates in 2015. All of these positions need to be assigned a stake. If a stake name already is listed, please review it to make sure the assignment should continue with that stake. If not, you can change the assignment.

A stake may be assigned to fill a non-assigned position or a previously entered stake assignment may be changed. You do this by entering the desired stake number on the line for that position under the **Stake #** column. If needed, use the magnifying glass or dropdown arrow to find the number of the desired stake.

Select the desired stake on the list by clicking on the name or number.
The number of the selected stake will appear in the Stake # column and the stake's name will appear in the Assigned Stake column for that position. You now will have entered the proposed stake assignment for this position.

Repeat this step for each position (either Future Vacancy or Vacant position) requested by the operation that has a start date in 2015.
Ensure you have completed assigning stakes to all the positions requested by your operation.

Then, click **Save for Later**.

Review your work and make sure you have followed your plan for stake assignments for this operation.

Then, check the box on the left of every position you have requested and assigned a stake to fill and click **Submit Selected**.

**Note:** Unless you intend to submitt all of the positions on the operation’s page, do not click **Submit All**.

**Modify Positions Previously Submitted:** Once you submit any selected position, it will be “locked down” on this page in CSM the system.

If you need to make any changes to the position details or assignment of any position, you have submitted here, you should contact the operation to confirm that adjustments to their submission need to be made. If so, you may make those adjustments for them.

To do so, you will need to enter the **Request CSM & LTV Positions** page of that operation using your LDS Account username and password and click on the **Unsubmit** button next to each position that needs adjustment. (Only the CSM Office and CSM Group coordinators can access and use the **Unsubmit** button).

If needed, use the **Coordination: Request CSMs & LTVs** instructional aid for operation managers to guide you in making the needed modifications to details of the position (e.g. **Standard Job title, Custom Job title, Location, Hours per Week**).

Make the changes to each position as agreed to, or requested, by the operation manager. Confirm with the operation manager that all has been done according to his direction.

Then, check the box on the left of the positions you have changed and want to submit and click **Submit Selected**.
Then return to the **Review & Modify Assignments** page for your CSM group and make sure the stake assignments are still correct. If not, modify the assignments, as appropriate to ensure an appropriate balance of stake assignments is maintained.

**This ends the procedure: “Assign Stakes to Fill Positions.”**
III-F: Coordination: 
Review & Modify Assignments

Overview

During the coordination process, CSM group coordinators can use the Review & Modify Assignments module of the CSM system to propose assignments to stakes to fill positions that the operations have requested in the Request CSM & Volunteer Positions module of the system. They can also modify the preliminary assignments they, as CSM group coordinators, have made to stakes in their group and they can finalize and submit for final approvals the assignments proposed to the Presidency of the Seventy.

This instructional aid explains how these procedures can be accomplished.

To access
the CSM system:

Enter the Internet at
http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on COORDINATION.

Follow the instructions below.
<table>
<thead>
<tr>
<th>Section</th>
<th>Summary of Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Advance Preparation</td>
</tr>
<tr>
<td>2</td>
<td>Review &amp; Modify Assignments - Overview</td>
</tr>
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<td>Review &amp; Modify using View by Operation</td>
</tr>
<tr>
<td>4</td>
<td>Review &amp; Modify using View by Stake</td>
</tr>
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<td>5</td>
<td>Modify Positions Previously Submitted</td>
</tr>
<tr>
<td>6</td>
<td>Review your overall work</td>
</tr>
<tr>
<td>7</td>
<td>Review preliminary assignments with priesthood leaders</td>
</tr>
<tr>
<td>8</td>
<td>Confirm, save and submit your work</td>
</tr>
</tbody>
</table>

**Advance Preparation:** Before you begin to make or modify assignments of positions to stakes, it is important to ensure that the operation has completed its work of inputting the requests for positions in accordance with the annual CSM coordination guidance and instructional aids. This includes updating the operation Setup, requesting all positions needed for replacement and growth (selecting correct start dates and length of service for requested positions, using the correct position numbers, and modifying positions descriptions, as needed, pairing couple only positions, etc.) See the CSM annual coordination guidance document Section III-C: Guidance for Operation Managers and the following instructional aids:

- **Coordination: Update Operation Setup**
- **Coordination: Request CSMs and LTVs**
- **Coordination: Setup Tasks and Shifts**
- **Coordination: Modify, Activate, Add, or Pair Positions**

If the operation has asked you to input its requested positions on their behalf, you may do so in accordance with above referenced guidance and instructional aids. Once done with that, return here and complete the following:

**Prepare to assign stakes to fill requested positions:**

*Before you make assignments to stakes to fill the positions you have requested, it is essential to be well prepared. Follow the guidance below as you prepare.*

**Follow guidance from the CSM office:** You will receive guidance from the CSM office regarding key factors you should use to assign stakes. While you may make advance preparations necessary to make the assignments (see below), you should defer the completion of the assignment of stakes until you have received that guidance (for 2015, July 1). The CSM office will let you know when it is appropriate to complete your stake assignments.
**Operation and stake setup:** Before you begin, make sure the operation and stake setup is complete for the operation whose positions you want to assign stakes to fill and for the stakes to be assigned. This includes ensuring that all the stakes that you want to assign are listed in the Setup page for the operation and that the boxes under the CSM/LTV and Shifts columns are checked for those stakes, as appropriate. If this is not done, you will not be able to assign the stakes to fill positions or to provide shift labor. To learn how to update or complete Setup, go to the instructional aid: [Coordination: Update Operation and Stake Setup](#).

If there is an agent stake president for the operation, consult with him and the operation manager to see if there are particular stakes that should be included in the list of those stakes you will assign. Consult with your CSM agent stake president and CSM area seventy. They may have some preferences on how to approach the stake assignments.

**Carry over assignments:** Remember, that if a stake was assigned to a position last year, the assignment will carry over to the new coordination year. You are not obligated to continue that assignment with that stake. You can change it if there is a good reason to do so. However, continuity is a good thing and should be the first option. Some of the reasons you would consider changing assignments include: the stake may have had too many assignments in the past; the stake may have been divided and the new stake needs to be assigned; the stake may be too far away from the operation to effectively provide people to serve, etc. It is also good to ask the stakes if there is anything that should be taken into consideration as you prepare the preliminary assignments.

**Using the auto assign function:** The CSM system has a function that, when activated, will assign stakes to all unassigned positions that have been requested by an operation for the upcoming coordination year. The purpose of this function is to make a rough cut at assigning, on an even basis, stakes to positions that have not already been manually assigned or carried over from the prior year. It is a starting point for further refinement and should not be considered the final step in making assignments.

The auto-assign function looks at all the stakes listed in the Setup of a particular operation and assigns to those stakes the remaining unassigned positions requested by that operation based on the proportion of each stake’s members 55-80 who have a current temple recommend compared to that of all other stakes in that operation’s Setup. Auto-assign will take into account all positions that are currently filled by the stake. It will not consider anything else (like distance from...
the operation, other assignments for temple or ecclesiastical callings outside the stake, etc.). It only optimizes assignments across the stakes in one particular operation and does not address the balancing of assignments across all operations for which a given stake may be included in those operations' Setup. So, all else being equal, a stake that is included in the Setup of ten operations would likely get more assignments than a similarly situated stake that is included in the Setup of only five operations. For that reason, you should pay particular attention to not list a stake in the Setup of too many operations and should review the overall assignments to make sure they are reasonable.

The auto-assign function will be turned on at a certain point in the coordination process. The CSM office will notify you when it will be turned on and how frequently it will run (e.g. every night, weekly, etc.). You can request that it not be run for your operations.

After auto assign runs, you should look at your overall assignments and answer the questions included on pages 14-15 of the annual CSM coordination guidance document and follow any further guidance from your area CSM priesthood leaders and the CSM office for more refined adjustments. Make the necessary modifications in assignments so that the desired end result — that stakes receive assignments in line with their capacity and willingness to fill positions — is achieved.

Prepare the plan for assignment of all stakes in your group: Before beginning to assign stakes to specific positions in your operations, you should have made an overall plan regarding which stakes will receive how many assignments. This plan should take into account all factors relevant to your area, including any guidance from local and area priesthood, the CSM office guidance, distance from the operation, capacity of the stake, balance among stakes of those serving, historical assignments, expressed preferences, etc.

Review & Modify Assignments - Overview. Click on the Coordination tab at the top left of the screen. Then below that, click the Review & Modify Assignments tab.
You can review and modify assignments in two modes: View by Operation or View by Stake. It is best to start with View by Operation since you can see all the positions requested by all operations for your Group (whether or not the positions have been assigned to a stake) and ensure they have a stake assigned to fill them.

The View by Stake option only shows positions already assigned to stakes, so if you start with that view, and some positions do not yet have a stake assigned to fill them, you will not see or be able adequately to consider the final balance among stake position assignments.

After making all your assignments of stakes to positions and shifts for each operation in the View by Operation tab, you should go to the View by Stake tab and review the assignments for each stake to ensure that stake assignments are appropriately balanced according to the annual guidance and your priesthood leaders’ direction. If some rebalancing is needed, you can also make modifications to assignments in View by Operation.

Review & Modify using View by Operation: First, click on View by Operation.

(A description of how to navigate the View by Stake alternative is presented further along in this instructional aid.)

To Review & Modify your operations assignments in View by Operation:

1. If it is not already displayed, enter the CSM Group, or use the drop-down menu to select your group.

2. Enter the coordination year to the right of the box labeled For.

3. Click Search.

4. A list of all the operations assigned to the CSM group will appear.

5. Click View Positions or View Shifts, for an operation, as desired.
(Note: If either View Positions or View Shifts is not “active” (clicking the button does not result in a page coming up), it means that the operation does not have assignments (that need to be filled under that category (e.g. positions or shifts.))

6. **Review and make/modify position assignments to stakes for each operation:** A list of the positions requested by the operation will appear. Some positions may have a stake assigned already and some may be empty (see the columns Stake # and Stake Name).

With this list you can make assignments to stakes for all the positions that do not have a stake assigned, or modify existing assignments for those that do.
7. To select a new or replacement stake, click on the magnifying glass to find a list of possible stakes (these are the stakes you have included in the Setup for the operation).

8. Click on the **Stake Name** you want to give this assignment.

9. The selected stake name and its number will be automatically loaded in the boxes on the prior page. You do not need to do anything else to have that stake name and number be retained in the CSM system for that position.

10. Keep doing this until all positions listed for the operation have a stake assignment.
11. Once done with all assignments, you may click **Return** to go to the **Review & Modify Assignments** page and select the next operation and complete its assignments as well.

12. Continue this process with each operation until all positions in all the operations listed **Review & Modify Assignments** for your group have an assigned stake.

13. Click **SAVE** to save your work.

**Review & Modify using View by Stake:** To see how these assignments are arrayed by stake, and to ensure that all assignments to your stakes are balanced and in accordance with the coordination guidance, click on the **View by Stake** tab on the **Review & Modify Assignments** page.

1. Select the **CSM Group** (If you are a CSM Group coordinator, your group should already be displayed).

2. If desired, you may select a specific coordinating council, but if you leave it blank you will see all of your Group’s stakes and councils.
3. Click on **Search**.

4. A list with the coordinating councils, stake names, and existing assignments will appear.

5. On this page you can see how many positions and shift hours are assigned to the stakes listed. This can allow you to determine if assignments are balanced among the stakes in your Group.

6. To see and modify detailed assignments for a stake, click on the **View Positions** or **View Shifts** labels to the right of the stake name.

7. **Review and make/modify position assignments to stakes for each stake:** A list of assignment for that stake will appear. You may change the stake that has that particular assignment by clicking on the magnifying glass to find a list of possible stakes (those included in the Setup for the operation where the position is located).
8. A list of the stakes included in the Setup for the operation that has requested that position will appear.

9. Select the desired stake by clicking on the name of the stake.

10. The position will be assigned to the newly selected stake. To confirm this, go to the list of Stakes and click on the View positions Link for the new stake.
11. The number and name of the newly selected stake will appear in the appropriate boxes next to the position.

12. Click **Return** to go to the previous page.

13. Then go to the stake for which the assignment was taken away. Click on **View Positions**. On the page that comes up, you will see that the assignment no longer is listed with that stake.

14. Click Return to go to the main page
15. Continue reviewing and modifying stake assignments until you have gone over each stake and are sure you have made all needed changes.

16. Once completed, click **Save** to save what you have done.

Modify Positions Previously Submitted: In the course of reviewing and modifying assignments, you may determine that a particular operation may have requested too many or too few positions or that **Start Dates, Length Of Service, Job Titles**, or **Job Descriptions** of positions requested need to be changed. If that is the case, you should contact the operation to confirm that he/she agrees. If so,
you may help them make those adjustments. You will need to enter the **Request CSM & LTV Positions** page of that operation using your LDS Account username and password and click on the **Unsubmit** button next to each position that needs adjustment. (Only the CSM Office and CSM Group coordinators can see and click on the **Unsubmit** button).

Use the **Coordination: Request CSMs & LTVs** instructional aid for operation managers to guide you in making the needed modifications.

Make the changes to each position as agreed to by the operation manager. Then, confirm with the operation manager that all has been done according to his direction.

Then, check the box on the left of the positions you have changed and want to submit and click **Submit Selected**.

Then return to this **Review & Modify Assignments** page and make sure the stake assignments are still correct, or change the assignments, as appropriate to ensure an appropriate balance of assignments is maintained.

---

**Review your overall work:** Once you have completed inputting your stake assignments for each and every operation in your group, take a step back and look at the overall picture of the assignments you have made for all of your
stake and operations.

- Make sure you review the questions on page 14-15 of the annual CSM coordination guidance with respect to your preliminary assignments.
- Review your assignments with the CSM office. They can provide global reports that may assist you in that evaluation. To assist in the review and approval of the Presidents of the Seventy, share with the CSM office the information you have received from the operations on any major changes in requests for requested positions, shift assignments or assignments to stakes.
- Once everything is submitted, download the draft position assignments and the draft shift assignments reports from the CSM system Reports page before sending them out to each stake president and area seventy for their concurrence/comments. Make sure they appear reasonable and in line with guidance and your plan.

Make any needed adjustments in the CSM system.

**Review preliminary assignments with priesthood leaders:** When you are sure your assignments are in good order, download the draft position assignments and the draft shift assignments reports for your group for the coordination year and review them with your CSM agent stake president and/or CSM area seventy. This should all be completed by **July 15**.

Once you have their approval to present these preliminary assignments (with any adjustments they may direct you to make) to local priesthood leaders, email the draft position assignments and the draft shift assignments report for each stake to that stake president and the reports for each coordinating council to the area seventy that presides over those councils. Ask for their concurrence/comments on the proposed assignments via reply email by the calendar deadline (August 15). If your CSM area seventy approves, you may indicate that a non-response will be considered concurrence. Review and confirm any changes they may request with your CSM area seventy and/or CSM agent stake president. Then, enter the system and make any adjustments to assignments that come from that review.

**Confirm, save, and submit your work:** Take a good look at the overall result of your assignments to stakes of positions requested by your operations. Ensure all positions requested by each operation are assigned a stake and that all assignments to stakes are well balanced.
Be sure to click Save to save what you have done in the system.

When you are satisfied your stake assignments are well balanced according to your plan, the annual coordination guidance and the direction received from your area CSM Area seventy and CSM stake president, review your proposed assignments with the CSM Office coordinator assigned to oversee the coordination process.

Do not click on Submit for Approvals until you have reviewed your proposed stake assignments with the CSM office and have received their authorization. Once the Submit for Approvals button is clicked, your ability to make further changes is lost.

This ends the procedure: “Review & Modify Assignments.”
III-G: Modify, Activate, Add, or Pair Positions

Overview

Positions to be filled with Church-service missionaries (CSMs), Young Church-service missionaries (YCSMs) and Long-tern volunteers, (LTVs) are listed in the CSM system, including the job title, location, hours per week, and so forth. CSM group coordinators can modify or add unique position details to the job description, activate an inactive position, or add new positions in the CSM system. They can also pair two positions (e.g., husband/wife teams) to ensure they are kept together when a call is being processed or a coordination assignment is being made or modified.

This instructional aid describes how to accomplish these procedures in the CSM system.

To access the CSM system:

Enter the Internet at http://csm.ldschurch.org

Sign in with your LDS Account User Name and Password.

In the top menu bar, Click on MY ORGANIZATION.

Follow the instructions below.

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Send suggestions to csm-aiidfeedback@ldschurch.org
**Modify, Add Position Details to a Position.** Before positions are submitted in the coordination process or a call is processed, the CSM group coordinator can modify or add position details to the job description. These details reflect the unique requirements, responsibilities, or qualifications related to the specific position being requested or filled.

Begin by clicking the **MY ORGANIZATION** tab on the main menu, and then the **CSM & Volunteer Positions** tab below it.

If the correct operation is not shown, type the name in the **Operation** field, or search for the desired organization using the magnifying glass icon or down arrow. A list of job titles for that operation will appear.

Click on **View Details** to the right of the **Job Title** to see a list of positions.

On the list that appears at the bottom of the page, scroll down to find the specific position number for the position that you want to add or modify details. Click the **Posting** button at the far right to view the **Posting Details** page for that job title and description.
The **Posting Details** page shows five boxes of general information describing the Job Title—**About Us, Purpose, Responsibilities, Qualifications**, and **Additional Position Details**. The first four boxes cannot be modified here. Operation managers, or CSM group coordinators on their behalf, may update the first box (”About Us”) on their operation setup page. The remaining three are maintained by the CSM office.

The last box on the page, **Additional Position Details**, is where the operation manager can include other information that someone considering this position should know before accepting the assignment. Priesthood leaders calling members to serve use this information along with the information recorded in boxes one through four to provide all the needed information about the position as they consider whether they are qualified to fill it.

After adding or modifying position details, click **Save** at the bottom of the page.
Modify/Update or Activate an Inactive Position. If there is a “Vacant” position that is active, but the information is not correct, you can modify or update the position information so that it conforms to the position being requested in coordination. In doing that you ensure that, when a member is called to serve in that position, the Priesthood leader may provide a correct and complete description of the position to the member of what they are being called to do.

You can also activate an “Inactive” position and then update it to fit the new requirements.

Begin by clicking the **MY ORGANIZATION** tab on the main menu, and then the **CSM & Volunteer Positions** tab below it.

1. If the correct operation is not shown, type the name in the **Operation** field, or search for the desired operation using the magnifying glass icon or down arrow.

2. Once the operation is selected, a list of job titles for that operation will appear.

3. Click on **View Details** to the right of the **Job Title** to see a list of positions.
4. On the list that appears at the bottom of the page, scroll down to find the specific position number for the Position that you want to update with new information. Click the Update button to the right of the number to go to the Update Position page where you can make your changes.

a. Create a New Record: On the Update Position page that appears, click on the plus (+) button in the upper right corner to create a new record. Fill in all the relevant information:

b. Choose an Effective Date: The position automatically will be assigned today as the Effective Date of the change. If you want to change the Effective Date, you can type it in the field or click on the calendar icon and select a different date (make sure you select the correct month, day and year). Press the Enter key on your keyboard to register the selected date.

(Note: It is preferable to use the current date or an earlier date for the Effective Date. You can back-date a position as far back as the date of the previous record (click on the “First” and “Last” arrows in the header to find the most recent position and its Effective Date). Although not advisable, you can also make the Effective Date a date in the future. However, a position with a future-date does...
not appear on lists and a report in the CSM system until that date arrives.)

c. **Activate a Position:** In the *Status* field, if the position is “Inactive,” click on the arrow that shows the drop-down list, and select Active. The position will now be ready to request for coordination or available for CSM group coordinators to process a call. Note: reactivated positions can only be backdated to the day after the date on which the last prior action was taken on the position (e.g. the date it was inactivated).

d. **Change the Standard Job Title,** if desired, by selecting one of the available options from the drop-down list.

e. **Choose a Custom Job Title:** The *Custom Job Title* field will be automatically filled in with the same name as listed in the Standard Job Title. However, if desired, you may replace it by typing in a different job title that will show on lists and reports.

f. **Choose the Location (operation):** Be sure the *Location* (i.e. operation) is correct. If the correct operation is not shown in the *Location* field, search for the desired operation, using the magnifying glass icon or down arrow. If the operation name you seek does not appear as you search, it may be that it is not registered in the CSM system. Call the CSM office at 801-240-4914 to request that it be registered.

g. **Select Hours per Week:** If needed, you may correct the *Hours Per Week* to be served.

h. **Choose a special category if relevant:** Check the box next to any of the specialized categories listed that may apply to the position, including:

- **Young Church-Service Missionary:** While requesting positions for coordination it is especially important to click this box for each position that can accommodate these young people who, due to physical or mental limitations, cannot serve a regular proselyting mission. Please consider each position to see if it can qualify and check the box if it can.
• **Couple Only:** Check this box for positions that require two people to serve together (such as a husband and wife). Make sure to type the companion position number in the box provided and write down the two position numbers that you want to pair. To pair the positions, follow the instructions in section 4 of this instructional aid.

• **Specialized Skill: Exclude from Stake Assignment:** You should click this box only if the position is not to be included in the coordination process because its requirements are such that it would be unlikely an assigned stake could find someone with those skills (e.g. hydro-geologist, or a medical doctor with a specific specialty). We use other means to find people that qualify for these specialized positions.

**i. Save:** Click Apply to save what you have done.

### 3a. Add a New Position
If there are no “Future Vacancy”, “Vacant”, or “Inactive” positions that can be activated, you can create a new position. *To avoid cluttering the System, this should be done only if there are no other viable options available. Once positions are created, they cannot be removed, but they can be inactivated.*

To create a new position, click the Add Position button on the CSM & Volunteer Positions page.
When the **Add Position** page appears, fill in all the relevant information for the new position.

1. Select “**Active**” for Status.

2. Choose a **Standard Job Title** from the drop-down list.

3. If desired, give the position a **Custom Job Title** that will appear on lists and reports.

4. Be sure the **Location** (e.g. operation) is correct. If not, search for the desired operation using the magnifying glass icon or down arrow.

5. Choose the **Hours per Week**.

6. Select the **Effective Date**, which should be the current date or earlier.

7. Check the box to indicate if the position is for a **Young-Church Service Missionary, Couple Only** or a **Specialized Skill** (see Section 2c. above for guidance on these categories).

8. Click **Save**.
When you click on **SAVE**, at the bottom of the **Add Position** page, a popup message will give you the **Position Number** that is created by the CSM system for the new position. Write the number down for future reference. Click **OK** to remove the popup. The new position will appear on the **Job Title** list of the previous page (**CSM & Volunteer Positions**). You can now request and assign the position in the coordination process and prepare a call letter for a new CSM or Volunteer.

**Pair Positions for People Serving Together.** If the operation desires two people to serve together (e.g., husband and wife) you can pair the positions so the CSM system assigns them to the same stake and they appear on reports together.

**Pair existing positions:** To pair positions already in the CSM system:

1. First go to **MY ORGANIZATION** on the main menu and click on **CSM &Volunteer Positions.** Click on **View Details** to the right of the desired **Job Title**.
2. On the table that appears at the bottom of the page, find the two position numbers you want to pair and write them down. Click the **Update** button for the first number.

3. On the **Update Position** page that appears, click on the plus (+) button in the upper right corner.

4. Enter the **Effective date** of the change.

5. Down the page, check the box labeled **Couple Only**.

6. Type the number of the second position in the **Companion Position Number** field.

7. If necessary, you can also make changes to other position information (e.g. **Standard Job Title**, **Custom Job Title**, **Location**, and **Hours per Week**).

8. When done, click **Apply** to return to the previous page.

9. Next, go to **Update Position** page for the second position number you
wrote down and follow the same procedure. The paired positions should show identical information (e.g., Standard Job Title, Custom Job Title, Hours Per Week, Effective Date, and so forth).

10. Once this is completed, and you click **Apply** for the second position, both positions will appear as paired on lists and reports in the CSM system.

**Pair New Positions:** You can also create two new positions, as described in **Section 3**, above, and pair them following these same instructions.

This ends the procedure: “Modify, Activate, Add, or Pair Positions”
III-H: Coordination: Assign Stakes to Fill Short-term Shifts

Overview

Once the Operation manager has gone through the steps of Shift Setup, Task Setup, and Annual Work Planning as it relates to the shift planning process, the CSM group coordinator proposes assignments to stakes to fulfill specific short-term shift assignments, as needed. An example of one of these situations where a CSM group coordinator would make a manual stake assignment of a shift requirement would be if a stake has requested a regular shift assignment, such as unloading a delivery truck for a Bishop’s Storehouse once a month. Submitted proposed shift assignments may also be edited and changed as needed in the Review & Modify Assignments module of the CSM system to achieve better stake assignment balance.

The CSM system has a feature by which proposed assignments to stakes to provide members to fill requested shift requirements can be made automatically. This is called the auto-assign function. Those requested positions that do not have a stake manually assigned to them are assigned through the auto-assign function when it is turned on in the CSM system. The auto-assign function is used to balance out assignments relatively evenly across all stakes assigned to support an operation as a starting point for determining the final recommended assignments. You should not rely on this auto assign function to be the final step in preparing recommended assignments to stakes. Human review and adjustment is always appropriate and desired. Assignments made from the auto-assign process can be manually overwritten in the CSM system.

If you do not wish to use the computer auto-assign function to assist you to determine equitable assignments, you may manually request specific stakes for each shift. However this can be time consuming given the large number of shift assignments that is typical of production operation.

Whatever method you may use to determine the assignment of shift labor to stakes, they are preliminary until concurred with by local and area priesthood leaders and approved by the member of the Presidency of the Seventy. Such concurrence/approval is obtained along with the approval of assignments to fill positions as discussed at length in the annual CSM coordination guidance document.

This instructional aid describes how to assign stakes manually to fill shifts in the CSM system.
ASSIGN STAKES TO FILL SHORT-TERM SHIFTS

To access the CSM system:

Enter the Internet at [http://csm.ldschurch.org](http://csm.ldschurch.org)

Sign in with your LDS Account User Name and Password.

In top menu bar, Click on COORDINATION.

Follow the instructions below.

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**Assign Shift Work to Stakes:**

*Note: The following task of assigning stakes to fill shift work needs is done by the CSM group coordinator in collaboration with the Operation manager.*

Go to the Coordination tab, and click on the Short-term Shift Assignments tab.

Enter the operation’s name in the Operation box

Ensure that the correct coordination year is displaying (if not, change it), and

Click on the Search button.
The assignments list for that operation will appear below. Perform the following steps:

1. On each work line, look up and select the **Stake Name** for the stake to be assigned to staff that work with volunteers.

2. For each of the assignments for which you need to manually assign stakes, or for which you want to override an assignment done by the auto-assign function, click on the magnifying glass or dropdown menu to bring up a list of the stakes from which to select the assigned stake.

3. Click on the stake’s name you wish to assign manually to the shift assignment.
4. That stake’s name will appear in the box to the left of the magnifying glass.

5. Repeat steps 1 through 3 for each of the shift assignments you wish to assign manually. If you wish auto-assign to make assignments, leave those requests blank. The auto-assign process will automatically assign those blank assignments to the stakes assigned to that operation. However, you should review the result of those automated assignments and, if needed, modify them to ensure that the desired balance among the stakes assigned is achieved.

**Edit Shifts:** Prior to submitting the shift assignments for an operation, the operation manager, or CSM group coordinators, on their behalf, may edit the specific assignment (date, times, & number of people needed). To edit the shift assignment:

1. Click on the **Edit** link to the right of the shift assignment.

2. Modify the **Start Time, End Time**, and/or the number **(# of People)** needed for the shift assignment, then click on the **OK** button to accept the edits.
Review and Submit: Once you have assigned all of the desired shift assignments to stakes, either manually or through the auto-assign function, step back and review what you have done. Ensure that all preliminary assignments for shifts, along with any preliminary assignments to fill positions are balanced across the stakes.

Review the questions on pages 14-15 of the annual coordination guidance, any guidance provided by your CSM area priesthood leaders.

Review your work with the CSM Office to ensure all has been done completely and in accordance with any guidance provided by the Presidency of the Seventy. Make any needed adjustments in the CSM system.

Then, select those shift assignments you wish to submit either individually or using the Select All option.

Then click on the Submit button.
Print off and review the draft shift assignments reports from the CSM system.

Make sure they reflect what you intended to input into the CSM system.

With permission from your CSM agent stake president and/or your CSM area seventy, send each stake’s draft shift assignment report along with the draft reports for position assignments to the respective stake president and the same reports for each coordinating council to their respective presiding area seventies for concurrence/comment by the calendar deadline.

Review any comments received from this process with your CSM agent stake president and/or your CSM area seventy. Following the instructional aid: Coordination: Review and Modify Assignments review and make any approved/needed adjustments to your proposed assignments.

Review your finalized input with the CSM office and submit your final assignments in the CSM system once you receive approval to do so.

**Note:** You may be asked to provide explanations for any major differences in shift labor requests or in stake assignments compared to the prior year for the CSM program director to pass on to the Presidents of the Seventy who approve the assignments for each area. Make sure you discuss those with the operation manager as you interact on their requests for shift labor or positions.

**This ends the procedure: “Assign Stakes to fill Short-term Shifts.”**
III-I: Print Release Letters and Certificates

Overview

Release Letters and Certificates of appreciation are processed within 30 days before the release date of the missionary. CSM coordinators process these release letters and certificates for Church-service missionaries. (Note: CSMs only get a release letter if they have served at least 6 months. LTVs do not get release letters, but the CSM group coordinator may prepare a special certificate and letter of appreciation, if the operation or the stake president so desires.)

This instructional aid describes how to accomplish this procedure in the CSM system.

To access the CSM system:

Enter the Internet at: csm.ldschurch.org

Login using your LDS Account username and password.

Click on REPORTS

Follow the instructions below to Print Release Letters and Certificates
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1a **Obtain a list of upcoming releases along with their 6-digit ID numbers:** On the page that appears, click **Missionary & Long-term Volunteer Release Summary**.

To request the report:

1. On the page that appears, type the beginning and ending release date range for which you would like to print release letters into the two boxes to the right of **Release Date**. (You can click on the calendar icons to help you.)

2. Type your 3-digit Group number in the **CSM Group** box, or find it by clicking on the magnifying glass icon or down arrow and selecting your CSM Group name.

3. Select if you want to have the list sorted by **Missionary Name** or by **Release Date**.

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4. Choose from the dropdown box if you want to receive the list in **PDF** (fixed) or **CSV** (spreadsheet compatible) format.

5. Click **Run**.

   ![Image](image-url)

Wait while the pop-up box says **Queue**, then **Processing**, then **Success**. A list of CSMs and LTVs that are scheduled for release in the next 90 days will appear. Save this list on your computer, since you will need the missionaries’ names and 6-digit ID numbers to process the release letters.

**Process a Release Letter.** On the CSM website, click the **Reports** tab. Then Click the **Release Letters** button.
Follow these steps:

1. If you know the missionary's 6-digit ID#, type it in the Reprint Missionary ID box.

2. If you don't know the missionary's 6-digit ID#, do the following:
   
   a. Click on the magnifying glass

   b. In the Search box that appears, click the down arrow by Empl ID, then click Last Name
c. Type the missionary's last name in the box to the right of “begins with”,

d. Click on Look Up

e. Click on the correct name in the list.

f. The missionary's number will appear in the box titled Reprint Missionary ID and his/her name will appear to the right of the box. **Note:** Save the missionary's number to use when you print the release certificate later.

g. Click Run.
h. On the pop up box that appears, click **Yes**, and wait for the report to generate. **(Note: To run another release letter, you will have to leave the Release Letters screen and then return to it before you run the next one or you will get an error message.)**

![Image of the pop up box]

i. Save each release letter in a file folder on your computer, giving it the missionary's name.

j. When you are ready to print, open the file and print the release letters on bond paper, or another nice paper. **(Note: You do not need to print the last two pages of the document, since those are extra pages.)**

### Process release certificates

On the CSM website home page, click on the **REPORTS** tab.
On the page that comes up, click on Release Certificates.

You have two options on this page:

1. You can type the missionary’s six-digit ID number in the Reprint Missionary ID textbox.

2. Alternatively, you can type the date that is located at top of the release letter—the day it was run—in the Print certificates for release letters printed on this date box. If you choose this option, compare the report with the people for whom you want to print certificates, since you might not need to print every certificate page.)

Whichever you choose, when you have done it, click RUN.

The certificate will appear after processing and you may print it.

Please print on certificate paper.

(Note: Again, you do not need to print the last two pages of the document, since those are extra pages.)
Generate Stake Presidents’ Addresses in Excel for Mailing Labels. You will need to create address labels for the ones you still need.

To do this, on the CSM website, click on the REPORTS tab, and then click on Query Manager.
To generate the mailing labels:

1. On the page that appears, type **CSM** in the right-hand “**begins with**” textbox.

2. Click the **Search** button.

3. Scroll down to find **CSM_MAILING_LABELS**. Click **Excel** in that row, near the far right.
4. In the Date textbox, type the date the letter(s) were generated. (Note: You can use the calendar feature by clicking on the tiny 31 and then click on the calendar date you want.)

5. Click the View Results button.

6. For the downloaded file that appears, click Open.

7. An Excel spreadsheet will come up, with a list of stake president names and their addresses. How you prepare the address labels for the stake presidents will depend on your own chosen process and your computer.

Email saved letters to Operation managers. Attach the saved release letters to emails, and email them as attachments to the managers of the operations in which the missionaries have been serving.

Mail out printed release letters and certificates to Stake Presidents. Mail the printed copy of the letters and the certificates to the stake presidents of those missionaries.

This ends the procedure: “Print Release Letters and Certificates.”
III-J: Print Call Letters And Instructions to Stake Presidents

Overview

*To Be Developed*

This instructional aid describes how to accomplish this procedure in the CSM system.

**To access the CSM system:**

Enter the Internet at: [csm.ldschurch.org](http://csm.ldschurch.org)

Login using your LDS Account username and password.

Click on [REPORTS](http://csm.ldschurch.org/)

Follow the instructions below to Print Call letters and instructions

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Send suggestions to [csm-aidfeedback@ldschurch.org](mailto:csm-aidfeedback@ldschurch.org)