



Introduction to KofC Member Management

Overview Developed for
Council Executive Management



Intro to Member Management

WHAT IS MEMBER MANAGEMENT?

Member Management is a LIVE, online database of Council Members that is maintained by the Supreme Council

Member management replaces the Peg Board and FSPC management systems

Access to Member Management is granted to Grand Knights/
Faithful Navigators and Financial Secretaries/Faithful Comptrollers



Intro to Member Management

WHY ARE WE DISCUSSING THIS TOPIC TONIGHT?

The Supreme Council is no longer providing Technical Support for the FSPC or Peg Board systems


Supplies will no longer be available for these systems through the Supreme Supply Department



Intro to Member Management

Does Your Council Use MM?

Look on the Semi-Annual Audit; If this box is checked, your Council makes the statement that you do!

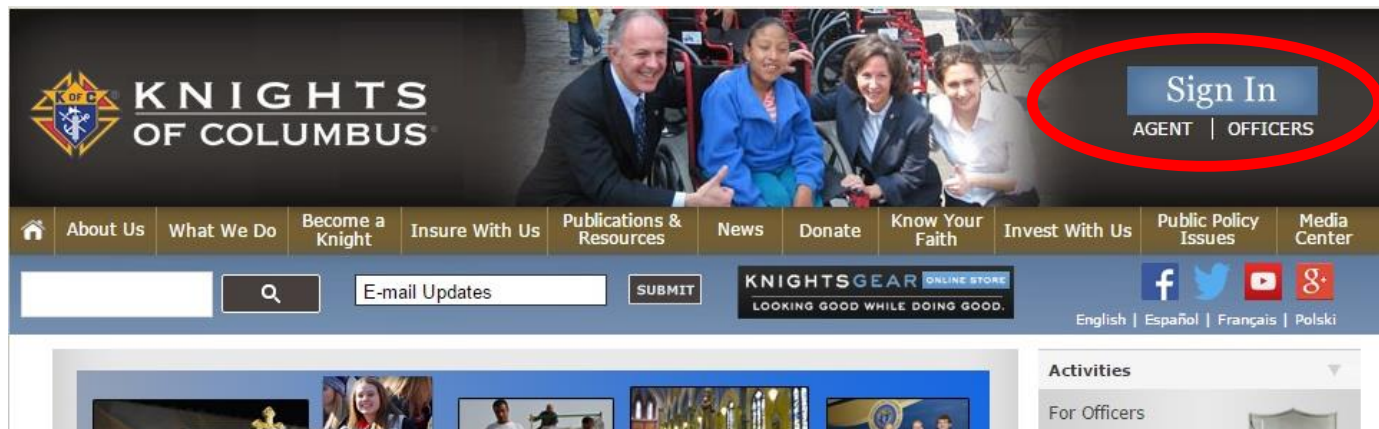
 KNIGHTS OF COLUMBUS IN SERVICE TO ONE. IN SERVICE TO ALL.		SEMIANNUAL COUNCIL A	
		FOR PERIOD ENDED JUN	
<input type="radio"/> COUNCIL NO. 4922	CITY Orange	STATE	
SCHEDULE A — MEMBERSHIP			
ADDITIONS	INS.	ASSO.	TOT.
Total members start of period			
Initiations			
Transfers from other councils			
Transfers—assoc. to insurance			
Transfers—ins. to associate			
Re-entries			
Total for period			
Minus total deductions			
Number members end of period			
DEDUCTIONS			
Suspensions			
Deaths			
Withdrawals			
Transfers—assoc. to insurance			
Transfers—ins. to associate			
Transfers to other councils			
Total deductions			
Do not include inactive insurance See Financial Secretary Handbook			
SCHEDULE A — ALTERNATIVE			
<input checked="" type="checkbox"/>	Our council uses Member Management/Member Billing. The requirement for completing S		
SCHEDULE B — CASH TRANSACTIONS			
FINANCIAL SECRETARY			TREASURER
Cash on hand beginning of period	\$	0.00	Cash on hand beginning of per
Cash received—dues, initiations	\$	1,545.15	Received from financial secreta
Cash received from other sources:			Transfers from sav./invest. acct



Intro to Member Management

HOW DO YOU GAIN ACCESS TO THE MEMBER MANAGEMENT SYSTEM?

- An Invitation has been emailed from the Supreme Council, assigning you a temporary user name and password (or call the Customer Service Dept at 800-380-9995)
- Go to KofC.Org, and select SIGN IN - Officers





Intro to Member Management

HOW DO YOU GAIN ACCESS TO THE MEMBER MANAGEMENT SYSTEM?

- Enter your User Name and Password (Refer to the Invitation)
- Select Login

English | Español | Français | Polski [Home](#)

Login

Please enter your username and password and click on the "Login" button to log in. Fields marked with an asterisk (*) are required.

This section requires user registration.

Some new sections of the Knights of Columbus Web site require users to log in. Appropriate users are sent registration instructions via postal service as such sections are added.

Username: *

☒ Remember my username
[I don't know what my username is](#)

Password: *

[Remind me of my password](#)
[Change password](#)

[Login](#)

Copyright © Knights of Columbus
See [Privacy Policy](#) and [User Agreement](#) for details.



Intro to Member Management

•Select Member Management

**KNIGHTS
OF COLUMBUS**

**OFFICERS
ONLINE**

CHANGE PASSWORD

LOGOUT

LANGUAGE: ENGLISH

FAQ

UPDATE YOUR PROFILE

KNIGHTSGEAR ONLINE STORE
LOOKING GOOD WHILE DOING GOOD.

Officers Online

Hi Thomas Collins | Last Login: 1/10/2016 at 1:01 am

Change Role: Financial Secretary

Urgent Messages

Welcome to the new Officers Online!

Due to technical difficulties and after considerable deliberation, the Supreme Council has decided to remove access to the online submittable forms that were engineered using PDF formatting until a solution to the issue we are experiencing is reached. We sincerely apologize for this major inconvenience and ask that you continue to use the print forms. These forms can be emailed to fraternalservices@kofc.org. We want to assure you that a solution to the issue is actively being researched to restore full functionality at the earliest possible opportunity.

Information in Officers Online has been organized under 'Tabs' located on the lower portion of the screen. Note that Membership Rosters can now be found under the 'Reports' tab.

For those that have the ability to view data for Districts or Council (Fourth Degree Districts or Assemblies), use the chevrons to select the organization unit you would like to view.

[First Degree Ceremonial Production](#)

Supreme Knight Carl Anderson has announced that a video production of the First Degree Ceremonial is available for councils to utilize when bringing in new members. This production is designed to aid any council lacking a degree team, or for those times when special circumstances prevent the candidate from attending a First Degree Ceremonial. While the preferred exemplification of the First Degree is to be conducted by a skilled council team, this video production offers every council an option. [Play Video](#) | [Download Video](#)

First Degree Ceremonial Instructions: [View](#) | [Download](#) | [Order](#)

California > 119 > #4922 (Orange)

Supporting Applications

**Officers Desk
Reference**

**Fraternal
Training**

**Member
Management**

**Member Billing**

**By Laws
Online**

Membership

Reports

Forms

Publications



Intro to Member Management

- Select Live or Training
 - Live gains access to the active Database
 - Training takes you to a temporary copy of the live data and will not affect the Live Data

The screenshot shows the 'KNIGHTS OF COLUMBUS OFFICERS ONLINE' portal. A modal window is displayed with a yellow icon of three people. The text in the modal reads: 'Due to the data synch project that the Supreme Council is working on, changes needed to be made on the recording of Next of Kin Information in Member Management. This information can only be reported when the Date of Death is reported, and not before. This change is necessary to since the recording of the Next of Kin prompts the generation of the Condolence Letter to the Next of Kin.' Below this, it says: 'For assistance with Member Management or Member Billing, we suggest contacting your State Council to learn about local training and assistance. If not an option, feel free to contact our support line at 203-800-4955 or email at ExpertFS@KofC.org'. At the bottom of the modal are two buttons: 'LIVE' and 'TRAINING', both of which are circled in red. The background of the portal shows navigation links like 'UPDATE YOUR PROFILE', 'KNIGHTSGEAR', 'CHANGE PASSWORD', 'LOGOUT', 'LANGUAGE: ENGLISH', 'FAQ', and a footer with 'Officers Desk Reference', 'Fraternal Training', 'Member Management', 'Member Billing', 'By Laws Online', 'Membership', 'Reports', 'Forms', and 'Publications'.




Intro to Member Management



YOU ARE NOW IN THE LIVE DATABASE!

English | Español | Français Home | Contact Us | Logout

Change Role: Financial Secretary ▼

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

Find a Member by Last Name:

[Print this screen](#)  

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

- Member Management
 - Find a Member
 - ▶ Search Results
 - ▶ General Information
 - ▶ Fraternal Information
 - ▶ Personal Information
 - ▶ Member Interests
 - ▶ Contact Notes
 - ▶ Change History

Member Management - Find A Member

Search Criteria

Display records for the following:

☒ Active Members ☐ Former Members

Required Criteria

Last Name: -or- Member #:

[Search Tips](#)



Intro to Member Management

How to Find A Member

English | Español | Français

Home | Contact Us | Logout

Change Role: Financial Secretary

Find a Member by Last Name:

Print this screen

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

Member Management - Find A Member

Search Criteria

Display records for the following:

☒ Active Members ☐ Former Members

Required Criteria

Last Name: -or- Member #:

Search Tips

- Enter the First letter of the member's Last Name in either of the two search locations, and select "Go" or "Search"



Intro to Member Management


How to Find A Member

- Select the desired Member by clicking on the name



English | Español | Français

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Change Role: Financial Secretary ▼

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


Find a Member by Last Name: Go

Print this screen  

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

• Member Management

- ▶ Find a Member
- Search Results
- ▶ General Information
- ▶ Fraternal Information
- ▶ Personal Information
- ▶ Member Interests
- ▶ Contact Notes
- ▶ Change History

Member Management - Search Results 

Total Search Results - 9

<< New Search

Results Returned

Name	Member No.	Age	Type	Class	City
Cao, Rev Bill T	3283701	43	Ins	Hon L.	Anaheim
Cardona, Vince M	4164935	65	Assoc	Reg	Orange
Casey, Francis J	4451846	85	Assoc	Reg	Santa Ana
Castillo, Ritchel M	4677356	44	Assoc	Reg	Orange
Chapman, Raymond B	965289	86	Ins	Hon L.	Santa Ana
Collins PGK, FDD, Thomas P	2640456	65	Ins	Hon	Santa Ana
Cowan, Edward J	2335971	69	Assoc	Reg	Santa Ana
Cowhey, Dr Keith W	4401781	32	Ins	Reg	Orange
Cruz, Jose	4448311	65	Ins	Reg	Santa Ana



Intro to Member Management




Current Member Data

Ready to Review and/or Update the Members General data

- Address
- Telephone
- Email address

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Change Role: Financial Secretary ▼

 **KNIGHTS OF COLUMBUS** IN SERVICE TO ONE. IN SERVICE TO ALL. Find a Member by Last Name: Print this screen  



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

Member Management

- Find a Member
- Search Results
- General Information**
- Fraternal Information
- Personal Information
- Member Interests
- Contact Notes
- Change History

Member Management - General Information 

Member

Thomas P Collins PGK, FDD   Council 4922

Member #: 2640456 Phone: 714-639-6438

DOB: 10-28-1950 Wife: Suzanne

Name Info | Address Info | Email Info

Name Information

Prefix: Suffix:

[Add Prefix](#) [Add Suffix](#)

First Name: Fraternal Suffix:

Middle Name: Nickname:

Last Name: Letter Salutation:

[Add Salutation](#)

Name Info | Address Info | Email Info



Intro to Member Management

Current Member Data

Ready to Review and/or Update the Members Fraternal data

- Degree Date
- Proposer Name

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KNIGHTS OF COLUMBUS Find a Member by Last Name: Go

Print this screen

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

Member Management - Fraternal Information

Member

Thomas P Collins PGK, FDD Council 4922

Member #: 2640456 Phone: 714-639-6438

DOB: 10-28-1950 Wife: Suzanne

<< Prev Next >> Email Member Member Info Report

Reset

Degree/Status Info | Proposed Info | Officer/Program Info

Degree and Status Information

Type: Insured	Class: Honorary	Disability: No
1st Degree Date: 08-01-1986	2nd Degree Date: 09-15-1986 MM-DD-YYYY <input type="checkbox"/> Yes, date unknown	3rd Degree Date: 10-26-1986 MM-DD-YYYY <input type="checkbox"/> Yes, date unknown
Council Re-entry Date:	Years of Continuous Service Since Last Day of Entry: 29	



Intro to Member Management

Current Member Data

- Fourth Degree Status
- Current and Former Officer and Committee Positions

Assembly Information:

Assembly: 3479 4th Degree Date: 06-01-1992 4th Degree Status: In Good Standing
Has Regalia: Assembly Re-entry Date: Years of Continuous Service Since Last Day of Entry: 23

[Save Degree and Status Info](#)

[Degree/Status Info](#) | [Proposed Info](#) | [Officer/Program Info](#)

Proposed Information

This member was proposed to Council by: Clear Proposer:

Member #: 494250 Name: Herve Binette ☐

[Save Proposed Info](#)

[Degree/Status Info](#) | [Proposed Info](#) | [Officer/Program Info](#)

Officer/Program Position Information

Officer Positions	Term	Org#	Organization
Financial Secretary	07-01-2015 --	4922	Council
Faithful Comptroller	07-01-2015 --	3479	Assembly

[Display All >>](#)

Program Positions	Term	Org#	Organization
Chapter Delegate 3	07-22-2015 --	4922	Council

[Display All >>](#)

[Reset](#)



Intro to Member Management

Current Member Data


Personal Information:

- Includes Parish (Only updateable by FS)
- Marital Status
- Occupation
- Children

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Change Role: Financial Secretary


 **KNIGHTS OF COLUMBUS** Find a Member by Last Name:

Print this screen  

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


Member Management - Personal Information

Member

Thomas P Collins PGK, FDD   **Council 4922**

Member #: 2640456 **Phone:** 714-639-6438

DOB: 10-28-1950 **Wife:** Suzanne

Email Member  **Member Info Report**

[Member Info](#) | [Spouse Info](#) | [Children Info](#) | [Deceased Date & Next of Kin Info](#)

Member Information

Parish:

Occupation:

Marital Status:

Employer:

Birth Date: 10-28-1950
Birth Date is updatable for Associate members only

Clergy:

Ordination Anniversary Date:

MM-DD-YYYY



Intro to Member Management

Reports

•14 Generic Reports are available

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Find a Member by Last Name:

Go

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• [Reports](#)

▶ [Labels](#)

▶ [Billing Reports](#)

▶ [Data Extract Tool](#)

▶ [Email](#)

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](#)



Intro to Member Management

Reports

Need a Current Officers List?

English | Español | Français

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Find a Member by Last Name:

Go

Print this screen



Officers Online

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Print Center - Reports



Council Reports

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Intro to Member Management

FATHER PETER J J JUBA CO 4922
ORANGE, CA



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January 28, 2016

Officers -- 2015 - 2016

Officer's List

This is where
the Supreme
and the State
Offices go to
find Specific
Officer Contact
Information

Officer Positions	Name	Address	Telephone #'s	Email
Grand Knight	Daniel A Arsenault	18331 Cranbrook Dr Santa Ana, CA 92705-2047	714-337-8052 (R)	drplus3@sbcglobal.net
Financial Secretary	Thomas P Collins PGK, FDD	18622 Hillhaven Dr Santa Ana, CA 92705-2128	714-639-6438 (R) 714-875-2774 (C)	KofC4922FS@gmail.com
Deputy Grand Knight	Gilbert Luna	Evista Industries Inc. 4030 Birch St Ste 105 Newport Beach, CA 92660-2256	949-302-8612 (C)	POLOMAN2K@HOTMAIL.COM
Chancellor	Tony R Paukstis PGK	3011 E Chapel Hill Rd Orange, CA 92867-1927	714-998-3441 (R) 714-307-0558 (C)	tonypaukstis@gmail.com
Recorder	Mark A Mc Whorter	250 S B St Tustin, CA 92780-3610	714-349-2007 (R) 714-349-6062 (C)	TXTRART2@YAHOO.COM
Treasurer	Christopher L Scarbrough	13142 Brittany Woods Dr Tustin, CA 92780-3912	714-292-1423 (R) 949-270-7784 (B)	CSCARBROUGH@KSANDCO.COM
Advocate	Felipe Mationg	2405 E Dana Ave Orange, CA 92867-7805	714-279-9488 (R) 714-650-3204 (C)	FELIPE.MATIONG@GMAIL.COM
Warden	Brian M Packer	263 S Oak St Orange, CA 92866-2301	714-512-9008 (R) 714-512-9008 (C)	BRIANPACKER4@GMAIL.COM
Inside Guard	Ritchel M Castillo	294 S Lime St Orange, CA 92868-3809	562-243-0909 (R) 562-243-0909 (C)	RITCHIE924@AOL.COM
Outside Guard	John H Sipp	481 N Seranado St Orange, CA 92869-2820	904-477-0312 (R) 904-708-8922 (C)	jbruyn@bellsouth.net



Intro to Member Management

Reports

Need a List of Council Chairmen?

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Change Role: Financial Secretary ▼



**KNIGHTS
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Find a Member by Last Name:

Go

Print this screen



Officers Online

Member Billing

Member Management

Council Administration

Print Center-MM

• Reports

▶ Labels

▶ Billing Reports

▶ Data Extract Tool

▶ Email

Print Center - Reports



Council Reports

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3. Current Service Program Personnel
4. Next Fraternal Year Service Program Personnel
5. Member Birthdays
6. Years of Service
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8. Council Members by Assembly
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Intro to Member Management

Reports

Need a Current List of Chairman?

FATHER PETER J J JUBA CO 4922
ORANGE, CA



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January 28, 2016

Service Program Personnel -- 2015 - 2016

Program Positions	Name	Address	Telephone #'s	Email
Program Director	Daniel A Arsenault	18331 Cranbrook Dr Santa Ana, CA 92705-2047	714-337-8052 (R)	drplus3@sbcglobal.net
Church Director	Donald C Franson	4437 W Tiller Ave Orange, CA 92868-1446	714-750-1691 (R) 714-356-0882 (B)	dfranson49@sbcglobal.net
Vocations Chairman	Anthony A Balfour	13162 Allard Ave Apt 2 Garden Grove, CA 92840-4360	714-260-1900 (R)	aabal4@yahoo.com
Community Director	Michael G Prater	249 N Sacramento St Orange, CA 92867-7835	714-532-1598 (R)	dragracerm@aol.com
Culture of Life Chairman	Bernard C Vitichus PGK	10582 Cedarhill Cir Villa Park, CA 92861-5302	714-771-0984 (R) 714-651-8923 (C)	bvitichus@aol.com
Health Service	UNASSIGNED			
Council Director	Joseph Rene Sepulveda PGK	945 E Tularosa Ave Orange, CA 92866-2837	714-997-4918 (R) 714-875-7829 (C)	jrsepulveda1950@gmail.com
Public Relations	Thomas R Kronebusch	18921 Silver Maple Way Santa Ana, CA 92705-2280	714-544-1477 (R) 714-306-0025 (C)	tomkronebusch@gmail.com



Intro to Member Management

Reports

Need a Current Contact List?

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Change Role: Financial Secretary ▼



**KNIGHTS
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IN SERVICE TO ONE. IN SERVICE TO ALL.

Find a Member by Last Name:

Go

Print this screen



Officers Online

Member Billing

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Intro to Member Management

Reports

Provide your
Officers and
Committee
Chairmen with
Telephone and
Email Contact
Information
Quickly and
Efficiently

FATHER PETER J J JUBA CO 4922
ORANGE, CA

Contact List
Page 2 of 10

January 20, 2016

Name	Telephone #'s	Email
Rev Bill T Cao		
Vince M Cardona	714-538-9559 (R)	vincentcardona@sbcglobal.net
Francis J Casey	714-544-2506 (R)	
Ritchel M Castillo	562-243-0909 (R) 562-243-0909 (C)	RITCHIE924@AOL.COM
John D Chapman PGK	714-731-6455 (R)	LISANNEBELCHER@YAHOO.COM
Thomas P Collins PGK, FDD	714-639-6438 (R) 714-875-2774 (C)	KofC4922FS@gmail.com
Edward J Cote	714-542-6161 (R)	PATRICIA.COTE@ATT.NET
Dr Keith W Cowhey	714 904-5613 (R) 714 904-5613 (C)	KCOWHEY@GMAIL.COM



Intro to Member Management

What Else Does this System Do?

- Source for Annual Reporting Forms
 - Survey of Fraternal Activity
 - Semi-Annual Audits

Supporting Applications

Officers Desk Reference Fraternal Training Member Management Member Billing By Laws Online

Membership Reports **Forms** Publications

Search:

Form Name	Form Number	Due Date	Print	Online
Annual Report KofC Round Table	2630	6/30		
Annual Survey for Fraternal Activity	1728	1/31		
Application for Appointment as Financial Secretary	101	As Needed		
Brother Barnabas	279	6/30		
Coats for Kids Order Form	Coats	As Needed		
Columbian Award Application	SP-7	6/30		
Columbian Squires Inquiry	2935	As Needed		
Columbian Squires Officers & Chairmen	468	8/1		
Corps d'Elite Award	278	6/30		
Council First Degree Exeplification Report	450C	As Needed		
Essay Contest Kit Order Form	EA-KIT	9/1		
Evaluation of Financial Secretary	1938	As Needed		
Family of the Month (PL=FAM)	1993A	As Needed		
Family of the Year Awards Entry Form (PL=FAM)	1993	As Needed		
Father Prior	4371	As Needed		



Intro to Member Management






What Else Does this System Do?

- Source for Periodic Reports

- Membership Roster
- Financial Statements (Shows your Account Balance with Supreme)

California > 119 > #4922 (Orange)

▼ Supporting Applications

-  Officers Desk Reference
-  Fraternal Training
-  Member Management
-  Member Billing
-  By Laws Online

Membership Reports Forms Publications

Report Name	Date
Membership Roster	1/26/2016
Membership Roster - January	1/1/2016
Membership Roster - July	7/1/2015
Financial Statement	1/1/2016



Intro to Member Management

What is the Next Step?

Call the KofC Supreme Customer Service Department (800) 380-9995

- Ask for your Invitation Code
- Ask For Assistance

Use the Member Management Expert Option

- Read the Answers to some of the Frequently Asked Questions
- Practice in the Training Module

Call the Orange County Chapter Trainer

- Ask for A District Wide Training Session
- Ask For in Home Assistance



Intro to Member Management

What is the Next Step?

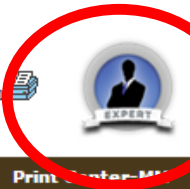
•Ask the Expert

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Change Financial Secretary ▼

Find a Member by Last Name:

Print this screen 

Officers Online **Member Billing** **Member Management** **Council Administration** **Print Center - Reports**

Print Center - Reports

Council Reports

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Reports

- Labels
- Billing Reports
- Data Extract Tool
- Email



Intro to Member Management

What is the Next Step?

•Select a Topic



Recent Updates:

Degree Level Reports

A new report was added to the Print Center in Member Management which displays only members who have attained the selected degree and not higher degrees.

Searching for Members / Payee/Payors

Changes have been made in the search areas to allow the user to search using the first letter of the last name and an asterisk or just the first letter of the last name (with no asterisk).

Member Management

General Information

Search Tips

Can a member be converted from FSC to Member Management?

Is a Form 100 still required?

Can a death of member be reported online?

Why are Former Members displaying?

Why are Degree Dates not accurate?

What are the various Member Types & Classes?

Reporting Officers & Service Program Personnel

Printing Issues

Email Functionality



Intro to Member Management

What is the Next Step?

[Read the Answer](#)



UPDATES

MEMBER MANAGEMENT

MEMBER BILLING

BY-LAWS

FS / FC SUPPORT

CONTACT US

Recent Updates:

Member Management

Is a Form 100 still required?

A Membership Document (Form 100) is not required to be submitted to the Supreme Council office if the member's record is updated in Member Management for data changes, including the deceased.

Form 100 is required for:

- Reporting of a new member
- Reporting the reactivation, readmission, or reinstatement of a member
- Suspension of a member for non-payment of dues

- Note: On May 1, 2011, Honorary and Honorary Life status is now automatically updated at the Supreme Council office once a member reaches eligibility of this new class:

+ **Honorary:** - 25 years of consecutive service to the council (or assembly) and the age of 65.

+ **Honorary Life:** - 25 years of consecutive service to the council (or assembly) and the age of 70; or 50 consecutive years of service to the council.

In the meantime, request for this new Class can be submitted to Membership Records, being emailing: Membership@KofC.org.





Intro to Member Management

Summary

Member Management is a tool that somewhat simplifies the Financial Secretary's job

Member Management places member information in the hands of the Grand Knight

Member Management makes the Semi-Annual Audit just a little bit easier



Intro to Member Management

Summary

Coming SOON :

Member Billing – Accessible ONLY to Financial Secretaries and Faithful Comptrollers