



# Financial Secretary 101 Handout

<https://KofC.org>

**Login to Officers Online (Member Management, Member Billing, Print Center...)**

Go to Kofc.org

Click on Sign in (upper right corner)

Enter your Username and Password and click on "Sign In"

## **Voucher**

Login to Officers Online

Click on Member Billing

Click on Live

Click on Vouchers

Choose either Member or Payee (click on the tab)

Fill in search criteria and search

Click on search result and then click on select

Fill in Voucher information, when finished click on Save

## **To process voucher**

Click on Pending Voucher

Details for the pending vouchers will appear, click on Process Vouchers

## **Print/Save Voucher**

Click on Print Center MB (tab in upper right)

Click on Voucher Report

Click on Report of Vouchers

Select posted Date (I use PDF, you can also choose Excel)

Click on Run Report

You will get a window that says your report is ready, click on "Click her to open "

Your file will be at bottom of screen, click to open

How you can print or save or both (upper right hand to select)

### **Assessments**

Click on Member Billing

Click on Assess Dues

Fill in "As of Date"

Click on Update Billing Status"

Click on Assessments

Click on Print Center MB

Click on Billing

Select Billing Notice

Fill in Addendum Message

Select Delivery Preference (note selecting email will auto send upon processing)

Click on Generate Notice

### **Receipts**

Click on Member Billing

Enter search criteria for Member and click on search

Choose search results and click on Select

Fill in Receipts information

Click on Save

To process receipts

Click on Pending Receipts

Details will appear, then click on Process Receipts

### **Look up Member Billing Status**

Click on Member Billing

Look up member by last name or member number

Results returned will have Billing Status Column

“Dues are Current” will appear once you process receipts

### **Member Roster**

Click on Reports tab at bottom of Officers Online

Select PDF or Excel, a window with confidentiality agreement will appear

Select I Agree

Your Council Roster will appear

You can Print and/or Save

### **Report of Officers**

Click on Member Management

Click on Council Administration

Click on Council Officers

Click on “Current” or “Next Fraternal Year”

Fill in the council members information then click on Assign

Repeat until all officers assigned

List of council officers will be at bottom

Click on Submit

### **Report of Service Program Personnel**

Click on Member Management

Click on Council Administration

Click on Service Program Personnel

Click on “Current” or “Next Fraternal Year”

Fill in the Service Program information then select Assign

Repeat until all programs assigned

List of Service Program Personnel will be at bottom

Click on Submit

### **Check Status of Safe Environment**

Go to Officers Online

Click on Reports

Click on Safe Environment Member Status (excel)

Report will be generated at lower left, click on report

### **Forms**

Go to Officers Online

Click on Forms tab

A list of forms will appear with pdf for printing and online if available for submitting

### **Prospects**

Go to Officers Online

Click on Prospects tab

A list of online members who have chosen your council will appear

Contact the member and arrange for an in-person ceremonial or another council's ceremonial

You can invite them to your business meetings and add them to your email notifications

They can complete the online Ceremonial

Once Ceremonial completed, you enter the date and click on Transfer

### **Candidates**

Go to Officers Online

Click on Candidates tab

Pending Members will appear

You can click on Add and add a new member

You will need their name, address, phone, email, birth date and preferred language

Remember to put in your member number as proposer

## **IRS 990**

<https://irs.gov>

990-N

## **Membership Cards**

Click on Member Billing

Click on Print Center MB

Click on Me0-mbership Cards

Follow instructions for back of card, then click print cards

Click on Member Type and select all Members, then click print cards

Or, you can ask for a black template

## **Supplies**

Go to Officers Online

Click on Supplies Online

Search 4817E

## **Member Information**

Go to Member Management

Find a Member by Last Name or Member number

Click on "Members Name" in Results Returned section

Click on Personal Information

You can update fields, just remember to Save your changes

If you have a member who has passed away, you can report this to Supreme by filling in the Deceased Date and Next of Kin section at bottom of personal information.

# Affiliate Member Info

Link to guidebook

<https://utahknights.org/wp-content/uploads/2022/05/11231-Affiliate-Member-Initiative-Guidebook-v04-22.pdf>

Questions can be asked by email to [affiliate@kofc.org](mailto:affiliate@kofc.org) or phone at (203) 752-4270

**FINANCIAL SECRETARY PROCEDURES:** The Financial Secretary creates a list of eligible members to be recommended for designation as Affiliate Members. The following procedure is recommended: a. Download a report of council members using the Data Extract Tool in Member Management

- 1) Log on to Officers Online
- 2) Click on the Member Management icon
- 3) Click on the “Print Center – MM” button on the top right of the page
- 4) Data Extract Tool” from the menu on the left side of the page
- 5) Select “Billing Info” (left side menu)
- 6) Click the “Select All” buttons under the sections for “General Contacts”, “Primary Address Information”, and “Billing Information”
- 7) Click the “Get Extract” button and when prompted, Click OK
  - a. It may take several minutes before the data is delivered. Please be patient
- 8) Open the spreadsheet that is downloaded by the system
- 9) Use this spreadsheet to create your list of recommended Affiliate Members
- 10) Refine your list by deleting members who are current, or only one year behind, on their dues, as follows:
  - a. Place your cursor on the letter(s) at the top of column (AI) “Dues Assessment Balance” and right click once to highlight the column (Please refer to Figure VI) ii. Left click on the “Sort & Filter” button on top of the page and select “Sort Largest to Smallest” (Please refer to Figure VII) iii. When the pop-up box appears click “Expand the selection” and press the “sort” button (Please refer to Figure VIII) iv. Members with the highest dues’ balances will now be at the top of the column (Please refer to Figure IX) v. Scroll down the column until you arrive at a dollar amount for 18 months of dues or more vi. Highlight all rows below that amount and then right click your mouse and press “delete” (Please refer to Figure X) vii. The remaining rows constitute your tentative council Affiliate Member designation list (Please refer to Figure XI) viii. To save this list, click on the “File” button at the top left of the page ix. Select “save as” from the drop-down menu<sup>6</sup> x. Change the default format from “CSV” to “Excel Workbook” by clicking the arrow next to the save button and selecting “Excel Workbook .xlsx” xi. Save your file as “Council XXXX Tentative Affiliate List” c. Send the list of tentative designated members to the Grand Knight (Please refer to Figure XII) d. For subsequent member billing cycles, use the interim procedures provided in Appendix B.

## Other useful links

Knights of Columbus State Webpage

<https://utahknights.org/>

Exemplification Videos in English and Spanish

[https://goto.webcasts.com/viewer/event.jsp?ei=1359367&tp\\_key=9eb24b3a45](https://goto.webcasts.com/viewer/event.jsp?ei=1359367&tp_key=9eb24b3a45)

[https://goto.webcasts.com/viewer/event.jsp?ei=1359906&tp\\_key=7669ae5c1d](https://goto.webcasts.com/viewer/event.jsp?ei=1359906&tp_key=7669ae5c1d)

Fraternal Planner

<https://www.kofc.org/un/en/resources/membership/fraternal-leader-success-planner5033.pdf>

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