Utah State Council 2021-2022 Organizational Meeting

Break-Out Session

Presentation on Administrative Forms & Paperwork

Jerry Angus, State Training Director
Bill Kelly, State Secretary

Home page - tabs

| Membership | Reports | Forms | Publications | Prospect | Candidate |

Awards Progress

		Month to Date			Year to Date			
	Quota	Gain	Loss	Net	Gain	Loss	Net	%
MBR	11	0	0	0	10	1	9	82
INS	0	0	0	0	1	3	-2	

Council Membership

Total Membership 8/23/2021	YTD Change in Membership
253	9

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Reports

Existing Reports

Report Name	Date	PDF	Excel
Membership Roster	6/22/2021	▦	▦
Membership Roster - January	1/1/2021	▦	▦
Membership Roster - July	7/1/2020	▦	▦
Financial Statement	6/1/2021	▦	
Safe Environment Member Status	6/22/2021		▦
Safe Environment Participation Rate Report	6/22/2021		▦

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Custom Reports

Member Management

Print Center-NM

Data Extract Tool

| Officers Online | Member Billing | Member Management | Council Administration | Print Center-MM |

Member Management

Member Management - Find A Member

• **Find a Member**
▶ **Search Results**

Search Criteria

| Officers Online | Member Billing | Member Management | Council Administration | Print Center-MM |

• **Reports**
▶ **Labels**
▶ **Billing Reports**
▶ **Data Extract Tool**

Print Center - Reports

Council Reports

1. Current Officers
2. Next Fraternal Year Officers

GET EXTRACT

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Custom Reports

Select Get Extract at Bottom right corner

Contact Information:	

General Contacts:

Select All	Unselect All

☑ Residence Phone	☐ Seasonal Phone
☐ Residence Phone Ext	☐ Seasonal Phone Ext
☐ Business Phone	☑ Primary Email
☐ Business Phone Ext	☐ Secondary Email
☐ Fax Number	☐ Tertiary Email
☑ Cell Phone	

Primary Address Information:

Select All	Unselect All

☑ Address Line 1	☑ State/Province
☐ Address Line 2	☑ Postal Code
☑ City	☐ Country

Select Get Extract at Bottom right corner

Report Will Generate

Select "Click Here to Open"

Either Open or Save As – dependent on your computer options

Get Extract

Custom Reports

	Membersl	Prefix	First Nam	Middle Na	Last Name	Primary Ty	Address Line 1	City	State/Pro	Postal Coc	Residence	Cell Phone	Primary Email
2	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
3	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
4	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
5	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
6	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
7	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
8	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
9	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
10	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
11	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
12	1234567		John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com

Save File with a logical name Council 12345 Membership extract 26Jun21
And store somewhere on your computer.

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Forms Most Frequently Used

- 10784 Fraternal Programs Reports Form (As Required)
- 1728 Annual Survey of Fraternal Activity (Jan)
- SP7 Columbian Award Application (Jun)
- Officers Chosen – See Council Administration (Jun)
- Program Personnel – See Council Administration (Jul)
- Semiannual Audits – (Aug/Feb)
- RSVP (Jun)
- Youth Programs (as required)

10784 Fraternal Programs Report Form

Replaced many individual program forms.

Fraternal Programs Report Form

Faith	Family	Community	Life
○ Into the Breach	○ Family of the Month	○ Disaster Preparedness	○ Christian Refugee Relief
○ Marian Icon Prayer	○ Keep Christ in Christmas	○ Free Throw Championship	○ Silver Rose
○ Build the Domestic Church Kiosk	○ Family Fully Alive	○ Soccer Challenge	○ Pregnancy Center Support
○ Rosary	○ Family Week	○ Helping Hands	○ Novena for Life
○ Spiritual Reflection	○ Consecration to the Holy Family	○ Catholic Citizenship Essay Contest	○ Mass for People with Special Needs
○ Holy Hour	○ Family Prayer Night	○ Coats for Kids	○ March for Life
○ Sacramental Gifts	○ Good Friday Family Promotion	○ Global Wheelchair Mission	○ Special Olympics
○ RSVP	○ Food for Families	○ Habitat for Humanity	○ Ultrasound
○ Other	○ Other	○ Other	○ Other

Anyone with System access can complete a program form.
Click on particular program, the form will expand and fill in the details.
When done click submit in lower left corner

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Electronic Filing of Officers/ Service Personnel Report Advantages

- File report electronically versus typing a form (saves time).

- Mouse selection and clicking to complete.

- Can submit multiple times direct feed into Supreme Database.

- Last submission is most current to fix any changes or errors.

- Use to make changes throughout Fraternal Year.

Submitting Officers Report

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Submitting Officers Report

Council Administration - Council Officers - Current

Council

🛡 MOTHER TERESA OF CALCUTTA

Council 12181

Council Location: DRAPER
District: 003

Jurisdiction: UT
Date of Institution: 03-29-1998

Current Council Year 2020-2021

Next Fraternal Year 2021-2022

Copy Current Year

Menu items:
- • Council Administration
- ▶ Council Information
- • Council Officers Current & Next
  - • Current Year
  - ▶ Next Fraternal Year
- ▶ Service Program Personnel Current & Next
- • Next Fraternal Year
- ▶ Additional Positions
- ▶ Member Info

Make the changes you know now using your dropdowns and mouse.

Submitting Officers Chosen

Select position, search "type 1-2 letters, click on Lname, then change with assign

Change an Officer

Council Members | **Members from other Councils**

Choose Role:
[Grand Knight ▼]

Search by Last Name:
[_____] [Search]
Search Tips

Enter Start Date:
[07-01-2021] [📅]

Choose Member:
[UNASSIGNED ▲
 ▼]

[Assign]

Next Year Officers

Officer Positions	Name	Member#	Start Date
Grand Knight	Rasmussen, Cody	4992722	07-01-2021
Financial Secretary	Thatcher, Steven Jeffrey	3146610	07-01-2021
Deputy Grand Knight	Mencia, Jaime E	5000787	07-01-2021
Chancellor	Barker, Justin O	4344327	07-01-2021
Recorder	Vanmaren, Karl A	3031726	07-01-2021

When done select submit, click ok, click ok again then Go to print center at top of page.

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Submitting Officers Chosen

| Officers Online | Member Billing | Member Management | Council Administration | Print Center–MM |

Print Center - Reports

- • Reports
- ▶ Labels
- ▶ Billing Reports
- ▶ Data Extract Tool
- ▶ Email

Council Reports

1. Current Officers
2. Next Fraternal Year Officers
3. Current Service Program Personnel
4. Next Fraternal Year Service Program Personnel
5. Member Birthdays
6. Years of Service
7. Member Wedding Anniversaries
8. Council Members by Assembly
9. Wife Birthdays
10. Contact List
11. Ordination Anniversaries
12. Degree Level Reports
13. Fourth Degree Prospects
14. Member Information Report

Report will prepare, then select "Click Here to open".
Click "Open" or "Save as" dependent on your system.
There is your report.

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File Saving Print to PDF

No need to print then scan a document for an online report!

If adobe acrobat is not set up as a default on your computer, after creating a report from the system save electronically by performing the following steps:

- Right Click anywhere on the document.

- Then Select Print.

- In print menu, select either "Save as PDF" or "Microsoft print to PDF" – system dependent.

- Name the document with a logical name for the report you just prepared i.e. KC12345 Council Officers FY21-22, AND save in a drive/subdirectory in your computer.

- You now have an electronic file that you can send to State, District Deputy and Council file.

* Now do your councils service program personnel report.

Filing Officers Chosen Report

Formerly referred to as Form 185.

1. Logon to Officers Online using your user name and password.

2. At bottom of page Select the gold "Member Management" Icon.

3. At bottom of next page Select "Live".

4. At top of next page, select the gold tab "Council Administration".

5. On left of next page, select "Council Officers Current and Next" (for 185/186) or "Service Program Personnel Current and Next (385)

6. On next page, select "Current Year".

7. After the screen updates, then go the gold section, Current Council (Assembly) Year 2020-2021. This is the area where you will make additions or changes.

8. Next go to the Current Officers Gold Tab. If positions are listed with assigned members all you need to do is review and identify any changes from your council elections. If nothing is listed, you will have to update all your officers.

9. Here is an example of how to assign or appoint your officers in the section titled Change a Current Officer

   a. In the box titled Choose a Role, click on the down arrow and select a role; example deputy grand knight click "deputy grand knight".

   b. Then in the box Search by Last Name, "type in the last three letters" of the officers last name. This will bring up the members with that last name.

   c. Then in the box Choose Member, Click on the member, the name will highlight.

   d. Then click "Assign" button on the right.

   e. You will now note that the change is now reflected in the Current Officers Section with today's date as the start date. You can change that back to 07-01-2020 if that is when they actually started.

Filing Officers Chosen Report Continued

10. Continue this process for all your elected council officers and or changes. You can enter your officers at once in current session or in multiple sessions but save your work. At bottom of page click "submit"

11. A message appears click "OK". Your report is now filed with Supreme, then Click "OK"

12. Now go to the gold tab at the top of the page titled "Print Center-MM" and click on it.

13. Select Item 1 Current Officers. Message appears, "Reporting Service preparing report please wait." When complete message appears "Thank you for waiting, your report is ready".

14. Next Click on "Click here to open"

15. You receive a message "What do you want to do with NextFraternalYearOfficers.pdf", Click on "Save", then "Open" and your report is done.

16. Now right click on the printer icon or anywhere on the page and select Print. Print the document dependent on your software as either "Microsoft print to PDF" or "Adobe PDF", then select "Print".

17. Then save the file at a directory somewhere on your computer and name the file "Council/Assembly XXXXX Officers 20-21". Retain this as your council filing of record.

18. Now all you have to do is create an email to me (kellywbill@msn.com), your DD's email and upload the file you just created and then you are done.

Filing Service Program Personnel Report

Formerly referred to as Form 365

1. Logon to Officers Online using your user name and password.

2. At bottom of page Select the gold "Member Management" Icon.

3. At bottom of next page Select "Live".

4. At top of next page, select the gold tab "Council Administration".

5. On left column of next page, select "Service Program Personnel Current and Next"

6. On next page, on the left select "Current Year".

7. After the screen updates, then go the gold section, Current Council Year 2020-2021. This is the area where you will make additions or changes.

8. Next go to the section Current Service Program Personnel Tab (Gold tab). If positions are listed with assigned members all you need to do is review and identify any changes from your council appointments. If nothing is listed, you will have to update all your program personnel.

9. Here is an example of how to assign or appoint your program personnel in the section titled Change a Current Service Program Personnel

     a. In the box titled Choose a Role, click on the down arrow and select a role; example community Director and click "Community Director".

     b. Then in the box Search by Last Name, "type in the last three letters" of the director's last name. This will bring up the members last name with that search criteria.

     c.   Then in the box Choose Member, Click on the member, the name will highlight.

     d. Then click "Assign" button on the right.

     e. You will now note that the change is now reflected in the Current Service Program Personnel Section with today's date as the start date. You can change that back to 07-01-2020 if that is when they actually started in the position.

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Filing Service Program Personnel Report Continued

10. Continue this process for all your service program personnel and/or changes. You can enter your directors at once in current session or in multiple sessions but save your work before you exit. Go to the bottom of page click "submit" (you can do this multiple times if need be to save your work).

11. A message appears "This will change your program personnel as of today. Do you want to proceed? click "OK".

12. A message appears "Program personnel saved" (. . . Print Center) Your report is now filed with Supreme, then Click "OK".

13. Now go to the gold tab at the top of the page titled "Print Center-MM" and click on it.

14. Select Option 3 Current Service Program Personnel. A message appears, "Reporting Service preparing report please wait." When complete message appears "Thank you for waiting, your report is ready".

15. Click on "Click here to open"

16. You receive a message "What do you want to do with CurrentProgramPositions.pdf, Click on "Open" and there is your report it is done and filled with Supreme.

17. Now right click on the printer icon or anywhere on the page and select Print. Print the document dependent on your software as either "Microsoft print to PDF" or "Adobe PDF", then select "Print".

18. Then save the file somewhere on your computer and name the file "Council/Assembly XXXXX Program Personnel 20-21". Retain this as your council filing of record.

19. Now all you have to do is create an email to me (kellywbill@msn.com), your DD email and upload the file you just created and then you are done.

UTAH KNIGHTS OF COLUMBUS

Prospect Tab

- Transfers Online Member to Council after degree completion.

- Supreme sends notice of degree completion to GK/FS.

- Input date, select transfer.

Candidate Tab

Transfer/Reinstate Members On-line

- Click Add

- Enter Basic demographics, Date of Birth, Sponsor's membership number

Click Add

Candidate Tab

Knights of Columbus

MEMBERSHIP FORM

Since 1882, membership in the Knights of Columbus has been open to men 18 years of age or older who are "practical" (that is, practicing) Catholics in union with the Holy See.

*Required Field

Council Number

12181

Title

Select Title

First Name

Several Fields missing here.

Country

*

Proposer Member #

Save

Click Save to Transfer member

Member Management

- Find current/former member (Last Name first letter) generates a list. Select a member

- General Information (save one section at a time)

- Fraternal Information (degree and proposer info)

- Personal Information (Parish, Married, Family, decedent info)

- Member Interest (Info from surveys)

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Updating Member Information

General: Member, Name, Address, Email

Fraternal: Degree & Status, Proposer, Position Info

Personal: Member (Parish/job), Spouse, Children Deceased Date.

Member Interests: Optional Check appropriate boxes, then save.

Notes: Optional

Reporting Decedent

Member Management

Find member with 1 or 2 letters of last name

Personal Information, then drop down to 5th Section

Deceased Date & Next of Kin Information

Member's Deceased Date:

[   ] [📅]

MM-DD-YYYY

☐ **Remove Deceased Date & Next of Kin**

First Name:
[   ]
☐ Use Member's Address

Last Name:
[   ]
☐ Use Member's Last Name

Address Line 1:
[t   ]

Address Line 2:
[   ]

City:
[   ]

State/Province:
[▾]

Postal:
[84020-9416   ]

Country:
[United States   ▾]

Relationship:
[Spouse ▾]

Phone:
[   ] **Ext.** [   ]

[Save Info]

Enter Information and click save.
Then verify posting by looking up former member

UTAH KNIGHTS OF COLUMBUS

COUNCIL EIN/990N Filing

UTAH EIN Information

Missing EINs

Councils	Assemblies
2611	1144
7401	1570
8350	2636
8606	
10304	
12959	
13646	

* - Does not include Inactive councils 11812, 15741,16006

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ACQUIRE COUNCIL EIN

- Acquire EIN from IRS at: https://sa.www4.irs.gov/modiein/individual/index.jsp

- Begin application,

- Select view additional types

- Select view additional Types including tax exempt & Government Orgs.

- Select Other non-profit/tax exempt organizations

- Next page select continue

- Select banking purposes

- Select individual

- Input responsible individual (FS/GK) and SSN, check "I am a responsible and duly authorized member or Officer having knowledge of this organizations affairs."

- Input council mailing address and phone number (normally FS). Enter FS Name, Click No on alternate address.

- Mailing Address of Non-profit organization Enter "PO Box 123 New Haven Connecticut 06510, Select United States

- Legal Name: example: Father McGivney Council 12345; Trade Name: Knights of Columbus 12345; County: Your County; State: UT; State/Territory Where Located: Connecticut; Start Date: pull from Council Administration Date of Institution.

- Tell Us about nonprofit status – Select "No" for five questions,

- What does your organization do – Select 'Other",

- Choose one of the following – Select "Other" and Enter Fraternal Benefits Society,

- Select Receive Letter on Line.

- In five minutes or less you will receive your EIN number, **IMMEDIATELY** print off or save as PDF File.

- Email the letter to tax.ein@kofc.org

UTAH KNIGHTS OF COLUMBUS

Register EIN With Supreme

Submit Master List Form with IRS letter.

Form on: Utahknights.org

KNIGHTS OF COLUMBUS
MAKING A DIFFERENCE FOR LIFE

ADD TO MASTER LIST FORM – NO SIGNATURE REQUIRED

** PLEASE PRINT - EMAIL OR MAIL - MUST INCLUDE COPY OF LETTER FROM IRS**

Date: _____

Office of the Supreme Advocate
PO Box 1670
New Haven, CT 06507-9982

Re: Authorization to Apply for Federal Income Tax Exemption Under Section 501(c)(8)
For Council/Assembly/Chapter [circle one] described below ("Unit")

Worthy Supreme Advocate:

This authorizes you to apply for inclusion of the **Unit** in the Supreme Council's group exemption roster. The **Unit** is a subordinate organization affiliated with and under the general supervision of the Supreme Council. When added to the group exemption, it will be exempt from federal income taxes under Internal Revenue Code Section 501(c)(8).

New Haven, CT 06507-9982

Re: Authorization to Apply for Federal Income Tax Exemption Under Section 501(c)(8)
    For Council/Assembly/Chapter [circle one] described below ("Unit")

Worthy Supreme Advocate:

This authorizes you to apply for inclusion of the **Unit** in the Supreme Council's group exemption roster. The **Unit** is a subordinate organization affiliated with and under the general supervision of the Supreme Council. When added to the group exemption, it will be exempt from federal income taxes under Internal Revenue Code Section 501(c)(8).

This authorization is given pursuant to Revenue Procedure **68-13.**

_____

Name of person responsible for filing Form 990 with IRS

_____

Name of Grand Knight/Faithful Navigator/Chapter Officer [circle one]

Unit Name_____

Unit Number_____

Unit Address_____

NOTE: THIS ADDRESS SHOULD BE A NEUTRAL ADDRESS WHERE MAIL FROM THE IRS CAN BE RECEIVED EVEN IF THE PERSON RESPONSIBLE FOR FILING 990 BECOMES UNAVAILABLE.

Unit Federal Employer Identification Number (EIN) _____

NOTE: EIN NUMBER IS FOUND ON THE LETTER RECEIVED FROM THE IRS OR PRINTED AT THE TIME OF THE ON-LINE APPLICATION.

Identifying Last Time Council Filed 990-N

- Need Council EIN

- Go to: https://apps.irs.gov/app/eos

- Enter EIN in "Search Term" Box.

- The system will find your record.

- Click on Knights of Columbus

- The history of your council's EIN filing is displayed.

Note: Your Council must file 990-N postcard every year. Failure to file will result in loss of EIN and potential fine ($600) from IRS.

Identifying Council EIN Filing Status

Filing Your Councils 990N

- Go to: https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard

- Click on Submit Form 990-N (e-Postcard)

- If you have a Log In, enter user name and password; Click Forgot Username, if you forgot

- If you previously have not filed with your EIN select Create Account (Detailed instructions will be uploaded to UtahKnights.org)

- History of account login is displayed; Select Continue

- Click on Manage Form 990-N Submissions

- Click on Create New Filing

- Select EIN, then select Continue

- Answer Questions; Out of Business – No, Receipts less than $50K – Yes, Then Continue

- Skip Additional DBA names, Country – US, Enter council address info, Principle Officer Type – Person, Enter person name (normally FS) and address then Save Filing, Followed by Submit Filing. Save electronic filing by printing to PDF.

IRS EIN Filing

IRS

Sign Up

Don't have an account? Create one now.

CREATE ACCOUNT >

Log In

Already have a username? Welcome back!

Username

LOG IN >

Forgot Username

PTIN and FIRE users need a separate account in this system

Answer No, and Yes, the click "Continue

Electronic Notice-Form 990-N (e-Postcard)

Organization Information

For the tax year ending

December 31, 2020

Has your organization terminated or gone out of business?

--Select One--

Are your gross receipts normally $50,000 or less?

--Select One--

Organization's legal name -Line 1

KNIGHTS OF COLUMBUS

Organization's legal name -Line 2

Employer Identification Number (EIN)

810798497

PREVIOUS   CANCEL FILING   CONTINUE

IRS EIN Filing

Ignore DBA Information, Enter Organizational and Principle Officer and click submit

Principal Officer:

Type of Name*

--Select One--

Person Name*

Country*

--Select One--

Number and Street (or PO Box)*

City or Town*

State*

--Select One--

Zip Code*

PREVIOUS | CANCEL FILING | SAVE FILING | SUBMIT FILING

Safe Environment Requirements

- Supreme Training: Council Grand Knights (GK), Program Directors (PD), Community Directors (CD) & Family Directors (FD).

- Supreme Background Checks: Council Community Directors & Family Directors.

- Diocese Training & Background checks: *Any Knight who actively participates in Diocese, Church, School or KofC activity.*

- Mandatory Reporting: Any suspicious or suspect activity.

Safe Environment Process

- Acquire commitment from GK, PD, CD and FD to complete the SE training prior to submitting Officers Report and Personnel Services Report.

- Submit Elected Officers and Service Program Directors Report online within Supreme directed timelines. Ensure appointees have valid email address in member file.

- Ensure at a minimum service report contains PD, CD, FD and retention chair otherwise Supreme will reject.

- Supreme sends appointees login and password set up info, e.g. "123456kelly"; Provides key ?s to reset Password.

- Appointees respond to emails from Supreme or Presidium for Background check initiation. *Check junk mail.*

Safe Environment Supreme Training

- Knights training can be completed online using Paesidium or via workbook self-study guides. www.kofc.org/safe

- https://armatus2.praesidiuminc.com/armatusUser/login

- Login Problems Call: 203-800-4940 or email at: support@PraesidiumInc.com

- Complete Training under the officer tab **not** member at large tab if in an appointed position.

- Three modules: Meet Sam, Policies - KofC, Duty to report.

- Appointees must complete training within specified time or they are removed from the system. GK/FS must then resubmit the Service Program Report for reappointment.

- Good for 3 years.

Safe Environment Diocese Training

- Salt Lake City Diocese website
  - https://www.dioslc.org/offices/office-of-safe-environment
  - Click on "Adult Certification: Child & Youth Protection Training"
  - https://saltlakecity.cmgconnect.org/
- Good for 3 years

Positions Requiring Training

State Deputy

State Advocate

State Youth Director

Grand Knights (every council)

Program Directors (every council)

Community Directors (every council)

Family Directors (every council)

Positions Requiring Background Check

State Youth Director
Family Directors (every council)
Community Directors (every council)

NOTE: The Diocese will accept a Knights background check but not the Knights Training. Must complete both the Diocese Training *and* the Knights Training.

UtahKnights.org

Available Tabs

Clicking at "calendar" at top of menu bar or
At bottom "Go to Full Calendar" takes you to the
"Big Cal" listing all the events that are going on in
State.

Council Health Status

Select Resources to determine your Council's Health

| Select Council # | [dropdown] | To clear and look at a different council either delete or select another from the dropdown menu. | | | | | | | | | | | | | | | | | |

Select your Council number above to see the data and status for your Council.			AS OF:		6/24/2021			Star Council Tracker								Other Forms		
			Membership			Ins Benefit Nights			AS OF:	6/8/2021	6/23/2021	9/1/2020	4/1/2021	6/23/2021	6/17/2021	9/1/2020	6/23/2021	
COUNCIL	DISTRICT	PARISH / LOCATION	Quota	Net	%	Quota	# Held	Ins Mbr Net	McGivney (Mmbrshp)	Founders (Insurance)	In Good Standing	Program Personel #365	Fraternal Survey #1728	Columbian Award SP7	Safe Env. Compliant	Officers Chosen #185	Audit Due 8/15	Audit Due 2/15
									Report Due:	8/1	1/31			6/30		7/1	8/15	2/15
		Does your Council have a balance or unpaid invoices with the State?					Council		Invoiced for						Invoice #	Subtotal	Prev Paid	Balance
		See what's been invoiced and what needs to be paid to the right -->																

Use Drop down to select your council.

Determine status in relation to programs, forms and invoices

UTAH KNIGHTS OF COLUMBUS

Star District Requirements FY 21-22

The Star District Award recognizes outstanding achievements in membership, insurance and overall excellence by the councils within the territory of a district deputy.

Membership Growth
The district reaches 70% of combined council membership quotas. You can track district membership on Officers Online.

Insurance Growth
The Founders Award is earned by every council within the district.

Overall District Excellence

• At least one council in the district earns the Star Council Award
• Submit two *District Deputy Semiannual Reports* (#944) for each council in your district. *District Deputy Semiannual Reports* (#944) are due on 12/31 and 6/30. Submit these reports for all councils – even councils that are currently suspended or inactive.

Form 994 may be found at url:
https://www.kofc.org/un/en/forms/district/dd_semi_report_june944B_p.pdf

FINANCIAL SECRETARY BREAKOUT

Member Billing

- Assessments
- Verify or change billings amounts by clicking class list.
- Enter new amounts or class, then click update.

Billing Status

- Assessments

- Update Status

- Change status from 1st Notice to 2nd notice, to Knights Alert to Intent to retain by clicking Update Billing Status

- Timeline Dec 15, Jan 15, Mar 15 and Apr 7.

- Enables you to pull report from Print Center, by clicking Billing, for respective billing printing and intent to retain reports.

- Intent to retain reports must be signed by GK and FS to be valid and mailed to members like other billings.

Printing Membership Cards

Member Billing

Print Center-MB

Select Option 1

Select Member Type:

- ⦿ All Billable
- ○ All Members
- ○ Regular
- ○ Honorary
- ○ Honorary Life
- ○ Members on Exemption

Click Print Cards

Receiving and Posting Dues

Member Billing

Receipts

Dues Collection Tool

- **Council Ledger**
  - **Receipts**
  - **Enter Receipts**
  - ▶ Dues Collection Tool
  - ▶ Pending Receipts
  - ▶ Receipt History

Council Billing & Accounting - Enter Receipts

Council

🛡 MOTHER TERESA OF CALCUTTA   Council 12181

Council Location: DRAPER   **Jurisdiction:** UT

- **Council Ledger**
  - **Receipts**
  - ▶ Enter Receipts
  - **Dues Collection Tool**
  - ▶ Pending Receipts
  - ▶ Receipt History
- ▶ Vouchers

Council Billing & Accounting - Dues Collection Tool

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Outstanding Balances

Name	Member #	Billing Status	Outstanding Balance	Amount Received	Paid	Check #

Select a letter to display members with outstanding balances

Receiving and Posting Dues

Using "C" yields

Outstanding Balances						
Name	**Member #**	**Billing Status**	**Outstanding Balance**	**Amount Received**	**Paid**	**Check #**
Carter, Leroy Shane	4452011	Intent to Retain	30.00		☐	
Conway Sr, Todd W	3727273	Intent to Retain	30.00		☐	
Curran, Patrick C	5028072	Intent to Retain	20.00		☐	

- • Dues Collection Tool
- ▶ Pending Receipts
- ▶ Receipt History
- ▶ Vouchers
- ▶ Assessments
- ▶ Adjustments
- ▶ Billing Information

Enter Amount, Click Paid, enter check#, cash, square, visa, etc., Then Select Save.
Transactions will post as Pending Receipts until you process them.

- • Pending Receipts
- ▶ Receipt History
- ▶ Vouchers
- ▶ Assessments
- ▶ Adjustments
- ▶ Billing Information
- ▶ Member Information
- ▶ Email

MOTHER TERESA OF CALCUTTA   Council 12181

Council Location: DRAPER   **Jurisdiction:** UT
District: 003   **Date of Institution:** 03-29-1998

Pending Receipts - Summary	
# of Transactions	**Total Amount**
3	120.00

Pending Receipts - Details						
Date	**Member/Payor**	**Check #**	**Total Amount**	**Split**	**Edit**	**Delete**
06-19-2021	Brandon S Miller	590	30.00	☐	View	Delete
06-19-2021	Stephen F Francisco	square	30.00	☐	View	Delete
06-21-2021	Sean P O Donnell	1444	60.00	☐	View	Delete

Process Receipts

Printing Outstanding Balance Report

Member Billing

Print Center-MB

Retention

Outstanding Balance Report

Select Option 2

Run Report and save report

Thank you!

We hope this was helpful.

Any questions?