BILLING AND MEMBERSHIP RETENTION PROCESS

Ontario State Membership Retention Director Jesmond Tabone December 5, 2020

Ontario State Membership Retention Process.

Step 1. Go to www.kofc.org

Step 2. Click on 'click on the blue box that says 'sign in''



STEP 3. ENTER USERNAME & PASSWORD, CLICK ON SIGN IN

KNIGHTS of columbus SIGN IN			
КОЕСНОМЕ			
	Please enter your username and password and click on the "Sign In" button to sign in. Fields marked with an asterisk (*) are required. Vor must be a registered user to access this portal. Username* Password is Required. Password is Required. Eremember Me SIGN IN PASSWORD RESET ACCUNT ASSISTANT		
© 2020 KNIGHTS OF COLUMBUS. ALL RIGHTS RESERVED.		PUBLIC POLICY PRIVACY AND USEAGE DONATE	

STEP 4 CLICK ON MEMBER BILLING

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Supporting documents: Utilize the following resources to familiarize yourself with the new Star Council Award criteria. Additional questions should be directed to fraternalmission@kofc.org.

2019-2020 Revised Star Council Requirements

New Quota Schedule

Frequently Asked Questions

Exemplification of Charity, Unity and Fraternity

Supporting documents: Utilize the following resources and direct questions to your State Ceremonials Chairman or ceremonials@kofc.org.

Exemplification presentation video

Communication to Knights of Columbus Leaders

- · Script for the Exemplification of Charity, Unity and Fraternity
- Frequently Asked Questions

IMPORTANT NOTICE ON IMPORT FEES AND SHIPPING:

We have opened Knights Gear Canada to serve our Canadian Councils! We strongly recommend that you place all Canadian orders with KnightsGear.CA to avoid US brokerage fees, taxes and duties that are due upon delivery. KnightsGear.com is a US company and the total price paid on the website is in USD and does not include any shipping or taxes import fees. Should you choose to order from KnightsGear.com in the US please note that ALL SALES ARE FINAL and no refunds will be given even for abandoned or refused items. If there are items you are interested in purchasing from KnightsGear Canada that are with not on the site – please email and we will work to get you what you need.

KnightsGear Canada Item Inquiry

> 39 > #4924 (Windsor) Supporting Applications Office Of Youth Home Member Member Billing By Laws **Knights Gear** Officers Desk Supplies Reference Protection Corporations Management Online Online Reports Forms Publications Prospect Candidate Membership Awards Progress Council Membership Total Membership YTD Change Month to Date in Membershi 336 -25 22 0 0 3 16 -13 MBR 0 0 0 0 0 6 -6 INS 8 Contact Us Privacy Policy Terms of Service © Knights of Columbus 2020

STEP 5 CLICK ON LIVE



STEP 6 CLICK ON ASSESSMENTS

OF COLUMBUS IN SERVICE TO ONE. IN SERVICE TO AN	Find a Member by Last Name: G0	APPLICATIO	
	Officers Online Member Billing	Print Center-MB	
• Council Ledger	Council Billing & Accounting -	Council Ledger	
Receipts			
Vouchers	Council		
Assessments		Council 4924	
Adjustments	Council Location: WINDSOR Jurisdict	ion: ON	
Billing Information		Institution: 04-03-1960	
Member	View Transactions		
Information	By Date By Transaction Type By Income Acco	ount By Expense Account By Eve	
Email	Show from: to:		
		Search	
	MM-DD-YYYY MM-DD-Y	YYY	
	Council Transactions - Processed		
	Date Transaction Batch # Account: Sub Account	Event Amount	
	Council Transactions - Pending		
	Pending Receipts		
	Pending Vouchers Pending Assessments		
	Pending Adjustments		

STEP 7 CLICK ON UPDATE STATUS



STEP 8, ON THIS SCREEN YOU WILL SEE ALL 4 NOTICES (BILLING CYCLE SCHEDULE) ENTER THE **"AS OF DATE**" ENTER CURRENT DATE (AS LONG AS IT IS 30 OR 15 DAYS PAST LAST NOTICE) ONCE ENTERED, SELECT UPDATE BILLING STATUS THE ABOVE STEPS NEEDS TO BE DONE FOR ALL BILLINGS LETTERS.

IT WILL NOT ALLOW YOU TO SET A DATE IN THE FUTURE, EVEN IN TRAINING MODE.



STEP 9 CLICK ON PRINTER CENTER-MB



STEP 10 CLICK ON BILLING



STEP 11- CLICK ON & CREATE FIRST NOTICE



STEP 12 REFER TO STEP 8, PRIOR TO GENERATING THIS NOTICE ADD ADDENDUM MESSAGE

SELECT DELIVERY PREFERENCE CREATE FILE COPY CLICK ON GENERATE NOTICE

English Español Franç	ais 🔹 Home Contact Us Logout
CFCOLUMBUS STERIE TO OUL. IN SERVICE TO ALL	Find a Member by Last Name: Go Go
	Officers Online Member Billing Print Center-MB
Treasurer Reports	Note: Using Email functionality in Training will generate a record as if the Email was actually
• Billing	sent but will not actually generate and send Emails to individuals.
• Membership Cards	Print Center - Billing Notices
Retention	
• Journals & Ledger	Billing - 1st Notice
Labels	Additional Options / Requirements
Miscellaneous Reports	
Data Extract Tool	
• Email	0 of 1000 characters used.
	Select Delivery Preference:
	O Email
	O Mail
	Create File Copy
	Generate Notice
	Back
	Copyright © Knights of Columbus 2008 - 2020. All rights reserved. See <u>Privacy Policy</u> and <u>Terms of Service</u> for details APPS02-P

Step 13. Send out notice based on your selection above.

STEP 14. REFER TO STEP 8, PRIOR TO GENERATING THIS NOTICE ENTER THE "AS OF DATE" ENTER CURRENT DATE (AS LONG AS IT IS 30 DAYS PAST LAST NOTICE) ONCE ENTERED, SELECT UPDATE BILLING STATUS THE ABOVE STEPS NEEDS TO BE DONE FOR ALL BILLINGS LETTERS. IT WILL NOT ALLOW YOU TO SET A DATE IN THE FUTURE, EVEN IN TRAINING MODE. 30 DAYS AFTER THE FIRST NOTICE WAS SENT OUT CLICK ON AND CREATE SECOND NOTICE.

*HAND OVER OUTSTANDING DUES LIST TO THE GK TO ACTIVATE COUNCILS RETENTION COMMITTEE . FS IS NOT A PART OF THIS COMMITTEE

*ADD ADDENDUM MESSAGE *CREATE FILE COPY *CLICK ON GENERATE NOTICE *SELECT DELIVERY PREFERENCE

English Español Franç	ais	Home Contact Us Logout
	Find a Member by Last Name:	APPLICATION
	Officers Online Member Billing	Print Center-MB
Tre -urer Reports Billing	Print Center - Billing Notices	
 Membership rrds Retention 	1. First Notice 2. Second Notice	
• Journals & Ledger	3. Knight Alert 4. Intent to Retain	
▶ Labels		
Miscellaneous Reports		
Data Extract Tool		
▶ Email		
	Copyright © Knights of Columbus 2008 - 2020. All rights reserv See <u>Privacy Policy</u> and <u>Terms of Service</u> for details APPS02-P	/ed.

* CLICK ON GENERATE NOTICE

English Español Frang	ais	• Home Contact Us Logout
KNIGHTS OFCOLUMBUS Is service to Out, wiservice to All	Find a Member by Last Name:	TRAINING APPLICATION
	Officers Online Member Billing	Print Center-MB
Treasurer Reports Billing	Note: Using Email functionality in Training will gene actually sent but will not actually generate and send Emails	erate a record as if the Email was to individuals.
 Membership Cards Retention 	Print Center - Billing N	Notices
Journals & Ledger	Billing - 1st Notice	
▶ Labels	Additional Options / Requirements	
 Miscellaneous Reports Data Extract Tool 	Addendum Message:	
' Email	0 of 1000 characters us	ed.
	Select Delivery Preference:	
	 Email Mail Create File Copy 	Generate Notice
	Back	
	Copyright © Knights of Columbus 2008 - 2020. All rig See <u>Privacy Policy</u> and <u>Terms of Service</u> for de APPS02-P	hts reserved. etails

STEP 15 REFER TO STEP 8 PRIOR TO THIS STEP HAND OVER OUTSTANDING DUES LIST TO THE GK TO UTILIZE THE COUNCILS RETENTION COMMITTEE . FS IS NOT A PART OF THIS COMMITTEE ADD ADDENDUM MESSAGE

CREATE FILE COPY

CLICK ON GENERATE NOTICE

SELECT DELIVERY PREFERENCE

CLICK ON GENERATE NOTICE 30 DAYS AFTER THE SECOND NOTICE WAS SENT OUT CLICK ON AND CREATE SECOND NOTICE. MAIL LETTERS OUT. THIS IS A MUST . EMAIL IS NOT ACCEPTABLE HERE

KNIGHTS Find a Member by Last Name: Get Officers Online Treasurer Reports	Member Billing	TRAINING APPLICATION Print Center-MB
Officers Online	Member Billing	Print Center-MB
Treasurer Reports	int Center - Billing Notice	ART
PI	· · · · · · · · · · · · · · · · · · ·	S
• Billing Billing Notices		
Membership Cards 1. First Notice		
Retention 2. Second Notice 3. Knight Alert		
Journals & Ledger 4. Intent to Retain		
Labels		
Miscellaneous Reports		
Data Extract Tool		
▶ Email		
Copyright © Knights of Colun See <u>Privacy Policy</u> an پ	nbus 2008 - 2020. Al <mark>l rights</mark> rese d <u>Terms of Service</u> for details APPS02-P	erved.

STEP 16.

HAND OVER OUTSTANDING DUES LIST TO THE GK TO UTILIZE THE COUNCILS RETENTION COMMITTEE . FS IS NOT A

PART OF THIS COMMITTEE

15 DAYS AFTER THE KNIGHT ALERT WAS SENT OUT CLICK AND CREATE INTENT TO RETAIN

SAVE A PDF OR ELECTRONIC COPY TO YOUR COMPUTER.

PRINT LETTER AND HAVE SIGNED BY GK AND FS

MAIL LETTERS OUT. THIS IS A MUST EMAIL IS NOT ACCEPTABLE HERE SEND COPY TO ONTARIO MEMBERSHIP RETENTION DIRECTOR AT MEMBERSHIPRETENTIONDIRECTOR@ONTARIOKOFC.CA WITH SO47



STEP 17 ONCE MEMBERSHIP RETENTION DIRECTOR APPROVES THE SUSPENSION, HE WILL SEND THE INTENT TO RETAIN TO SUPREME WITH A CC TO THE FS THEN HE WILL FORWARD YOU THE TRACKING NUMBER ISSUED BY SUPREME.

STEP 18. SUPREME WILL SEND OUT LETTERS TO THOSE WHO WE ARE LOOKING TO SUSPEND.

STEP 19 60 DAYS AFTER THE INTENT TO RETAIN IS SENT TO SUPREME THE FS IS TO SEND IN FORM 100 FOR EACH MEMBER TO BE SUSPENDED.

STEP 20 SUPREME WILL SEND AN EMAIL TO THE STATE DEPUTY AND THE STATE MEMBERSHIP RETENTION DIRECTOR (HOPEFULLY) STATING THE FOLLOWING.

FROM: WOOD, ROBIN L < ROBIN.WOOD@KOFC.ORG>

SENT:

TO: DAVIDPETERS123@ROGERS.COM CC: JESMOND TABONE <JTABONE@OUTLOOK.COM> SUBJECT: FW: #### ON # OF FORM 100

GOOD DAY, SIR.

WE RECEIVED XX FORM 100'S FOR SUSPENSION FROM COUNCIL XXXX. NOTICES OF INTENT TO RETAIN/SUSPEND HAVE BEEN ON FILE FOR 60 DAYS. IF NO REPLY IS RECEIVED, WE WILL PROCESS THESE DOCUMENTS ON SUCH AND SUCH DATE. PLEASE INCLUDE A COPY OF THIS EMAIL WHEN REPLYING. THE SUSPENSIONS ARE ORGANIZED BY EMAIL FOR QUICKER RETRIEVAL.

REGARDS,

ROBIN

PLEASE INCLUDE A COPY OF THIS EMAIL WHEN REPLYING.

STEP 21. THE STATE MEMBERSHIP RETENTION DIRECTOR WILL FORWARD A COPY OF THIS EMAIL TO THE FS ONLY.

STEP 22. ALL DONE.

IT IS MY INTENTION TO ROLL THIS OUT TO ALL THE FS' IN THE PROVINCE.

THANKS FOR YOUR TIME.