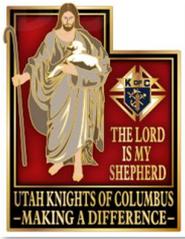


UTAH KNIGHTS OF COLUMBUS

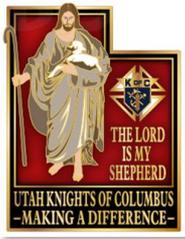




Administrative Breakout Session

- **Chuck Davlin**
 - Assistant Regional Growth Director – West
- **Karl VanMaren**
 - State Executive Secretary
- **Bill Kelly**
 - State Deputy

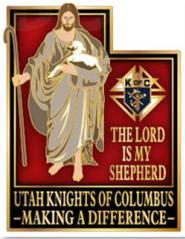




Administrative Breakout Session

- Chuck Davlin
 - Assistant Regional Growth Director – West





Administrative Breakout Session – Karl VanMaren

- Karl VanMaren
 - State Executive Secretary





Administrative Breakout Session – Ordering Supplies

Ordering Supplies from Supplies Online

- A credit/debit card is REQUIRED (even if there is no charge)
- Searching by item number [usually] works great.
- Watch/Compare shipping costs.
- The FIRST time you place an order, enter a custom location for the shipping destination

Shipping

Shipping Destination

Select a Location:

Enter a Custom Location

Click On The Arrow to the Right and select enter a custom location.

Enter a Custom Location

* Mark to the Attention of

* Company Name:Your Name





Administrative Breakout Session – Ordering Supplies

Ordering Supplies from Supplies Online

1. Login to Officers Online

1. <https://www.KofC.org/oo>

2. Click “Supplies Online” icon in the “Supporting Applications” section. *Not there? Look again!*



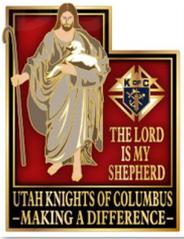
3. Find your item(s)

1. Click through the menus (great for finding random stuff)
2. Search by item # (usually on the back cover)

3. Like free? READ the description, check for a DOWNLOAD LINK (for PDFs you can print), and click the item’s picture (sometimes it is the full PDF link). *Does it say anything about shipping?*





Administrative Breakout Session – Ordering Supplies

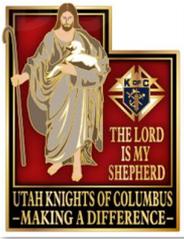
Ordering Supplies from Supplies Online

Notes:

- Some items need approval.
 - You only find that out AFTER you try and order them.
 - It usually is next business day.
 - Examples: Pilgrim Icon Prayer Cards (11221), Choose Life Signs (9341)
- Check Shipping Costs
 - US Postal is a flat \$3.50 charge
 - UPS Ground **could** be free (depends on the item)
- Remember Shipping Time
 - **Give it 7 calendar days to arrive using USPS or UPS Ground.**

USPOSTAL
UPS Ground
UPS 2nd Day Air
UPS NextDay Air
International



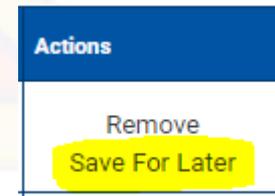


Administrative Breakout Session – Ordering Supplies

Ordering Supplies from Supplies Online

Notes on Shopping Cart Screen (Checkout):

- You can save items for later
 - Add them to your cart, then click “save for later”
 - Might want to do this if an item is backordered.



▼ SHOPPING CART

You have 2 item(s) in your shopping cart.

You have 9 item(s) in your saved shopping cart.

Order Email CCs:

- Does someone else need to know you ordered something? Will they be asking you for updates? Add their email address to the order (top, above the list of items)





Administrative Breakout Session – Ordering Supplies

Any Questions?

YOUR ASSIGNMENT:

- DD: Please order a set of Free Throw Championship District Medals.
 - Item: **FT MEDAL**
- GK: Order a **\$5.00** Kit for a Youth Program
 - EA-KIT-E (Catholic Citizenship Essay); SC-KIT-E (Soccer Challenge);
 - FT-KIT-E (Free Throw Championship); CPC-KIT-E (Keep Christ in...).
 - **and/or 5033-2023** (Fraternal Success Planner 2022-2023).
- FS: Order a Church Drive Kit
 - Item: **DRIVE-KITE**

Add my email address to the CC line so I know you've done it, and choose UPS Ground (free) shipping.





Administrative Breakout Session – State Website

www.UtahKnights.org

EVENTS (sliders on the home page)

UtahKnights.org/Events (they don't slide away)

RESOURCES

UtahKnights.org/Resources

MEMBERS ONLY (needs a password)

UtahKnights.org/Secrecy (has Google Calendar links)

DIRECTORY PAGE

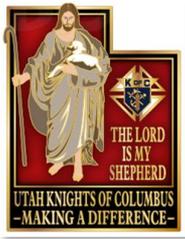
UtahKnights.org/Directory

TRAINING

UtahKnights.org/Training

UTAH KNIGHTS OF COLUMBUS





Administrative Breakout Session

- Bill Kelly
 - State Deputy





Officers Online

Home page - tabs

- Membership
- Reports
- Forms
- Publications
- Prospect
- Candidate

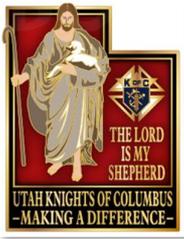
Awards Progress

	Quota	Month to Date			Year to Date			%
		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 6/23/2021	YTD Change in Membership
253	9





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		





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	Print Center - Reports
▶ Labels	
▶ Billing Reports	
▶ Data Extract Tool	

Council Reports

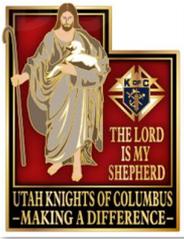
1. Current Officers
2. Next Fraternal Year Officers



GET EXTRACT

UTAH KNIGHTS OF COLUMBUS





Custom Reports

Select Get Extract at Bottom right corner

Contact Information:

General Contacts:

Select All Unselect All

<input checked="" type="checkbox"/> Residence Phone	<input type="checkbox"/> Seasonal Phone
<input type="checkbox"/> Residence Phone Ext	<input type="checkbox"/> Seasonal Phone Ext
<input type="checkbox"/> Business Phone	<input checked="" type="checkbox"/> Primary Email
<input type="checkbox"/> Business Phone Ext	<input type="checkbox"/> Secondary Email
<input type="checkbox"/> Fax Number	<input type="checkbox"/> Tertiary Email
<input checked="" type="checkbox"/> Cell Phone	

Primary Address Information:

Select All Unselect All

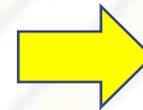
<input checked="" type="checkbox"/> Address Line 1	<input checked="" type="checkbox"/> State/Province
<input type="checkbox"/> Address Line 2	<input checked="" type="checkbox"/> Postal Code
<input checked="" type="checkbox"/> City	<input type="checkbox"/> Country

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

Members	Prefix	First Name	Middle Name	Last Name	Primary Title	Address Line 1	City	State/Prov	Postal Code	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
5	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
0	1234567	John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
1	1234567	John	R	Smith	Fraternal	59 Any Street	Salt Lake Cit	UT	84092-123	801- 867-9	801-123-4567	johndoe@gmail.com
2	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.

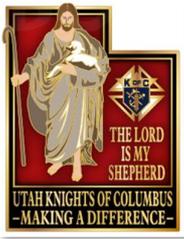




Affiliate Roster

- Member Billing
- Print Center-MB
- Data Extract Tool
- Billing Info
- Get Extract (csv file)
- Insert a column, then copy dues Amnt Balance.
- Copy to Column A, then sort hi to low.
- Delete rows for anyone with zero balance

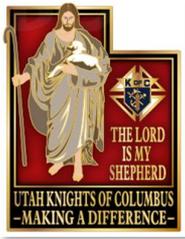




Forms Most Frequently Used

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





10784 Fraternal Programs Report Form

Replaced many individual program forms.

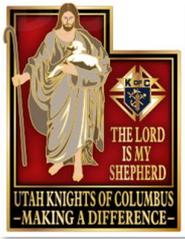


Fraternal Programs Report Form

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





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



Find a Member by Last Name:

Go

Print this screen



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

- Member Management
 - Member Management - Find A Member
 - Search Criteria
 - Display records for the following:
 - Active Members
 - Former Members
- Council Administration
 - Council Information
 - Council Officers Current & Next
 - Service Program Personnel Current & Next
 - Additional Positions
 - Member Testaments

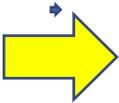
Council Administration - Council Information

Council

MOTHER TERESA OF CALCUTTA Council 12181

Council Location: DRAPER **Jurisdiction:** UT

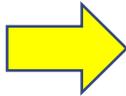
District: 003 **Date of Institution:** 03-29-1998





Submitting Officers Report

- Council Administration
 - ▶ Council Information
 - Council Officers Current & Next
 - Current Year
 - ▶ Next Fraternal Year
 - ▶ Service Program Personnel Current & Next



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
 - ▶ Additional Positions
 - ▶ Member Int



Next Fraternal Year 2021-2022

Copy Current Year

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 | Enter Start Date: **07-01-2021** |

Search Tips
Choose Member:
UNASSIGNED

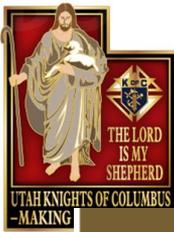
Assign

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.





Submitting Officers Chosen

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

Print Center - Reports 

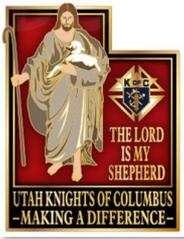
Council Reports

- 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

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

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





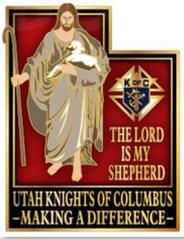
File Saving Print to PDF

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.

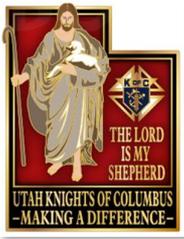




Filing Officers Chosen Report Continued

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.



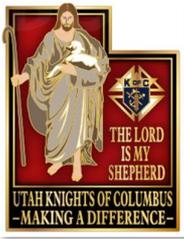


Filing Service Program Personnel Report

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.





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.





Prospect Tab

- Transfers Online Member to Council after degree completion.
- Supreme sends notice of degree completion to GK/FS.
- Input date, select transfer.

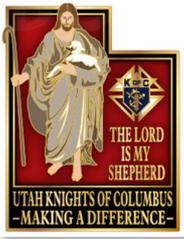
Membership Reports Forms Publications **Prospect** Candidate

Assigned

Search:

Council # ▲	Assigned Date ▾	Name ▾	Member # ▾	Entry Date ▾	Ceremonial Date ▾	Action ▾
12181	05/09/2021	Douglas A Saar	4671252	11/26/2013	<input type="text" value="MM/DD/YYYY"/>	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>
12181	02/11/2021	Hedthel Corieto	5198545	02/08/2021	<input type="text" value="MM/DD/YYYY"/>	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>
12181	09/23/2020	MR Arcadio Madrigal	5172380	09/23/2020	<input type="text" value="MM/DD/YYYY"/>	<input type="button" value="Transfer"/> <input type="button" value="Reject"/>





Candidate Tab

Transfer/Reinstate Members On-line

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

Membership Reports Forms Publications Prospect **Candidate**

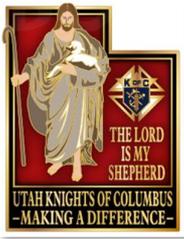
Pending Members

Search:

Created Date	Name	Email	Ceremonial/ Process Date	Action
				<input type="button" value="Add"/>

Click Add





Candidate Tab



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

Country

Proposer Member #

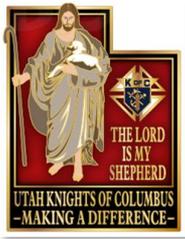


Save

Several Fields missing here.

Click Save to Transfer member





Candidate Tab

Info Required:

Title: **Must** enter "Mr." or other from drop down

Name: First, MI, Last

Email, Mobile Phone

* Date of Birth

* First Degree Date

Complete Address: Street, City, ST ZIP

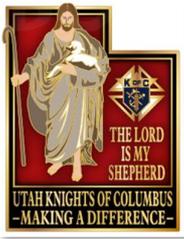
Proposer Member# (normally FS)

Click Save

Input Ceremonial/Process Date, **Click Process**

* Can be obtained by calling membership





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)

Member Management - Find A Member

Search Criteria

Display records for the following:

Active Members Former Members

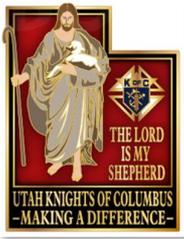
Required Criteria

Last Name: -or- Member #:

Search Tips

Search Reset





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:

Address Line 2:

City:

State/Province:

Postal:

Country:

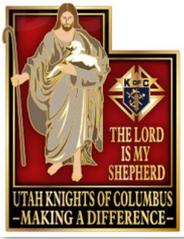
Relationship:

Phone:
 Ext.

Enter Information and click save.

Then verify posting by looking up former member

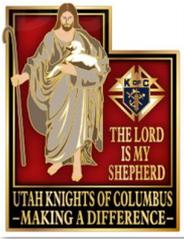




McGivney Award

- **Membership growth quota of 6% intake; minimum 5, maximum 15**
 - ***Change:*** quota increased from 5% to 6%
 - ***Change:*** quota based on intake only
 - no penalty for withdrawals or suspensions
 - ***Change:*** minimum increased from 3 to 5
 - ***Change:*** maximum reduced from 20 to 15

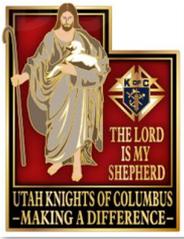




Founders' Award

- **Promote and host TWO Fraternal Benefit Seminars (virtual or in person)**
 - ***Change:* no longer based only on promotion of event**
 - ***Change:* Each must have at least 7 member or member eligible attendees**





Fraternal Benefit Seminar Council Report Form

Councils striving for the Founder's Award must host (or co-host) two fraternal benefit seminars (in-person or virtual) per year. Each council must have a minimum of 7 members or member-eligible attendees at each seminar. Suggested methods of promotion include council email/social media, parish email/social media, pulpit announcement, bulletin notice, and personal outreach to prospects.

COUNCIL NUMBER:

DATE HOSTED:

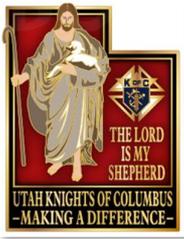
NUMBER IN ATTENDANCE:

GRAND KNIGHT SIGNATURE OF APPROVAL:

This form must be submitted to the council's general agent
within 7 days of the Fraternal Benefit Seminar.

11077 3/21

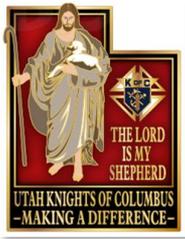




Columbian Award

- **16 Program credits – 4 in each of the Faith in Action categories**
 - *No changes*
 - *Recommend Fill Out all 16 lines*
 - *Submission of SP7, 15 Jun 23*

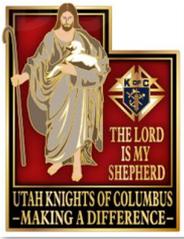




Star Council Award

- **Earn the McGivney, Founders' & Columbian Awards**
- **Submit officers, program personnel and #1728 (survey)**
- **Safe Environment compliant (GK, PD, CD, FD)
Training and Background Checks**
- **Good standing with Supreme Council**
- **Plaque and lapel pins awarded**
- ***No Changes***





UtahKnights.org

Available Tabs

Join Us Calendar Events State Convention Insurance Contact

KNIGHTS OF COLUMBUS
IN SERVICE TO ONE. IN SERVICE TO ALL.

Home Resources Programs Photos Directory Fourth Degree

Jun 26 Sat

- 8:45 am State Organizational Meeting (in Person)
- 9:30 am Silver Rose - Rosary, English (State Meeting)
- 5:00 pm Silver Rose - Mass, English (Council 6966)

Jun 27 Sun

- 8:00 am Silver Rose - Mass, Spanish (Council 14239)
- 9:30 am Breakfast Burritos To-Go (Council 602)

Go To Full Calendar

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 # To clear and look at a different council either delete or select another from the dropdown menu.

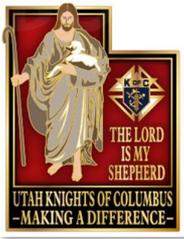
Select your Council number above to see the data and status for your Council.

			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





Star District Requirements FY 22-23

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

Founders Award is earned by every council within the district.

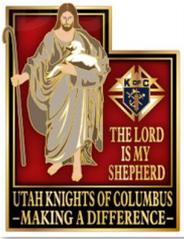
Overall District Excellence

- At least one council in the district earns the Star Council Award
- Submit one Annual Report on Council Status (#944) for each council in your district. Due 9/15/22, optimally NLT 9/1/22.
- - 20 multiple choice questions

Form 994 may be found at url:

https://www.kofc.org/un/en/forms/district/dd_semi_report_june944B_p.pdf





FINANCIAL SECRETARY BREAKOUT



UTAH KNIGHTS OF COLUMBUS





Member Billing

- Assessments
- Verify or change billings amounts by clicking [class list](#).
- Enter new amounts or class, then click [update](#).

Officers Online Member Management Member Billing Print Center-MB

Council Billing & Accounting - Council Ledger

Council

 **MOTHER TERESA OF CALCUTTA** Council 12181

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

View Transactions

By Date By Transaction Type By Income Account By Expense Account By Event

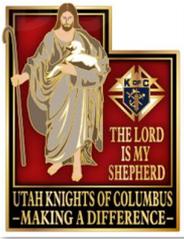




Billing Status

- 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

Print Center - Membership Cards

Membership Cards

1. By Member Type
2. All Members whose Dues are Current
3. By Degree Date
4. Blank Membership Card Template
5. Back of Card

Select Option 1

Select Member Type:

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

Click Print Cards





Membership Cards

Coming soon:

Removing all signatures

KNIGHTS OF COLUMBUS
THIS IS TO CERTIFY THAT

BROTHER _____

MEMBER NO. _____ IS A **3rd** DEGREE MEMBER OF _____

COUNCIL NO. _____ CITY _____ STATE _____

DUES PAID TO _____ **2022**

 _____ G.K.
_____ F.S.
_____ MEMBER SIGNATURE





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

UTAH KNIGHTS OF COLUMBUS





Receiving and Posting Dues



Using "C" yields

• Dues Collection Tool

- ▶ Pending Receipts
- ▶ Receipt History
- ▶ Vouchers
- ▶ Assessments
- ▶ Adjustments
- ▶ Billing Information

Outstanding Balances						
Name	Member #	Billing Status	Outstanding Balance	Amount Received	Paid	Check #
Carter, Leroy Shane	4452011	Intent to Retain	30.00	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Conway Sr, Todd W	3727273	Intent to Retain	30.00	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Curran, Patrick C	5028072	Intent to Retain	20.00	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

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	<input type="checkbox"/>	View	<input type="button" value="Delete"/>
06-19-2021	Stephen F Francisco	square	30.00	<input type="checkbox"/>	View	<input type="button" value="Delete"/>
06-21-2021	Sean P O Donnell	1444	60.00	<input type="checkbox"/>	View	<input type="button" value="Delete"/>





Printing Outstanding Balance Report

Member Billing

Print Center-MB

Retention

Outstanding Balance Report

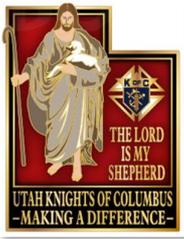
The screenshot shows a software interface with a blue navigation menu on the left containing the following items: 'Treasurer Reports', 'Billing', 'Membership Cards', and 'Retention'. A yellow arrow points from the 'Retention' item to a window titled 'Print Center - Retention Reports'. This window has a header 'Retention Reports' and a list of two options: '1. Retention Committee Report' and '2. Outstanding Balance Report'. The second option is highlighted with a blue background.

Select Option 2

The screenshot shows a window titled 'Retention Reports - Outstanding Balance Report'. Below the title is a section labeled 'Additional Options / Requirements' with the text 'Select Report Option'. A yellow arrow points from this text to two radio button options: 'Members with Outstanding Balances' (which is selected) and 'All Members'.

Run Report and save report





Disability Exemption Form (#1831)

NEW

- **Simpler form**
 - **GK and FS attest**
 - **No doctor sig**
 - **No member sig**
 - **No annual recertification**

Application for Per Capita Disability Exemption

CERTIFICATION OF COUNCIL

Council No. _____

This is to certify that _____, _____ is a
(Member Name) (Member Number)
member in good standing in this council and that he is eligible for relief from payment of all council dues and Supreme and state council per capita taxes, due to total disability, as authorized by Section 118(e) of the Charter, Constitution, and Laws of the Knights of Columbus.

Attest: _____
Financial Secretary Grand Knight

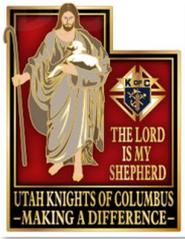
Dated _____

Submit completed form to membership@kofc.org.

Notes: If the application is approved, dues and per capita shall be waived until the financial secretary notifies membership@kofc.org that the exemption should be rescinded. Membership that is continued under the provisions of Section 118(e) shall be construed as active membership in computing the membership requirement for recognition as honorary or honorary life membership.

1831 3/22





Summary

We Hope this Info was helpful

