

Family History Center Operations Guide

United States and Canada

If you have questions or suggestions about this operations guide, contact:

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The terms *stake* and *ward* also refer to *district* and *branch*.

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Introduction

This guide is for family history center directors and staff, and for high councilors who oversee family history centers. The guide includes sections that discuss policies and procedures for all family history centers. It also includes an appendix with financial and microfilm ordering policies and procedures and support information for specific areas of the world.

Locally produced manuals

Some family history center directors create manuals containing local policies and procedures, such as how to open and close the center and what to do in case of emergencies. These locally produced manuals complement but do not replace this guide.

What Is a Family History Center?

The Church has established family history centers in many locations. Centers are designed to help members identify their ancestors and provide temple ordinances for them. Centers provide local access to microfilmed family history records of the Church and to Church family history computer resources, including FamilySearch on the Internet. Community patrons are welcome to use resources available at centers.

Family history centers are effective to the extent that:

- All patrons are made welcome to use the resources of the center.
- Members are providing temple ordinances for their ancestors.
- Community patrons have opportunities to learn why members do family history work.
- Both members and nonmembers are contributing their family-linked records to the Church.

Family history centers are established according to approval processes discussed in the Request to Create or Relocate a Family History Center form (34793).

Family History Centers and FamilySearch

FamilySearch is the name for the Church's family history and genealogy resources. Many FamilySearch resources are available on the Internet at www.familysearch.org. Other resources are available only through

the Family History Library in Salt Lake City or local family history centers. The FamilySearch Web site provides access to millions of records, family-linked information, the Family History Library Catalog, how-to guides, and much more.

New features will be added to the FamilySearch Web site. These new features include a simplified process for preparing names for the temple. During the introduction period, the new features will be available only to members of the Church at new.familysearch.org and will be rolled out gradually, a few temple districts at a time.

Members can use the new FamilySearch features to see what information the Church already has about their family and to organize, preserve, and share family history information. Members can also use the new features to see what ordinances have already been performed for their ancestors and to prepare their ancestors' names for submission to the temple so needed ordinances can be performed for them.

After the new features have been made available to members of the Church worldwide (all temple districts), they will be available to the general public through www.familysearch.org.

Patrons who do not have access to the Internet in their homes may go to a local family history center to use the FamilySearch Web site. Family history center staff can provide assistance and training.

Family History Online Guide in FamilySearch

The Family History Online Guide is a Web site that contains training and resource materials that family history center directors and staff can access through FamilySearch. Directors and staff can use the site from any location with Internet access.

The Family History Online Guide includes:

- Electronic copies of administrative manuals for family history centers.
- An archive of the *Family History Center Memorandum*, the newsletter sent to centers by Church headquarters.
- Answers to frequently asked questions about family history centers.
- Information for family history consultants.
- Links to the research tools found in FamilySearch.

The Online Guide is available at www.familysearch.org/eng/library/fhcdirector. To access the

Online Guide, center directors and staff must be registered in FamilySearch at www.familysearch.org. Directors then contact the Family History Support Office to request access to the Online Guide for themselves and their staff. See the Appendix for contact information.

Help Center

A Help Center with training and resources for family history center directors and staff will be available at the new.familysearch.org Web site. These include:

- **Find Answers.** The Find Answers section of the Help Center allows center directors and staff to search a knowledge database to find the answers to commonly asked family history questions, including family history center operations questions. When operations questions arise, directors should check Find Answers in the Help Center to obtain the most current policies and procedures for family history centers.
- **Training and Resources.** The Training and Resources section of the Help Center includes training lessons for family history leaders and workers. It also has resources and help for family history center directors and staff.

Additional Help for Center Directors and Staff

New directors should contact their Family History Support Office as soon as possible after they are called to receive instruction and help. If family history center directors and staff need help finding the answers to family history questions or need further information on family history center operations and technical issues, they can contact the Family History Support Office. See the Appendix in this guide for contact information.

Additional Resources

The following additional resources are helpful for family history center directors and staff:

Resources available for order from Distribution Services:

Church Handbook of Instructions, Book 2: Priesthood and Auxiliary Leaders, section 9, "Temple and Family History Work" (35709)

A Member's Guide to Temple and Family History Work (34697)

A Guide to Research (30971)

How to Use the Family History Library Catalog video (53191)

Training for Family History Leaders DVD (00410090)

Microfilm Reader-NMI 2020 Clean and Repair Manual (35890)

NMI 2020 Microfilm Reader Repair DVD (00655)

Request to Create or Relocate a Family History Center (34793)

Family History Materials List (34083)

Resource available from the Family History Support Office:

Inventory Manager User's Guide (for use in the United States and Canada only)

Resources available from the stake technology specialist or the Family History Support Office:

Policy and Guidelines for Computers in Family History Centers

Internet Use Policies

People Who Oversee, Operate, and Provide Help to Family History Centers

Priesthood Direction of Family History Centers

Family history centers operate under priesthood direction. A high council adviser for temple and family history work, under the direction of the stake presidency, oversees the family history centers in the stake. The family history center director reports to and is supervised by the high council adviser. Additional information on priesthood direction of family history centers, including multistake family history centers, is found in the *Church Handbook of Instructions, Book 2: Priesthood and Auxiliary Leaders*, section 9.

The high council adviser:

- Recommends the establishment and placement of family history centers, when needed.
- Recommends individuals to be called as family history center directors.
- Oversees the operation of family history centers through those called as directors.
- Makes assignments to wards to provide family history consultants to staff each family history center in the stake.
- Reviews family history center audits and works with directors to ensure compliance with policy and financial controls.

See “Working with Others in the Ward and Stake” in this guide for the high council adviser’s responsibilities and duties in overseeing family history centers.

Staffing

The director of a family history center is a Church member called from the stakes that support the center. Family history centers are staffed by family history consultants. The high council adviser makes assignments to wards to provide enough family history consultants to staff each family history center in the stake.

- The family history center director and staff all serve as volunteers and are not compensated for their service.
- Members of the community may serve as volunteers in the center with the approval of the high council adviser.

Training

The family history center director and staff receive training from the following sources:

Priesthood direction

- The high council adviser.
- The high priests group leader (or assigned member of the elders quorum presidency where there is no high priests group leader), who provides priesthood direction and supervision to family history consultants, including those assigned to serve as staff in family history centers.

Family history center operations

- The Family History Support Office. (See appendix.)
- The family history center director or an assigned member of the center staff.
- The *Family History Center Operations Guide*.
- Family history center memoranda and communications sent by the Family and Church History Department to the family history centers’ LDS-Mail.net account (see “Internet Connection” in this guide).
- Training Resources in the Family History Online Guide in FamilySearch.
- Online training lessons and resources in the Training and Resources section of the Help Center in FamilySearch.

Other training sources

- The previous director, current staff members, or the director and staff of a neighboring family history center.
- The area family history adviser. The high council adviser and stake president may request that the area family history adviser provide family history training to family history workers in the stake. The area family history adviser serves under the direction of the Presidency of the Seventy or Area Presidency.

The center director ensures that staff members are trained to fulfill their assigned tasks. The director may assign a staff member to serve as a training coordinator to provide training to staff (see “Director and Staff Duties” below).

Church Standards

The family history center director ensures that staff members, volunteers, and patrons keep Church standards in the center and on Church grounds. If questions arise or the director needs assistance in resolving a situation, the director should consult with the high council adviser.

Director and Staff Duties

The director is responsible for all center operations. The director assigns staff to assist with center administrative duties and to help patrons use center resources.

Assistant Director

The high council adviser may call a member to serve as assistant director. The assistant director helps the director administer center operations, as determined by the director. The assistant director can fulfill the duties of the director when the director cannot be present.

Additional Staff Leadership

If the center is large enough, the director may assign staff members to assist with and lead other staff assigned to do specific tasks. As an example, staff could be assigned responsibility for the following tasks:

Patron Services Coordinator

- Help patrons use the center’s resources.
- Schedule shift assignments for staff.
- Develop a materials plan to recommend books or resources for the center.
- Organize supplies, microfilm and microfiche, books, maps, publications, and other research materials.
- Recommend the elimination of unneeded materials in the center.
- Encourage patrons to share family information with the Church.

Technical Services Coordinator

- Order and receive microfilm and microfiche from Distribution Services or the microfilm ordering center.
- Track microfilm and microfiche orders.
- Return microfilms to Distribution Services or the microfilm ordering center.

- Clean and maintain film reading equipment, photocopy machines, microfilm and microfiche reader-printers, and digital imaging systems.
- Coordinate maintenance and repair service with the facilities manager.
- Coordinate computer support with the stake technology specialist.
- Obtain help with the center’s Internet connection from the Global Service Desk. (See appendix.)

Family History Center Director and Staff Duties

Family history center director	<p>Duties:</p> <ul style="list-style-type: none"> • Reports to the high council adviser. • Administers all center operations. • Determines with the high council adviser: <ul style="list-style-type: none"> - The days and hours the center will be open. - How many ward family history consultants are needed to staff the center. - An annual operating budget. • Establishes a staff organization and a shift schedule. • Supervises staff in their family history center duties. • Ensures staff members are trained to perform their assigned duties. • Manages center finances, as discussed in the “Financial Policies and Procedures” section in the Appendix. • Identifies needed supplies and research materials.
Staff	<p>Duties:</p> <ul style="list-style-type: none"> • Help patrons use the center’s resources to identify their ancestors. • Help members use FamilySearch to prepare ancestor’s names for submission to the temple. • Organize the center’s microfilm, microfiche, books, and other materials. • Order microfilms and microfiche for patrons, track orders, and return microfilms when due. • Help clean and maintain center equipment and furnishings. • Teach training classes.

Training Coordinator

- Train new staff.
- Provide ongoing staff training.
- Organize and teach patron classes.

Working with Others in the Ward and Stake

The family history center director and staff work with others in the ward and stake, as shown in the following chart:

Director and Staff Coordination with Others in the Stake

Person	What this person does	How the director and staff work with this person
High council adviser	<ul style="list-style-type: none"> • Recommends the establishment and placement of family history centers. • Recommends individuals to be called as family history center directors. • Oversees the operation of family history centers through those called as directors. • Makes assignments to wards to provide family history consultants to staff each family history center in the stake. • Reviews family history center audits and works with directors to ensure compliance with policy. 	<p>The director and staff:</p> <ul style="list-style-type: none"> • Report to the high council adviser on center operations. • Receive priesthood direction from the high council adviser. • Work with the high council adviser and the facilities manager to establish facilities, security procedures, and hours of service. • Consult with the high council adviser to develop and submit an annual budget request. • Discuss staffing needs with the high council adviser. • Review with the high council adviser the results of center audits and implement recommended changes. • Help the high council adviser organize and present family history open houses and seminars in the stake.
High priests group leader (or a member of the elders quorum presidency where there is no high priests group leader)	<ul style="list-style-type: none"> • Ensures that enough family history consultants are called to meet the needs of the ward, including those needed to fulfill the ward's assignment to provide staff for a family history center in the stake. • Supervises family history consultants and provides priesthood direction. 	<p>The director and staff:</p> <ul style="list-style-type: none"> • Assign family history center duties to family history consultants assigned by the high priests group leader to serve as staff in the center. • Supervise staff in their family history center duties. • Help the high priests group leader organize and present family history open houses and seminars in the ward.

Director and Staff Coordination with Others in the Stake

Person	What this person does	How the director or staff work with this person
Family history consultant	<ul style="list-style-type: none"> • Works with members and others who are either beginning or continuing their family history work. • Provides members individual family history help. • Helps members identify ancestors and ensure temple ordinances are performed for them. • When assigned, serves as a staff member in a family history center. 	<p>The director and staff:</p> <ul style="list-style-type: none"> • Provide consultants access to and training on center resources. • When requested, assist consultants in teaching Sunday School class members how to use family history resources. • Assign family history center duties to consultants who serve as staff in the center. • Supervise consultants in their family history center duties. • Provide training in center policies and procedures.
Stake technology specialist	<ul style="list-style-type: none"> • Orders, sets up, and maintains computer equipment in the stake, including family history center computers. • Helps center directors and staff install and learn to use software. • Ensures that center computers have virus protection, a firewall, and Internet filtering. • Ensures that software on center computers is properly licensed. • Determines if computers offered as donations meet Church guidelines and should be accepted. • Troubleshoots the center’s Internet access and coordinates with the Global Service Desk, as needed, to obtain help. 	<p>The director and staff:</p> <ul style="list-style-type: none"> • Obtain computer equipment maintenance or replacement. • Obtain help to install and use software. • Obtain help to determine if potential computer donations should be accepted. • May coordinate with the Global Service Desk to obtain help with the center’s Internet connection.
Facilities manager	<ul style="list-style-type: none"> • Coordinates with the high council adviser to designate space for the center. • Maintains center facilities. • Maintains and orders center equipment and furnishings (except computers and photocopy equipment). • Provides cleaning supplies, bulbs, and parts for equipment. • Determines if equipment and furnishings offered as donations are the authorized brand and model and should be accepted. 	<p>The director and staff:</p> <ul style="list-style-type: none"> • Request needed maintenance and repair of the facility, equipment, and furnishings. • Obtain cleaning supplies, bulbs, and parts to clean and maintain center equipment and furnishings. • Order equipment and furnishings as needed. • Maintain a current inventory of the center’s equipment, furnishings, and resources. • Obtain help in determining if potential equipment and furnishings donations should be accepted.

Director and Staff Coordination with Others in the Stake

Person	What this person does	How the director or staff work with this person
Stake or ward financial clerk	<ul style="list-style-type: none"> Assists the center director to comply with Church financial policies. Ensures center fund deposits are regularly made in the Church unit checking account. 	<p>The director and staff:</p> <ul style="list-style-type: none"> Counsel regularly with the clerk to ensure the center follows Church financial policies. Coordinate center financial transactions with the clerk. Regularly submit funds for deposit in the Church unit checking account.
Stake family record extraction director	<ul style="list-style-type: none"> Administers the stake family record extraction program. 	<p>The director and staff:</p> <ul style="list-style-type: none"> Share the center facility and equipment with extraction workers, as determined by the high council adviser.
Stake director of public affairs	<ul style="list-style-type: none"> Handles any media involvement with the center. 	<p>The director and staff:</p> <ul style="list-style-type: none"> Notify the director of public affairs if contacted by the media.
Other family history center directors in the stake	<ul style="list-style-type: none"> Direct family history centers. 	<p>The director and staff:</p> <ul style="list-style-type: none"> Share ideas and training, under the direction of the high council adviser.
Ward or full-time missionaries	<ul style="list-style-type: none"> Teach their contacts the plan of salvation and the importance of temple and family history work. Invite their contacts to the family history center to use family history resources and learn about their family. 	<p>The director and staff:</p> <ul style="list-style-type: none"> Help new patrons use family history resources in the center. Assist missionaries in outreach efforts involving family history to introduce people to the Church.
Stake auditors	<ul style="list-style-type: none"> Conduct semiannual audits of the family history center. Use a family history center audit form provided by the Church Auditing Department. 	<p>The director and staff:</p> <ul style="list-style-type: none"> Meet with auditors and provide financial records as needed. Implement the auditors' recommendations to ensure the center complies with Church policies.

Family History Center Facilities and Resources

Types of Centers

There are two types of family history centers:

Computer-only family history center	<ul style="list-style-type: none">• Includes a computer with Internet capability and basic furnishings.• Requires a small classroom, which may be used for other purposes on Sundays.• May be sufficient for Church units whose members are beginning to organize family information but may not need access to the Church's microfilm collection.• Serves as a place where members can access the Internet in locations where access is generally limited.
Family history center with film circulation	<ul style="list-style-type: none">• Includes access to the Church's microfilm collection, a microfilm reader, other equipment and furnishings, and a computer with Internet capability.• May require dedicated space; or shared space, which may be used for other purposes on Sundays; or a combination of both.• May meet the needs of Church members in a ward or one or more stakes.

Establishing a New Center

To request a new family history center, stake leaders complete a Request to Create or Relocate a Family History Center form (34793) and follow the submission instructions. If the request is approved, the Family and Church History Department provides instructions and materials to help the stake establish the new center.

Location and Facility

The high council adviser, facilities manager, and center director determine where a family history center will be located. The facilities manager arranges any needed minor remodeling to accommodate the center, according to facilities management guidelines.

Relocating a Center

If local leaders determine to move the location of the family history center, they complete the appropriate section of the Request to Create or Relocate a Family History Center form (34793) and follow the submission instructions.

Making Best Use of Space

Centers should not expand beyond the space authorized by the high council adviser. If needed to

meet the needs of members, the center director and high council adviser could:

- Extend the center's operating hours.
- Establish separate hours for member use only.
- Schedule the use of computers and equipment.
- Place some equipment on movable carts that can be used in nearby classrooms when the center is open.
- Use nearby classrooms for training staff or helping patrons.
- Eliminate unneeded materials from the center's collection.
- Contact the Family History Support Office regarding equipment that is unneeded or cannot be repaired.

The high council adviser may approve center space, equipment, and computers to be shared by family history consultants and family record extraction workers.

Security

The center director, high council adviser, and facilities manager should establish safety and security procedures.

- At least two staff members, or a staff member and a person authorized by the center director, must be on duty at all times when the center is open. At least one of the people on duty must be a

Church member. If at least two people are not available, the center should not open.

- In all cases, the center director and staff should use wisdom when scheduling shifts to avoid potential problems or inappropriate situations.
- The high council adviser determines who will have keys to the center. Only Church members should have keys.
- Access to the center should be secured.
- Center staff should have ready access to a telephone.
- Emergency numbers and evacuation routes should be posted.
- First aid kits and fire extinguishers should be readily accessible.
- Rules about personal safety and emergency procedures should be written and regularly reviewed with staff members in regularly scheduled training sessions.

Hours of Operation

The center director and high council adviser determine the days and hours of operation for the center.

- Centers should be open enough hours to meet the needs of members.
- Centers are encouraged to open on Sundays for a family history or other Sunday School class. Members may use the center during other hours on Sunday that do not conflict with regular Sunday meetings.
- Centers must not be open on Monday evenings after 6:00 p.m.
- Centers may schedule members-only hours to ensure members have access to center resources. Members-only hours should not be advertised to the general public.

Computers, Equipment, and Furnishings

The Church provides a limited amount of authorized computers, equipment, and furnishings for family history centers. Guidelines for facilities managers and stake technology specialists include information on authorized computers, equipment, and furnishings.

Information on acquiring, maintaining, repairing, and replacing center computers, equipment, and furnishings is found in *Policy and Guidelines for Computers in Family History Centers* and in the Find

Answers section of the Help Center in FamilySearch. Always check the Help Center for the most current information.

Equipment and Furnishings

- The amount of equipment and furnishings the Church provides depends on the type of center and the needs of members.
- Information on authorized equipment and furnishings is provided to stake leaders when a new center is approved.
- Center directors may request additional equipment and furnishings from the Church in order to meet the needs of members. The director will be asked by the Family and Church History Department to justify the request. If the request is justified to meet the needs of Church members to access and use center equipment and furnishings, the Church will provide the additional items as budget allows.
- Center directors should accept donated equipment and furnishings that are the authorized brand and model only. The director should coordinate with the facilities manager before accepting donated equipment and furnishings (see “Donations” in this guide).

Computers

- The Family and Church History Department normally provides family history centers one computer only. The Church-provided computer is replaced on a five-year cycle.
- Centers may accept voluntary, unsolicited donations of computers or funds to buy new computers. Donated computers must meet the minimum criteria established by the Family and Church History Department and be approved by the stake technology specialist (see *Policy and Guidelines for Computers in Family History Centers*).
- The most current computer system requirements are found in the Find Answers section of the Help Center in FamilySearch.
- The stake technology specialist should ensure family history center computers have:
 - Church-authorized virus protection installed and regularly updated.
 - Only properly licensed software installed.
 - Filtered access to the Internet.
 - Approved firewall protection.

Maintain a Current Inventory of Center Resources

A current inventory of center resources is essential in cases of loss due to disaster, theft, or vandalism. A copy of the inventory should be maintained away from the meetinghouse where the center is located to ensure a copy is available in case of damage to the meetinghouse.

The center director and facilities manager should meet annually to:

- Agree on what equipment and furnishings the facilities manager is authorized to repair.
- Assess the condition and repair history of center equipment and furnishings to determine if replacement is advisable.
- Maintain a current inventory of the center's equipment, furnishings, and research materials, including the microfilms in the center's collection.

The center director and the stake technology specialist should meet annually to:

- Determine the center's computer and software needs.
- Maintain a current inventory of the center's computers and computer resources, including software and licenses.

Moving Computers, Equipment, and Furnishings

The high council adviser or area leadership may move computers, equipment, or furnishings between family history centers and family record extraction programs in the stake or area, regardless of how the computers, equipment, or furnishings were originally acquired.

- Movement of computers, equipment, or furnishings must be coordinated with the Family History Support Office because of the need to maintain an accurate inventory of Church resources and to ensure that all centers have at least one Internet-capable computer. If computers, equipment, or furnishings are moved, please inform the Family History Support Office.
- The Church will not provide computers, equipment, or furnishings to replace any that have been moved from one location to another.

Internet Connection

The Church requires an Internet connection in all family history centers. Internet access is installed by the Information and Communication Systems Department of the Church in buildings where family

history centers are located. Wherever possible, a high-speed connection will be provided.

Internet Use Policies

Policies on Internet access and use in family history centers are discussed in *Policy and Guidelines for Computers in Family History Centers and Internet Use Policies*. Contact your stake technology specialist. Directors should also check the Find Answers section of the Help Center in FamilySearch for the most current policies on Internet use.

Family history centers are not authorized to install Internet access through local efforts unless specifically assigned to do so by the Family History Support Office or the Information and Communications Systems Department.

Internet access on family history center computers may be used for other Church or educational purposes where approved by priesthood and family history center leadership. These other activities should not interfere with the family history activities in the center.

Ongoing Monthly Cost

The payment of ongoing monthly costs for Internet access in official family history centers is managed by the local facilities manager.

Safety

With the help of the stake technology specialist, the family history center director should periodically:

- Review the history, cache, temporary Internet files, and "favorites" on family history center computers and remove any unnecessary or inappropriate material.
- Ensure that the appropriate Internet filtering and firewall safeguards are in place and functioning.

LDSMail.net

The Family and Church History Department establishes an LDSMail.net e-mail account for all family history centers. The department will regularly send information to family history centers via LDSMail.net. Staff should use the center's LDSMail.net e-mail account for family history center operations and may use the account for family history purposes. Instructions on how to use LDSMail.net are available from the Family History Support Office and the Online Guide.

Publications and Research Materials

Center directors may acquire a collection of research materials that will be used frequently by Church members or community patrons. Center directors and staff consider the research needs of members and community patrons in the area served by the center.

These materials are obtained with operating funds allocated by the stake or through donation. Because space is limited, center directors should not acquire large collections of materials. Centers should not be the storage facility or repository for materials belonging to another organization.

Family and Church History Department Materials

Center directors obtain Church family history publications from Church Distribution Services. The Family and Church History Department publishes many publications and materials that help members and community patrons do family history work. These are listed in the Family History Materials List (34083). Directors may order materials from the local distribution center or online at www.ldscatalog.com.

These publications are also listed in a printable version on FamilySearch under Research Helps. Directors and staff can view the publications online and print out copies when needed.

Commercial Materials

The director, with high council adviser approval, may purchase commercially available materials using the center's operating funds allocated by the stake(s) that support the center. These are purchased through bookstores, publishers, or other commercial sources. This includes materials such as:

- Reference books, maps, and other available research materials.
- A limited number of microfilms renewed for an extended period with the director's approval. For information on ordering microfilms and microfiche from Salt Lake Distribution Services, see "Microfilm and Microfiche Ordering Policies and Procedures" in the Appendix.
- Genealogical databases available on the Internet.

Donated Materials

Donated materials must be approved by the center director and the high council adviser. These leaders consider the available storage space and whether the materials serve member needs. Donated materials:

- Must have no restrictions on their use or disposition.
- Must be given outright to the center. The center should not store genealogical records that belong to patrons or organizations such as genealogical societies.

Books in the Family History Library Catalog

Books listed in the Family History Library Catalog cannot be circulated to family history centers unless microfilm or microfiche copies are available.

The Family and Church History Department and Brigham Young University are working together to make digitized copies of family history books available through the Family History Library Catalog on FamilySearch. If the catalog entry for a book indicates a digitized copy of a book is available, patrons can click a link to see a searchable copy of the book online.

Returning and Discarding Unneeded Materials

Staff should periodically review the materials in the center. They should:

- Return microfilms no longer needed to Distribution Services. The center is not reimbursed for these films.
- Discard materials with outdated information, such as old publications, notices, memos, instructional materials, and periodicals.
- Discard the following items that may not be donated or sold to individuals or other Church units or organizations:
 - Microfiche*—old editions of the Family History Library Catalog, the International Genealogical Index, and other microfiche products.
 - Compact discs*—outdated FamilySearch discs.

Helping Patrons Reference Guide

Help Patrons

Family history centers help patrons identify their ancestors. Both members and community patrons are welcome to use center resources to accomplish this objective. Priesthood leaders, missionaries, members, and family history center staff use centers to strengthen members and build lasting ties with others.

Family history center staff should:

- Help all patrons feel welcome to use the resources of the center.
- Help patrons select and use resources to identify their ancestors.
- Help members prepare ancestors' names for submission to the temple.
- Encourage all patrons to contribute their family-linked records to the Church.

Helping Patrons Reference Guide

Step 1: Help Patrons Feel Welcome

Greet patrons, giving them your full attention and letting them know you are there to serve them.

Step 2: Ask Questions to Determine Needs

Because every patron will have a particular reason for coming to the center, make every effort to identify his or her specific need. Ask questions and listen carefully to determine how best to help.

- Open-ended questions help the patron express in general terms his or her need. For example, staff can ask open-ended questions such as:
 - How can I help you today?
 - What information have you brought with you?

- What are you hoping to accomplish today?
- What can you remember about your grandfather?
- Closed-ended questions help specify the patron's need and how the staff member can provide help. For example, staff can ask closed-ended questions such as:
 - What is your mother's maiden name?
 - What year did your grandfather die?
 - Do you know how to use the Family History Library Catalog?

Step 3: Help Patrons as Needed to Select and Use Resources

Provide Help Using Church Resources

The following chart lists patron needs and suggests Church resources that center staff can use to provide help:

Church Resources to Help Patrons

Patron Need	Resource
How to begin doing family history work.	<i>A Member's Guide to Temple and Family History Work</i> (34697) FamilySearch <i>How Do I Start My Family History?</i> (32916)
How to submit a name to the temple.	<i>A Member's Guide to Temple and Family History Work</i> (34697). FamilySearch
How to find answers to family history questions.	The Find Answers section of the Help Center in FamilySearch

Church Resources to Help Patrons

Patron Need	Resource
How to do research.	<i>A Guide to Research</i> (30971)
How to do research in specific areas of the world.	Family and Church History Department research outlines and publications Research Helps in FamilySearch The Find Answers section of the Help Center In FamilySearch
How to find what research resources are available.	<i>Family History Materials List</i> (34083) Research Helps in FamilySearch
How to keep track of what research the patron has already done.	<i>Research Log</i> (31825)
How to use the Family History Library Catalog.	<i>How to Use the Family History Library Catalog: A Beginner's Guide</i> video (53191)
How to choose a record to search.	Records in the center Records from the Family and Church History Department (see the Family History Library Catalog) Family and Church History Department research outlines and publications
How to order a microfilmed record from the Family and Church History Department's circulating collection.	<i>Microfilm and Microfiche Order Card</i> (34310)
How to understand what is in a microfilmed record.	Family and Church History Department research outlines and word lists

Obtain Research Advice

Patrons and center staff can obtain research advice from staff and volunteers at the Family History Library and other locations. Staff and volunteers will answer questions and give advice, but cannot do research for patrons. To get research advice quickly, use the phone number or e-mail address listed in the Family History Support section of the Appendix. To obtain research advice by postal mail, center staff can help patrons complete and submit a Reference Questionnaire form (31761) to the Family History Library. Center staff follow the submission instructions on the form to mail the completed form to the Library.

Recommend Other Sources

The center staff can recommend:

- Local libraries, archives, and societies that have genealogical and historical information.
- Family history sites on the Internet that may help patrons find family history information and records.

Step 4: Encourage Patrons to Continue to Search for Their Ancestors

Next Steps

Summarize what you have helped patrons think about or find. Discuss the next thing they need to do to continue their research. Help them go away with a feeling of success.

Family History Center Procedures

Advertising the Center's Hours and Services

Center staff should not advertise the center's hours and services in community publications or at public functions without the high council adviser's approval. Also, the high council adviser should be notified of and give approval for any contact with the media. Center staff should work with the stake director of public affairs if they are contacted by the media or if center services will be advertised through the media.

Allowing Community Groups to Use the Center

If community groups, such as Personal Ancestral File user groups, use the center for meetings, they may affect the Church's tax-exempt status. They may meet at the center only if they:

- Fulfill all the requirements for meetinghouse use as outlined in the *Church Handbook of Instructions, Book 1* (35205) and *Church Handbook of Instructions, Book 2* (35209). Center staff should consult with the high priests group leader, who can refer to the requirements in the handbook.
- Have approval from the appropriate priesthood leaders to meet in the building.

Supporting Missionary Efforts

A family history center should maintain its integrity as a research facility. Those of other beliefs should feel free to ask about the Church, but they should not feel obligated to do so. To support missionary efforts, priesthood leaders, missionaries, and staff should cooperate to introduce the gospel to those who express interest and to strengthen less-active members.

The missionary handbook *Preach My Gospel* (36617) contains suggestions on how full-time missionaries can work with ward leaders in using family history to find people interested in learning about the gospel. Priesthood leaders may assign family history consultants and family history center staff to help missionaries in these efforts.

Supporting Missionary Activities

Family history center staff should refer patrons who request more information about the Church to ward or full-time missionaries. Staff can support missionary activities by:

- Conducting a brief and cordial orientation for new patrons to explain why members do family history work and what services are available at the center.
- Being prepared to give brief, sensitive answers to patrons' questions about the Church.
- Displaying Church-approved missionary materials intended for family history centers, such as the *Welcome to the Family History Center* brochure (35753) or the *Family History Display Panels* (36658).
- Displaying copies of the Book of Mormon, pictures of the Savior and temples, and other appropriate information about the Church.
- Helping missionaries learn about center resources and assisting them when they bring guests to the center.
- Under priesthood direction, sponsoring and attending open houses where members and missionaries can bring nonmembers and less-active members to learn about center resources.

Ward or Full-time Missionaries

Ward or full-time missionaries may:

- Invite investigators and less-active members to the center where they can personally enjoy finding records of their ancestors.
- Help members use the center to introduce their friends and less-active members to family history and gospel teachings.
- When the center is open to the public, use a room other than the center to discuss the gospel with those who are interested.
- Provide volunteer service in the center.

Note: Ward and full-time missionaries may not use center patron sign-in logs to contact community patrons.

Copying

Duplication of a copyrighted work generally must be authorized by the copyright holder. A prospective user of a work should assume it is protected by copyright, even if the work does not include a copyright notice.

- Copyrights to many of the microfilms, microfiche, books, and other materials located in a center do not belong to the Church.

- Patrons may make copies as permitted by local copyright law. The center director must post copyright signs on or near photocopy machines, digital image systems, reader-printers, computer printers, and other duplication equipment. If you do not have the copyright signs for family history centers, contact the Family History Support Office.
- Directors and staff should not supervise patron copying or make copies for patrons.
- Patrons and staff may copy printed family history materials that are copyrighted by Intellectual Reserve Inc. for the Church for personal family history research or Church instruction. Any other use of Church family history materials requires written permission from the Family and Church History Department. Contact the Family History Support Office when questions arise.
- Center directors, staff, or patrons may not remove microfilm or microfiche from the meetinghouse in which the center is located to use copy equipment in another location or institution.

Donations

Church members and other patrons may offer to make donations of funds, research materials, computers, and equipment to family history centers.

- Donations must be:
 - Offered voluntarily and not solicited. Donation boxes, signs requesting donations, or other means to solicit donations are not allowed.
 - Given without restriction on their use or disposition.
- All donations become the property of the Church.
- The acceptance of donations must be approved by the high council adviser or other local leaders and as needed by the stake president (the center director and staff may accept small-change donations without review). The high council adviser may establish guidelines for center directors and staff to follow in accepting donations.
- The center director may issue a receipt for donations to the donor. Use a standard receipt book available in a local office supply store. Do not estimate or write the value of in-kind donations of equipment, computers, or other resources on the receipt. The donor determines the value of the donation.
- Centers may accept donations of computers or funds to buy new computers. Donated computers

must meet the minimum criteria established by the Family and Church History Department and be approved by the stake technology specialist. For further information, see Policy and Guidelines for Computers in Family History Centers and the Find Answers section of the Help Center in FamilySearch. Always check the Help Center for the most current information.

- Center directors should accept donated equipment and furnishings that are the authorized brand and model only. The director should coordinate with the facilities manager before accepting donated equipment and furnishings.
- Donors may express preferences as to how the donations are to be used, but priesthood leaders have the final responsibility in determining how donations will be used.
- Donations must fit within the size and scope of the center. Some donations of equipment, furnishings, research materials, or other items may be of significant value but may require more space or cost to maintain than is available to the center. These donations should be graciously declined.
- Centers should not be the storage facility for materials belonging to another organization.

Cash donations of US\$100 or less

- Cash donations of US\$100 or less may be accepted, with the approval of the high council adviser.
- Centers may simply accept small-change donations without review by the high council adviser.

Cash donations over US\$100

- Cash donations over US\$100 are to be sent to the general Church funds.
- If the donor does not want to donate to the general funds of the Church but wants only to support family history work as carried out through family history centers, the donation is to be sent to the Family and Church History Department designated fund.
- If the donor insists on making the donation to the family history center, the stake president may approve the donation as long as there are no restrictions on use. Funds in excess of one year's operating budget for the center should be forwarded to the Family and Church History Department designated fund.

Donations to the Family History Center

Donations of:	Are approved by:
Funds	The center director and the high council adviser. Note: The center director and staff may accept small-change donations without review by the high council adviser.
Books and other research materials	The center director and the high council adviser.
Computers (or funds donated to purchase a computer)	The stake technology specialist, under the direction of the stake president.
Equipment	The facilities manager.

Appendix *United States and Canada*

Financial Policies and Procedures

Handling Money—General Principles

- Church funds provide the following for approved family history centers:
 - A computer system and printers.
 - Internet access.
 - Authorized equipment and replacement.
 - Maintenance of authorized equipment through the facilities manager.
 - No-charge publications and materials available from Distribution Services.
 - Space in the church meetinghouse.
 - Utilities.
- Operating funds for a family history center are allocated by the stake(s) that supports the center. The family history center director works with the high council adviser to develop an annual budget request from the stake(s). These funds pay for:
 - Telephone expenses.
 - Office supplies and postage.
 - Staff training materials created by the center.
 - A limited collection of microfilms and microfiche, reference books, maps, and other materials obtained by the center to meet the research needs of members and other patrons.
 - Repair and maintenance of equipment that is not the authorized brand and model.
- Surplus center funds that exceed that which is needed for normal operations for one year should be sent to the Family and Church History Department. The director coordinates with the high council adviser and the stake clerk to determine what funds could be considered surplus and to transfer the funds.
- Patrons may be charged at-cost fees for:
 - Microfilm and microfiche loans.
 - Church publications and materials ordered from Distribution Services.
 - Use of digital imaging systems, reader-printers, or photocopy machines.
 - Computer printouts.
 - Blank disks or CDs.
- Fees must be the same for members and non-members.
- Some centers have access to a photocopy machine, a microfilm-microfiche reader-printer, or a digital imaging system. Patrons should pay a per-copy fee for photocopies.
 - Fees should cover the cost of toner cartridges, paper, and maintenance and repair costs.
 - Fees should not be used for other operating expenses.
 - Centers that have reader-printers should let patron fees accumulate to approximately US\$1,500 per machine to cover the cost of maintenance and repairs. Centers that have digital imaging systems should let patron fees accumulate to approximately US\$500 per system. The stake clerk provides assistance in maintaining these funds in an appropriate account.
- The high council adviser and center director ensure that the center does not:
 - Send general messages to all family history centers through LDSMail.net or other communications media to advertise materials for sale.
 - Advertise and sell locally produced training materials or CDs for more than actual cost.
 - Raise its own operating funds or generate a profit.
 - Charge a fee to use the center, computers, or microfilms and other materials in the center.
 - Charge more than cost for services or for materials ordered from Distribution Services.
 - Charge more than the microfilm or microfiche loan fee established by Distribution Services and the Family and Church History Department (the fee may include a small notification fee and any applicable taxes).
 - Solicit donations, put up a donation box, or display requests or suggestions for donations.
 - Conduct fund-raising activities of any kind.
 - Charge for training classes or seminars. (Optional syllabus material may be sold for the cost of printing but should not be required for attendance. Optional refreshments may be sold at cost.)
 - Pay a speaker or teacher.
 - Offer research services for a fee.

- Sell commercial or non-Church materials, advertise commercial products or services in the center, or allow anyone to promote, demonstrate, or sell products in the center without authorization from Church headquarters.
- The center director is responsible for financial security in the center. To ensure proper financial controls, more than one person should be involved in cash receipt and disbursement duties. One individual should not have sole responsibility for recording, authorizing, and accounting.
- The center director and staff should:
 - Keep a small amount of cash available for making change. The amount should be approved by the high council adviser.
 - Keep cash and postage secure in a locked box or cabinet.
 - Where possible, do not leave cash in the center overnight. This does not include the small amount of cash for making change, unless otherwise directed by the high council adviser.
 - Never mix center funds with personal funds.
- The family history center director and staff should keep records of money received, refunded, spent, and deposited. The director uses these records to:
 - Administer center finances.
 - Coordinate with the assigned priesthood leader and the financial clerk.
 - Prepare for stake audits.
 - Develop annual budget requests.
- The director should keep financial records for the current year and three prior years.
- Directors and staff may create their own financial forms or photocopy the following forms:

Daily Cash Transaction Report. This form is used to record money received, refunded, and spent each day. At the end of the day, the cash, checks, and credit certificates received should match the total recorded on the form.

Monthly Cash Transaction Report. This form is used to summarize the daily reports on a monthly report.

Cash Box Report. This form is used to record cash amounts at the beginning and end of a shift.

Monthly Expenses Compilation. This form is used to record expenses paid by cash, check, or automatic deduction by the distribution center each month.

Financial Procedures

Using a Church Unit Checking Account

Family history centers must use a Church unit checking account for their financial transactions. Centers may use one of the following:

- A stake or ward account.
- As needed, a separate account for the center, if requested by the stake president.

Church Unit Checking Account

Many centers use the stake or a ward Church unit checking account. The high council adviser determines if a center will use the stake account or a ward account, based on the center's location and convenience for the director to coordinate financial procedures with the financial clerk. The center director regularly gives the clerk these items to be deposited to the account:

- Patron microfilm and microfiche loan fees.
- Computer printout and photocopy fees that should accumulate in the account to cover the cost of supplies, maintenance, and repairs of photocopy machines, digital imaging systems, and reader-printers. The financial clerk may maintain a separate category for these funds.
- Funds derived from the at-cost sale of Distribution Services items.
- Donations.
- Any other funds.

The clerk uses the Church Financial Information System (FIS) to send deposit information to the Finance and Records Department. The Finance and Records Department will:

- Credit the Church unit checking account.
- Send the stake president a monthly Church unit financial statement that includes family history center transactions.

Note: If the Church unit changes that is handling the finances, or if there are any changes that affect the checking account, the financial clerk should notify the Family History Support Office at 1-866-406-1830.

Cash Box Report

Date _____ Staff member _____

	Beginning of Shift	End of Shift	
Pennies			Cash at beginning of shift _____
Nickels			Amount received + _____
Dimes			Subtotal = _____
Quarters			Amount spent - _____
Currency			Balance (ending cash) = _____
Checks			(Balance amount must agree with the <i>Daily Cash Transaction Report</i>)
Checks			Amount deposited - _____
Checks			Balance (cash left) = _____
Checks			
Checks			
Total			

Family History Center Monthly Operating Expense Compilation Month _____

Expense categories	Purchases by cash	Purchases by check	Deductions made by Church headquarters	Total
Distribution center supplies and publications				
Postage				
Staff training materials				
Collection development materials (books, film, fiche, etc.)				
Patron training materials				
Equipment repair				
Other (explain)				
Totals				
				Grand total

Automatic Deductions

Church headquarters will automatically deduct funds from the stake or ward Church unit checking account when a center orders the following:

- Microfilm and microfiche loans for patrons (including state use taxes, in states where this applies).
- Distribution Services items.

Reconcile Transactions

Financial transactions are recorded in the Church unit financial statement regularly sent to the stake president or bishop. Because the center director does not receive a copy, he or she should meet regularly with the financial clerk to reconcile the transactions.

A Separate Church Unit Checking Account for the Center

If the family history center has many financial transactions or if distance makes it inconvenient for the center director to meet regularly with the financial clerk, the stake president may request a separate Church unit checking account for the center. To establish a Church unit checking account for a family history center, the stake president or high council adviser should contact the following:

Family History Center Support
Family and Church History Department
15 East South Temple Street, Room 3B4
Salt Lake City, UT 84150-3460
Tel: 1-866-406-1830
Fax: 1-801-240-2579

If the separate account is approved, the center director receives instructions, REFIS financial software (which the center director uses to transfer funds), and special checks with the Church's logo to pay expenses.

The Center Director's Financial Responsibilities

Under the direction of the high council adviser, the center director and a second person:

- Deposit all funds received at the center in the local deposit bank. Funds include microfilm loan fees, photocopy fees, and funds derived from the at-cost sale of Distribution Services items.
- Deposit center operating funds allocated by the stake(s) or ward(s).
- Report deposit amounts to the Financial Reporting and Controls Department.

The director must regularly report deposit information to the Financial Reporting and Controls Department. Otherwise, the Church unit checking account will be overdrawn.

For centers with their own Church unit checking account, the center director has the responsibility of using the Church's Related Entity Financial Information System (REFIS) to report deposit information to the Financial Recording and Controls Department.

Church Financial Reporting and Controls Department Responsibilities

The Financial Reporting and Controls Department will:

- Credit the center's Church unit checking account.
- Send the stake president a Church unit financial statement of the family history center transactions.

Note: If a center has its own Church unit checking account, the stake president may request that a copy of the financial statement also be sent to the center director by sending a written request to the Financial Reporting and Controls Department.

Maintaining Sufficient Funds in the Account

The center director and the high council adviser should ensure that sufficient funds are maintained in the Church unit checking account.

Funds allocated by the stake must cover annual operating expenses and the automatic renewal of microfilms when a center is closed for an extended period (see "Planned Extended Closure of the Center" in this guide).

Online Ordering Account with Salt Lake Distribution Services

Family history centers that have their own Church unit checking account may set up an online ordering account with Salt Lake Distribution Services. With this account, they may order publications from Distribution Services using the Internet at: www.ldscatalog.com

Items will be charged to the Church unit checking account and will be sent directly to the name and address given for this account. (**Note:** This does not include microfilms and microfiche. Microfilms and microfiche must be ordered through Inventory Manager or by telephone. See "Inventory Manager Software" in this Appendix.)

To set up an online ordering account:

1. The family history center director fills out the Request for Family History Center Password for Ordering Church Materials on the Internet form and sends the form to Distribution Services. Contact the Family History Support Office to obtain a copy of this form.
2. Distribution Services establishes the account and gives the center director the password.
3. The center may now order publications online.

If the name and address for the online account changes, the family history center director must notify Distribution Services of the change so that orders can be sent to the appropriate address.

Handling Credit Certificates

When appropriate, the Family and Church History Department issues refunds to patrons for photoduplication requests. Refunds are generally sent in the form of credit certificates. Patrons may take these certificates to a family history center, where they may use them as cash.

When a center receives a credit certificate from a patron, a staff member should send it to the Family and Church History Department using these procedures:

1. Write the family history center name and unit number (for example: 3369845) on the certificate.
2. Each month, mail the certificates with a request that the certificates be redeemed for cash to:
 Family and Church History Department
 Financial Resources
 50 East North Temple Street, Room 599
 Salt Lake City, UT 84150-3400

Audits

To ensure compliance with Church financial policies and procedures, stake auditors are required to audit family history centers twice a year, in February and August. If audits are not taking place, contact the high council adviser.

- Auditors receive from Church headquarters a form specifically designed for family history centers. Items on the audit are based on policies given in this operations guide. To obtain a copy of the audit form, center directors can contact the Family History Support Office.
- The high council adviser reviews the results of the audit and provides instruction and direction as needed to correct any items out of compliance.
- When a new center director is called, the new director and the high council adviser should request an audit of the center.

Microfilm and Microfiche Ordering Policies and Procedures

Ordering Microfilms and Microfiche— General Principles

- Microfilm and microfiche are loaned to family history centers by Distribution Services.
- Patrons pay loan fees established by Distribution Services and the Family and Church History Department.
- Microfilms are loaned for specific loan periods. Patrons may request loan renewal or loans for an extended period.
- Microfiche are loaned to centers for an extended period. They are not returned to the microfilm ordering center.
- Patrons and staff refer to the Family History Library Catalog to determine what microfilms and microfiche can be distributed to a family history center. The Family History Library Catalog indicates:
 - The catalog number assigned to the microfilm or microfiche.
 - The contents of a microfilm or microfiche.
 - How many fiche or parts are included in a set of microfiche.
 - If there are any restrictions on the circulation or use of a microfilm or microfiche.
- Family and Church History Department microfilms and microfiche are on loan to family history centers. They do not belong to the patron or the center that requested them.
- Microfilms and microfiche may not be removed from a center, ordered from one center and sent to another, or transferred from one center to another.

Microfilm and Microfiche Ordering Procedures

Inventory Manager Software

Family history centers in the United States and Canada should install and use the latest version of the Church's Family History Center Inventory Manager software to order microfilms and microfiche from Salt Lake Distribution Services. Inventory Manager allows center staff to submit an order electronically to Church headquarters. Once an order is sent, the software tracks the status of the orders and facilitates the administration of microfilm and microfiche inventories in a family history center.

For information or help in using Inventory Manager, consult the *Inventory Manager User's Guide*. To obtain a copy of the *User's Guide* or if you need further help, contact the Family History Support Office.

Maintaining a Current Mailing Address

Salt Lake Distribution Services cannot mail microfilms and microfiche directly to the center. Therefore, the director should provide the current mailing address and telephone number of the director or another person assigned to receive the center's materials. If an address changes, the director should immediately contact both:

- The Family History Support Office
- Salt Lake Distribution Services Customer Service

Ordering Microfilms and Microfiche from Distribution Services

To order microfilm or microfiche, center staff should follow these steps:

1. Before placing an order, check the availability of the microfilm or microfiche.
 - a. Make sure the microfilm or microfiche is not already in the center or on order.
 - b. Check if the microfilm is restricted. Any restrictions usually are noted in the entry in the Family History Library Catalog. Inventory Manager will indicate if a microfilm or microfiche you attempt to order is restricted and prevent you from ordering the film or fiche.
2. Fill out an order card.
 - a. Help the patron fill out the Microfilm and Microfiche Order Card (34310). The director or a staff member usually fills out the right side of the card.
 - b. Write the correct catalog number for the microfilm or microfiche. The number imprinted on the upper right corner of the card is the order number. If a microfiche number includes more than one fiche, also write the total number of fiche.

Note: Catalog numbers for microfiche are assigned to a set of records, which can include one or more microfiche. It is not possible for patrons to order just one fiche in the catalog entry. When ordering microfiche, patrons will receive all the

fiche in the set. For example, if a microfiche catalog number includes 45 fiche, the patron will receive all 45 fiche at \$.15 per fiche. The Family History Library Catalog should indicate the number of fiche included in each catalog entry. When ordering microfiche, verify in the catalog the number of fiche included, and inform the patron of the total cost to avoid unexpected charges.

3. Calculate and collect the fee from the patron.
 - a. Centers should charge only the established loan fees, as listed in the chart below. For microfiche, multiply the total number of microfiche in the set by the microfiche fee.
 - b. Where applicable, centers should collect state use tax. (When the order is shipped, Salt Lake Distribution Services will deduct the fee and any applicable state tax from the Church unit checking account.)
 - c. If needed, centers may add a small fee to notify the patron that a microfilm or microfiche has arrived. These fees should only be enough to pay for a telephone call or postage.
 - d. The chart below shows the loan fees (in U.S. dollars). In Canada, multiply the U.S. loan fee by the current exchange rate.
4. Prepare the order.
 - a. Use the Microfilm and Microfiche Order Cards to fill out the Microfilm and Microfiche

Order Sheet (31895). Microfilms and microfiche should be ordered separately. Use two order sheets if you are ordering microfilms and microfiche.

- b. In the upper right-hand corner of each order card, there is a purchase order (PO) number for that card. The PO number for the first microfilm or microfiche you list on the order sheet becomes the PO number for the entire microfilm or microfiche order.
5. Place the order with Salt Lake Distribution Services.
 - a. Centers should order by modem using Inventory Manager ordering software.
 - b. Place orders at least weekly, or more often if the center has at least 25 orders to send.

Centers may also place an order by phone or fax. The family history center unit number must be given with the order. To place an order by phone or fax, contact Distribution Services at:

Telephone: 1-800-537-5971
1-801-240-3800 (Salt Lake City area or Canada)
Fax: 1-801-240-3685
6. File the order card and order sheet (or a copy of an order sent by modem) by the PO number of the first microfilm or microfiche on the sheet. The first order number serves as the purchase order number.

Microfilm and Microfiche Loan Fees

<i>Loan Fees (in U.S. dollars)</i>			
Type of Loan	Loan Fee	Loan Time*	Days Available for Patron Use*
Microfilm loan	\$5.50	60 days* 90 days in Canada*	30 days*
Microfilm loan, 1st renewal	Additional \$5.50	Additional 60 days*	Additional 60 days (total of 90 days)*
Microfilm loan, 2nd renewal	Additional \$5.50	Extended loan, no due date	As long as needed
Microfiche loan	\$.15 per fiche	Extended loan, no due date	As long as needed (Centers may discard unnneeded fiche.)
* Note: Loan time includes shipping time to and from the center. Church headquarters assumes 15 days shipping time each way (30 days each way in Canada) for a total of 30 days shipping time (60 days in Canada). Shipping times are taken into account to determine how much time the film will be available in the center for patron use.			

Microfilm and Microfiche Order Card								U.S., Canada, and the Caribbean		PO. number	062007
Beginning number	0	1	2	3	5	6	7	Microfilm item number	Family History Center name and unit Sample City FHC 3335555		
Ending number									Total number of microfiche	\$	Microfilm due date
Title of record Sample County Civil Records, 1878-1910								Type of microfilm loan		If the order is for a renewal, list the original purchase order number here.	
								<input checked="" type="checkbox"/> Short-term \$ 5.50 <input type="checkbox"/> *First renewal \$ <input type="checkbox"/> *Second renewal \$			
Patron's name John Smith						Telephone number 222-123-4567		*Renewals are automatically charged to your unit number if the film is not received by the due date. Please do not send in a change of loan type on an order sheet.			
Complete address 456 No Such Road Our town, ST. 54321								Notification fee		\$.25	Staff signature <i>Signature</i>
								Total amount collected		\$ 5.75	Date ordered by patron 7 Sept. 05
WHITE—Family History Center PINK—Patron								5/97. Printed in the USA. 34310			

Receiving Shipments of Microfilms and Microfiche

When a shipment of microfilm or microfiche arrives, center staff should do the following:

1. Check the order. Use the purchase order number on the packing list to find the appropriate order sheet in the center's files and to reconcile the order with the packing list.

Packing List. A packing list will accompany each shipment (see the sample packing list below). The packing list indicates:

- The microfilms or microfiche in the shipment and any microfilms or microfiche that are backordered or restricted.
- The purchase order number of the shipment. The purchase order number appears on the "Ship via" line.
- The order number assigned by Salt Lake Distribution Services. Center staff use this number to make sure that the center receives the entire order. When the Packing List for the first shipment is sent, the number assigned by Distribution Services ends with "00."

Backordered items

- If there are backordered items, the center will receive another packing list when those items are sent. Distribution Services will assign the same order number to the backordered items, but the number will end with "01."
- If a second shipment of backordered items is needed to complete the order, it will have the same Distribution Services order number, but it will end with "02."

- If additional shipments are needed to complete the order, the same order numbering pattern will be followed.

2. Update the order sheet and Family History Center Inventory Manager. List the date the films were received and the date they are due for return. (Calculate the due date from the date the film was shipped.)
3. File the microfilms or microfiche.

Note: Staff should not write or put permanent labels or stickers on the bar code on microfilm boxes.
4. Notify the patron who ordered the microfilm or microfiche that it has arrived. Tell the patron how long the item will be at the center before it must be returned or renewed.
5. Compare the packing list(s) associated with the order with the Invoice/Record of Purchase form to ensure the center has received all the shipments.

Invoice/Record of Purchase. A few days after the shipment, Distribution Services will send an Invoice/Record of Purchase form (see the sample Invoice/Record of Purchase below). The form indicates:

- Charges to the Church unit checking account. When a microfilm or microfiche is shipped to a center, the loan fee and any applicable state use tax are automatically deducted from the Church unit checking account.
- The purchase order number.
- The invoice number.

The center director and the stake or ward clerk use the invoice number to reconcile the order with the monthly Church unit financial statement, which the Church Finance and Records Department sends

to the stake president. (On the Church unit financial statement, the invoice number is called the reference number.)

How to Read the Packing List

Detachable mailing label (affixed to shipping box)

Backordered film

Restricted film (which cannot be circulated)


Film included in this shipment

Packing List

THE CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS

SALT LAKE DISTRIBUTION CENTER
1999 West 1700 South
Salt Lake City, Utah 84104-4233 U.S.A.

10818/00
DFTUP SAMPLE CITY FHC
092697 1234 No Such Road
0003338312 Sample City ST 00000
(505) 555-5915



DOAN0FG975 B

Date printed: 10/03/97 Box size: -AN0FG FO12

Ship to:
SAMPLE CITY FHC
1234 No Such Road
Sample City ST 00000

Order number: 10818/00
Unit/Customer number: 0003335555
Customer telephone: (505) 555-5915
Entry date: 09/26/97
Order source: Modem Order Mi
Taken by: TANYA
Ship via: PO # 595809

Special instructions:

Location	Quantity	Unit of issue	Description	Item number	Quantity ordered	Quantity shipped	B. O.
			ITEM HAS BEEN BACKORDERED: #0030604				
			ITEM HAS BEEN BACKORDERED: #0364798				
			ITEM HAS BEEN BACKORDERED: #0545848				
		GS# 101852	is a Permanently Restricted Item				
		GS# 103880	is a Permanently Restricted Item				
			ITEM HAS BEEN BACKORDERED: #1205388				
			MICROFILM M-20261	1292795	1	1	0
			MICROFILM N-74189	1485676	1	1	0
			ITEM HAS BEEN BACKORDERED: #1549797				
			MICROFILM J-12109	1827313	1	1	0

If there is a problem with this order call: 240-1857 (Salt Lake Area), 1-800-537-5951 (U.S.), 1-800 453-3860 extension 2031 (Canada), 1 801-240-1126 (outside U.S. and Canada).

3/96 Printed in USA 33359

Date the order was shipped

Distribution center order number (Number assigned by Distribution Services)

Date the order was entered into Distribution Services Ordering System

Purchase order number

Item number of microfilm included in shipment (Item number is the catalog number of the microfilm or microfiche. It is also known as a GS number.)

How to Read the Invoice/Record of Purchase

THE CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS		Invoice/Record of Purchase	
Correspondence — For questions about merchandise on this order, write or call: U.S. & Canada (800) 537-5951 International (801) 240-1174 Local (in SLC) 240-1857		Sold to SAMPLE CITY FHC 1234 No Such Road Sample City ST 00000	
Salt Lake Distribution Center 1999 West 1700 South Salt Lake City, Utah 84104-4233		Sold to SAMPLE CITY FHC 1234 No Such Road Sample City ST 00000	
Distribution Services order number →	Unit/Customer number 1/0003326780 Customer order/PO number 595808	Distribution Center order number 86423/01 Special instructions	Invoice number 2526640 Invoice date 10/03/97
Purchase order number →	Distribution Center order number 86423/01	Entry date 10/03/97	Invoice date 10/03/97
Description of microfilm ordered →	Quantity ordered 1 EA	Description MICROFILM DUE DATE: 11/30/97 SERIAL # P-55690 MICROFILM MICROFILM MICROFILM	Item number 0894506 0894507 0894508 0894509
Item number of microfilm →	Unit of issue EA EA EA EA	Description MICROFILM DUE DATE: 11/30/97 SERIAL # P-55690 MICROFILM MICROFILM MICROFILM	Back ordered 1 1 1 1
		Quantity shipped 1 0 0 0	Unit price 3.250 3.250 3.250 3.250
		Extended price 3.25 N/C N/C N/C	Loan charge 3.25 N/C N/C N/C
		Back ordered 1 1 1 1	Indication that there is no charge on backordered items N/C N/C N/C N/C
		Sales tax .13	Total loan charges 3.25 .00 3.38
		Total 3.25 .00 3.38	Total amount deducted from Church Unit Checking Account 3.38
		Refunds for less than \$5.00 must be requested in writing.	Total amount deducted from Church Unit Checking Account

889. Printed in the USA. 33365

Returning Microfilms

To return microfilms to Distribution Services, staff members do the following:

1. Identify each week which microfilms are coming due. Contact the patrons who ordered the films to determine if they want to renew the loans or return the microfilms.

Note: Allow 15 days (30 days in Canada) of shipping time to ensure return to Salt Lake Distribution Services within the 60-day loan term (90 days in Canada). If a microfilm is not returned to Distribution Services on time, the loan is automatically renewed, and the center's Church unit checking account is automatically billed.

2. Check the microfilms to be returned.
 - a. Reuse the shipping box the films came in. Make sure the correct microfilm is in the correct box. Do not return empty boxes; they may be used for other purposes as needed.
 - b. If the bar code label is missing, use a rubber band to attach a note with the center's name and unit number.

Note: You do not need to list the microfilms being returned.
3. Update Inventory Manager.
4. Mail the microfilms back.

- a. Consolidate return shipments as much as possible, still taking care to return microfilms on time.
- b. In the United States:
 - Attach a Merchandise Return Label (34323) to the shipment.
 - Mail the shipment at a U.S. Post Office. Do not request special services (such as insurance or registered or certified mail).
- c. In Canada:
 - Attach an address label and sufficient postage.
 - Write in the lower right corner of the label the number of films in the shipment.
 - Use the chart below to determine where to send the shipment.

Renewing Microfilms

If a patron has not finished using a film by the time it should be returned, the patron can renew it. Films not returned in 60 days from shipment will be renewed automatically, and the center's account will be billed. The first renewal is for an additional 60 days.

If the film is renewed a second time, the second renewal is for an extended period of time with no specific due date. See the Loan Fees chart in this section for more information.

Where Centers in Canada Return Microfilms

Family history centers in:	Should return their films to:
British Columbia Alberta Saskatchewan Yukon Northwest Territories Nunavut	Pederson Storage and Cartage, Ltg. 3755-64th Ave. SE Calgary, Alberta T2C 2V5
Ontario Quebec Newfoundland New Brunswick Nova Scotia Prince Edward Island	DPGM Canada 2-7496 Bath Road Mississauga, Ontario L4T 1L2
Manitoba	Send to the less expensive of the two addresses listed above.

To renew a microfilm, the center staff should follow these steps:

1. In the file, find the Microfilm and Microfiche Order Card (34310) for the original order and indicate that this is a first or second renewal.

2. Collect the renewal fee (US\$5.50, plus any applicable tax).
3. Calculate the new due date and update Inventory Manager.
4. File the order card and order sheet.

Resolving Microfilm and Microfiche Order Problems

Problems	Solutions
You received a microfilm or microfiche, but the patron cannot find the records he or she expected to find on it.	<p>Check the item number in the Family History Library Catalog, and look at each item on the film to the end of the film. If the information indicated in the catalog does not match the film or fiche:</p> <ul style="list-style-type: none"> • Call the Customer Service Unit at Salt Lake Distribution Services: 1-801-240-3800 (Salt Lake City area) or 1-800-537-5971. • Then complete a Microform Action Request form, and send the form and the microfilm or microfiche in question to Distribution Services.
The number on the film does not match the number on the box.	Call the Customer Service Unit at one of the above numbers. Complete a Microform Action Request form, and send the form and the microfilm or microfiche in question to Distribution Services.
The film is not the one the patron ordered.	<p>Check the order sheet or Inventory Manager to make sure the correct microfilm was ordered.</p> <ul style="list-style-type: none"> • If Distribution Services sent the wrong film or fiche, call the Customer Service Unit at one of the above numbers. Fill out a Microform Action Request form, and return it with the film or fiche to Distribution Services. • If the center ordered the wrong film or fiche, reorder the correct film or fiche without charging the patron.
The film is damaged or unreadable.	Try to repair it with J-Lar splicing tape (80628), available from Distribution Services, or check the microfilm box to see if it is stamped "Best Copy Available."
You received the microfilm or microfiche, but it is now missing.	Call the Customer Service Unit at one of the above numbers.
You have not received a microfilm or microfiche in a reasonable amount of time from when it was ordered.	Call the Customer Service Unit at one of the above numbers.
You returned a microfilm on time but got charged for a renewal.	Call the Customer Service Unit at one of the above numbers.
Other problems not specified above.	Call the Customer Service Unit at one of the above numbers. If needed, fill out a Microform Action Request form, and return it with the film or fiche to Distribution Services.

Planned Extended Closure of the Center

When a center will close for a planned, extended period of time (for example, vacation or remodeling), the center director should:

1. Alert patrons well in advance to help them plan their microfilm and microfiche orders.
2. Obtain a patron's agreement before ordering any film that might be available for fewer than 30 days.
3. Renew only those films that patrons request and pay for.

4. Keep enough funds in the Church unit checking account to cover the cost of backordered films that may arrive and be automatically renewed during the closure.

Note: When an extended closure is planned, Distribution Services will not provide no-cost loan extensions.

Unplanned Extended Closure of the Center

In cases of an unplanned extended closure, such as an emergency, disaster, or unplanned remodel, contact both Salt Lake Distribution Services and the Family History Support Office.

Family History Support

Contact Information

Family history consultants, family history center directors, and staff in the United States and Canada can contact the following offices to obtain help and resolve questions or problems:

Family History Support *United States and Canada*

For help with:	Contact:	At:
<ul style="list-style-type: none"> • Establishing a new center. • Center policies. • Center operations. • Family history questions. • Technical questions or problems. • Research advice. 	Family History Support Office	1-866-406-1830 (toll free) (Ask for the Family History Center Support team.) 1-801-240-2584 (Salt Lake City area) support@familysearch.org Ask for the Research Support Team.
<ul style="list-style-type: none"> • Microfilm or microfiche orders. • Shipping. • Billing. 	Salt Lake Distribution Services	1-800-537-5971 (toll free) 1-801-240-1400 (Salt Lake City area)
<ul style="list-style-type: none"> • Internet service. • Provider support. 	Global Service Desk	1-866-678-2763, select language, select option 4 (toll free) 1-801-240-4357, select language, select option 4 (Salt Lake City area)

THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

ENGLISH



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