# LCL.Net Version 2.2

# Hands-On Technical Training

# Instructor Guide

Class Attendees,

The Training Department of Moose International welcomes you to the 2-Day Hands on Technical Training (2-HOTT) Class.

Training plays a vital role in the success of our Fraternal Units. Through this training, in particular, you will learn the processes that Moose International asks *ALL* Fraternal Units to follow to ensure accurate record keeping. The Data Entry and processing of Membership and Financial Records and information is performed, for the most part, in the same way whether the records are for a Lodge, Chapter, or Moose Legion. However, there are a few processes that are handled slightly differently among the various Fraternal Units.

While, typically, the attendees of 2-HOTT classes are a mix of new and seasoned Lodge Administrators, Chapter Recorders and Moose Legion Secretaries, any Officer or Member is encouraged to attend. The materials used in this class, for simplicity, are Lodge oriented. Please keep in mind that it isn't the actual entry of data being taught but rather the Data Entry process, which is the same for all three (3) Fraternal Unit types.

All 2-HOTT Trainers are volunteers who generously give many hours to the Fraternity in order to provide training to those in need. Any Registration Fees for attending this Training is used to offset the expenses incurred by the Trainer, including travel, lodging, materials, etc. The Training Department is quite proud of the 200 plus 2-HOTT Trainers across the United States and Canada who donate their time and resources to take train the Lodge, Chapter and Moose Legion personnel throughout our Fraternity. It is without question that we could not get the job done without them.

We ask that, as you attend this training, you give the instructor(s) the respect and attention deserved. Please give your fellow learners the courtesy of keeping side conversations and distractions to a minimum. This class is two full days of learning and in order to complete the entire course, it must be kept on schedule.

Thank you for attending this training. We are confident you will learn the correct procedures necessary to maintain your FRUs records accurately and in a timely manner. Listed in the back of this workbook are options available to you should you need additional help or instructions for LCL.net or QuickBooks.

Training Department
Moose International
630-966-2294

# How to Use This Instructor Guide

## Purpose

This Instructor Guide has been created to ensure that all 2-HOTT training sessions are taught consistently. More specifically, this guide will help you:

- Teach basic LCL.net concepts and procedures in a logical order for the participants;
- Identify where, and when, critical concepts or tasks need to be reinforced; and
- Set up, coach, and review exercises.

## Layout

This guide is arranged with instructor material on the left page and the participant guide material on the right. This enables you to see what the participant has in his workbook as well as your instructor information at the same time.

Your Instructor information is in a larger pitch size so that you can easily see it even if it is not directly in front of you. Often when teaching computer systems the book is off to the side.

The key below will help you tell from a distance when a particular activity or point is coming up that you need to pay attention to and relate.

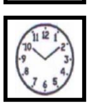

This icon is displayed when there is something specific for you to say. This is not a "scripted" workshop by any means, but there are certain things that need to be said!

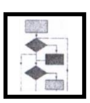

This icon is displayed when there are really important or key points to make. Key points can be made at any time during the page/section you are on.


This icon is displayed when you need to pass out or refer to the use of a tool or handout.


This icon appears when you need to make reference to a resource, such as a manual or workbook.


This icon appears when it is time to take a break or go to lunch!


This icon represents time allowed to complete a section.


This icon appears when you are showing a step-by-step process.


This icon appears when the information is very important.


This icon appears when there is an exercise for your Learners to do.
You may find it odd initially to have two totally different books merged into one, but as you follow along in your Train the Trainer session, it will become clear to you how it works.

**Class Requirements**

While we know that many times a quick turnover occurs in an Administrator or Recorder position at a fraternal unit, it would still not be unreasonable for you to require that your prospective Learners take the LCL.net and QuickBooks tutorials prior to coming to your workshop. At the very least they would have a base knowledge of how to get around in the programs and a good handle on basic entry and editing skills. It is difficult and frustrating for everyone, to have one or two people among many who have never even laid eyes on the program to be mixed in with folks who have been using the program consistently.

All participants must bring an LCL.net and QuickBooks Resource Manual with them to class. The one on their original training CD is outdated and a much newer version can be found on the Education and Training webpage on Moose International's website. There are separate versions for Lodges, Chapters and Moose Legions.

**Co-Teaching**

We think co-teaching is great! Having one trainer at the front of the classroom with the other at the back watching people work and being sure no one is left behind is a great way to keep a class on track. Switching roles also give each trainer a bit of a break from a very full class schedule.

**Remember: Teach Them Their Resources!!**

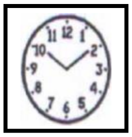
"*Give a man a fish, he eats for a day…teach a man to fish, he eats for a lifetime*"

You are not always going to be there for your learners. Teach them while you have them…but also teach them their resources for when you are not.

Throughout the class it is important to encourage the Learners to use their resources. Have them physically turn to the page in the resource manual that gives them the detail for the area you are working in. Refer to the handouts each time they can be useful in completing a task.

A Learner cannot possibly retain all of the information given to them in any but the very briefest training sessions. If they know their resources, they know where they can go to find their answers.

## Welcome, Introductions, and ALL THAT JAZZ



The introduction area should last no more than 20 minutes.

Welcome your Learners and introduce yourself and any co-instructors.

Thank the host Lodge and any key Moose International, Lodge, Chapter or Moose Legion personnel who may be in the room.

You can have the Learners introduce themselves, but be sure to set parameters. (Name, FRU, and how long with Moose or how long as a trainer, etc.)

Housekeeping

Take a moment to cover “Housekeeping Details”

- Keep drinks away from keyboards.
- Don’t chat while others are entering – need to concentrate.
- Break Schedule
- Smoking rules…
- Bathrooms are…
- Refreshments…
- Encourage them to ask questions but try to stay within the current topic. Let them know that if it is something that will be addressed later we will indicate this.
- Confirm that we will address the differences between FRUs at the appropriate spot.

Talk about the materials.

Explain that the Workbook is the main focus of our activity during this class, but the Resource Guide and handouts will be additional resources we use as we work our way through.

Ask if there are any questions to this point.

# Table of Contents

ASK them to open their Workbooks to Page 5.

Introduce the topic.

SHOW them how to access LCL.net, select the Fraternal Unit type, and log into the system.

Ask them to follow along with you.

Be sure to choose the **STUDENT** area for the workshop!

The User Name is: **level3** (no space between l and 3)

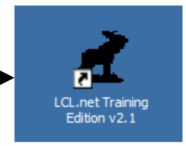
The Password is: **Lodge, Chapter or Legion**

## Accessing LCL.net 

Refer to Chapter 1, Overview and Navigation, of the LCL.net Resource Manual under Accessing LCL.net.

To access the LCL.net double-click the program Icon. The Icon for LCL.net is found on your computer's desktop.

Desk Top Icon
Will not say "Training"




The LCL.net Version: V2.2 Login Screen will appear:

**Note: Your version will not say Training**.

LCL.net Login Screen


If the LCL.net software Icon is not displayed on the Windows desktop, then follow these instructions:

1. Click the **Start** button on the Windows task bar.
2. Scroll the cursor up to **All Programs**.
3. Right-click **LCL.net**.
4. Scroll to **Send To** in the menu box.
5. Click **Desktop (create shortcut)**.
   *The LCL.net Icon will appear on your Desktop.*

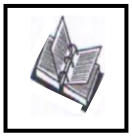
## Logging into LCL.net

Refer to Chapter 1, Overview and Navigation, of the LCL.net Resource Manual under Logging into LCL.net.

**To Log into LCL.net:**

1. Type your **User Name** in the *User Name* field (use *level3 for training).*
2. Type your **Password** into the *Password* field. (use *Lodge, Chapter, or Legion* for training).
3. The **Fraternal Unit** field must match the type of FRU you entered as a Password. *Use the Drop Down Menu to find **Lodge**, **Chapter**, or **Legion**.*
4. In the **Organization** field, choose **Student** for training, **Moose** for live FRU Data.

Introduce the topic.



ASK them to turn in their Workbooks to Page 6

EMPHASIZE that the information in the FRU Information screen is displayed in different sections, but that each section is accessed in the same way for editing.

STRESS that this is a special training database and that the **MMMS** and **Restore Student Data** that appear on the Menu bar were especially created for this training and **ARE NOT** and **WILL NOT** be available for the fraternal units.

Verbally OVERVIEW each of the FRU Information screen areas (listed).

ASK them to follow along with you.

TALK about **Spare Date** labels and how they can be used to classify information and produce Reports about Members. Stress that this is the label for a date field that will appear on the individual Member Screen.

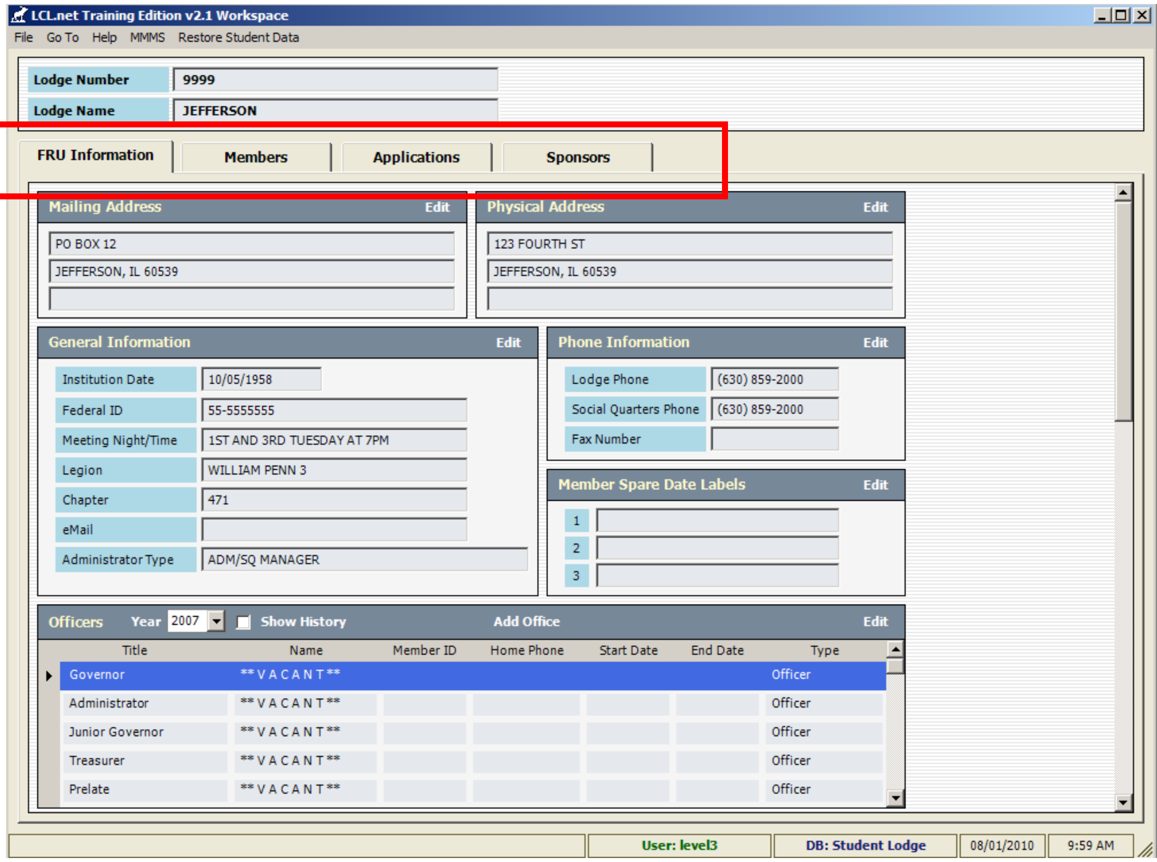
*Tell them that when entering Spare Date Labels that the names they enter may have to be abbreviated. There are **20** spaces available to type the full names of the labels. (Spare Date Labels could be **Preferred Members**, **Charter Members**)*

Talk about the **Control Date Area** that is used for information purposes only.

Refer to Chapter 2, the FRU Information Screen, of the LCL.net Resource Manual.

LCL.net has four main areas that are based on functionality:

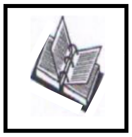
**FRU Information, Members, Applications and Sponsors**



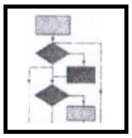

The FRU Information screen is broken down into individual information boxes. Each of these boxes contains a specific type of FRU Information such as:

- Mailing Address
- Physical Address
- General Information
- Phone Information
- Member Spare Dates Labels
- ~~Officers~~ (No longer used)
- Lodge Totals
- Rates
- Last Examination
- Control Dates
  - Last Changed Date
  - Last Backup Date
  - Period End Date
- Categories
- Activities

SAY that all areas are edited in very much the same way.



ASK them to turn to Page 7 in their Workbooks.



SHOW them how to edit using the **Address** field and the following data:

**Change the mailing address from 123 FOURTH ST to PO BOX 123**

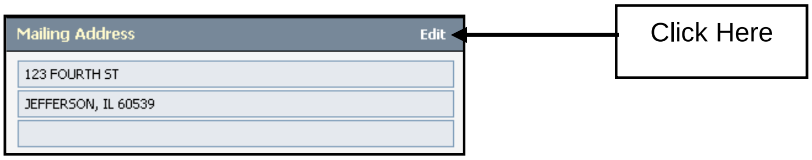
ASK them to follow along with you.

UNLESS the address is out of the country **<u>Do Not</u> select Country.**

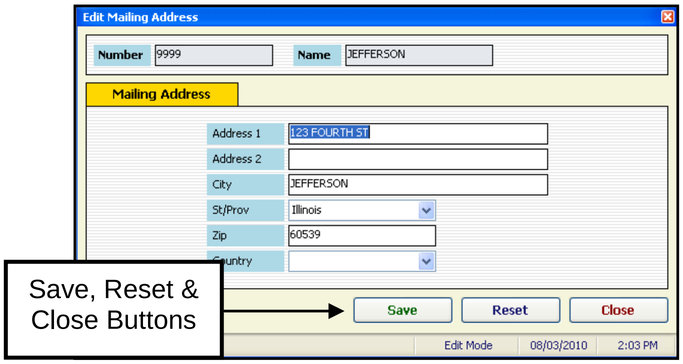
- The Post Office does not like it.
- Do not use punctuation in any address.
- Do not use commas in an address
- Zip Codes must be in one of these formats: **XXXXX** or **XXXXX-XXXX**
- Canadian Zip Codes have their own format.

## To edit information on the FRU Information Screen:

1. Click the **Edit** option located in the upper right corner of the box you wish to edit.




2. Enter the new information in the available fields.




3. Click the **Save** Button to enter these changes into the system.

FRU Officers must be entered each year through the **Admin Menu**, located on the Moose International Website.

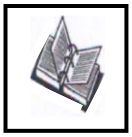
We no longer enter officers through LCL.net or via **MMMS Online**.

Officer Entry and Maintenance will be addressed later in this Workbook and is covered when the Training gets to the Topic **“Admin Menu”**

**Officer entry is NO LONGER completed through LCL.net.**

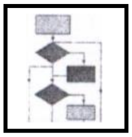
**NOTE:** FRU Officers must be entered each year on the Moose International Website using the **Admin Menu**.
If an Officer or Chairman resigns or is removed during the Moose Year, the Officer or Chairman Position must be edited in the Admin Menu.

Officer entry and maintenance is addressed later in this Workbook and is covered when the Training gets to the Topic "**Admin Menu**".



ASK them to turn to page 9 in their Workbooks.

ENCOURAGE them to make notes in their Resource Manuals.



SHOW them how to add **Dues** to the FRU Screen.

You **CAN ONLY** Add, Edit or Delete Dues.

EMPHASIZE that after approval of the new Dues Rate by the FRU Membership, the FRU must add the Dues Rate in LCL.net V2.2 and transmit the change to Moose International via a Daily Transmit.

The **Lodges** must then send a letter stating the new Dues Rate and its effective date to the General Governor.

The **Women of the Moose**, after approval of the new Dues Rate by the Membership, need only to enter the new Dues Rate into LCL.net V2.2.

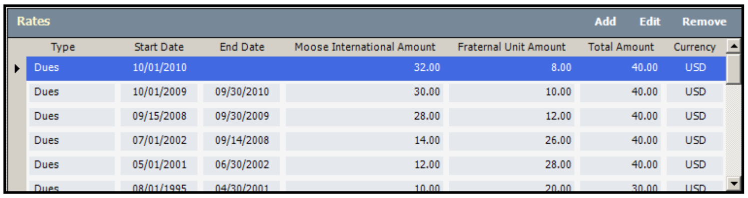
If a field remains gray you cannot edit it. The start date is automatically populated and will remain grey.

You can only change the total amount of the dues. The MI portion will stay the same. Only the FRU rate will change.

DEMONSTRATE adding a **NEW DUES RATE**.

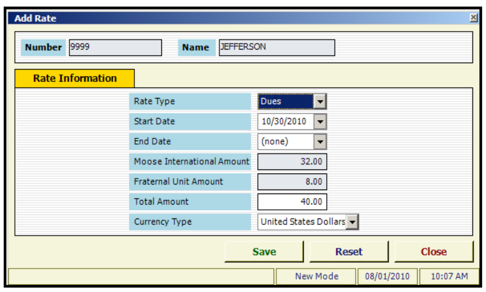
Refer to Chapter 2, The FRU Information Screen, of the LCL.net Lodge Resource Manual under Rates.

The **Rates** box is used to Add, Edit and Remove Dues Rates for the FRU.



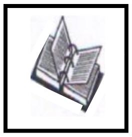

**<u>To add a new Dues Rate to the FRU Information Screen:</u>**

1. Click the **Add** button in the upper right corner of the Rates Box.
   The Add Rate Screen opens.




2. Choose "**Dues**" as the Rate Type.
3. Enter the Dollar Amount of the new Dues Rate in the **Total Amount** field. *LCL.net V2.2 will automatically calculate the Start Date, ABCD and the FRU amounts.*
4. Choose the **Currency Type** by clicking the drop down arrow.
5. Click the **Save** button to enter the new Dues Rate into LCL.net V2.2.

**NOTE: READ – IMPORTANT:** After approval of the new Dues Rate by the FRU Membership, the FRU must add the Dues Rate in LCL.net V2.2 and transmit the change to Moose International via a Daily Transmit. Upon entry of the new rate in LCL.net V2.2, the start date will be automatically filled with a date that is 90 days after the date of entry. DO NOT ENTER AN END DATE! The **Lodges** must then send a letter stating the new Dues Rate and its effective date to the General Governor. The **Women of the Moose**, after approval of the new Dues Rate by the Membership, need only to enter the new Dues Rate into LCL.net V2.2.
If your FRU is running a special promotional rate, please phone the helpdesk for guidance before adding any new rates.

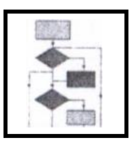


ASK them to turn to Page 10 in their Workbooks.

EMPHASIZE the usefulness of using **Categories** and **Activities**. The hardest thing is to get the members to give input!

WAR STORIES: One Lodge used this area extensively to schedule key tournaments and earned enough to build a pavilion with garage doors.

GIVE EXAMPLES of how to use this area to enhance the member experience. (Country music vs. big band – will have better participation and the suggestion to enter women’s committees as categories, using the same code as in Committee area, and add members to those category committees and get committee lists!) *Be sure to ask your experienced participants how they use this field in their units.*



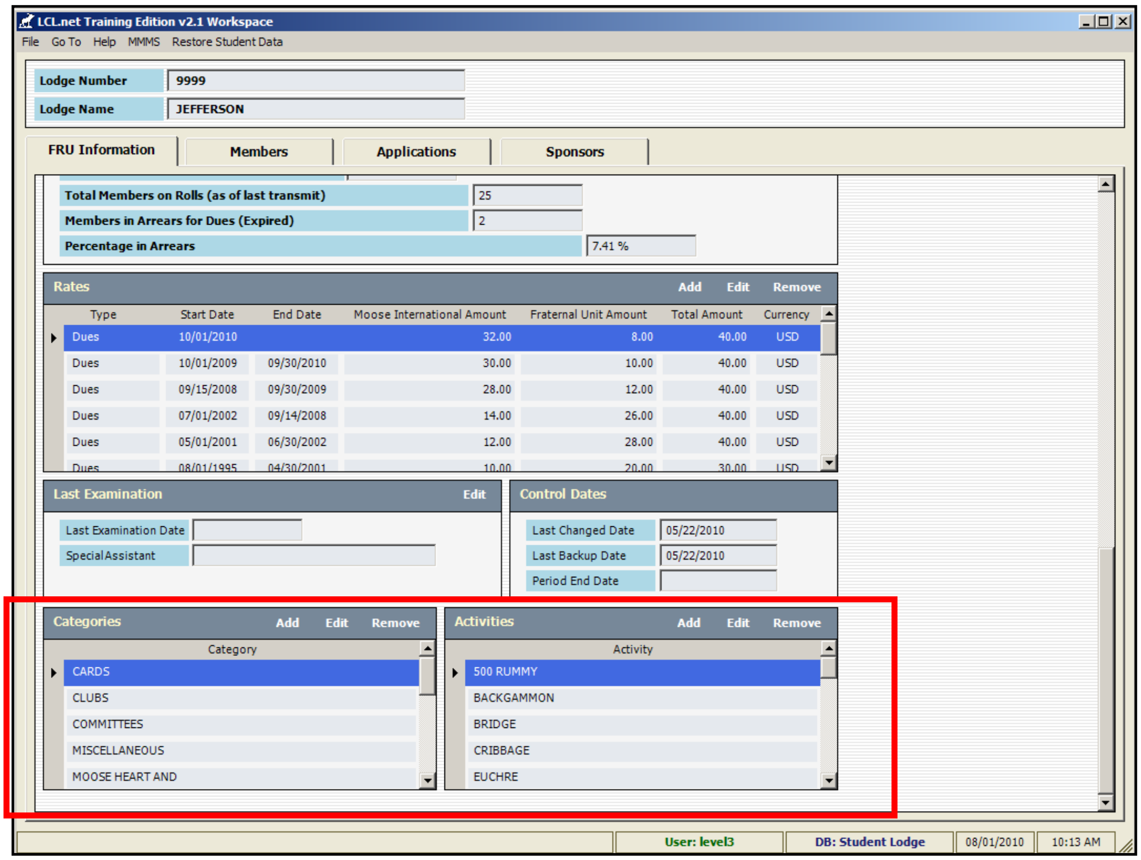
SHOW them how to add a category using this data:

**OUTDOORS**

Refer to Chapter 2, the FRU Information Screen, of the LCL.net Resource Manual.

The **Categories** box is used to Add, Edit and Remove activity categories for the FRU.
Categories are used to group your FRU Activities by Type.

**NOTE:** Selecting (Highlighting) a category in the Categories box will update the activities displayed in the Activities box, located to the right of the Categories box. The updated Activities box will show the activities that have been assigned to the selected (highlighted) category.



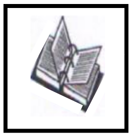
# Add a Category

**To add Categories on the FRU Information Screen:**

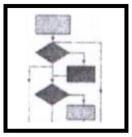
1. Click **Add**
2. Enter the **Category Name** in the Category field.

**NOTE:** You will want to enter the specific category name that you wish to create, such as "Newsletter". This type of entry would be useful for setting up who should receive a newsletter.

3. Click the **Save** button to enter the Category into LCL.net V2.2.



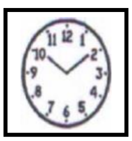
ASK them to turn to Page 11 in their Workbooks.



SHOW them how to add **Activities** using this data:

**ADD Camping and Hiking under the Category – Outdoors**

ASK them to complete the Exercise – **Editing Lodge Information.**




GIVE them 15 minutes to complete the exercise.

REMIND them that they need to limit conversation while others are still working.

DO NOT mention that a break is next as Learners will rush through the exercise or perhaps not complete it.

10 minute break.

STRESS that class will begin again in exactly 10 minutes as there is much information to cover.

Refer to Chapter 2, The FRU Information Screen, of the LCL.net Resource Manual.

The **Activities** box is used to Add, Edit and Remove activities for the FRU. Activities are grouped into categories based on the type of activity. For Example, the Activities Bridge, Rummy and Poker are grouped under the category "Cards".

**To add Activities on the FRU Information Screen:**

1. Click "**Add**" in the Activities box on the FRU Information Screen.
2. Enter the activity name in the Activity field.

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**NOTE:** You will want to enter the specific activity name you wish to create, such as "School Board".

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3. Click the **Save** button to enter the activity information into LCL.net V2.2.

## ***Exercise*** - Editing FRU Information

Enter the following information. Use this Workbook, as well as, the referenced section of the Resource Manual if you have questions:

1. Enter a new Mailing Address for the FRU: **PO Box 3429**<br>**Jefferson IL 60539**
2. Enter the following Spare Date Label Information: **Preferred Member**<br>**Charter Member**
3. Enter the following new Dues Rate: **$50.00 – Use the default effective date**
4. Enter the following new Categories: **Newsletter**<br>**Community Involvement**
5. Enter the following new Activities:

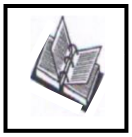
   **Enter under the Category – Newsletter**

   1. Does get Newsletter
   2. Does not get Newsletter

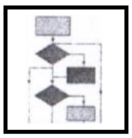
   **Enter under the Category – Community Involvement**

   1. School Board
   2. Little League Coach
   3. City Council

INTRODUCE the topic **Member Info Tab**



ASK them to turn to Page 12 in their Workbooks.



OVERVIEW screen functions – sort by column headers, column width adjustments, search, etc.

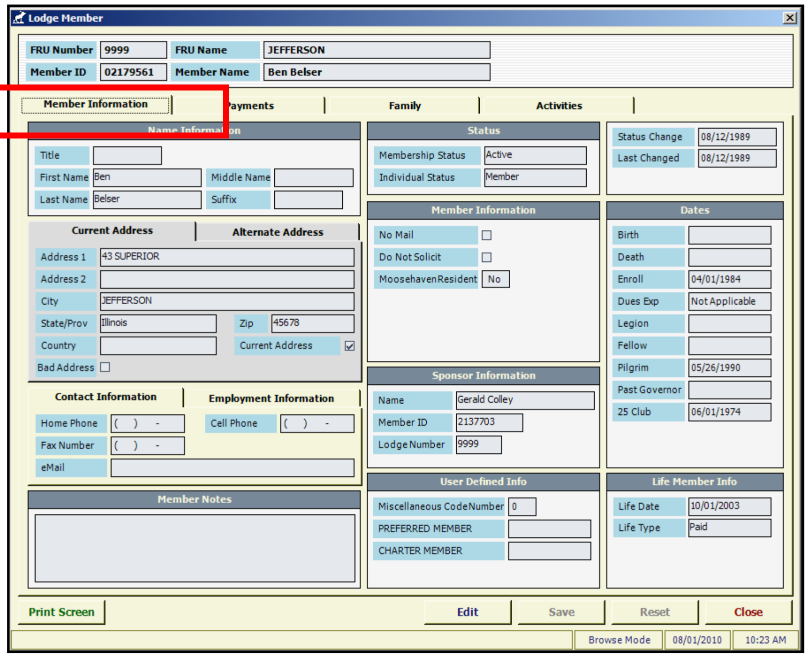
DISCUSS **Active Member List** and **In-Active Member List**.

OVERVIEW each area of the **Individual Member** Info using **Ned Avery** as the example.

Refer to Chapter 3, The Member Screen, of the LCL.net Resource Manual.

Clicking the **Members Tab** accesses the Members screen. This chapter will demonstrate how to access, edit, add and delete FRU Member Information using the Members Screen.

To access and update a Member's Information you must open the member record in the Member Information window. The Member Information window contains four tabs to view and edit specific member, family and activity information, or to view payment history information.




# Member Information Tab

Refer to Chapter 3, The Member Screen, of the LCL.net Resource Manual

The Member Information window is broken down into individual information boxes.

- Name Information
- Address Information (Current and Alternate Address Information)
- Contact and Employment Information
- Member Notes
- Status
- Member Information
- Sponsor Information
- User Defined Information
- Dates
- Life Member Information

ASK them to turn to Page 13 in their Workbooks.

SHOW them how to edit a member name using this data:

**Add Jr. as a suffix to Ned Avery's name.**

If the data field is still shaded in **Edit Mode**, the Fraternal Unit may not edit that field.

SHOW them how to edit and use **Current** and **Alternate** Addresses using this data:

**Add an Alternate address: #10 Sea Wall Blvd, Daytona, FL 32981**

ASK them to follow along with you.

DISCUSS use of **Current** and **Alternate** Addresses and give examples of how they are useful.

To print labels for snowbirds in Current and Alternate Address – you need to physically take out the one you do not want or it will print two labels. This works on some reports but not on others.

SHOW them how to edit **Contact** and **Employment Information** using this data:

**Telephone**: 630.328.2697

**Email Address**: Avery@comcast.net

**Occupation**: Attorney, Employer: Avery & Associates

**Work Phone**: 630.593.9889

ASK them to follow along with you.

# Editing Name Information PAGE 13

Refer to Chapter 3, the Member Screen of the LCL.net Resource Manual

The **Name** Information box is where you would edit the Member's first name, middle name, last name and any name suffix such as "Sr." or "Jr."

**To edit Member Name Information:**

1. Click the **Edit** button located at the bottom of the Member Information window.

**NOTE:** Only the Data fields that are not shaded can be edited.

2. Edit the Member's Name Information in the available fields.
3. Click the **Save** button to enter these changes into LCL.net V2.2.

# Editing Current and Alternate Addresses

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Current Address** and **Alternate Address** Tabs are used to enter and select the active address for the selected member. For Members with more than one mailing address, you can enter the second address by clicking the Alternate Address Tab. The **Active Address** checkbox allows you to select an address as the Member's current active address. This is very useful for those FRUs with "Snow Bird" Members that move between two addresses.

**To edit Current and Alternate Address Information:**

1. Click the **Edit** button located at the bottom of the Member Information window. The data fields will no longer be shaded and the bottom status bar will display Edit Mode.
2. Enter your Member's Current or Alternate Address information in the available fields.
3. Click the **Save** button to enter any changes into LCL.net V2.2.

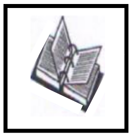
# Editing Contact and Employment Information

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual

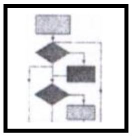
The Contact Information and Employment Information tabs are used to enter contact numbers and employment information for the selected Member. The Employment Information tab has a **Volunteer** checkbox that allows you to produce a report to identify those Members who are willing to donate their skill or expertise to the FRU.

**To enter or Edit Contact and Employment Information:**

1. Click the **Edit** button located at the bottom of the Member Information window.
2. Enter the Member's Home Phone Number, Cell Phone Number, Fax Number and E-mail address information in the available fields.
3. Click the Employment Information tab and enter the Member's Occupation, Employer and Business Phone Number in the available fields.
4. Select the Volunteer checkbox, if this Member volunteers his services to the FRU.
5. Click the **Save** button to enter these changes into LCL.net V2.2.



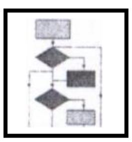
ASK them to turn to Page 14 in their Workbooks



SHOW them how to enter **Member Notes** using this data:

Enter **GOVERNOR 1993-1994, DISTRICT PRESIDENT 1995-1997; STATE PRELATE 1997-1998; DEPUTY SUPREME GOVERNOR 1999-2000** into Ned Avery's member's notes.

Member Notes can be used to enter "Moose resume," i.e. past offices held, district or state positions, etc. No Report can be produced from this information.



SHOW them how to change a Status.

The only status changes you can make are **Resigned**, **Transferred** and **Deceased**. Moose International will be entering all the statuses pertaining to non-payment of dues.

## Viewing and Editing Member Notes



Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Member Notes** tabs are used to view and add any specific notes that apply to that Member.

The Member Notes tab contains a text box that allows up to 100 characters to be entered.

**To edit or add Member Notes:**

1. Click the **Member Notes** tab.
2. Click **Edit** and enter or edit the Member Notes.
3. Click the **Save** button to enter any changes into LCL.net V2.2.

## Editing Status

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Status** box is where you enter the Member's current status in the FRU. The **Membership Status** and **Individual Status** allow you to select the current status from a drop down list.

The Available **Membership Status** selections include:

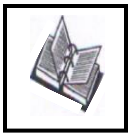
- Active
- Resigned
- Transferred

The available **Individual Status** selections include:

- Deceased
- Member

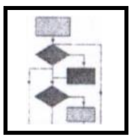
**To edit Membership Status:**

1. Click the **Edit** button located at the bottom of the Member Information window.
2. Click the **Membership Status** drop down arrow.
3. Select the Member's current Status from the drop down list.
4. Click the **Individual Status** drop down arrow.
5. Select the member's current Status from the drop down list.
6. Click the **Save** button to enter any changes into LCL.net V2.2.



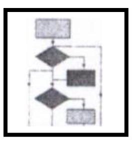
ASK them to turn to Page 15 of their Workbook.

The **Member Information** box is where you enter or edit the members Mail Preferences. The Moosehaven Resident field will indicate if the Member is residing at Moosehaven and may only be edited by Moose International.



SHOW them how to view sponsor information using **Ned Avery's Sponsor** as the example.

You can only **View** Sponsors – **Sponsors cannot be edited**.



OVERVIEW the use of the **User Defined Info** and **Miscellaneous Code** fields.

**User Defined Info** box is used to enter or edit specific user defined dates for FRU members such as **Preferred Member** dates, **Charter Member** dates.

**Miscellaneous Code** numbers are used for entering a number for tracking purposes such as sign ups.

ASK for more ideas on how they might be used.

# Editing Member Information (Mail Preferences) PAGE 15

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Member Information** box is where you enter or Edit the members Mail Preferences. The Moosehaven Resident field will indicate if the Member is residing at Moosehaven and may only be edited by Moose International.

**To edit Member Information (Mail Preferences)**

1. Click the **Edit** button at the bottom of the Member screen.
2. Click the **No Mail** check box if desired.
3. Click the **Do Not Solicit** check box if desired.
4. Click the **Save** button to enter any changes into LCL.net V2.2.

# Viewing Sponsor Information

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Sponsor Information** box shows the Member Name, Member ID and FRU number of the person that sponsored the member.

**NOTE:** Sponsor Information cannot be edited.

# Editing User Defined Info

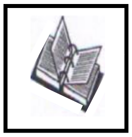
Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **User Defined Info** box is used to enter or edit specific user-defined dates for FRU Members such as Preferred Member Dates.

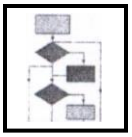
The **Miscellaneous Code Number** field is used to enter a number that may be assigned to Members for tracking purposes.

**To enter or edit User Defined Info:**

1. Click the **Edit** button located at the bottom of the Member Information window.
2. Enter the Miscellaneous Code Number, if needed.
3. Click the **User Defined field 1** drop down arrow and select the date from the Calendar or manually enter the desired date.
4. Click the **User Defined field 2** drop down arrow and select the date from the Calendar or manually enter the desired date.
5. Click the **User Defined field 3** drop down arrow and select the date from the Calendar or manually enter the desired date.
6. Click the **Save** button to enter any changes into LCL.net V2.2.



ASK them to turn to Page 16 of their Workbooks.

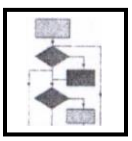


Show them how to edit dates, by directly entering and via the calendar, using this data:

**Enter Ned Avery's birthday 02/29/1964.**

ASK them to follow along with you.

You can change a member's Birthdate, but all dates from Enrolled through all of the Higher Degree Dates come from Moose International and cannot be edited.



SHOW them how to view **Life Member** Information

Life Member information may only be edited by Moose International.

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Dates** box is used to view important dates in the Member's record. The only date that may be edited at the FRU is the Member's **Birth Date**.

**NOTE:** All other changes to the Dates in LCL.net V2.2 are made at Moose International.

**To enter or edit the Birth Date:**

1. Click the **Edit** button at the bottom of the Member Window.
2. Click the Drop down arrow in the **Birth** field.
3. Select the Member's Birth Date from the Calendar or manually enter the Birth Date.
4. Click the **Save** button to enter any change into LCL.net V2.2.

## Viewing Life Member Information

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The Life Member Info box contains a Member's Life Membership Information data, if applicable.

**NOTE:** Life Member Information is entered by Moose International and cannot be entered or edited from the Member Screen.

The Life Member Types that display are:

- **Paid** – The Life Membership was purchased.
- **50 Year** – The Member has been awarded a Life Membership for 50 Years Service.
- **250 Sponsor** – The Member has been awarded a Life Membership for sponsoring 250 Members into the Lodge or Chapter. (This does not apply to the Moose Legion)

INTRODUCE the topic “**Payments Tab**”.

ASK them to turn to Page 17 in their Workbooks.

The **Payments Tab** displays member payment information that has been received from Moose International.

INTRODUCE the topic “**Family Tab**”.

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

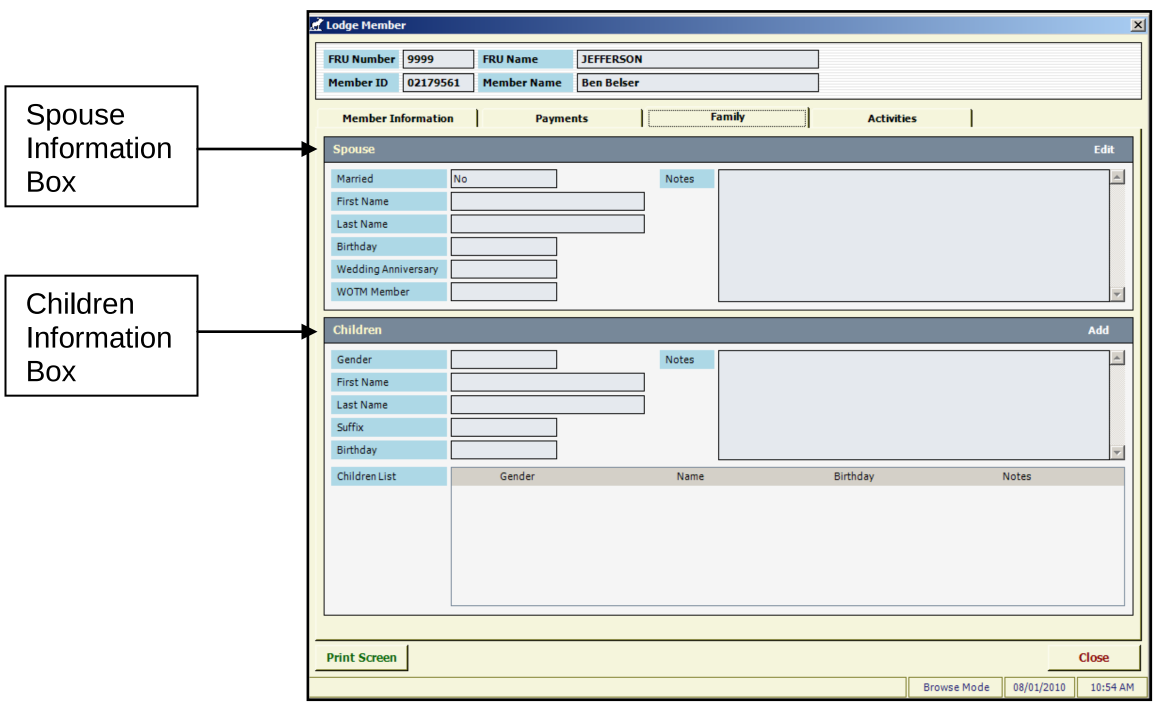
The **Payment** window is used for reference purposes only. This screen will display all payments made to Moose International through the Lock Box by the Member.

**NOTE:** This screen will be populated with information after the Member payment is received through the Lock Box at Moose International and the Member's Record will be updated during the Daily Transmit process.

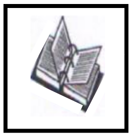
## Family Tab

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

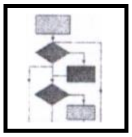
The **Family Information** boxes and fields are where you will enter, update or view the Member's family information in LCL.net V2.2.



## The Member Screen – Family Tabs
## Adding, Editing and Removing Spouse Information PAGE 18



ASK them to turn to Page 18 in their Workbook.



OVERVIEW screen layout.

SHOW them how to add and edit **SPOUSE** Information using this data:

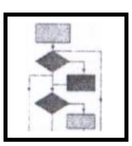
- **Wife's Name**: Nicole Avery
- **Birthday**: 05/16/1965
- **Wedding Anniversary**: 06/22/1985
- Click **Check Box** to indicate that she is a member of the **WOTM**.

Keep in mind that this information could include a significant other or partner – not necessarily a spouse.

ASK them to follow along with you.

The wife's name will populate from the application screen.

If the wife retains her maiden name or hyphenates it with her married name, the last name can be changed when the last name field automatically populates.



SHOW them how to remove the Spouse Information.

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Spouse Information** box is used to enter and edit spouse information for the selected Member.

**To Edit Spouse Information:**

1. Click the **Edit** option located in the upper right corner of the Spouse Box.
2. Click to Select the **Married (Y/N)** checkbox.

**NOTE:** All data fields will now be activated for data entry and the Last Name field will automatically populate with the Member's Last Name. This field may be edited if necessary.

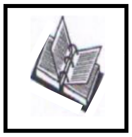
**NOTE:** To remove existing spouse information for the Member, simply click to uncheck the Married (Y/N) checkbox. The spouse information fields will be cleared.

3. Enter the spouse's first name in the **First Name** field.
4. Change the Spouse's **Last Name** field if needed.
5. Click the **Birthday** drop down arrow and select the spouse's Birth Date from the Calendar or manually enter the correct date.
6. Click the **Wedding Anniversary** drop down arrow and select the correct Anniversary Date from the Calendar or manually enter the correct date.
7. Click to select the **WOTM (Y/N)** checkbox if needed.

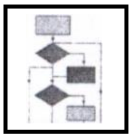
   *This option should be checked, only if the spouse is an Active WOTM Member.*
8. Enter any additional **Notes** for the spouse in the Notes field.
9. Click the **Save** button to enter these changes into LCL.net V2.2.

**To Remove the Spouse Information:**

1. Click the **Edit** option located in the upper right corner of the Spouse box.
2. Click to uncheck the **Married (Y/N)** checkbox.



ASK them to turn to Page 19 in their Workbooks.

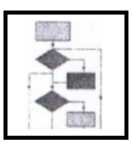


SHOW them how to add and edit **CHILDREN** information using this data. Enter the following children:

**Jeffrey**: **07/10/1987**
**Sarah**: **10/01/1989**

ASK them to follow along with you.

The child's last name will automatically populate with the member's last name. If a child's last name is different than the members, it can be changed.



SHOW them how to **Remove** the Children information.

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Children Information** box is used to Add, Edit or Remove child information for the selected Member.

**To Add Children Information:**

1. Click the **Add** option located in the upper right corner of the Children box.

**NOTE:** The Add Child window will open and the Last Name field will automatically populate with the Member's last name. This may be changed if necessary.

2. Click the **Gender** drop down arrow and select the gender of the child to be added.
3. Enter the child's first name in the **First Name** Field.
4. Change the last name for the child in the **Last Name** field if necessary.
5. Click the **Birthday** drop down arrow and select the child's birth date from the Calendar or manually enter the correct date.
6. Enter any additional **Notes** for the child in the Notes field.
7. Click the **Save** button to enter the information into LCL.net V2.2.

**To Edit Children Information:**

1. Click to select (Highlight) the child with information to be edited in the children list.
2. Click the **Edit** option located in the upper right corner of the Children box.
3. Click the **Gender** drop down arrow and edit the gender of the child if necessary.
4. Edit the child's first name in the **First Name** field, if necessary.
5. Edit the child's last name in the **Last Name** field, if necessary.
6. Edit the Child's Birthday by clicking the **Birthday** drop down arrow and selecting the child's birth date from the Calendar or manually enter the correct date.
7. Enter or Edit the notes for the child in the **Notes** field.
8. Click the **Save** button to enter any changes into LCL.net V2.2.

**To Remove Children Information:**

1. Click to select (Highlight) the child to be removed from the children list.
2. Click the **Remove** button located in the upper right corner of the Children box.

INTRODUCE the topic “**Activities Tab**”.

ASK them to turn to Page 20 of their Workbooks.

OVERVIEW the screen layout.

SHOW them how to enter **Categories** and **Activities** information using this data:

**Ned**: Cards – Poker
Committees – Membership
Sports – Golf

ASK them to follow along with you.

Enter the following as an exercise:

**Nicole**: Committees – Family Activities
Sports – Golf

**Jeffrey**: Sports – Golf, Volleyball

**Sarah**: Sports – Soccer, Swimming

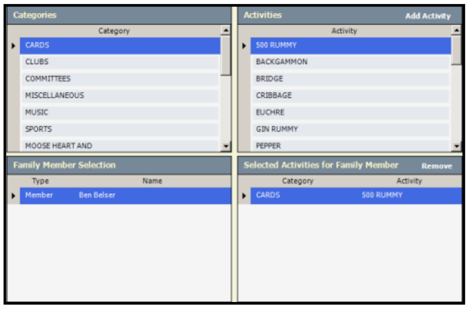
DISCUSS creative ways this area can be used. Give some examples.

ASK for other creative ways they can think of to use it.

SHOW them how to **Remove** Activities for a Family Member.

Refer to Chapter 3, The Member Screen of the LCL.net Resource Manual.

The **Activities** window is broken down into four main information boxes. The **Activities box** in the upper right contains all the activities specific to the Category selected (Highlighted) in the **Categories box** in the upper left. The **Selected Activities for Family Members box** in the lower right contains activities specific to the Family Members selected (Highlighted) in the **Family Member Selection box** in the Lower left.




## Adding Activities for a Family Member

**<u>To Add Activities for a Family Member:</u>**

1. Click to highlight the desired family member in the **Family Member Selection** box.
2. Click the desired Activity Category in the **Categories** box.
3. Click the desired activity in the **Activities** box.
4. Click the **Add Activity** button to add the highlighted activity for the selected family member.
5. Continue to select and add categories and activities for the selected family member as needed.

**NOTE:** Alternately, you can double-click an activity (after choosing the category) to add it to the selected family member.

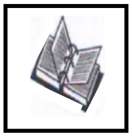
To choose a different family member and add activities, simply click to highlight another family member in the Family Member Selection box.

## Removing Activities for a Family Member

**<u>To Remove Activities for a Family Member:</u>**

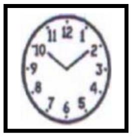
1. Click the desired family member in the **Family Member Selection** box.
2. Click the desired activity to remove in the **Selected Activities for Family Member** box.
3. Click the **Remove** button in the upper right corner.
4. Click the **Yes** button to remove the activity of the **NO** button to cancel.

**NOTE:** The removed activity will be deleted from the selected activities for that family member.



ASK them to turn to Page 21 in their Workbooks.

ASK them to complete the Exercise – **Editing Member Information**.



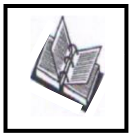
GIVE them 15 minutes to complete the exercise.

REMIND them that they need to limit conversation while others are still working.

Edit Dan Manley's record using the following information. Use the previous pages of this Workbook as the reference if you have questions.

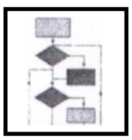
| | |
|---|---|
| • Dan Manley: | MD |
| • Birth Date: | 5/15/1965 |
| • E-mail address: | **drdan@comcast.net** |
| • Alternate Address: | 12 South Beach Road<br>South Padre Island, TX 79854 |
| • Occupation: | Doctor |
| • Employer: | Methodist Hospital – Phone #630.987.4125 |
| • Miscellaneous Code No.: | 382 |
| • Wife: | Sylvia – Birth Date: 09/22/1968 |
| • Children: | Jimmy – Birth Date 08/12/1995<br>Sara – Birth Date 05/05/1997<br>Tim – Birth Date: 10/22/1999 |
| • Dan's Activities: | Golf, Ritual, Fishing, Little League Coach |
| • Sylvia's Activities: | Bridge, Bowling, Fishing |
| • Jimmy's Activities: | Football, Amusement Parks, Fishing |
| • Sara's Activities: | Swimming, Ice Skating, Fishing |
| • Timothy's Activities: | Fishing, Soccer |

INTRODUCE the topic "**The Sponsors Screen**".



ASK them to turn to Page 22 in their Workbooks.

This screen is used to enter just those sponsors that are not members of your FRU into the Sponsor's List. These sponsors must be entered into the Sponsor's List before their Sponsor Information can be entered on the Applicant Info screen for the Application they are sponsoring.



OVERVIEW the screen layout.

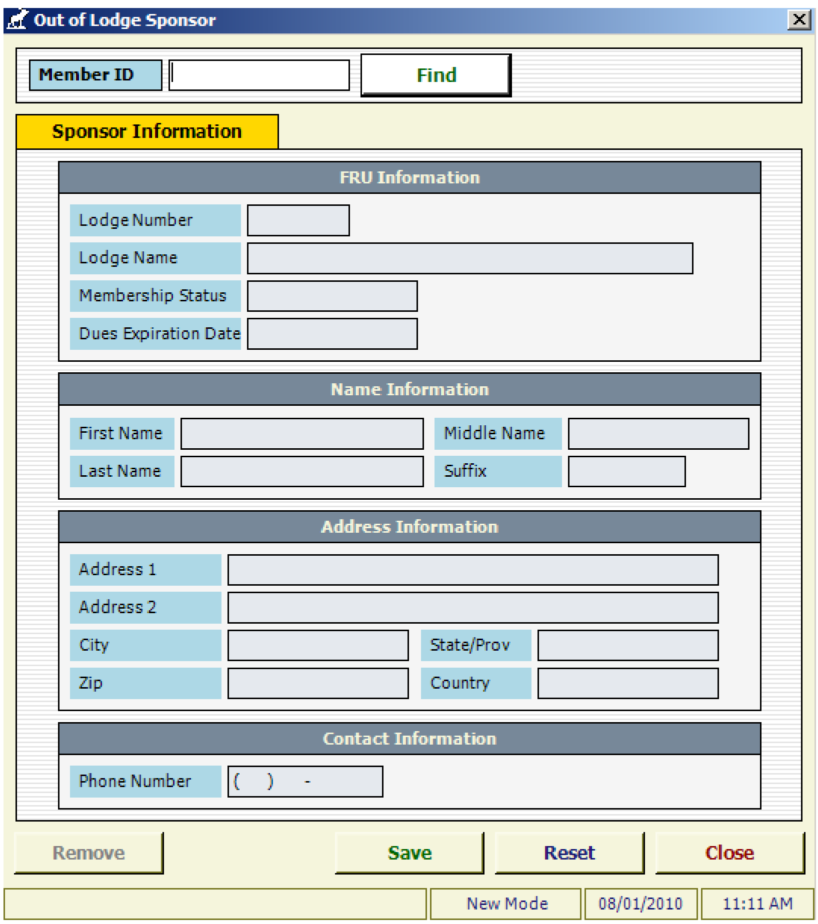
Refer to Chapter 5, The Sponsor Screen of the LCL.net Resource Manual

The **Out of Lodge Sponsors** screen is used to retrieve real time information from Moose International about sponsors that are not a Member of your FRU, but are Members of another FRU. This includes women sponsoring men into a lodge and men sponsoring women into a chapter. They must be saved into the Sponsor's List before they may be entered on the Application screen as the Sponsor.

## To access the Out of Lodge Sponsor Screen:

1. Click the **Sponsor** Tab.
2. Click the **New Sponsor** button in the upper right corner of the Sponsor List screen.

*The Out of Lodge Sponsor screen opens.*



## Entering an Out of Lodge Sponsor Information and Learner Exercise PAGE 23

EXPLAIN what an out of lodge sponsor is. Give an example and remind them that men & women can cross-sponsor.

ASK them to turn to Page 23 in their Workbooks.

SHOW them how to add an **OUT OF LODGE SPONSOR** using this data:
**ENTER MID# 17970267***(Jason Sparks' info should appear)*

ASK them to follow along with you.

The only required information is the **MEMBER ID** number.

ASK them to complete the Exercise – **Entering an OUT OF LODGE SPONSOR**. (*Info on William Tell should appear*)

GIVE them 5 minutes to complete the exercise.

REMIND them that they need to limit conversation while others are still working.

DO NOT mention that a break is next as Learners will rush through the exercise or perhaps not complete it.

10 minute break.

STRESS that class will begin again in exactly 10 minutes as there is much information to cover.

**To enter out of lodge sponsor information:**

1. Click the **Sponsors** Tab
2. Click the **New Sponsor** button in the upper right corner of the Sponsor List window.
3. Enter the Sponsor's **MID** number in the Member ID field.
4. Click **Find**.

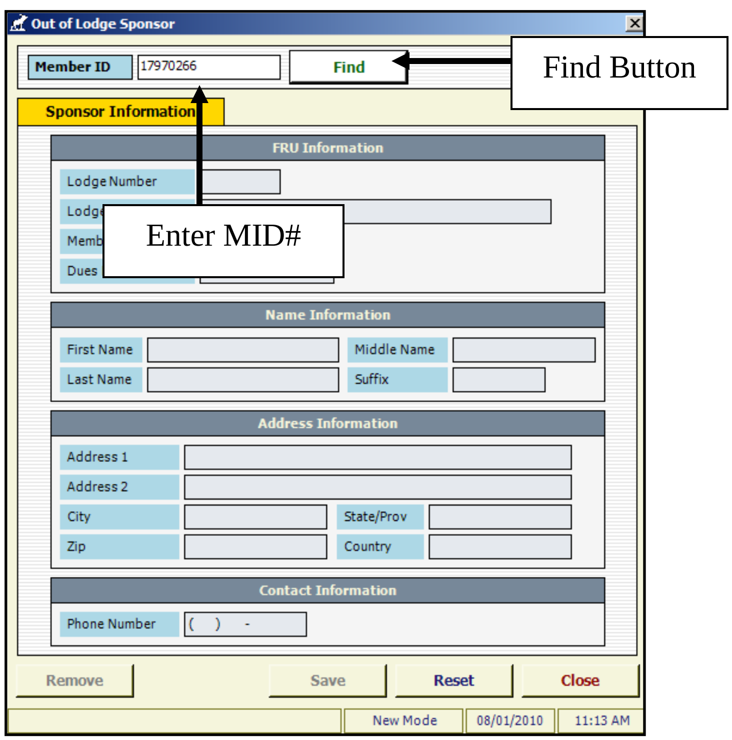
   *The current information on the Member Sponsor will be retrieved from the Moose International Computer.*
5. Click the **Save** button to save the current information to the Sponsors List and allow you to enter the Sponsor's MID or select the Sponsor from the Sponsors List.

**NOTE:** Clicking the **Reset** button will cancel entry of the Out of Lodge Sponsor.

## ***Exercise*** - Entering an Out of Lodge Sponsor

Enter the following Out of Lodge Sponsor information. Use this Workbook as a reference if you have questions.

1. Enter **MID#**: **17970266** in the **Member ID** field.
2. Click "**Find**".




3. Click **Save** to add the sponsor to your Sponsor List.

INTRODUCE the topic "**The Application Screen**".

ASK them to turn to Page 24 in their Workbooks.

OVERVIEW the screen layout.

*(Explain the* ***Accepted****,* ***Rejected****,* ***Transmitted****,* ***Active****,* ***Other*** *Tabs)*

Remind the participants that this screen works just like the Member screen as far as sorting, sizing, look and feel, etc.

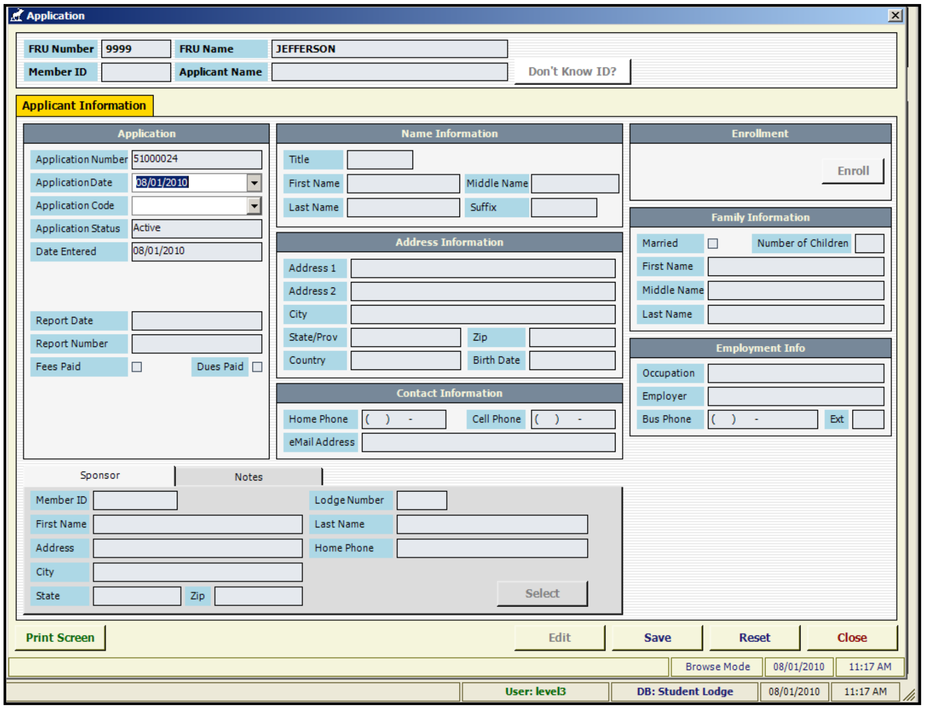
The information at the top of the screen and **Application Number** (*which is system assigned*) are gray and not editable.

REVIEW the Application Code selections at the bottom of the page.

Point out that our General Laws, Sect 30.5 – 30.6, outline eligibility for reinstatement of membership and for re-enrollment. Please explain why a member who is eligible to do either would choose to re-enroll vs. reinstate and vice versa. It becomes a decision of which way is more beneficial for the member. Remember, a member loses all years of service with a re-enroll. Therefore, a member who has many years of service may find it to their benefit to pay the back dues in order to retain years of service. For newer members who do not have a lot of years of service, it may be a decision based upon which option is most cost effective to them.

Refer to Chapter 4, The Application Screen in LCL.net Reference Manual.

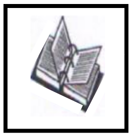
The Application Screen is broken down into different sections for entry.



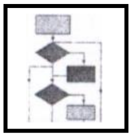

**Applicant Code Selections:**

- **Code 1** – **New** – For Applicants that have never been a Moose Fraternity Member.
- **Code 1** – **Multiple Membership** – For Members of another FRU applying for Multiple Membership in your FRU.
- **Code 2** – **Re-Enroll** – For previous Moose Fraternity Members in arrears for six (6) months or more from the expiration date of the member's last Membership Dues Record. The Former Member would have a Status of Expired, Dropped or Terminated. The applicant must pay dues and fees.
- **Code 3** – **Reinstate** – For previous Moose Fraternity Members dropped for non-payment of Dues for more than 12 months, but less than 24 months from the expiration date of the Member's last Membership Dues Record. Back Dues must accompany the Application in an amount sufficient to bring the Member's Dues Date to a current Status. The Former Member would have a Status of Dropped.
- **Code 5** – **Transfer In** – For Members transferring to your FRU from another FRU. The Member's Dues Date must be current.
- **Code L** – **Comp Member** – For Members who are not a member of your FRU that are entered so labels can be printed (ex. To receive your FRUs Newsletter).

**NOTE:** All references to Tax ID Type, Tax ID and Social Security Number have been removed from the Application Screen.



ASK them to turn to Page 25 of their Workbooks.



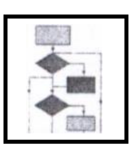
SHOW them how to add a **New Application** using this data:

| | |
|---|---|
| NAME: | Don Cobb |
| ADDRESS: | 396 Alexander, #12 |
| | Jackson, IL 60559 |
| BIRTHDAY: | 11/04/1983 |
| HOME PHONE: | 815.562.1112 |
| EMAIL: | dcobb@sbcglobal.net |
| MARITAL STATUS: | Not married |
| CHILDREN: | None |
| OCCUPATION: | Photographer |
| EMPLOYER: | Jackson Daily News |
| WORK PHONE: | 815.998.9998 |
| SPONSOR: | Beau Leyton |
| PAID: | Fees and Dues |

ASK them to follow along with you.

TELL them that entering the first letter of State will take you to the first item beginning with that letter in the list. Repeating the letter will continue down the list of that letter.

IF the date entered in the Birth Date field shows the Applicant to be under 21, the system will not allow you to save the Application. The Birth Date field is available for L-Comp Member Application, but does not need to be entered.



LIFE MEMBER dates are entered by Moose International and will be downloaded to the Fraternal Units through the Transmit Application and Daily Transmit Functions.

**To Enter an Application:**

1. Click the **Applications Tab** near the top of the LCL.net Workspace screen.
2. Click the **New Application** button on the upper right side of the Applications screen to open a new Application screen.
3. Enter the Application Date in the **Application Date** field by clicking the drop down arrow to access the Calendar or manually type in the date. If no date is entered the date will default to the current date after pressing the Tab Key.
4. Press the **Tab** key to move to the **Application Code** field.
5. Click the drop down arrow to the right of the Application Code field.
6. Select and click **Application Code 1 – New**.

**NOTE:** The Status field defaults to Active and cannot be changed at this time.

7. Click in the box next to **Fees Paid** to indicate all fees have been paid.
8. Click in the box next to **Dues Paid**, if applicable.

**To Enter Name Information on the Application Screen:**

1. Enter the Applicant's First Name.
2. Enter the Applicant's Middle Name.
3. Enter the Applicant's Last Name.
4. Enter a Suffix, if applicable, by clicking the drop down arrow and selecting the appropriate suffix by scrolling through the selections.

**To Enter Address Information on the Application Screen:**

1. Enter the Applicant's Street Address, City, State and Zip Code.
2. Enter the Applicant's Country, only if different from the Country of the FRU.
3. Enter the Applicant's Date of Birth

**To Enter Contact Information on the Application Screen:**

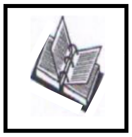
1. Enter the Applicant's Home Telephone Number.
2. Enter the Applicant's Cell Phone Number.
3. Enter the Applicant's E-mail Address.

**To Enter Family Information on the Application Screen:**

1. If the Applicant is married, click in the box next to Married which will open the Spouse Name information area.
2. Enter the First Name, Middle Name and Last Name of the spouse.
3. If the Applicant has children, enter the number of children in the box.

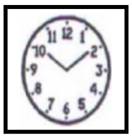
**To Enter Employment Information on the Application Screen**

1. Enter the Applicant's Occupation.
2. Enter the Applicant's Employer Name.
3. Enter the Applicant's Business Telephone Number.



ASK them to turn to Page 26 in their Workbooks.

ASK them to complete the Exercise – **Enter a New Member Application (Application Code 1 – New)**



GIVE them 10 minutes to complete the exercise.

Remember that a manual receipt will need to be prepared and given to the Applicant.

REMIND them that they need to limit conversation while others are still working.

1. Click **Select** in the Sponsor area to open the Sponsor selection screen.
2. Click on the **Members** or **Sponsors** tab and select the Sponsor by entering an MID# or Last Name of the Sponsor in the **Find** box or scroll down in the list until you find the Name of the Sponsor.
3. Double click the name of the Sponsor in the **Members** or **Sponsors** list. The Sponsor's information will populate the Sponsor area of the Application Screen.

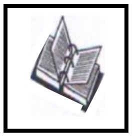
## ***Exercise*** - Entering Applications

### Enter a New Member Application (Application Code 1 – New).

**A Code 1 – New Member** Application is for an Applicant that has never been a member of the Moose Fraternity.

Enter the following Code 1 – New Application:

- Name: John Davis
- Address: 1938 Belt Line Road
  Jefferson, IL 60532
- Date of Birth: 08/21/1962
- Telephone: 630.897.7412
- E-mail Address: jdavis@sbcglobal.net
- Wife: Brenda
- Children: (3) three
- Occupation: Nurse
- Employer: Rush-Copley Hospital
- Business Telephone: 630.216.5698 ext 563
- Sponsor: Brad Leonard
- Paid: Fees
- Paid: Dues



ASK them to turn to Page 27 in their Workbooks.

OVERVIEW how to enter an **Application Code 2 – Re-Enroll**.

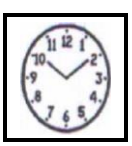
A Re-Enroll Applicant is a former member whose dues have been expired for more than six (6) months. A Re-Enroll **MUST** pay fees & dues, and, agree to and check the *Former Member Acknowledgement Box* on the application.

## Learner Exercise – Page 27

ASK them to complete the Exercise – **Enter a Re- Enroll Application (Application Code 2**)

REMIND them that the **Don't Know ID** button is a good tool to use for a Re-Enroll or Re-Instate Application from a former member of their Fraternal Unit.

You can only enter an Application as a Re-Enroll if you have the Member ID number previously assigned to the Applicant. If you don't have the Member ID number and you cannot get it from Moose International, then the Application must be entered as **New**.



Give them 10 minutes to complete the exercise.

REMEMBER that a manual receipt will need to be prepared and given to the Applicant and a QuickBooks Receipt must be entered for Deposit purposes

An Applicant for **Re-Enrollment** is a Former Member of the Moose Fraternity whose Dues have been expired for 6 months or more. He/She may Re-Enroll into any FRU of the same Unit type in the Fraternity.

**Remember**: When entering a Re-Enroll or Reinstate Application, you must enter the Applicant's MID# in the Member ID field after selecting the Application Code *or* if the Applicant is a Former Member of your FRU, you may click the **Don't Know ID** button and select the Former Member from the drop down list.

**NOTE:** If the Application is a Re-Enroll, the drop down list will contain Former Members with a Status of "Dropped," or "Terminated". If Applicant has a status of "Expired" you must check your inactive list for the MID or contact the Help Desk if the applicant is a former member of a different lodge. If the Application is a Reinstate, the drop down list will contain only Former Members with a Status of "Dropped."

If the Former Member is listed in the drop down list, the information from the Applicant's previous Membership Record will populate the Application screen. This information should be edited for any changes before saving the Application.

If the Application is a Re-Enroll, the Sponsor's MID# must be entered or the Sponsor selected from the Member or Sponsor list on the select Sponsors screen. If the Sponsor is from another FRU, he must be added to the Sponsors list prior to entering him as the Sponsor of that Applicant, if not previously added.

## ***Exercise*** - Enter a Code 2 – Re-Enroll Application

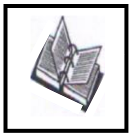
**Enter the following Code 2 – Re-enroll Application:**

1. Enter**: MID# 09400405**
2. Click: **Tab**

**Verify and Edit the Following Information:**

- Name: David Smith
- Address: 3592 Nottingham Circle
  Jefferson, IL 60539
- Date of Birth: 06/30/1950
- Telephone: 630.857.6925
- E-Mail Address: dsmith50@aol.com
- Wife: Sharon
- Children: (2) two
- Occupation: Produce Manager
- Employer: Jewel Food Store
- Business Telephone: 630.914.2585 ext 332
- Sponsor: Brad Leonard
- Paid: Dues and Fees
- Former Member Acknowledgement Signed

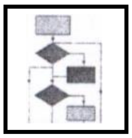
## Entering a Life Member Transfer-In Application (Application Code 5) PAGE 28



ASK them to turn to Page 28 of their Workbooks.

OVERVIEW how to enter a **Life Member Transfer-in Application.**

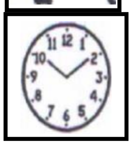
Life Member Transfer-In Applications are handled the same as regular Transfer-in Applicants.



SHOW them how to enter a Transfer-in Application using the following information: **Member ID number 17970273** (*Farley Grainger*)

## Learner Exercise PAGE 28

ASK them to complete the Exercise – **Enter a Life Member Transfer-in Application (Application Code 5)**



Give them 10 minutes to complete the exercise.

## Entering a Comp Member (Application Code L) PAGE 28

EXPLAIN what an **L-Comp Member** is and how it is used. An L-Comp Member is a member of another Fraternal Unit or a Vendor (anyone) that wants to receive a copy of your Newsletter. They are added to your database for mailing labels only.

OVERVIEW how to enter an L-Comp Member.

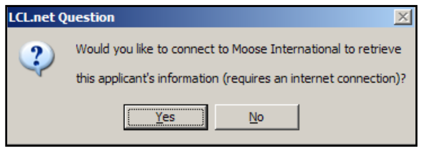
L-Comp Member Applications are not transmitted to Moose International. When the L-Comp Member Application is saved, it goes immediately to the Inactive Member list.

## Learner Exercise PAGE 28

ASK them to complete the Exercise – **Enter an L-Comp Member (Application Code L)**

Give them just a couple of minutes to complete the exercise.

When an **Application Code 5 – Transfer-in** is selected, you will enter the MID# of the Member and press the **Tab** Key. An **LCL.net Question Box** will appear asking "Would you like to connect to Moose International to retrieve this Applicant's information?" Connect to the Internet and then click "**Yes**". The Application screen will populate with the information retrieved from Moose International. Life Member and Sponsor Information will be downloaded from Moose International.




## ***Exercise*** - Enter a Code 5 – Transfer In

**Enter the following Code 5 – Transfer In:**

1. In the MID # field, type **17970266**
2. Click the **Tab** Key
3. Click **Yes** in the Question Box.

**Verify and Edit the Following Information:**

- Name: William Tell
- Address: 658 Lakeview Street
  Jefferson, IL 60539
- Date of Birth: 06/21/1945
- E-Mail Address: wtell@yahoo.com
- Occupation: Retired

4. Click **Fees Paid**
5. Click **Save**.
6. Click **Close**.

# Enter a Comp Member (App Code L):

A Comp Member is someone that you enter into your Inactive Member List that is not a member of your FRU for the purpose of producing mailing labels.

## ***Exercise*** - Enter a Code L – Comp Member Application

**Enter the following Code L – Comp Member:**

Charlie Brown
1221 Hickory Creek
Sugarland, TX 77852

Click **Save**.

**NOTE:** The L-Comp Member will move to your Inactive Member List when saved without transmitting the information to Moose International.

## Entering a Reinstate Application (Application Code 3) — PAGE 29

ASK them to turn to Page 29 of their Workbooks.

EXPLAIN that a **Reinstate Application** is an application from a dropped member whose dues have been expired for more than twelve (12) months and less than twenty-four (24) months. A Reinstate Applicant must pay dues in an amount to bring his/her Dues Date current. No application fee is required, but **One** or **Two** year's dues must be paid as required to bring the Member current.

OVERVIEW how to enter a Reinstate Application.

## Learner Exercise — PAGE 29

ASK them to complete the Exercise – **Enter a Reinstate Application (Application Code 3 – Reinstate)**

EXPLAIN the use of the **Don't Know ID** button again.

Only "Dropped" members will be on the list.

Give them 10 minutes to complete the exercise.

DO NOT mention that lunch is next as Learners will rush through the exercise or perhaps not complete it.

LUNCH

STRESS that class will begin again in exactly ______ as there is much information to cover.

# Enter a Reinstate Application (Application Code 3): PAGE 29

An Applicant for **Reinstatement** must be a Former Member of your FRU that has been dropped for non-payment of dues at least 12 months prior to applying for reinstatement, but not more than 24 months prior to applying. The Former Member **MUST** Reinstate into his/her Former FRU.

You may enter the MID of the applicant for Reinstatement or Click the **Don't Know ID** button and select the Applicant from the drop down list.

## ***Exercise*** - Enter a Code 3 – Reinstate Application

1. Enter: **MID# 1777612**
2. Press: **Tab**
3. Check **Dues Paid**

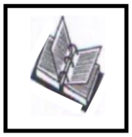
**NOTE:** An amount equal to one (1) or two (2) years Dues, whichever brings the Dues Date back to a current status, must accompany the Reinstate application.

**Verify and Edit the Following Information:**

- Name: Ralph Weller
- Address: 102 Oak Point<br>Jefferson, IL 60539
- Date of Birth: 01/15/1961
- Telephone: 630.259.2489
- E-Mail Address: ralphw@comcast.net
- Wife: Karen
- Children: (2) two
- Occupation: Machinist
- Employer: Wright's Machine Shop
- Business Telephone: 630.975.8521
- Paid: Dues

**NOTE:** Applicant's original enrollment date will appear.

**NOTE:** No Sponsor is required on a Reinstate Application.
*The Original Sponsor will be downloaded from Moose International.*



ASK them to turn to Page 30 in their Workbooks.

INTRODUCE the topic **Transmitting**.

REMIND them that the Fraternal Units have to initiate the transmit connection with Moose International. Moose International cannot initiate the connection.

POINT OUT that there are several transmit functions that need to be performed:

**Application Transmit**

**Daily Transmit**

**Monthly Reports**

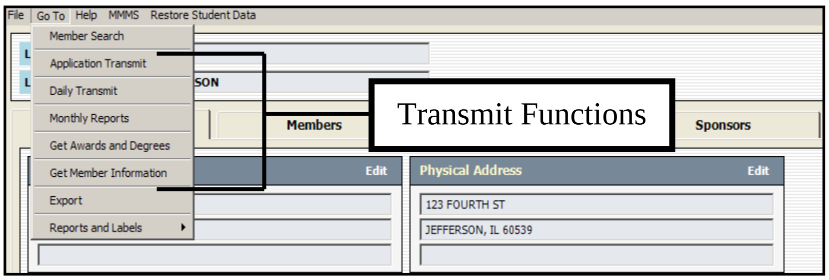
**Get Awards and Degrees, and**

**Get Member Information**

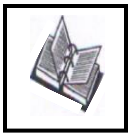
Refer to Chapter 6; Transmit Functions of the LCL.net Resource Manual

This Chapter will demonstrate how to use the Transmit Functions to transfer and receive Fraternal Unit, Member and Application Data with Moose International.

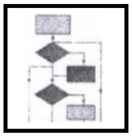
**NOTE:** The Moose Legion **GO To** menu includes an option named **Get Lodge Information** that retrieves the Moose Legion Member's Lodge number from Moose International when performed.




**NOTE:** You are required to perform an Application Transmit each day before the system will allow you to perform a Daily Transmit. It is strongly suggested, but not required, you perform the Application Transmit and Daily Transmit together each time you transmit.



ASK them to turn to Page 31 of their Workbooks.



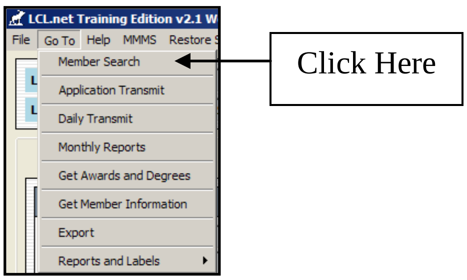
SHOW them how to access **Member Search** in the **Go To** menu.

OVERVIEW the Search options.

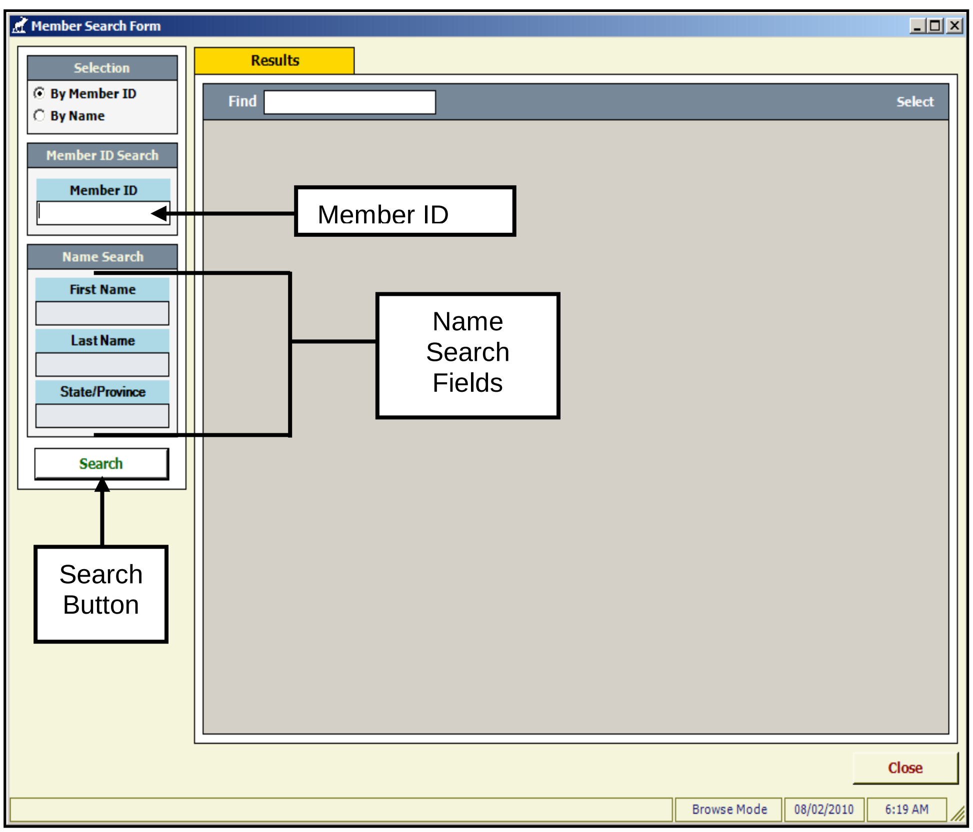
Additionally, **Member Search**, can be done through the Admin menu. An Admin menu Member Search offers slightly more functionality than LCL.net, all to be discussed later.

The **Member Search** function is helpful when a known Member of your FRU does not appear in your Membership Records or as an alternate means of locating a Member Record. This function allows you to search for the Member using the **Member ID** number or **Name.** Once found you can View, Print, Edit and Save the Member's Record Information. Information details will be given for you to relay to the Help Desk when trying to rectify a problem with the Member Record.

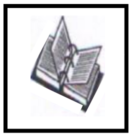
The **Member Search** function is located under the Go To menu.




The following screen will appear when you click **Member Search**.




**NOTE:** A Member Search can also be done through the Admin Menu, to be detailed later in the guide.



ASK them to turn to Page 32 of their Workbooks.

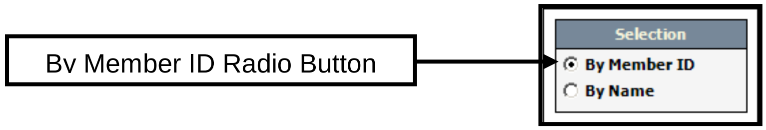
EXPLAIN the process for performing a **Member Search by Member ID**.

*USE Member ID: **1606006** for the example*

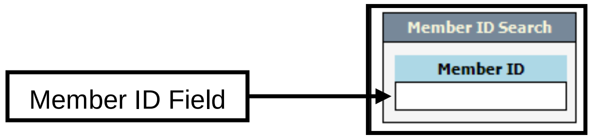
## To perform a Member Search by Member ID:



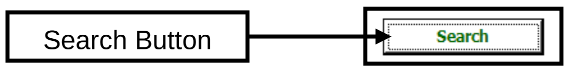
1. Click the Radio Button in front of **By Member ID** in the selection box.



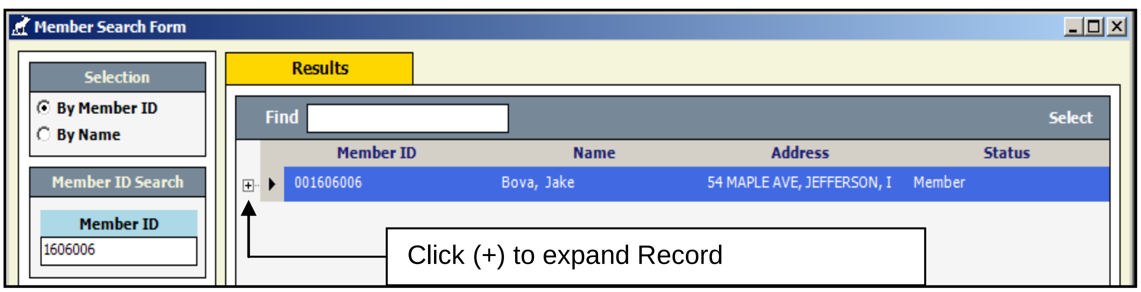

2. Enter the Member ID in the **Member ID Search** field.




3. Click **Search**.

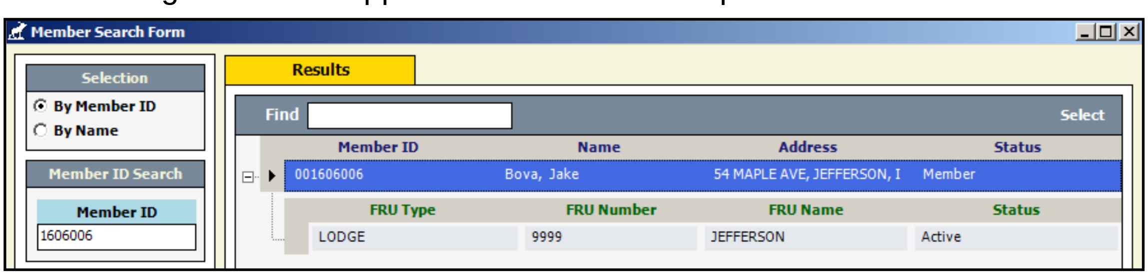



The following screen will appear with the Member listed.

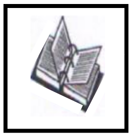



4. Click the (+) sign to the left of the Line Item to expand the Record.

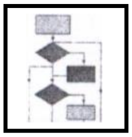
The following screen will appear with the Record expanded.



## Member Search by Member ID Continued — PAGE 33



ASK them to turn to Page 33 of their Workbooks.

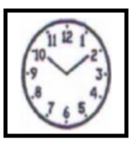


CONTINUE showing them how to do a member Search by Member ID.

## Learner Exercise — PAGE 33

ASK them to complete the Exercise at the bottom of Page 33.

*****Exercise – Member ID Search**

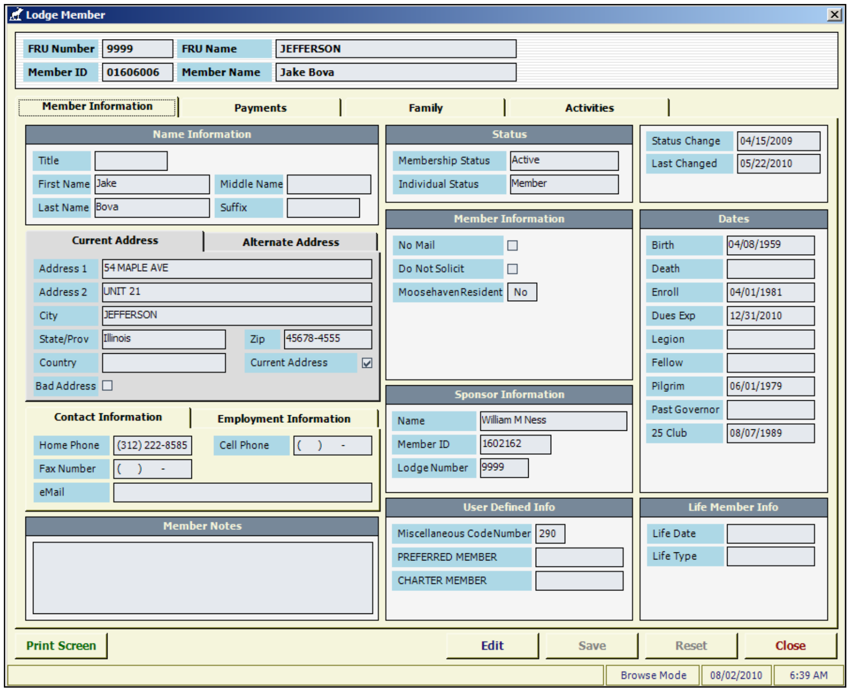



ALLOW 10 minutes to complete the Exercise.

EXPLAIN the Note at the bottom of Page 33.

5. Double-click the Line Item to open the Member Record.

   The Member Screen will open.




6. Print Screen, Edit, Save, Reset or Close the Member Record.

## ***Exercise*** - Member ID Search

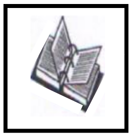
1. Click the **By Member ID** Radio Button.
2. Enter Member ID #**2137698**
3. Click **Search**
4. **Expand** the Record
5. Double-click the **Line Item** to open the Member Record
6. Click **Edit**
7. Add Phone # **630.859.2000**
8. Click **Save**
9. Click **Close**

---

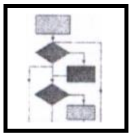
**NOTE:** A Member Search **By Name** is performed in the same manner by clicking the Radio Button in front of **By Name**, entering the **First Name**, **Last Name** or **Both Names** of the Member and clicking **Search**.

*You may narrow a Member Search By Name by selecting a State/Province.*

---



ASK them to turn to Page 34 of their Workbooks.



SHOW them how to access **Application Transmit** in the **Go To** Menu.

OVERVIEW the three Transmit Application window tabs.

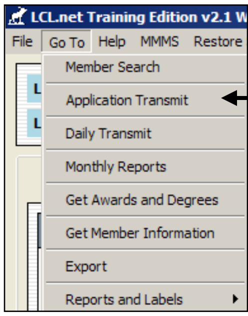
**Active Applications**

**Transmitted Applications**

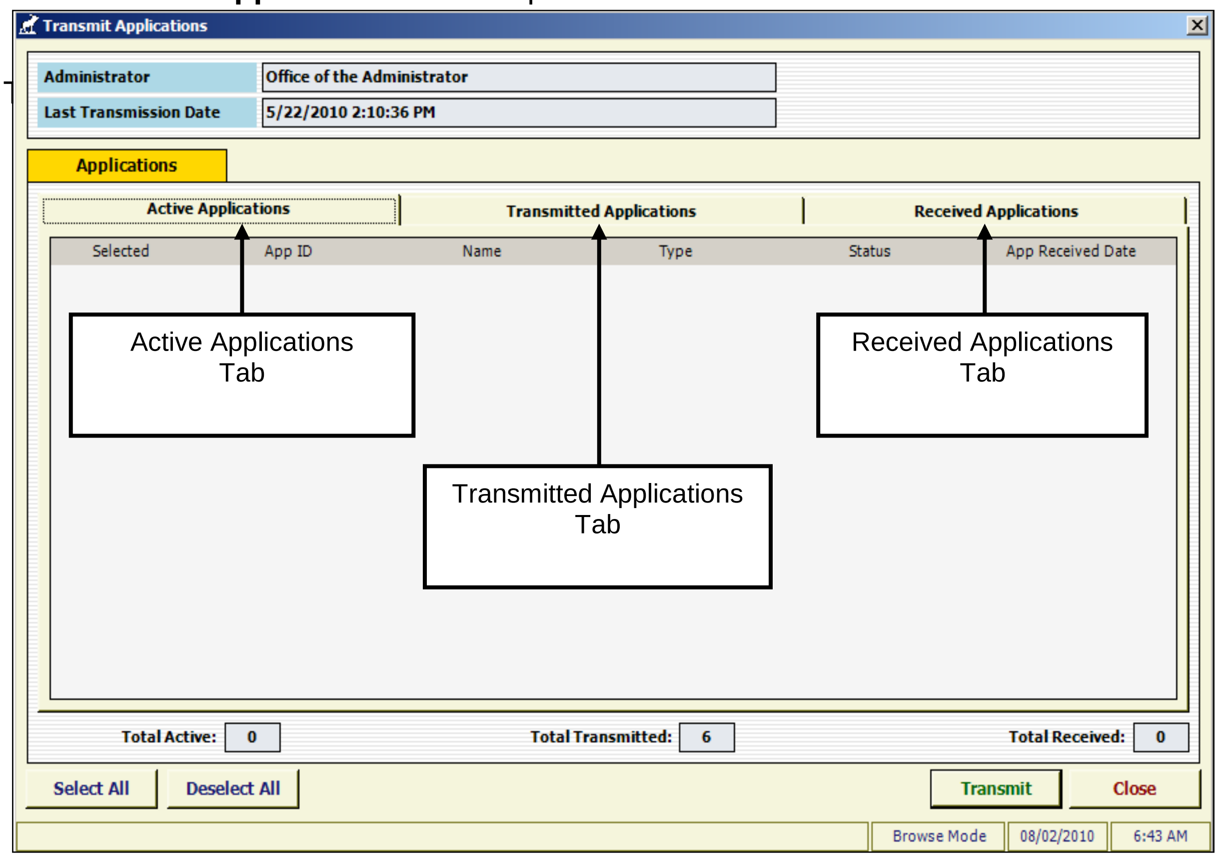
**Received Applications**

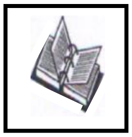
Refer to Chapter 6; Transmit Functions in LCL.net Resource Manual

The **Application Transmit** function is located under the GO To menu.




The **Transmit Application** window opens.





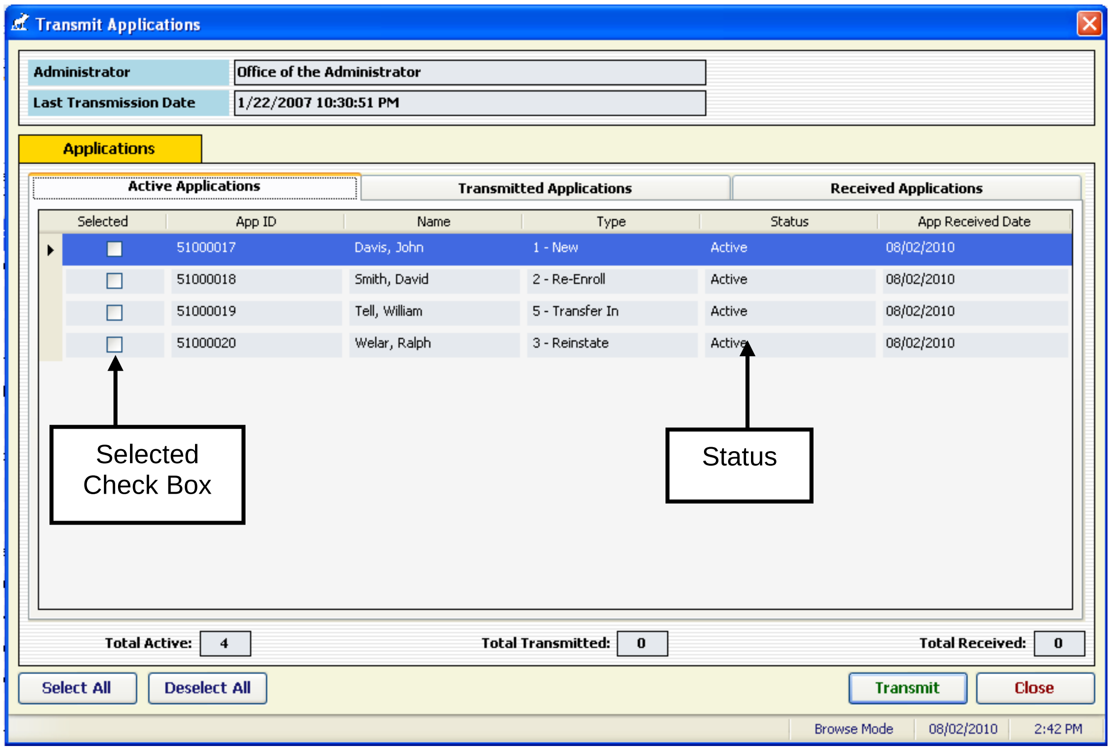
ASK them to turn to Page 35 of their Workbooks.

VERIFY the information displayed before you connect to Transmit.

EMPHASIZE that you can check just the ones you want or you can select all.

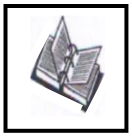
Refer to Chapter 6; Transmit Functions in the LCL.net Resource Manual

The **Active Applications** Tab displays a list of Applications with a Status of **Active** and allows you to individually select the Applications or select **All** Applications to be sent to Moose International.

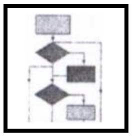



Select the Applications to be transmitted by clicking the **Selected** check box(es) to the left of the App ID numbers of the Applications you wish to transmit. If you wish to transmit all of the Active Applications in the Active Applications List, click the **Select All** button.

## Selecting Applications PAGE 36



ASK them to turn to Page 36 in their Workbooks.



SHOW them how to select All Applications or select just certain Applications for transmission.

ASK them to follow along.

## Transmitted Applications Tab – PAGE 36

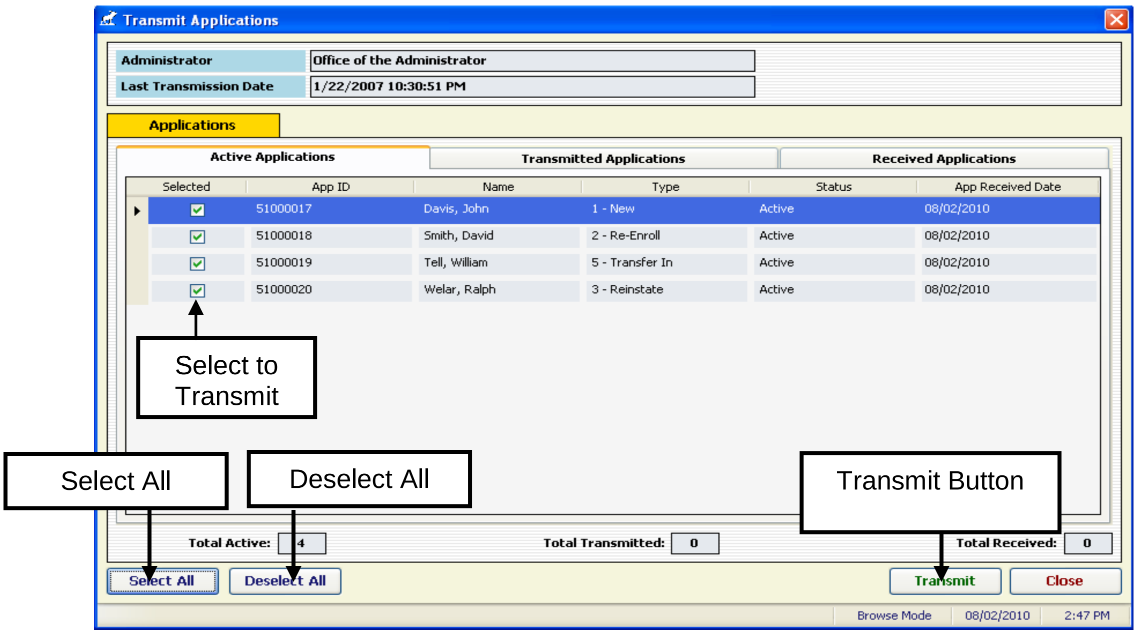
The **Transmitted Applications** tab displays applications that have already been sent to Moose International.

You MUST connect and Transmit Applications again after at least 24 hours in order to see the changes!!!! After the Transmit, go back to the Member List and Applications List to see the changes.

Refer to Chapter 6; Transmit Functions of the LCL.net Resource Manual

Applications can be individually selected for transmission to Moose International by selecting individual check boxes beside each name

If you wish to send all active Applications to Moose International, click the **Select All** button to add check marks to all Applications.




Clicking the **Deselect All** button will remove the checkmarks from all Applications.

When all Application selections have been made and you are ready to transmit them to Moose International, click the **Transmit** button.

**NOTE:** Your computer must be connected to the Internet for a connection to be made between your LCL.net V2.2 Software and the Moose International Server.

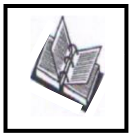
## Transmitted Applications Tab

Refer to Chapter 6; Transmit Functions of the LCL.net Resource Manual

The **Transmitted Applications Tab** displays a list of Applications that have been transmitted to Moose International. They will have a Status of **Transmitted**.

This list only contains those Applications that have been transmitted, but have not been processed by Moose International. Once they have been processed and you have done another Application Transmit, the Applications will display under the Received Tab with an updated Status of **Accepted** or **Rejected**.

**NOTE:** Any transmission to Moose International must be initiated by clicking the Transmit button. Moose International cannot initiate a data transmission with your FRU.

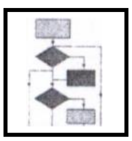


ASK them to turn to Page 37 of their Workbooks.

The **Received Applications** tab displays applications that have already been returned by Moose International and identifies their current membership status.

STRESS that applications with **Accepted** status are ready for enrollment in the Fraternal Unit. Applications with a **Rejected** status have a problem that must be addressed or corrected.

The Messages column will indicate the problem that prevented the application from being accepted by Moose International.

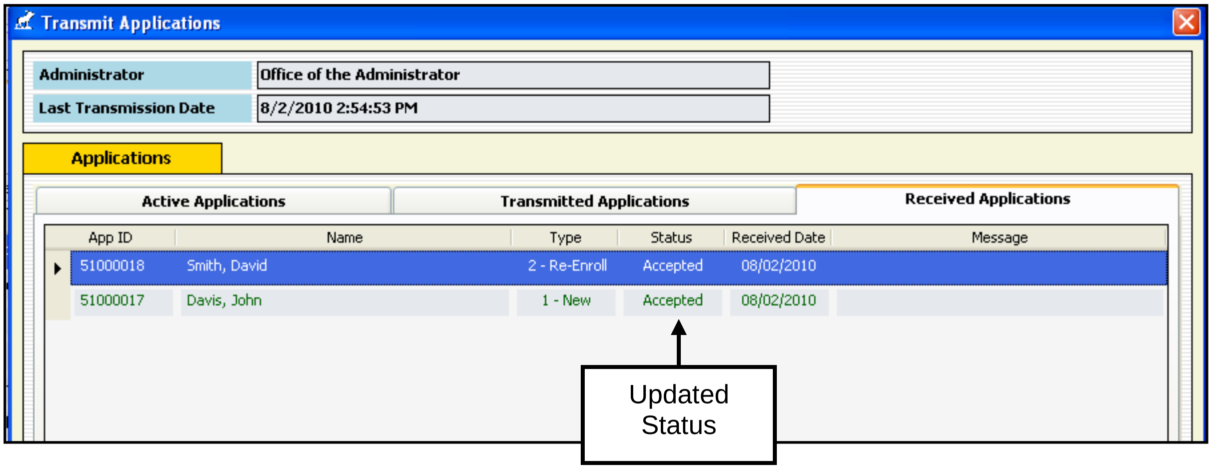


SHOW them how to change an Application from Rejected to Active.

# Received Applications Tab  PAGE 37

Refer to Chapter 6; Transmit Functions of the LCL.net Resource Manual

The Received Applications Tab will display a list of all Applications processed by Moose International and will list the updated Status for that Application.



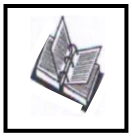

The Received Applications tab displays a list of Applications processed by Moose International that have been returned to your FRU for processing. They will have either an **Accepted** or **Rejected** Status.

Applications with an **Accepted** Status are ready for enrollment in your FRU and will be discussed in a subsequent chapter. Applications with a **Rejected** Status have a problem that must be addressed, corrected and re-transmitted to Moose International. The Messages Column will indicate what the problem is that kept the Application from being accepted. The problem will also be displayed in the **Notes** box on the Application screen.

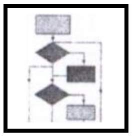
Any Rejected Application that has been corrected must be re-transmitted to Moose International for re-processing. Once the problem with the Application has been corrected, the Application Status must be changed back to Active before LCL.net V2.2 will allow you to re-transmit it.

## To Change an Application Status from Rejected to Active:

1. Open the **Application** Record.
2. Click the **Edit** button.
3. Click the **Status** drop down.
4. Select **Active**.
5. Edit the **Application Information** that has caused the problem, if allowed.
6. Click **Save** to enter the changed information and Status change into LCL.net V2.2.



ASK them to turn to Page 38 of their Workbooks.



SHOW the Learners how to access the **Daily Transmit** function through the **Go To** menu.

ASK them to follow along with you.

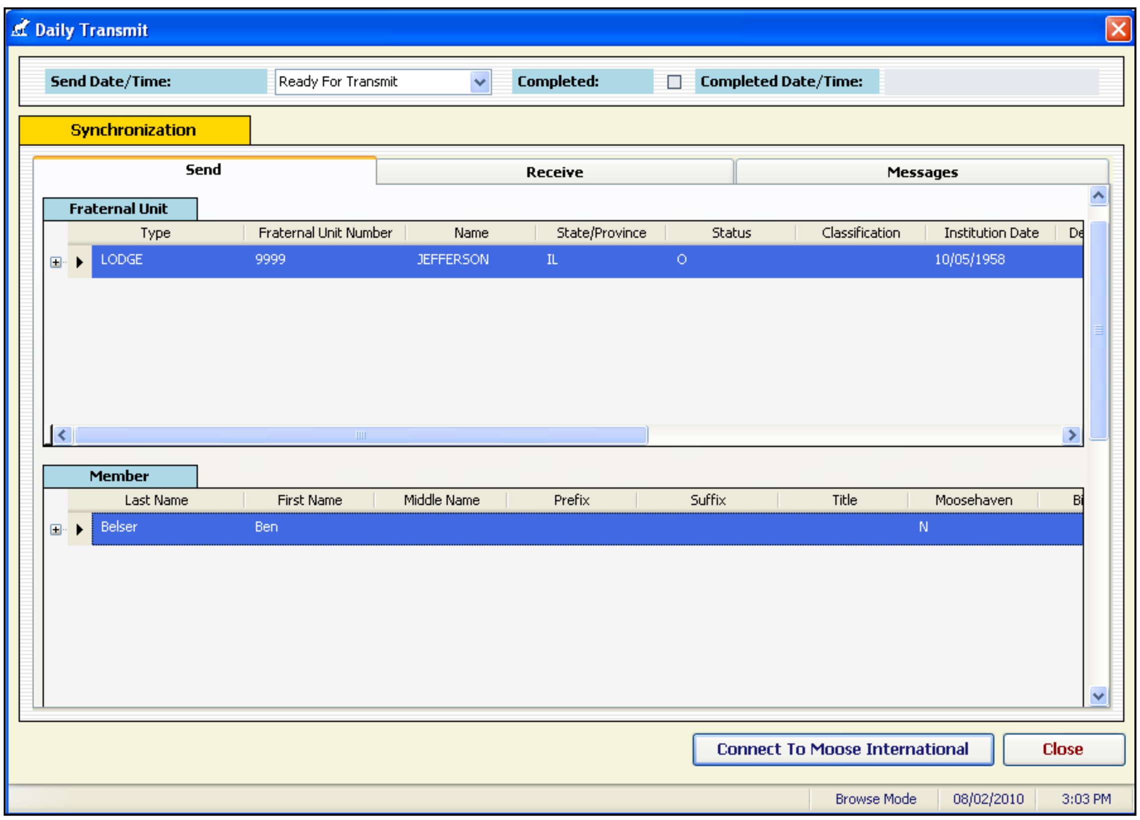
EXPLAIN that the Daily Transmit function screen will appear after each Application Transmit; but, is only required after the first Application Transmit.

STRESS that it is strongly recommended that the Daily Transmit be done after each Application Transmit.

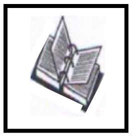
Refer to Chapter 6; Transmit Functions of the LCL.net Resource Manual.

The **Daily Transmit** window will open after each Application Transmit or by selecting **Daily Transmit** from the **Go To** menu, allowing you to view the FRU information changes or Member information changes to be transmitted to Moose International. If no FRU information or Member information changes have been made, the information areas will be blank. The Daily Transmit should still be performed because Moose International may have information to download to your FRU.

The **Connect to Moose International** button is used to initiate a data transfer session that will upload your FRU and Member information and will download any changes received at Moose International to your system. Downloaded information will be displayed under the **Receive** tab.



## Fraternal Unit and Member Data Transfer — PAGE 39

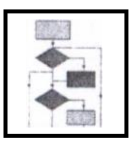


ASK them to turn to Page 39 of their Workbooks.

EXPLAIN what the **Daily Transmit** does in general:

- Transmits FRU and Member Information changes to Moose International.
- Downloads any information from Moose International pertaining to the FRU or Member Information.
- After the Sweeper runs at Moose International overnight, any information processed and synchronized will be returned to the FRU during the future Daily Transmit.  This will take at least 24 hours.

Refer the Learners to the section of Chapter 5 as a reference.



OVERVIEW the three tabs in Daily Transmit – **Send, Receive** and **Messages** and the information that will be displayed within.

SHOW the **Transmit History** dropdown *(Receive Date/Time Dropdown box)*

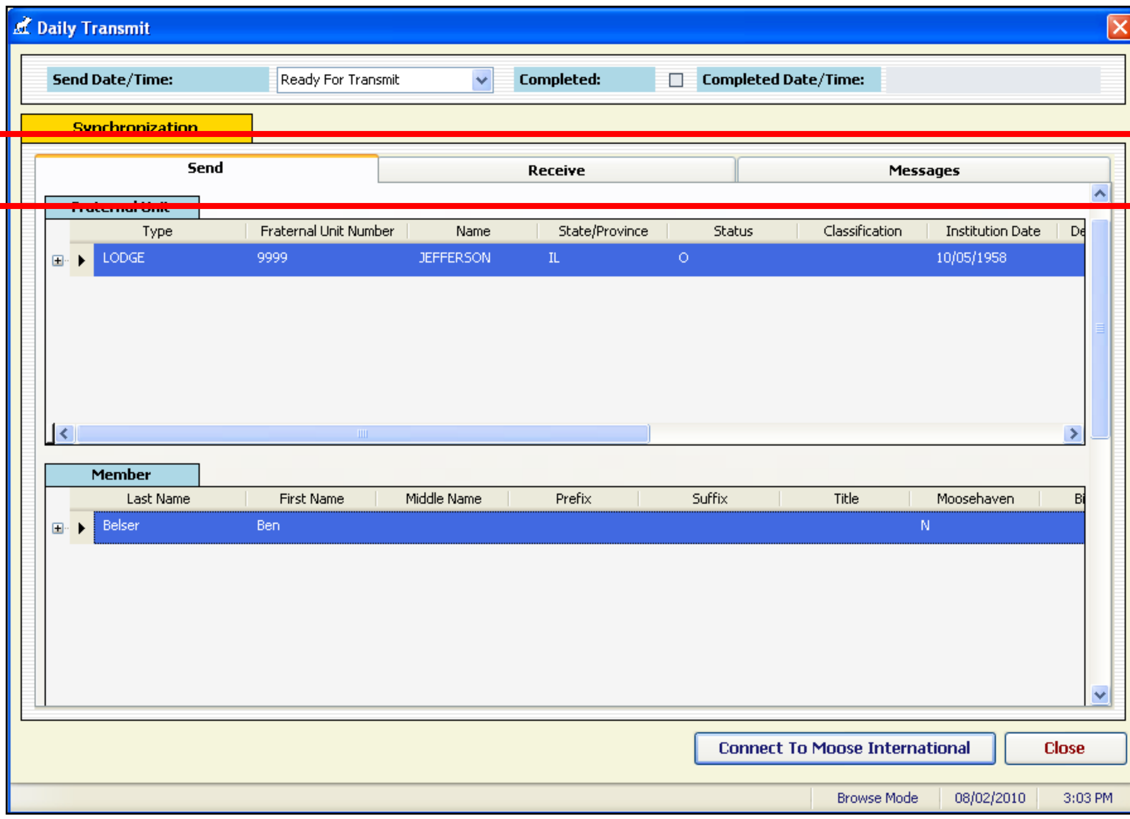
**SHOW them how to do a Daily Transmit.**

## Send Tab — PAGE 39

The **Send** tab displays three information areas – **Fraternal Unit, Member**, and **Fraternal Unit Rates**.

Fraternal Unit and Member data transfer with Moose International is displayed under three (3) Transmissions tabs.

- **Send**
- **Receive**
- **Messages**

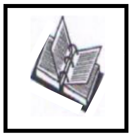



# Send Tab

The **Send** tab displays three (3) information areas, **Fraternal Unit**, **Member** and **Fraternal Unit Rates**. The **Fraternal Unit** information area will list all Fraternal Unit changes to be uploaded to Moose International. The **Member** information area will list all Member changes to be uploaded to Moose International. The **Fraternal Unit Rates** information area would contain any information pertaining to a Dues increase or decrease to be recorded with Moose International.

**NOTE:** To view the Fraternal Unit Rates area, you will need to scroll down in the window.

## Receive Tab — PAGE 40



ASK them to turn to Page 04 of their Workbooks.

Once the transmit to Moose International is completed, the system inserts checkmarks and indicates dates of transmission.  Also at this time the **Receive** tab will be brought to the front of the display.  After the next Transmit, information returned from Moose International is displayed in the Receive Tab.

## Messages Tab — PAGE 40

CHECK the **Messages** tab regularly for additional communications from Moose International.

## Connecting to Moose International — PAGE 40

REVIEW the changes you see in the Fraternal Unit, Members, and Fraternal Unit Rates areas before you connect to be sure they are accurate.

You will see a status bar displaying the progress.

After it is complete the Receive tab will be displayed in front with any returned information from Moose International.

## Receive Tab

The **Receive** tab, just like the Send tab, displays three (3) information areas: **Fraternal Unit, Member** and **Fraternal Unit Rates**. This tab will contain any information sent to your FRU from Moose International regarding these three (3) areas.

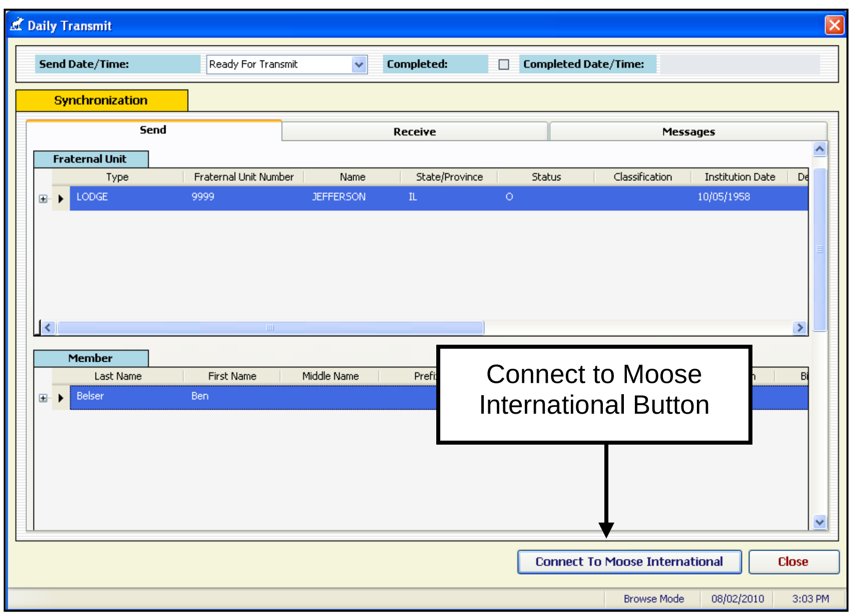
## Messages Tab

The **Messages** tab will display messages sent to your FRU from Moose International. These could include items such as notification of an update in your Membership demographic information, an Address change or possibly problems with the data transmission or conflicting information in a record.

## Connecting to Moose International

When all Fraternal Unit and Member data changes have been reviewed and you are ready to transmit the information to Moose International, click the **Connect to Moose International** button.

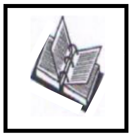
**NOTE:** Internet Service must be connected before clicking "Connect to Moose International".




**NOTE:** A connection will be initiated between LCL.net V2.2 and the Moose International Server. The Status Bar will display the steps in the transmission process and when the transmission is complete.

After the transmission is completed the Daily Transmit window will switch to the Receive tab to display any information downloaded from Moose International.

**Always check the Messages tab for any messages that may have been transferred with these records.**

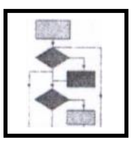


ASK them to turn to Page 41 of their Workbooks.

EXPLAIN what the **Get Awards and Degrees** transmit does in general.

LCL.net retrieves current Degrees, Past Governor, Past Regent and 25 Club Awards for all members that qualify and populates the Member screen with the dates that are on file at Moose International. After the initial retrieval of records, this transmit only needs to be done periodically.

Sometimes it takes several transmits to get all of the information back as there is another system involved in the tracking of Awards and Degrees.



SHOW them how to do the Get Awards and Degrees transmit.

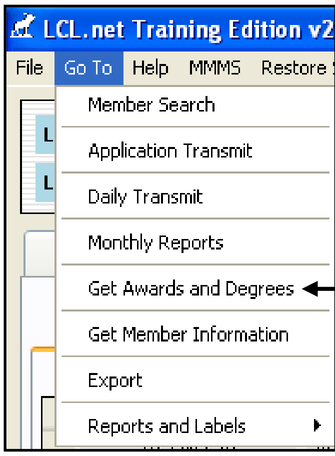
Refer to Chapter 6; Transmit Functions of the LCL.net Resource Manual.

The **Get Awards and Degrees** menu option is located under the **Go To** menu.

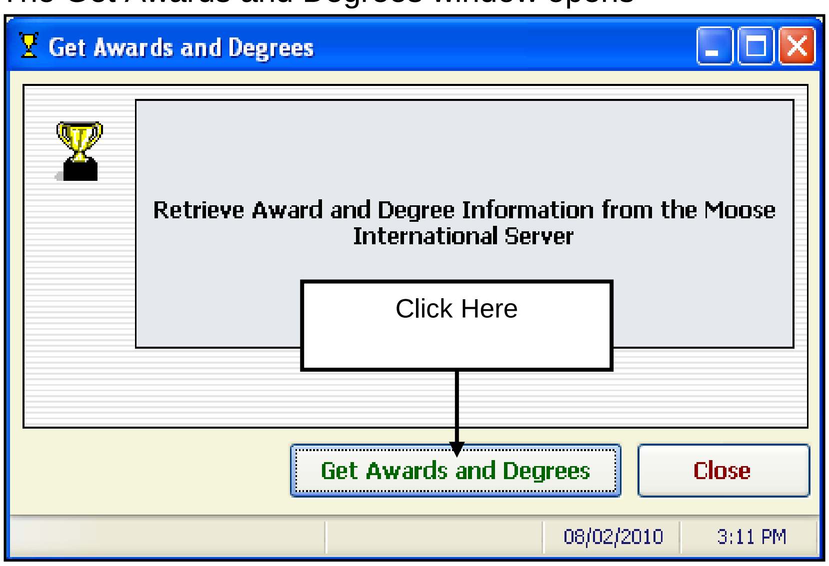
When **Get Awards and Degrees** is selected, LCL.net V2.2 retrieves current dates for Life Membership, Higher Degrees, 25 Club, etc. for each FRU Member and populates the Member Screen of each Member with the dates that are on file at Moose International.

## To Run "Get Awards and Degrees":

1. Click the **Go To** menu item on the menu bar.
2. Click **Get Awards and Degrees** in the Go To drop down menu.

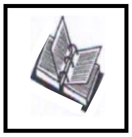



The Get Awards and Degrees window opens




3. Click the **Get Awards and Degrees** button in the dialog box.
4. Click the **OK** button.
5. Click the **Close** button.

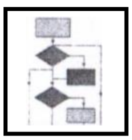
## Inactivating and Deleting and Application PAGE 42



ASK them to turn to page 42 in their Workbooks.

There are times when you must change an application status to **Inactive** or **Deleted** in the system.

An application must be inactivated before it can be deleted.



SHOW them how to inactivate an application using **DAVID SMITH** as the applicant.

SHOW them how to **Delete** the Application

ASK them to follow along with you.

Refer to Chapter 5, The Application Screen of the LCL.net Resource Manual.

There are times when you must change an Application Status to **Inactive** or **Delete** in the system.

**Inactivating** removes an Application from the Active Application List and puts the record in the Inactive Status. A reason for inactivating an Application could be that the Applicant is unable to be enrolled for several months (maybe being deployed in the military), but wants to enroll when he/she returns.

Before an Application can be **Deleted** the Status must first be changed to Inactive. A reason to delete an Application might be that the Applicant has passed away or has moved to another state and no longer wants to join.

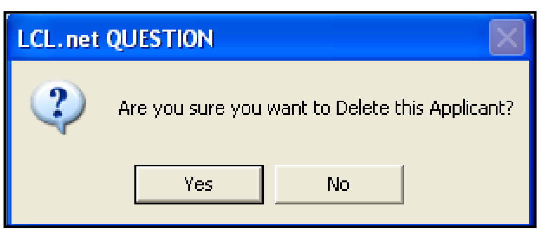
**To Inactivate and Delete an Application:**

1. Open the Application Record.
2. Click the **Edit** button to allow editing of the Application information.
3. Click the Status drop down arrow and select **Inactive**.
4. Click the **Save** button to enter the status change.

**NOTE:** At this point you may either leave the Application in the Inactive Status to be activated and enrolled later or delete the Record completely.

5. To retain the Application in the Inactive Status, click the **Close** button to close the record.
6. To Delete the Application, click the **Edit** button again.
7. Click the **Status** drop down and select **Deleted**.
8. Click **Save**.

The following screen will appear:




9. Click the **Yes** button to complete the process of deleting the Application.

ASK them to turn to Page 43 in their Workbooks.

WHEN an applicant is ready to be enrolled in the Fraternal Unit, it is necessary to move them out of the Applications List and activate him as a Member of the Fraternal Unit.

The Application must have been transmitted and received with an **Accepted Status** and **Member ID** number.

ALL dues and fees must be marked as paid as required.

*FEES are **not required** for Re-Instate Applications.*

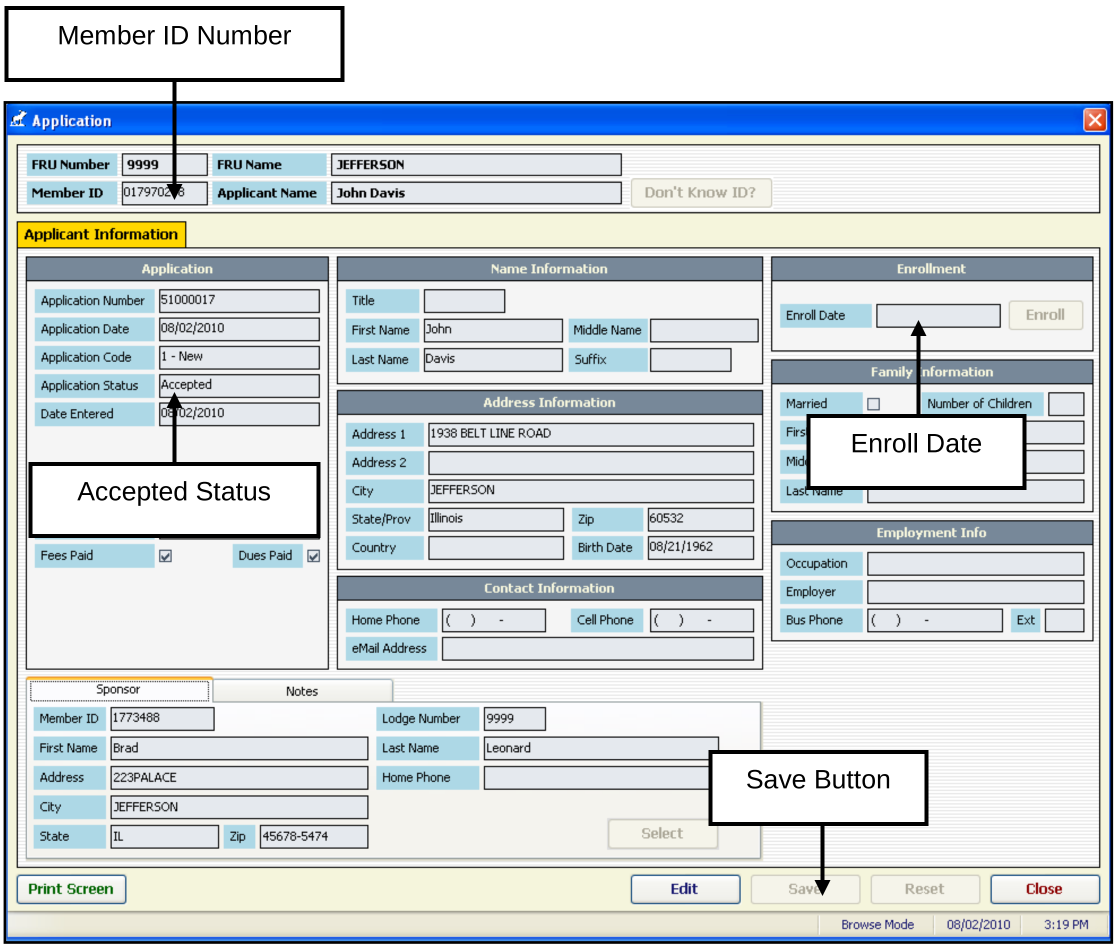
An **Enroll Date** must also be entered in the Enroll Date field in the upper right hand corner of the screen.

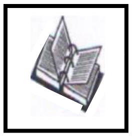
SHOW them how to enroll an applicant using **JOHN DAVIS**.

ASK them to follow along with you.

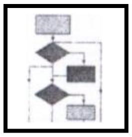
Refer to Chapter 5, The Application Screen of the LCL.net Resource Manual.

When an Application is in the **Accepted** status and ready to be enrolled into the FRU, it is necessary to move the Applicant out of the Applications list into the Active Members List as a Member of the FRU. The Application must have been transmitted to Moose International, processed by the Moose International Server (Takes up to 24 Hours) and a second Application Transmit must have been performed to receive the Application back into the FRUs Applications List as **Accepted** and containing a **Member ID** number. All **Dues** and **Fees** must have been paid. An Enrollment Date must also be entered in the **Enroll Date** field in the upper right corner of the screen.





ASK them to turn to Page 44 of their Workbooks.



CONTINUE demonstrating how to enroll an applicant.

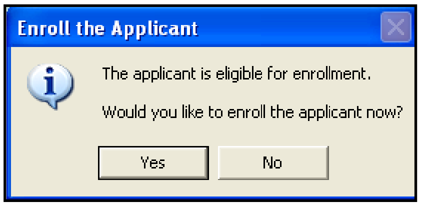
10 minute break.

STRESS that class will begin again in exactly 10 minutes as there is much information to cover.

## To Enroll An Applicant: PAGE 44

1. Select the Application to be enrolled from the **Accepted Applications List**.
2. Click the **Edit** button to open the Application Record.
3. Check to ensure the **Report Date, Report Number** and **Batch Number** appear in the Application Information box.
4. Enter the Applicant's Enrollment Date in the **Enroll Date** field.
5. Click the **Save** button to save the entry into LCL.net V2.2.

   The following Enroll the Applicant box will appear


6. Click the **Yes** button to enroll the Applicant
   – or –
   Click the **No** button to enroll the Applicant later.

---

**NOTE:** When the above process is complete, the Application record moves to the list under the **Other** tab. During each Application Transmit, applications listed under the **Other** tab are deleted from LCL.net V2.2. Inactive Applications will remain in the List under the Other tab until they are either changed to Active or Deleted.

---

## To see the Newly Enrolled Membership Record in the Member List:

1. Click the **Member** Tab.
2. Scroll down in the List to the name of the Newly Enrolled Member.
   *The Dues Expiration Date will show as **Newly Enrolled**.*

The Dues Expiration Date will be downloaded from Moose International after the Enrollment Date has been transmitted to Moose International, the Sweepers have processed the information and the Daily transmissions have been performed again by the FRU.

*This may take a couple of days and a couple of transmits to complete.*

ASK them to turn to Page 45 in their Workbooks.

EXPLAIN what **Get Member Information** does in general.

The Get Member Information function allows you to download current member information from Moose International one member at a time.

All changes members make will come to you via MI in your daily transmit. However, if you are transmitting infrequently, information can get “log jammed” causing gaps in information received. That is when it becomes necessary to employ this feature.

*Remember*: If you are transmitting daily or at least 3X/week it will greatly reduce your need to use this feature.

When necessary, it is a very useful tool. For example, if you receive mail returned by the Postal Service as undeliverable, it will be helpful to perform the Get Member Information function to find a new address for the member if a change was made through the website.

*If no change was made, the downloaded information will not change the FRU Information Records.*

SHOW them how to perform the Get Member Information function.

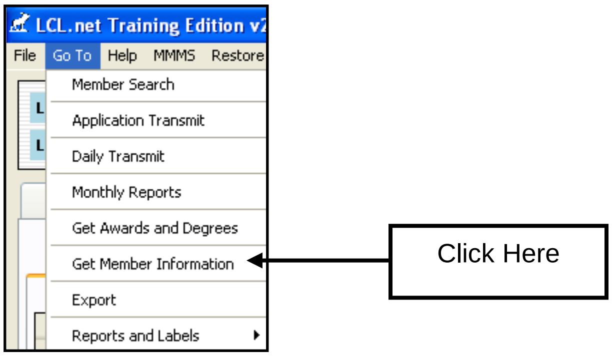
USE **Member ID** number: **2179561** (Ben Belser)

The Get Member Information function allows you to download current Member information from the Moose International Servers, one Member at a time.

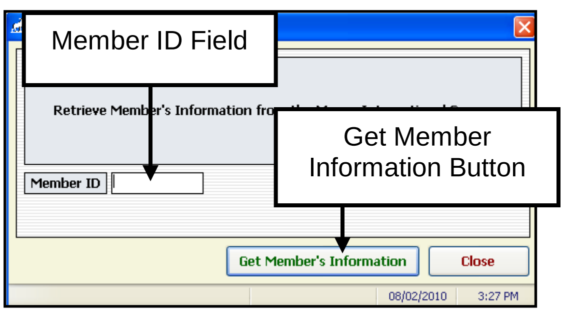
*This allows the FRU to keep up to date on changes made by the Member via the Website such as Address changes or by Moose International such as Dues Dates, Etc.*

## To Get Member Information:

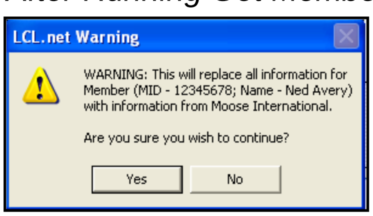
1. Click **Go To** on the menu bar.
2. Click **Get Member Information** in the Go To dropdown menu.




The **Get Member Information** screen opens.




3. Enter the Member ID number in the **Member ID** field.
4. Click the **Get Member Information** button.
*After Running Get Member Information the following Warning Box Appears:*




5. Click **Yes** in the LCL.net Warning Box to replace the information in the FRU Data Base with the information downloaded from the Moose International Server.
6. Click **NO** to exit **Get Member information** without saving the downloaded information.

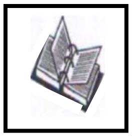
The **EXPORT** function under the Go To menu option on the Menu Bar is documented with a Handout.

*The Export function may be taught in a future experienced user course that has not been developed at this time.*

HANDOUT the Export Function Document.

The **Export** function in LCL.net V2.2 is currently addressed in the LCL.net Resource Manual beginning on Page 28 and is also available as a Handout.

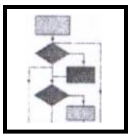
Should an Advanced User Course be offered in the future, Export will be taught as part of that class.



ASK them to turn to Page 47 in their Workbooks.

INTRODUCE the topic **Reports and Labels**.

EMPHASIZE that you can't hurt anything in here! The best way to learn is to practice and experiment.



SHOW them how to access the different kinds of Reports and Labels under the Go to menu.

OVERVIEW the buttons at the top of the screen. These are found in every report area.

EXPLAIN the difference between reports and labels.

IDENTIFY the different kinds of reporting areas currently available. (See list in participants guide)

IT is recommended that you use the suggested Avery Labels or a brand that is equivalent to the Avery Labels. Many other labels may use the same layout, but their size will vary and the labels won't print correctly.

Stress to Participants that they should NOT use the Deposit report found here. For "real time" data, they need to access this information through the Admin Menu. Using the Admin Menu will ensure more accurate deposits in QuickBooks.

Refer to Chapter 7, Reports and Labels of the LCL.net Resource Manual

The **Reports and Labels** function in LCL.net V2.2 provides several options for creating reports to get specific information about a FRU. Reports and Labels allow you to create Reports in the following areas and, in some, create Mailing Labels and Badges.

- Address Change
- Activities
- Applicant
- Arrears
- ~~Deposit~~ **
- Member Payments
- Officer
- Member
- Special Dates
- Miscellaneous Code
- Deceased
- Paid as of Date

The Reports and Labels function in LCL.net is accessed by clicking the **Go To** menu option on the menu bar. The **Reports and Labels** option contains a sub-menu that lists each reporting area available.

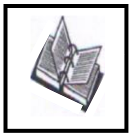
Most report selections have a **Reports/Labels Selection** box that allows you to choose the type of reporting format you want to create in the viewing area and provides you with two options. Select the Radio button beside the desired report type to select either **Reports** or **Labels**.

- **Reports** – Creates a detailed report based on the options selected
- **Labels** – Creates Labels and badges based on the options selected.

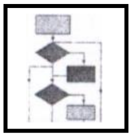
**IMPORTANT:**

**Although this report function is still operational, deposit histories should only be retrieved through the Admin Menu.

It is recommended that you buy the suggested Avery labels or a brand that is equivalent to the Avery labels. Many other labels use the same layout, but the size will vary and the labels won’t print properly.



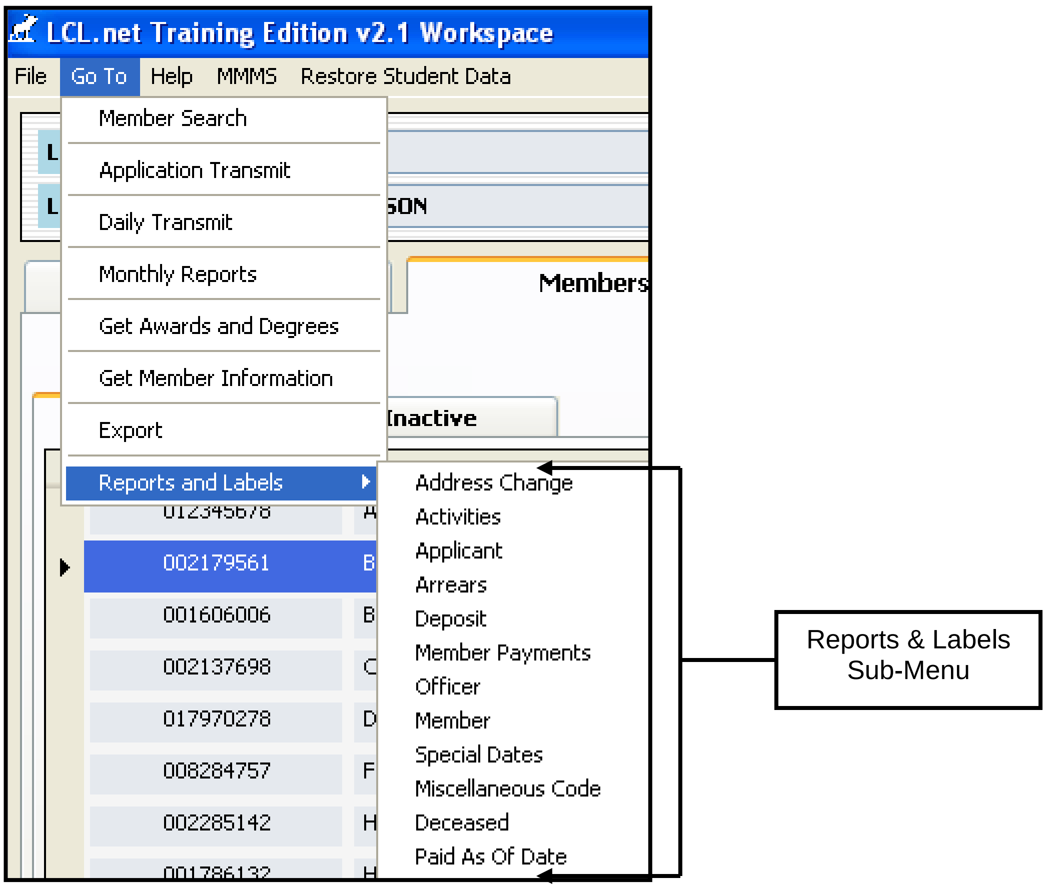
ASK them to turn to Page 48 in their Workbooks.



SHOW them how to access **Address Change Reports and Labels** in the Sub-menu of Reports and Labels on the Go To Menu.

The **Address Change** Reports and Labels function will generate a Report or Labels reflecting any address changes made at the FRU, at Moose International or on the Moose International Website by the Member during a period of time designated by the FRU.

The Address Change Reports/Labels area is located in the Reports and Labels sub-menu that appears when you select Reports and Labels under the Go To option.

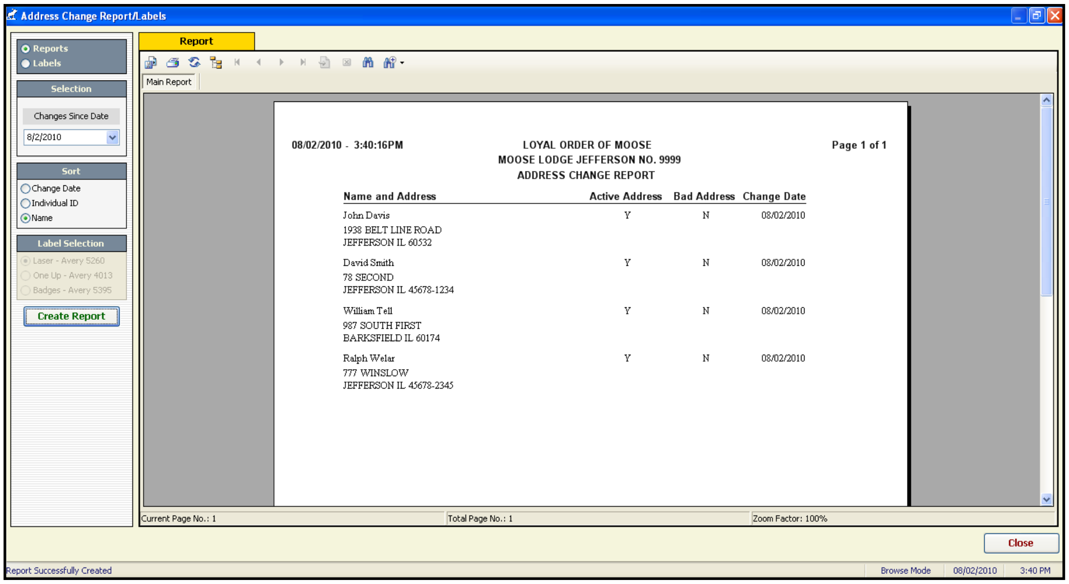


ASK them to turn to Page 49 in their Workbooks.

EXPLAIN the **Reports and Labels** options in the selection boxes in the Screen Shot on Page 49 of the Workbook.

1. Click or Highlight **Reports and Labels** in the Go To Menu dropdown.
2. Click **Address Change** in the sub-menu to open the Address Change Reports/Labels window.

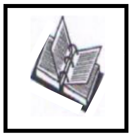
   The Address Change Reports/Labels window will open.



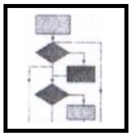

Once open, the Address Change Reports/Labels window allows you to select reporting options to narrow the Report by selecting a **Changes Since Date** to use as a starting date for the Reporting Period.

When the options are all chosen, you must click the **Create Report** button to begin the creation of the Report.

**NOTE:** Some reports are going to take several minutes to create. If the Progress Bar is showing in the Report Area of the window, it is gathering information. Be patient!



ASK them to turn to Page 50 in their Workbooks.

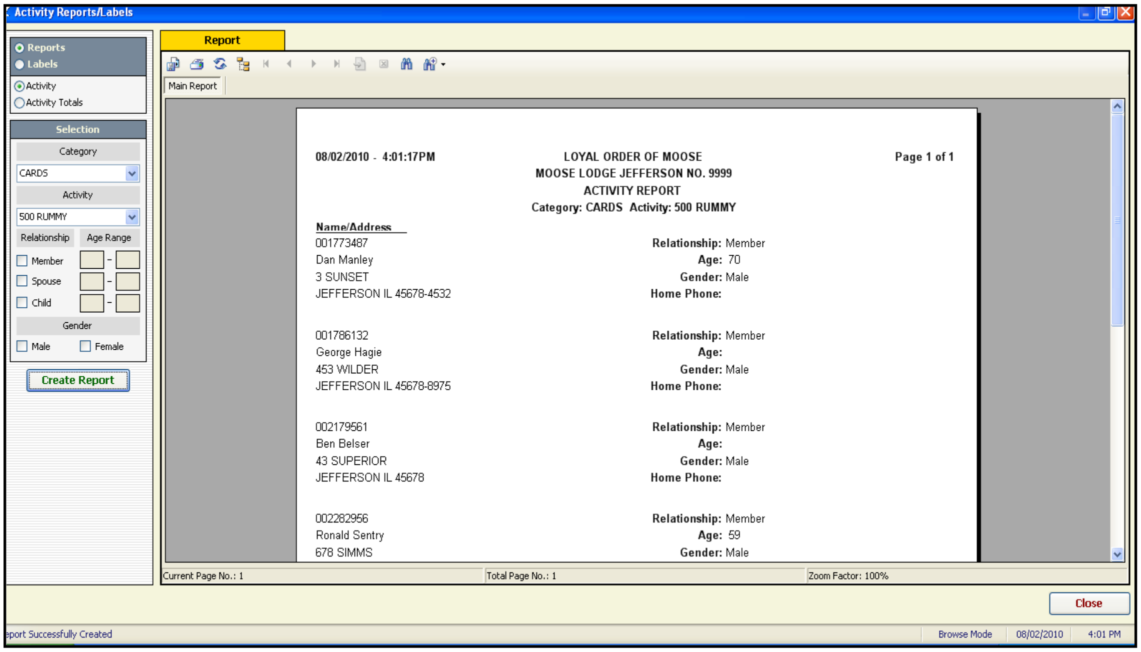


SHOW them the options available for **Reports and Labels** selection in this area.

**CREATE** a report that shows all members and their families that like to go **FISHING**.

The **Activities** that are displayed are based upon the **Category** selected.

The **Activities** Reports and Labels function, will generate the specified type of Reports or Labels based on the selections made for the Report.

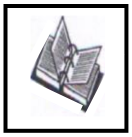



## <u>To create an Activities Report:</u>

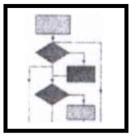
1. Select the **Report** radio button to specify that you want to view the selected data in a Report format.
2. Select the type of Activity Report you wish to create. Selecting **Activity Totals** will clear all selection options and creates a Report on all Member and Family activities.
3. Click the **Category** dropdown arrow and select the Category of the Activity you wish to create a Report for.
4. Click the **Activity** dropdown arrow and select the Activity you wish to create the Report for.

   *The Activity selections will change based on the Category selected.*

5. Select the Family Members to include in the Report.
6. Enter a specific Age Range for the selected Family Member(s), if desired.
7. Select a specific Gender for the Report, if desired.
8. Click the **Create Report** button.



ASK them to turn to Page 51 in their Workbooks.

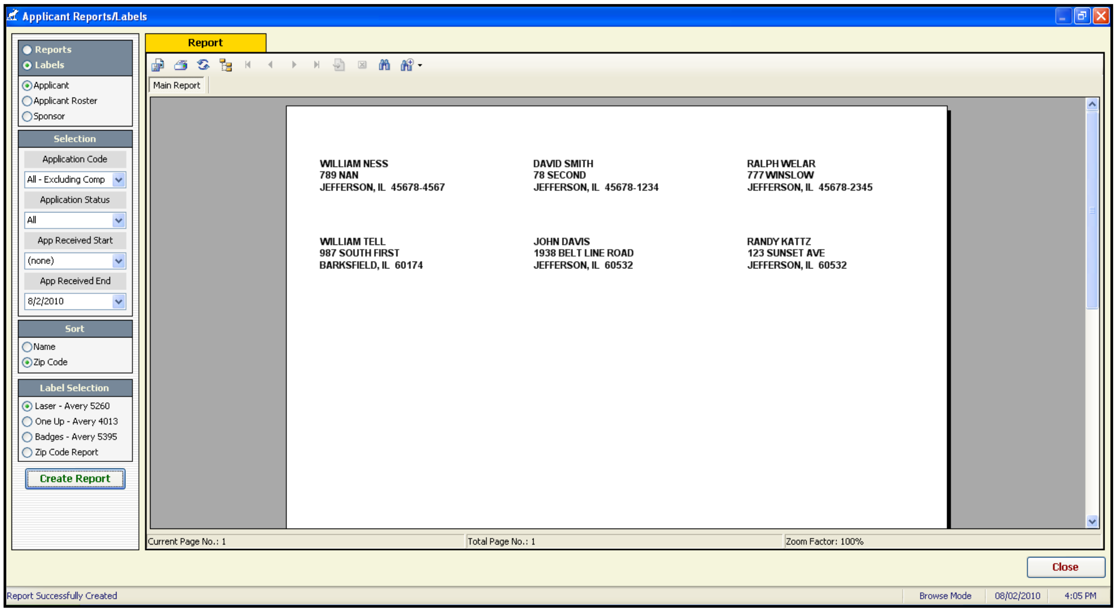


SHOW them the options available for **Reports and Labels** selection in this area.

**CREATE** a report that shows all **Active Applications**.

This report is especially helpful for application reporting to the Board of Officers or the Membership Committee.

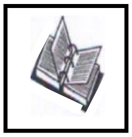
The **Applicant** Reports/Labels function allows you to produce detailed Reports to be used for application reporting to the Board of Officers or Membership Committee. It also gives you the option to produce Mailing Labels for inviting Applicants and Sponsors to Orientations or Enrollments.



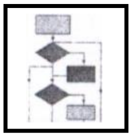

## <u>To Create Application Reports:</u>

1. Select the **Reports** radio button to specify that you would like the data in Report Form.
2. Select **Applicant** to create a List of Applicants and their Sponsors.
3. Click the **Application Code** dropdown arrow to select Applicants with a specific Application Code to be included in the Report. Selecting **All** will produce a report including all Application Codes.
4. Click the **Application Status** dropdown arrow to select applicants with a specific status to be included in the Report. Selecting **All** will return a report of all applicants regardless of their status.
5. Enter an **App Received Start** date to specify the start of a date range if desired.
6. Enter an **App Received End** date to specify the end of the desired date range.
7. Select **Application Number, Name, Application Code, Application Status, Sponsor ID** or **App Received Date** to sort the Report as desired.
8. Click the **Create** button.

## Arrears Reports and Labels PAGE 52



ASK them to turn to Page 52 in their Workbooks.



SHOW them the options available for **Reports and Labels** selection in this area.

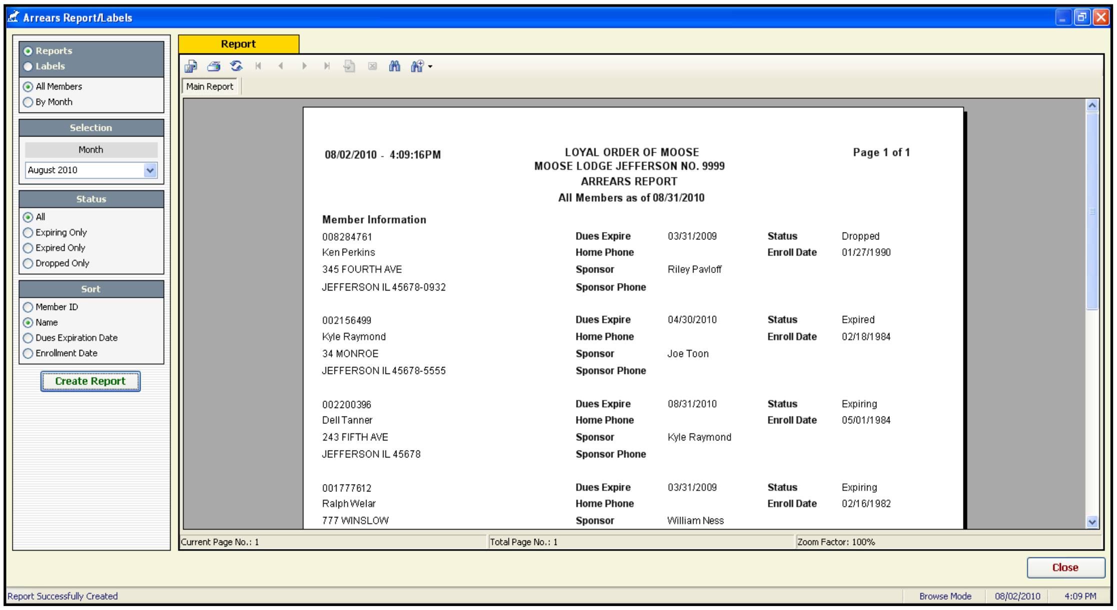
**CREATE** a report that shows all **Members Arrears as of the current month.**

Give a quick review of Member Status Types:

**Expired** = Members whose dues are 1 – 364 days overdue
**Dropped** = Members whose dues are at least 12 months overdue but less than 24 months.
**Terminated** = Members whose dues are more than 24 months overdue.

You can create an Arrears Report to assist the Membership Retention Committee in following up on delinquent dues or to conduct a Moose-a-thon to encourage people to bring their Membership to a Current Status.

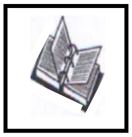
The **Arrears** Reports/Labels function provides several options for creating reports of members in arrears.



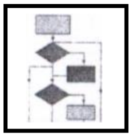

## To create an Arrears Report:

1. Select the **Reports** radio button to specify you would like the data in a Report Form.
2. Select the type of report you wish to generate.
   - Selecting **All Members** generates a report of all FRU members in arrears.
   - Selecting **By Month** creates an arrears report for the month selected.
3. Select the **Month**, if the selection above was By Month.
4. Select the **Status** for the Report.
   - Selecting **All** will generate a report on all members with **Expired** or **Dropped** Status.
   - Selecting **Expiring Only** will generate a report of members whose dues expiration date is within the month selected.
   - Selecting **Expired Only** will generate a report of all FRU members with a status of Expired.
   - Selecting **Dropped Only** will generate a report of all FRU members with a status of Dropped.
5. Select **Member ID, Name, Dues Expiration Date** or **Enrollment Date** to sort the report as desired.
6. Click the **Create Report** button.

## Member Payment Report PAGE 53

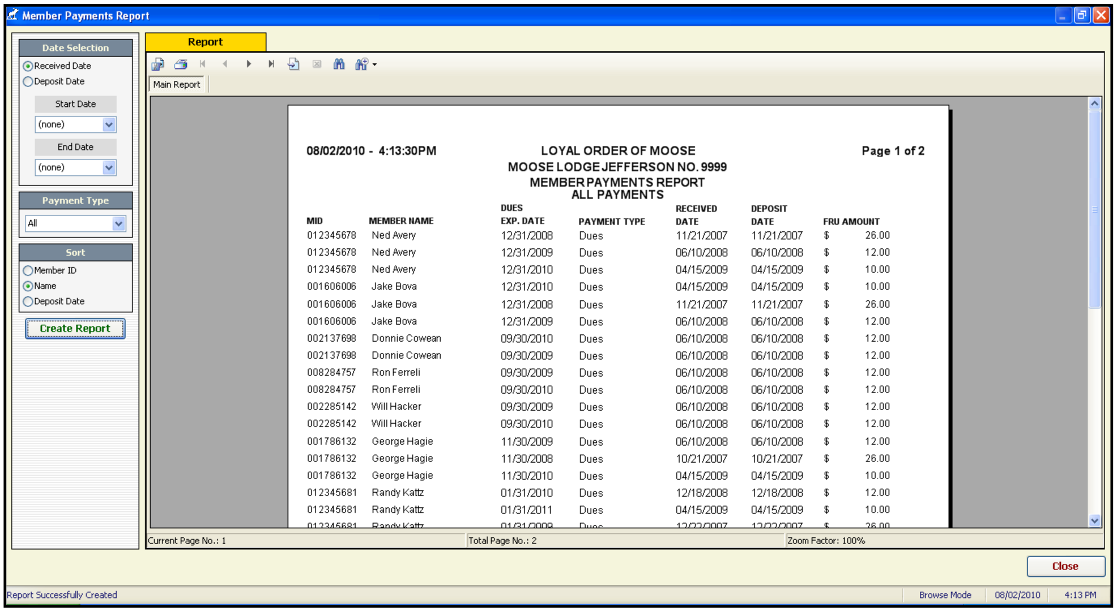


ASK them to turn to Page 53 in their Workbooks.



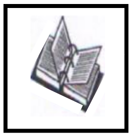
SHOW them the options available for **Reports and Labels** selection in this area.

The **Member Payments** Report is a list of FRU Amount payments by Received Date or Deposit Date for the period of time specified by the Start Date and End Date you enter.

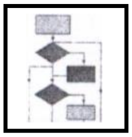



## To create Member Payment Reports;

1. Select **Received Date** or **Deposit Date** for the type of report you desire.
2. Select the **Start Date** and **End Date** for the report.
3. Select the **Payment Type** from the Payment Type dropdown box.
   - Selecting **All** creates a report of all Life Member and dues payments received during the report period.
   - Selecting **Life Member** creates a Report of all Life Member payments received during the report period.
   - Selecting **Dues** creates a report of all Dues payments received during the report period.
4. Select **Member ID, Name** or **Deposit Date** to sort the report as desired.
5. Click the **Create Report** button.



ASK them to turn to Page 54 of their Workbooks.



SHOW them the options available for **Reports and Labels** selection in this area, especially the **Report Type Selection Box**.

**CREATE** a Member Status Report for **ALL ACTIVE MEMBERS**.

ENTERING a specific date in the Start Date field will generate a report containing only names entered since that date.

The Selection Box for **Member Status Drop Down Menu** is only displayed when the Member Status report type is selected.

IMPORTANT! Using the **ALL** selection in the Member Status Drop Down Box generates a list of all Active and Inactive members. For large Fraternal Units, this type of report could number 100+ pages when printed. Use the other Member Status options to narrow the parameters of the Report and generate a more specific member report.

The **Member** Reports/Labels function provides ways to produce detailed Reports for use by the Board of Officers, Membership Committee, Retention Committee, Publicity Committee, etc.

The **Member Report Type** selection box allows you to choose the type of Member Report to create.

- **Member Status** – Creates a member status report or labels based on the Reports/Labels selection and the Member status selected. This is the preferred selection for printing newsletter labels.
- **New Member** – Creates a report or labels of all new members enrolled in the current quarter based on the Reports/Labels selection and sorting options.
- **Volunteer** – Creates a Volunteer Report or Labels based on the Reports/Labels selection and sorting options.
- **Active Roster** – Creates an Active Roster report based on the reports selection and sorting options. This option is available for reports only.

**NOTE:** Using the All Status in the Member Status dropdown menu list creates a report of all members regardless of Status. This report may be very lengthy and it is advised that you use the Status Selection option to limit the size of the report.

The **Member Status Selection** box is only displayed when Member Status is selected as the Report Type. The Member Status Selection box allows you to produce a report based on member status.

**NOTE:** Entering a date in the Start Date field generates a report of only names entered since that date.

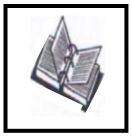
**To create Member Reports:**

1. Select the **Reports** radio button to specify that you want to view the selected Data in the Report Format.
2. Select **Member Status, New Member, Volunteer,** or **Active Roster** to create the type of report desired.
3. Select the desired **Member Status**, if needed.

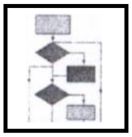
**NOTE:** The selection box for choosing a Member Status is only displayed when the Member Status Report type is selected.

4. Select **Member ID, Name, Status** or **Enroll Date** to sort the report as desired.
5. Click the **Create Report** button.

## Member Labels PAGE 55



ASK them to turn to Page 55 in their Workbooks.

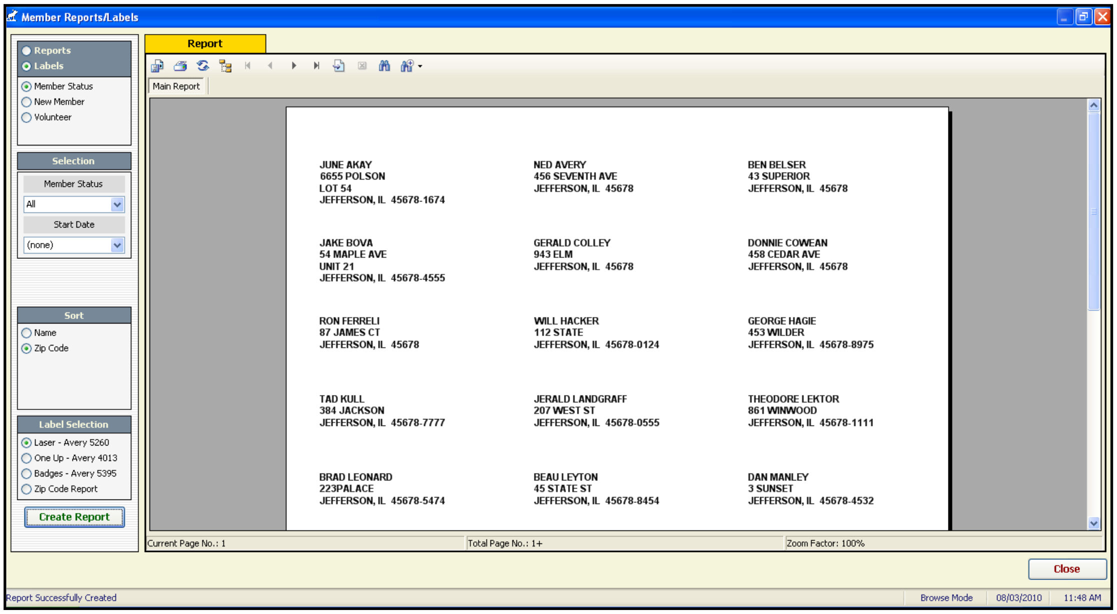


SHOW them the options available for **Reports and Labels** selection in this area.

**CREATE** labels that show **ALL ACTIVE MEMBERS SORTED BY ZIP CODE**.

The **Member** Reports/Labels function allows you to produce mailing labels that can be used for mailings by the FRU, Board of Officers, Committees, etc.

**NOTE:** For best results, use the suggested Avery Labels listed in the Label Selection box of the Member Reports/Labels screen. There are many label sizes and the labels another supplier issues may not fit the LCL.net V2.2 template.




## To create Member Labels:

1. Select the Labels radio button to specify that you want the selected data in labels format.
2. Select **Member Status, New Member** or **Volunteer** to generate the type of labels desired.
3. Select the desired **Member Status**, if needed.

**NOTE:** The selection box for Member Status will only be displayed if Member Status type is selected. This will narrow the Member Labels parameter.

4. Select a **Start Date** if you wish to create labels for only those members added since a certain date.
5. Select **Name** or **Zip Code** in the Sort field.
6. Select the label being used in the **Label Selection** box.
7. Click the **Create Report** button.

## Zip Code Report PAGE 56

ASK them to turn to Page 56 in their Workbooks.

SHOW them the options available for **Reports and Labels** selection in this area.

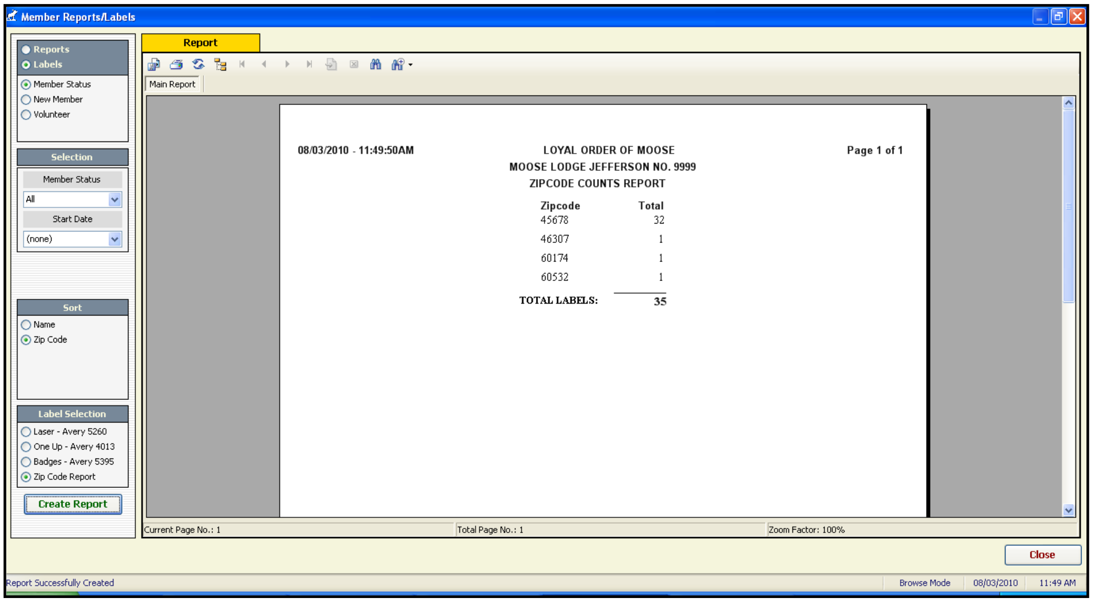
**CREATE** a report showing the number of labels per Zip Code.

## Volunteer Report PAGE 56

SHOW them how to create a **VOLUNTEER** Report.

EXPLAIN that this Report is keyed off of entries made on the Member Information Screen in the Employment Information Field.

The **Zip Code** Report is helpful when filling out paper work for Bulk Mailings such as newsletter or membership mailings. Federal paper work asks for how many pieces are being mailed to each Zip Code. This report will supply those numbers.




**To create a Zip Code Report:**

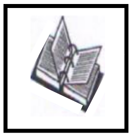
1. Select the **Labels** radio button to specify that you want to view the selected data in labels format.
2. Select the **Member Status** radio button for the type of report desired.
3. Select the **Zip Code** radio button in the Sort box.
4. Select the **Zip Code Report** radio button in the Label Selection box.
5. Click the **Create Report** button.

# Volunteer Report

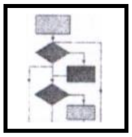
**To create a Volunteer Report:**

1. Select the **Reports** radio button.
2. Select the **Volunteer** as the Member Report type.
3. Select **Name** or **Zip Code** to sort the report as desired.
4. Click the **Create Report** button.

## Active Roster Report PAGE 57



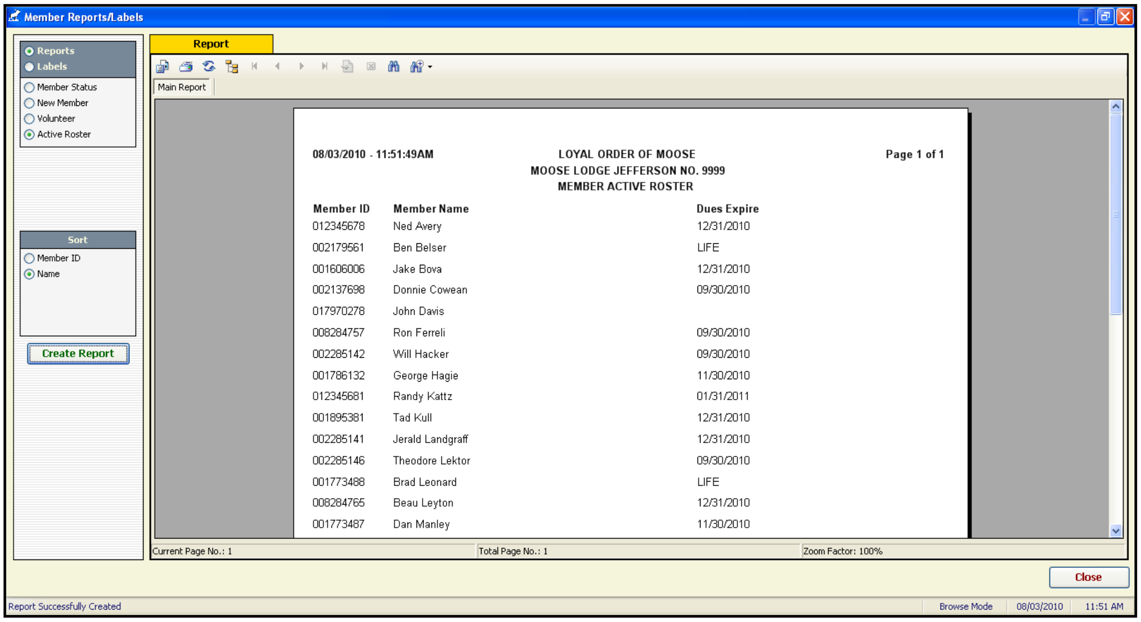
ASK them to turn to Page 57 in their Workbooks.



SHOW them the options available for **Reports and Labels** selection in this area.

**CREATE** an **ACTIVE ROSTER** Report.

The **Active Roster** Report gives you a way to create a report of the Active Members of the FRU in List Format (One member per line) sorted by Member ID or Name.  It is a list of only the Active Members of the FRU.

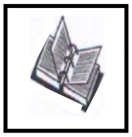



## <u>To create an Active Roster Report:</u>

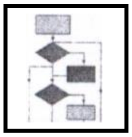
1. Select the **Reports** radio button.

   *Active Roster appears in the Report Type selection box.*

2. Select the **Active Roster** radio button in the Report Type selection box.
3. Select **Member ID** or **Name** to sort the Report as desired.
4. Click the **Create Report** button.



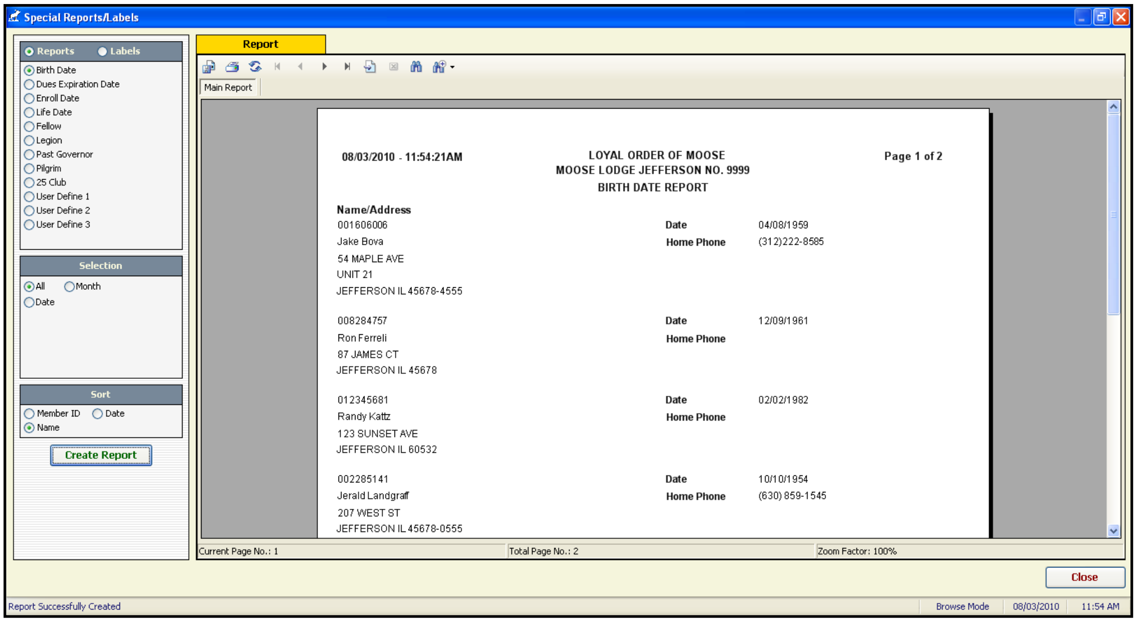
ASK them to turn to Page 58 in their Workbooks.



SHOW them the options available for **Reports and Labels** selection in this area.

**CREATE** an **ENROLL DATE** Report.

The **Special Dates** Reports/Labels function allows the FRU to create reports based on the member's service to the Moose Fraternity.

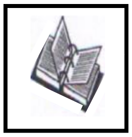



## To create Special Dates Reports;

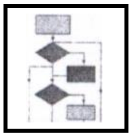
1. Select the **Reports** radio button to specify that you want the selected data in report format.
2. Select the Radio button next to the type of member report you want to create.

   *The selection criterion is specific to each type of FRU – Lodge, Chapter, & Moose Legion.*
3. Select **All, Month** or **Date** range to select the parameters for the report.
   - **All** – Includes all members showing a date entry in that field on their member screen.
   - **Month** – Includes members with entries within that month.

     *i.e. Birthdays in May.*
   - **Date** – Allows you to enter a date range for a report.
4. Select **Member ID, Name** or **Date** in the sort field to indicate how you would like the report sorted.
5. Click the **Create Report** button.



ASK them to turn to Page 59 in their Workbooks.

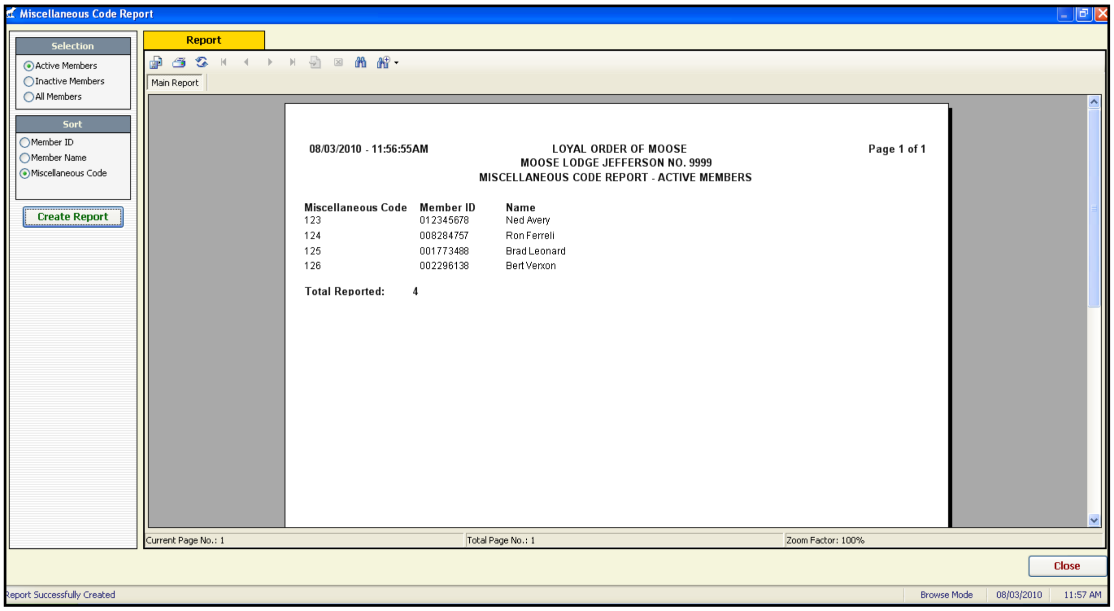


SHOW them the options available for **Reports and Labels** selection in this area.

**CREATE** a **MISCELLANEOUS CODE** Report.

The **Miscellaneous Code** Report function allows you to assign a number to each of your Members for a specified use. A member's Miscellaneous Code Number is assigned on the Member Information screen.

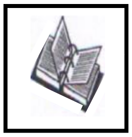
**NOTE:** The Miscellaneous Code function does not provide a Labels option.



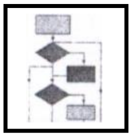

## To create a Miscellaneous Code Report:

1. Select **Reports and Labels** from the **Go To** Menu.
2. Select **Miscellaneous Code Report** from the sub-menu.
3. Select **Active Members, Inactive Members,** or **All Members** in the selection field to choose the type of report desired.
4. Select **Member ID, Member Name** or **Miscellaneous Code** in the sort field to indicate how you would like the report sorted.
5. Click the **Create Report** button.

## Deceased Report PAGE 60



ASK them to turn to Page 60 in their Workbooks.



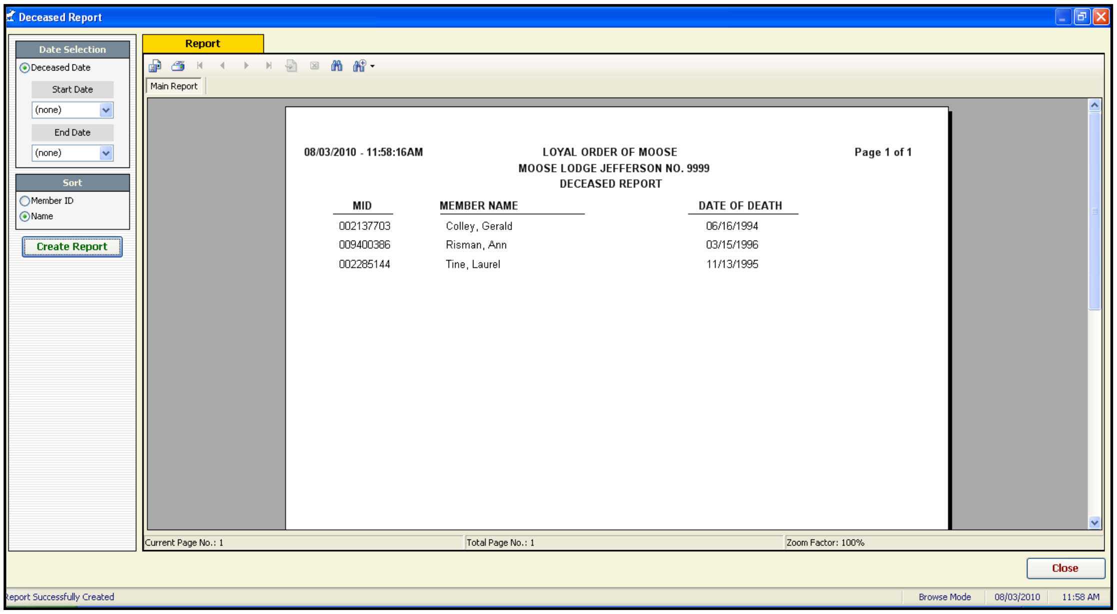
SHOW them the options available for **Reports and Labels** selection in this area.

**CREATE** a **DECEASED** Report.

# Deceased Report

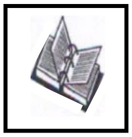


The **Deceased** Report allows FRUs to create a report of members who have passed away during a certain period of time. This report is used most often by FRUs for listing death notices in the newsletter or as a reminder of which members have passed away so that their families can be invited to the yearly Memorial Service.

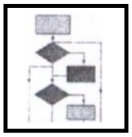



## <u>To create a Deceased Report:</u>

1. Select **Reports and Labels** from the **Go To** menu.
2. Select **Deceased Report** from the sub-menu.
3. Enter a **Start Date** and an **End Date** to customize the report for the time period desired.
4. Select **Member ID** or **Name** to sort the report as desired.
5. Click the **Create Report** button.



ASK them to turn to Page 61 in their Workbooks.

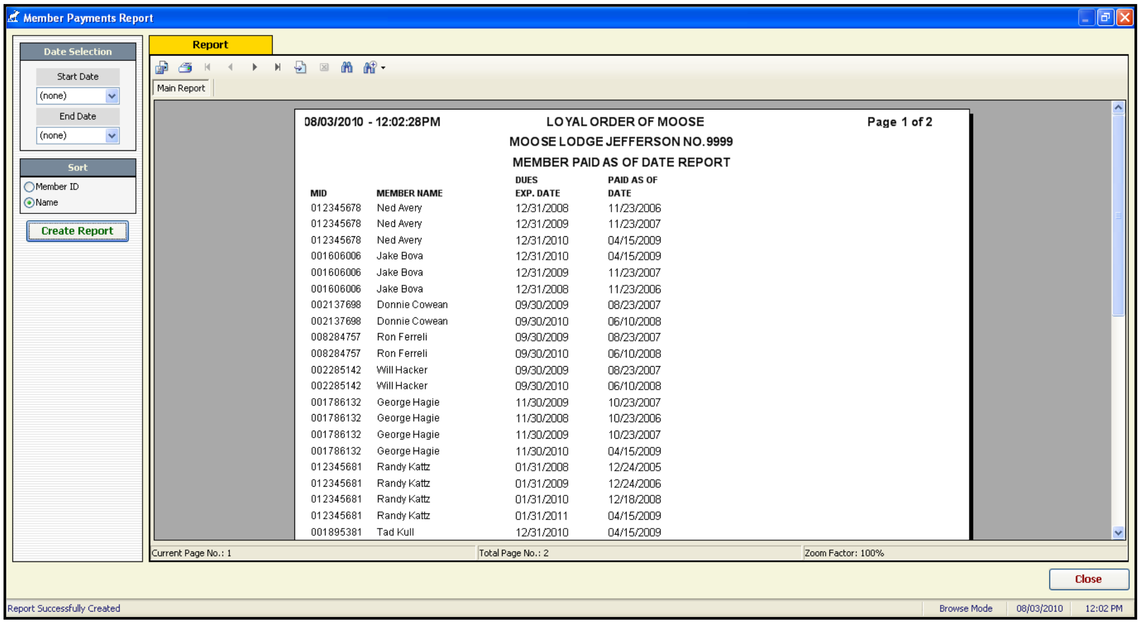


SHOW them the options available for **Reports and Labels** selection in this area.

**CREATE** a **PAID AS OF DATE** Report.

The **Paid as of Date** Report allows FRUs to create a report to show each member with their dues expiration date and the date that the dues were paid to Moose International.

By selecting a **Start Date** and an **End Date**, the FRU can select a particular time frame for a report.




08/03/2010 - 12:02:28PM LOYAL ORDER OF MOOSE Page 1 of 2

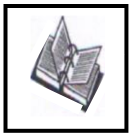
MOOSE LODGE JEFFERSON NO.9999

MEMBER PAID AS OF DATE REPORT

| MID | MEMBER NAME | DUES EXP. DATE | PAID AS OF DATE |
|---|---|---|---|
| 012345678 | Ned Avery | 12/31/2008 | 11/23/2006 |
| 012345678 | Ned Avery | 12/31/2009 | 11/23/2007 |
| 012345678 | Ned Avery | 12/31/2010 | 04/15/2009 |
| 001606006 | Jake Bova | 12/31/2010 | 04/15/2009 |
| 001606006 | Jake Bova | 12/31/2009 | 11/23/2007 |
| 001606006 | Jake Bova | 12/31/2008 | 11/23/2006 |
| 002137698 | Donnie Cowean | 09/30/2009 | 08/23/2007 |
| 002137698 | Donnie Cowean | 09/30/2010 | 06/10/2008 |
| 008284757 | Ron Ferreli | 09/30/2009 | 08/23/2007 |
| 008284757 | Ron Ferreli | 09/30/2010 | 06/10/2008 |
| 002285142 | Will Hacker | 09/30/2009 | 08/23/2007 |
| 002285142 | Will Hacker | 09/30/2010 | 06/10/2008 |
| 001786132 | George Hagie | 11/30/2009 | 10/23/2007 |
| 001786132 | George Hagie | 11/30/2008 | 10/23/2006 |
| 001786132 | George Hagie | 11/30/2009 | 10/23/2007 |
| 001786132 | George Hagie | 11/30/2010 | 04/15/2009 |
| 012345681 | Randy Kattz | 01/31/2008 | 12/24/2005 |
| 012345681 | Randy Kattz | 01/31/2009 | 12/24/2006 |
| 012345681 | Randy Kattz | 01/31/2010 | 12/18/2008 |
| 012345681 | Randy Kattz | 01/31/2011 | 04/15/2009 |
| 001895381 | Tad Kull | 12/31/2010 | 04/15/2009 |

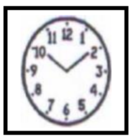
## To create a Paid as of Date Report:

1. Select **Reports and Labels** from the **Go To** menu.
2. Select **Paid as of Date Report** from the sub-menu.
3. Enter a **Start Date** and an **End Date** to customize the report for the time period desired.
4. Select **Member ID** or **Name** to sort the report as desired.
5. Click the **Create Report** button.



ASK them to turn to Page 62 in their Workbooks.

ASK them to complete the Exercise – **CREATING REPORTS.**

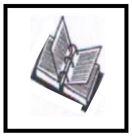


Give them 15 minutes to complete the exercise.

Create the following reports:

*Use this workbook as a reference if you have questions.*

1. Create Member Labels for only Active Members sorted by Zip Code.
2. Create an Application Report that contains only New Applicants.
3. Create Labels for only the New Applicants.
4. Create Labels for New Member Sponsors.
5. Create an Arrears Report of all Members in Arrears as of January 31$^{st}$.
6. Create a Special Date Report for all Members with birthdays in May.
7. Create a Zip Code Report.



ASK them to turn to Page 63 in their Workbooks.

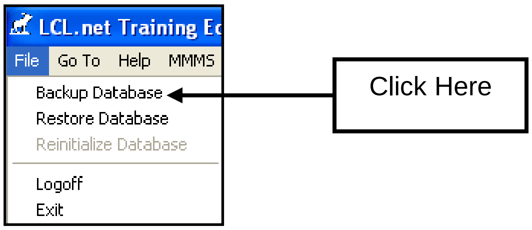
EXPLAIN the importance of doing a **BACKUP**.

EXPLAIN the two different ways to get to the Back Up Screen; either by closing the program and receiving the message or by clicking on File on the Menu Bar and scrolling down to Back Up.

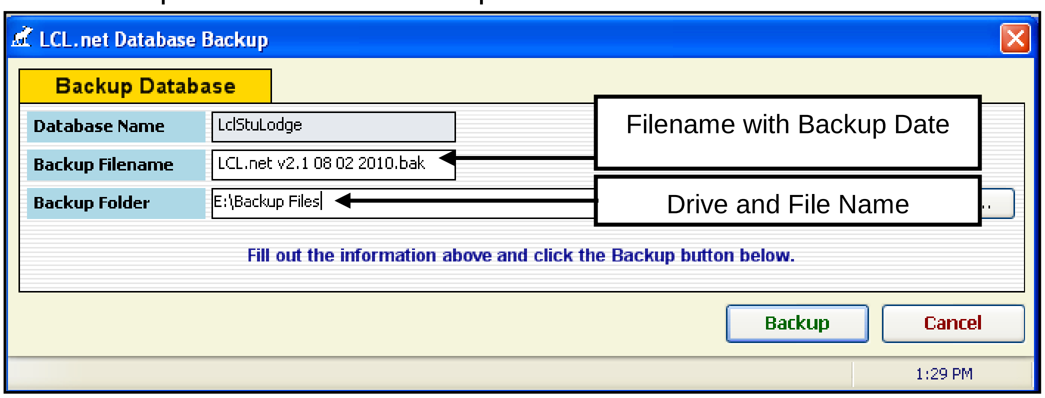
It is very important that you back up your LCL.net V2.2 Database regularly. The Backup files should be on a **REMOVABLE** storage device such as a Disk, External Drive or Stick Drive. This Storage Device should be removed from the computer and stored in an area away from the computer, so that if something happens to the computer, the backup files will not be destroyed with it. The Backup Files would be used to restore your Membership Records to a new computer, if necessary, or to restore your Membership Records to you present computer should it crash and you lose all your data.

**<u>To Backup your LCL.net V2.2 Database:</u>**

1. Click **Backup Database** in the dropdown box under **File** on the Menu Bar.




The Backup Information screen opens.




2. Enter a **Backup Filename** specific to that backup.

   *Include the backup date in the filename for future reference. This will make it easy to determine which Backup File to use should you have to do a restore.*

3. Click the **Browse** button.
4. Select the **Drive** the External Storage Device is in.

   *The External Storage Device must be connected to the computer before clicking the Browse button for that drive to appear in the Drive List that opens.*

5. Enter the **Folder** you would like the Backup Files stored in on that device.

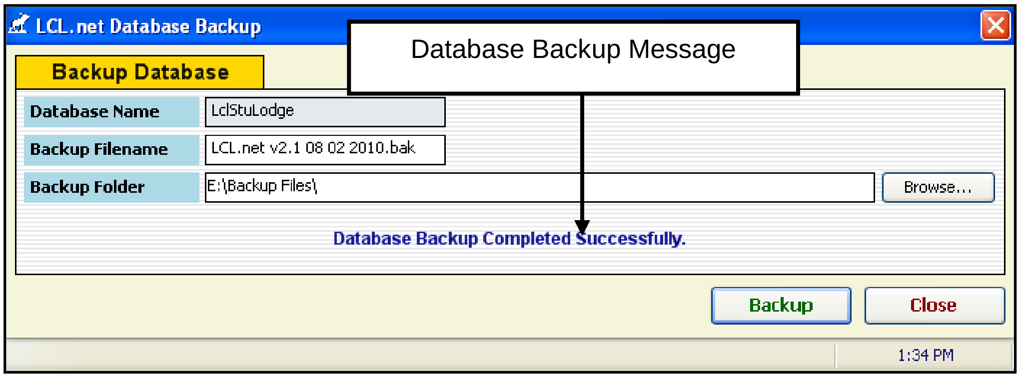
**NOTE:** Notice in the above screen shot, the Backup File on a Stick/Thumb in “E” drive in a Folder titled “Backup Files”. The Backup Filename contains the date (08 02 2010). Thus the Filename is LCL.net V2.2 08 02 2010.bak.

## Backup Continued: PAGE 64

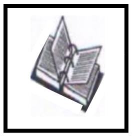
ASK them to turn to Page 64 in their Workbooks.

6. Click the **Backup** button.

   The following screen opens when the Backup is complete.




7. Click the **Close** button.
8. Remove the **External Storage Device**.
9. Store the External Storage Device in a **Safe, Dry** and **Fire Proof** place.



ASK them to turn to Page 65 in their Workbooks.

STRESS that in order to do the **RESTORE** Function, the Fraternal Unit must contact the HELP DESK first.

STRESS that the **RESTORE** Function is **PASSWORD PROTECTED** which must be received from the Help Desk.

STRESS that in order to do the RESTORE Function; the Fraternal Unit must have a current back up of their database.

The **Restore** function in LCL.net V2.2 is used to restore a Database Backup File to your LCL.net V2.2 program if the FRU Membership files are lost for any reason.  If you have backed up your database regularly, you can restore the data in the backup file to a repaired or new computer and will only need to enter any data entered since the backup was performed.

> *If you backed up your Database the day before the FRU Membership Files were lost, you will only have to re-enter one day's entries.  If you have not backed up your Database for a month, you will have to enter a whole month's data entries.*
>
> ***Thus:  The importance of backing your Database often!***

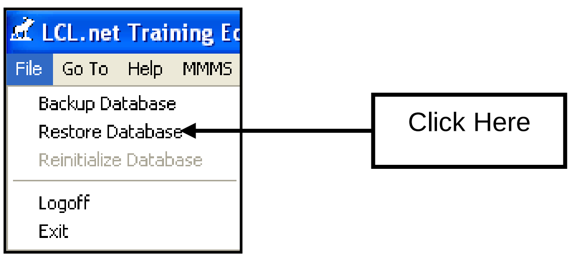
---

**NOTE:**  The Restore function in LCL.net V2.2 is "**Password of the Day**" protected.  You must contact the Help Desk on the day you are doing the Restore to get the Password of the Day and also for instructions to restore your database.

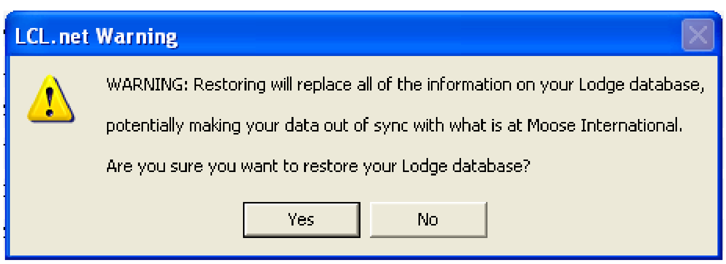
---

**<u>To Restore your Database from a Backup File:</u>**

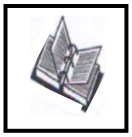
1. Click **Restore Database** in the dropdown box under **File** on the Menu Bar.




An LCL.net Warning box appears.

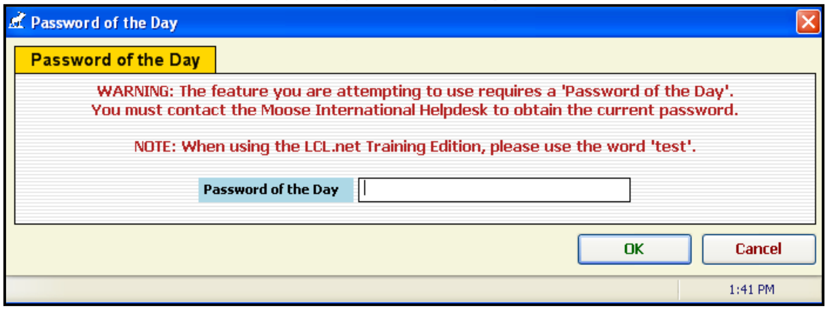



2. Click the **Yes** Button.



ASK them to turn to Page 66 in their Workbooks.

The Password of the Day screen opens.




3. Call the Moose International **Help Desk** to get the **Password of the Day** and instructions on how to proceed with the Restore.
4. Enter the **Password of the Day** received from the Help Desk.
5. Click the **OK** button.
6. Follow the Instructions on the screen and those provided to you by the Help Desk.

- **Help Desk Phone Number:** **630.906.3658**
  - or –
  **630.859.2000 Ext. 3658**
- **Help Desk E-mail Address:** helpdesk@mooseintl.org

Due to the volume of Phone Calls to the Help Desk at times, it is better if you send an E-mail asking the Help Desk to call you back. Please include the following in the E-mail.

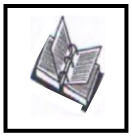
- FRU Name and Number
- Your Name
- Date and Time you will be available to take the call.
- Phone Number you would like the Help Desk to use.
- A brief description of the problem you are contacting them about.

**If you give the Help Desk a Day, Time and Number**

**PLEASE BE THERE**

**THAT DAY at THAT TIME at THAT NUMBER**

**Thank you.**



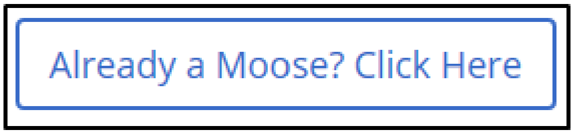
ASK them to turn to Page 67 in their Workbooks.

MENTION there are several ways to find a **2HOTT Trainer**:

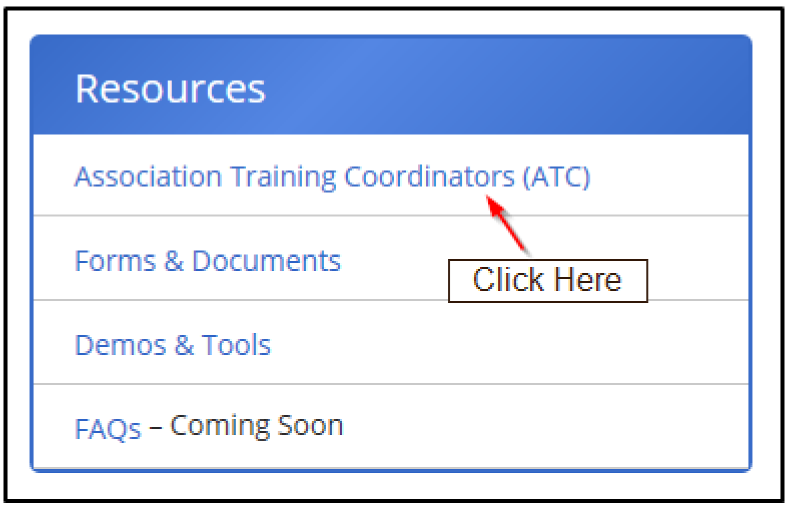
1. Moose International's Website – www.mooseintl.org
2. Contact the Association Training Coordinator for the Association.
3. Contact the Regional Manager for the State.
4. Contact the Training Department at Moose International - **630.859.2000 Ext 2294**

**<u>Option 1:</u>**

- Contact the Association Training Coordinator
- Go to the Moose International Website at**:** **[www.mooseintl.org](http://www.mooseintl.org)**.
- Go to the Members area of the site by clicking




- Click on "**Moose Training**" link.
- Click the link for Association Training Coordinators (ATC) found in the Resources box




- *The Association Training Coordinators are listed by **Association** and are listed with their N**ame** and **E-Mail Address**.*

**<u>Option 2:</u>**

- Contact the "**Regional Manager**" for your State or Region.

**<u>Option 3:</u>**

- Contact Moose International's Education and Training Department at:

**630.859.2000 Ext 2294**

# Appendix A

# Using Moose Admin

# Table of Contents – Appendix A

ASK them to turn to Page 70 in their Workbooks.

EXPLAIN what the Admin Menu is used for in general.

The Admin menu allows Administrators, Recorders and Secretaries to see certain information in real time – meaning it is the most up-to-date data available to them. Additionally, it must be used when entering officers, running deposit histories and for submitting select reports. The reports include: Heart of the Community Report and the Lodge Safety Inspection Report. Member Retention Survey is also done through here but is not required.

**Please note:** some screen shots have a different color scheme due to recent changes that were instituted after the new website went live. Everything remains the same, only the color schematics are different.

The Admin menu offers many very useful features. It can be used to pay multiple members' dues, up to 15 at one time, and A/R can be paid through here. Member searches can be done providing details such as sponsor, officer and training histories.

SHOW them the screen capture for the login and walk through the process.

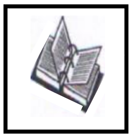
Moose Admin must be used for certain functions required of the Administrator, Recorder or Secretary. It also provides the most up-to-date information.

---

**NOTE:** You must have the passcode, issued by Moose International to the Administrator, Recorder or Secretary, and your own My Membership Record username and password to log in to the Moose Admin.

---

To access the Admin Menu, you must first go to www.mooseintl.org and choose *Moose Admin* from the bottom of the page, under "RESOURCES."



ASK them to turn to Page 71 in their Workbooks.

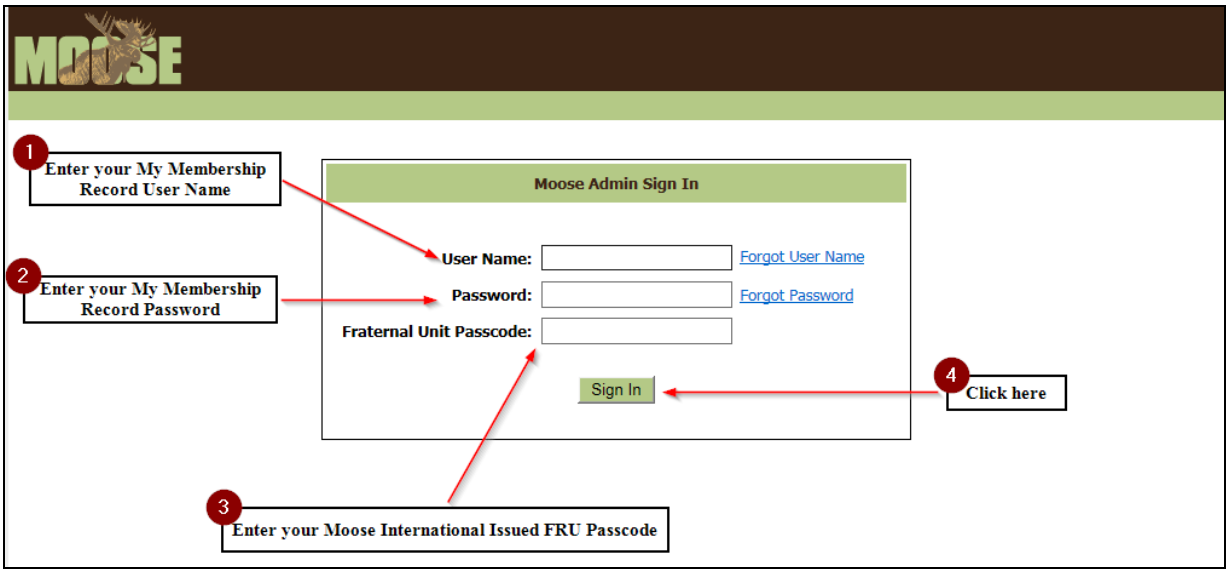
## To Sign In to Moose Admin:

1. Enter your User Name – this is the same user name you established for your *My Membership Record* account.

2. Enter your Password – this is the same password you established for your *My Membership Record* account.

3. Enter your Passcode.  The passcode is issued by Moose International.

4. Click “Sign In.”

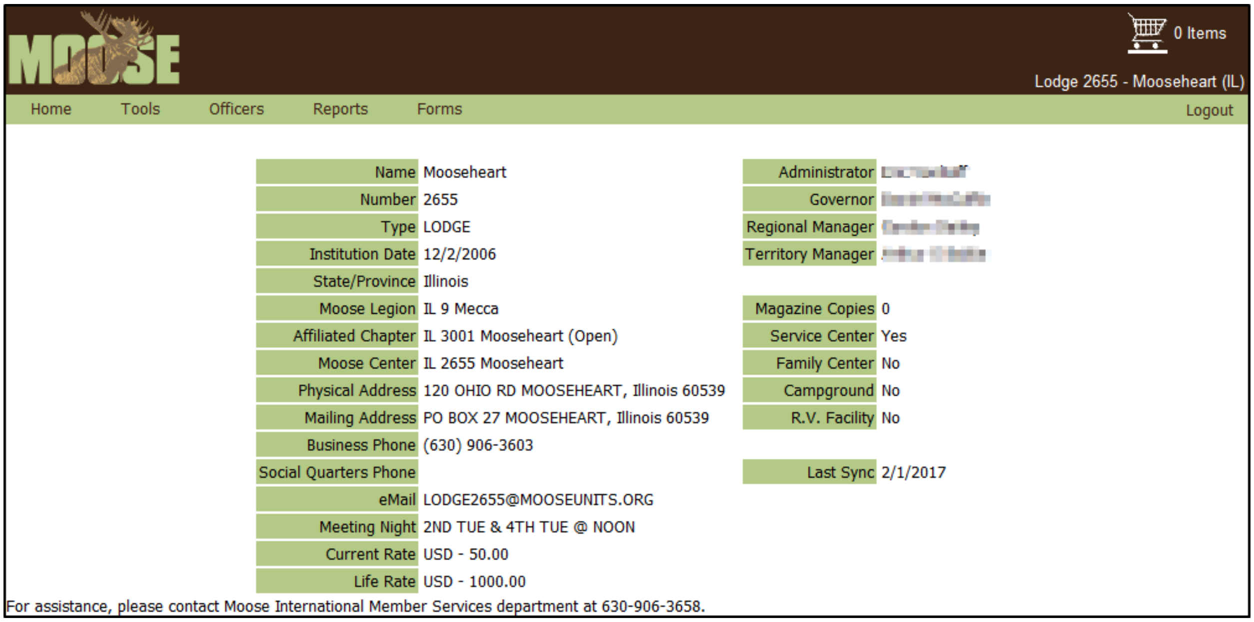


ASK them to turn to Page 72 in their Workbooks.

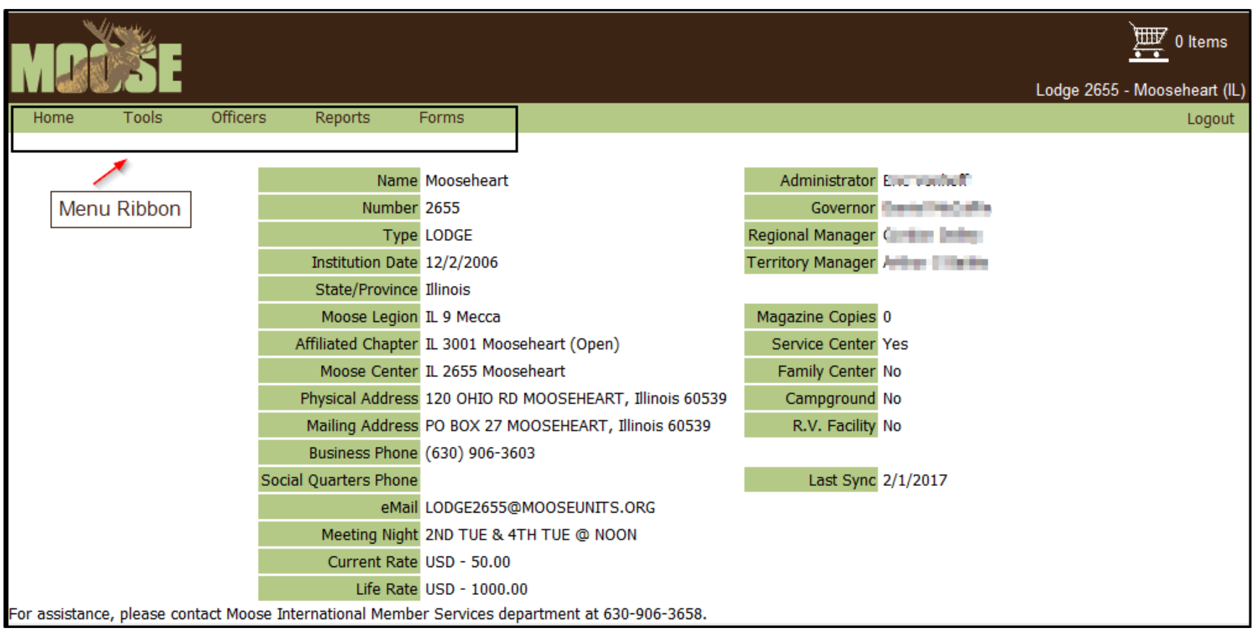
EXPLAIN the information shown on the Home Screen is specific to that Unit and cannot be edited from this screen.

Point out the menu ribbon, found across the top of the page, to be used for navigating the page.

The Moose Admin Home screen displays information specific to your Fraternal Unit, however, the information cannot be edited from this screen.




To move throughout Moose Admin, use the menu ribbon shown below:



ASK them to turn to Page 73 in their Workbooks.

EXPLAIN what is offered through Tools.

Through the Tools drop down menu you can:

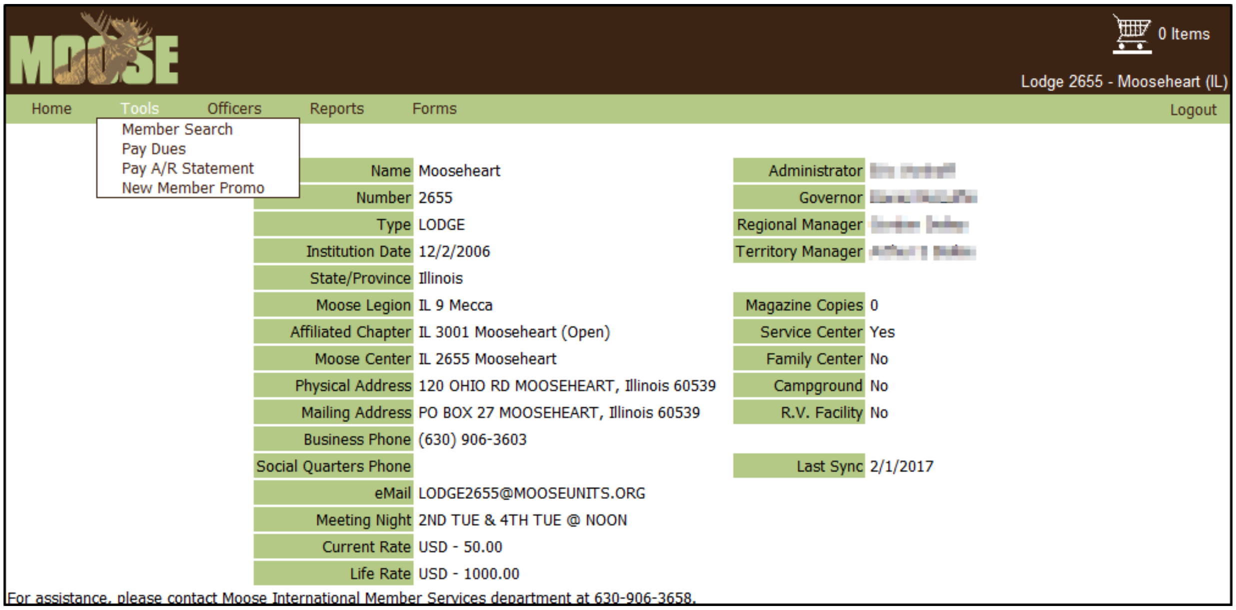
- Conduct Member Searches
- Pay Dues
- Pay your FRU's A/R Statement

EMPHASIZE that New Member Promo is for temporary promotions. There will be many times that this feature is defunct.

If there is a promotion utilizing this feature currently, please take some time to walk participants through its use.

Please note: all functions of Tools are the same for LOOM, WOTM and Moose Legion.

Moose Admin – Tools has several very useful and important features available to you as Administrator, Recorder or Secretary.




Click on Tools to see the drop down menu, listing the available features:

- Member Search
- Pay Dues
- Pay A/R Statement
- New Member Promo **

**NOTE:** New Member Promo is only used temporarily on an as needed basis.

ASK them to turn to Page 74 in their Workbooks.

EXPLAIN how the Member Search feature can be used.

Detail how you can search for members by MID or by name.

Admin menu offers much flexibility when searching for members. There are times when members are known by a nickname and it may be unclear whether the nickname or birth name was used for the membership record. Fortunately, it is possible to search based on name with as little as a last initial.

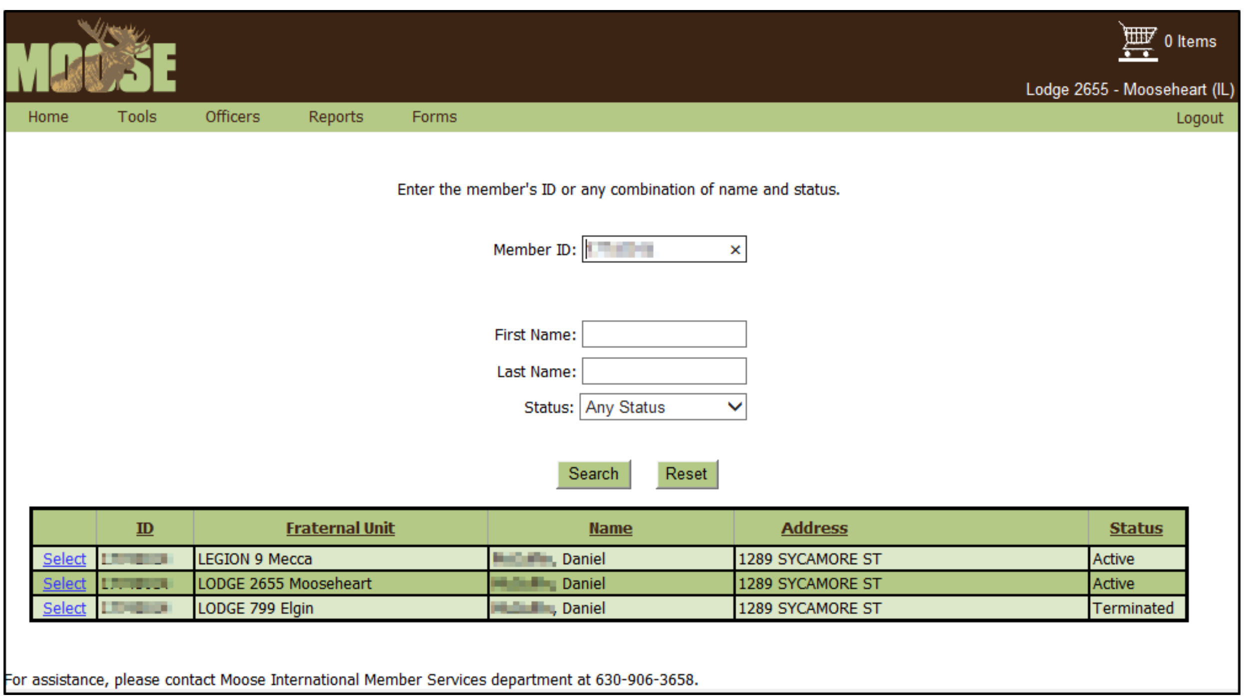
SHOW them the screen capture for Member Search. Walk through the processes necessary for searching based on MID as well as on name.

Member Search can be used to search for members of your FRU. You may search by Member I.D. or name.

**<u>Search Based on Member I.D.</u>**

1. Enter the MID in *Member ID* field
2. Click *Search*


Given a valid member ID within your FRU, the following results will display.




Notice that two other membership records are reported for this member in addition to the record for the lodge under which the Administrator signed into Moose Admin. Each record can be viewed by clicking *Select*.

## Tools – Member Search continued PAGE 75

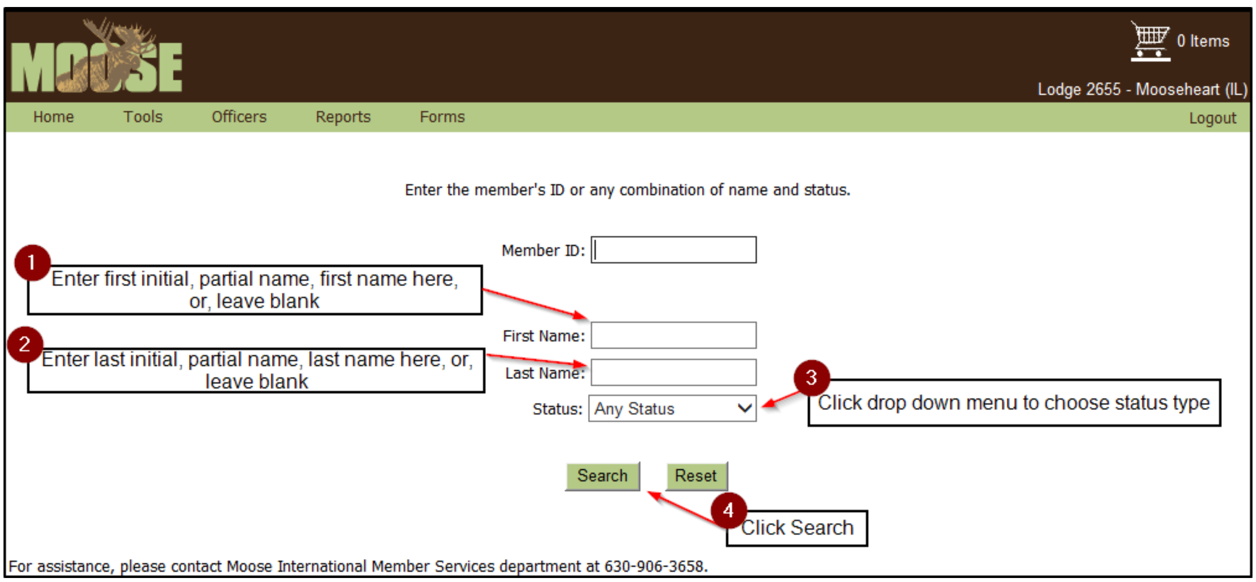
ASK them to turn to Page 75 in their Workbooks.

# Tools – Member Search continued PAGE 75

## Search Based on Member Name

Any combination of first name, last name and status may be used to search. You may use incomplete names if you are unsure of the spelling or whether a member's nickname or full name was used on the membership record.

1. Enter partial name, initial or full name in First Name field
2. Enter partial name, initial or full name in Last Name field
3. Use the drop down menu to choose one of the following status types:
   - Any
   - Deceased
   - Dropped
   - Expelled
   - Expired
   - Resigned
   - Terminated
4. Click Search

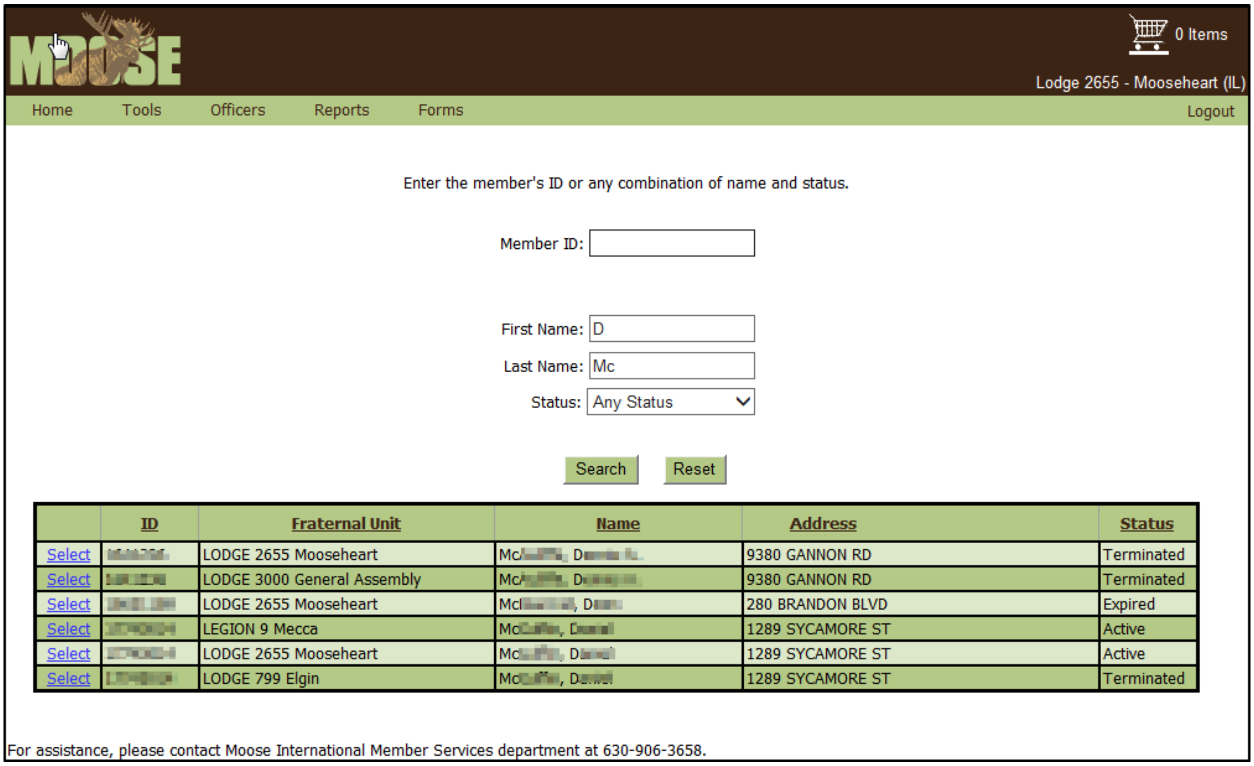



The search results, dependent upon the amount of information entered, can deliver different results.

For instance if it is unknown whether the member provided his full first name or a nickname for his membership record, it would be wise to enter a first initial or part of the name. The same is true if the spelling of the last name is unknown.

ASK them to turn to Page 76 in their Workbooks.

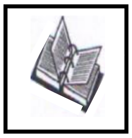
In the example below a partial first and last name were entered, with the status *Any*. The results generated are shown below:




| | ID | Fraternal Unit | Name | Address | Status |
|---|---|---|---|---|---|
| Select | [illegible] | LODGE 2655 Mooseheart | Mc[illegible], D[illegible] | 9380 GANNON RD | Terminated |
| Select | [illegible] | LODGE 3000 General Assembly | Mc[illegible], D[illegible] | 9380 GANNON RD | Terminated |
| Select | [illegible] | LODGE 2655 Mooseheart | Mc[illegible], D[illegible] | 280 BRANDON BLVD | Expired |
| Select | [illegible] | LEGION 9 Mecca | Mc[illegible], D[illegible] | 1289 SYCAMORE ST | Active |
| Select | [illegible] | LODGE 2655 Mooseheart | Mc[illegible], D[illegible] | 1289 SYCAMORE ST | Active |
| Select | [illegible] | LODGE 799 Elgin | Mc[illegible], D[illegible] | 1289 SYCAMORE ST | Terminated |

Every member of Lodge 2655, regardless of status, whose first name begins with D and last name begins with Mc is reported. Again, multiple membership records are shown when applicable. Once the desired member is located, the record can be viewed in more detail by clicking *Select*.

It is also possible to leave all fields except Status blank. Use the drop down menu to choose the status you want to search on and click Search. All members with that specific status associated with your lodge will appear. Please note there is no printer friendly option for printing this list.



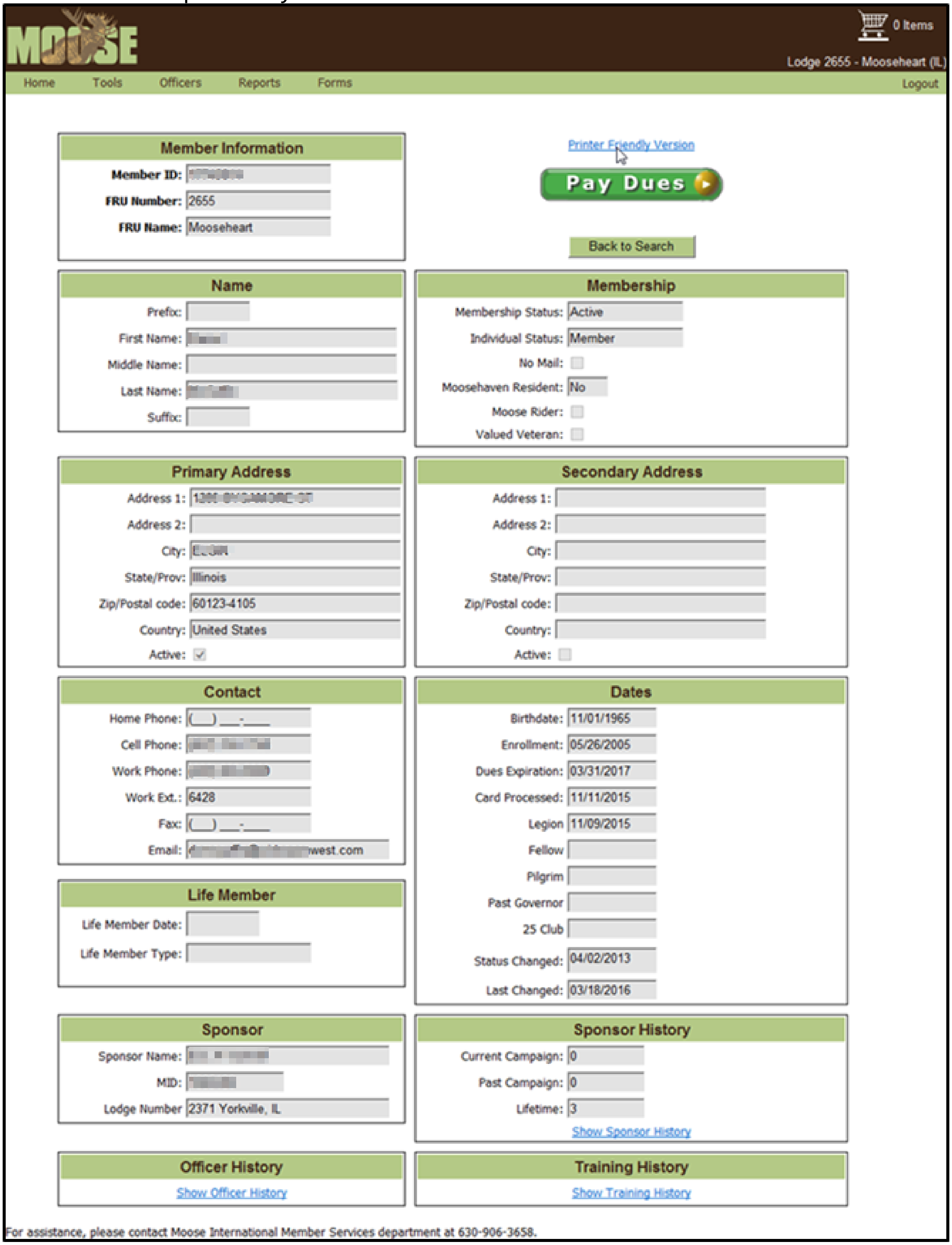
ASK them to turn to Page 77 in their Workbooks.

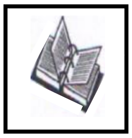
EXPLAIN how to view a member record after completing a member search.

DISCUSS each section found on the member record.

Although no editing of the member record can be done through this screen, Moose Admin offers additional information about that member that is not available in LCL.net. You can see the member's training history, Sponsor history as well as the member's Officer history.

The Moose Admin Member Record is divided into 12 sections. There are NO editing capabilities on this screen. All edits to a member record must be completed through LCL.net V2.2 as previously demonstrated.





ASK them to turn to Page 78 in their Workbooks.

POINT OUT and explain the *Printer Friendly Version*. This feature provides the same information shown on the screen but in an easy to read, print-ready format.

OVERVIEW each section found on the top portion of the member record. Notice that through Moose Admin you can see the member's primary and alternate address at a glance.

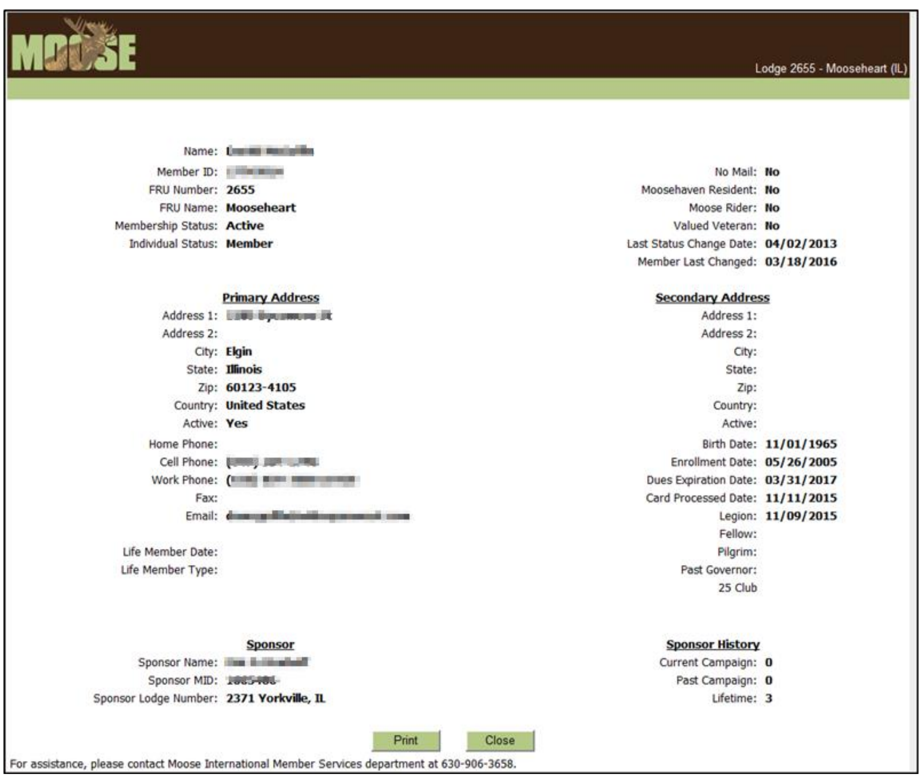
POINT OUT the Pay Dues button found at the top right corner of the screen. This button can be used to pay dues for that individual member. The button will *only* appear when a member has an active or expired status and there has been a renewal created by Moose International which has not yet been paid.

When paying dues from this screen, you will next be taken to the shopping cart. Once in the cart, you have the option of selecting more members for which to pay dues, up to 15 in total.

Moose Admin offers several helpful options from the Member Record view.

Click on *Printer Friendly Version* to print the information displayed on the screen in a format suitable for printing.

See the Printer Friendly version below:

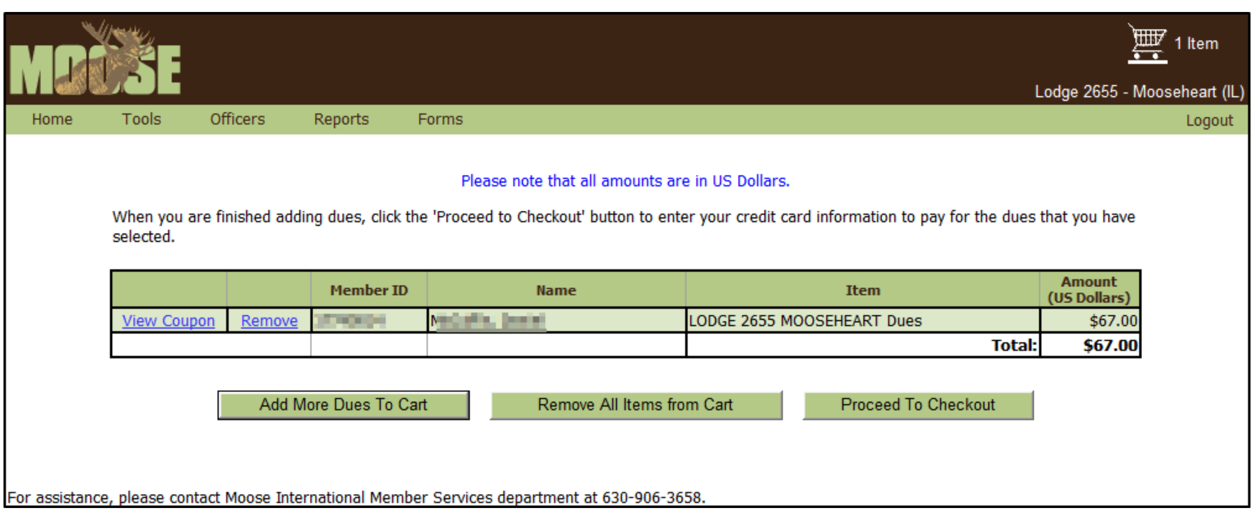


## Member Record continued PAGE 79

ASK them to turn to Page 79 in their Workbooks.

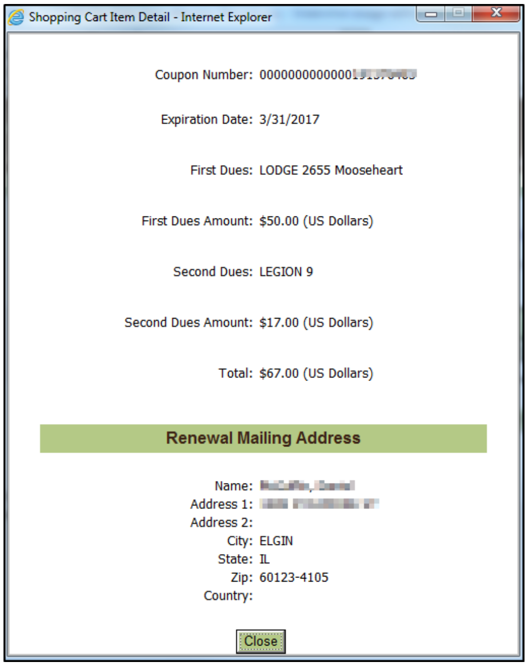
Moose Admin also offers an option to pay a member's dues from the Member Record view. Click on *Pay Dues* to pay the dues for the member displayed.


The Shopping Cart Screen will appear next with the member and you have three choices:*View Coupon*, *Remove*, *Add More Dues to Cart*, *Remove All Items from Cart* or *Proceed to Checkout*.

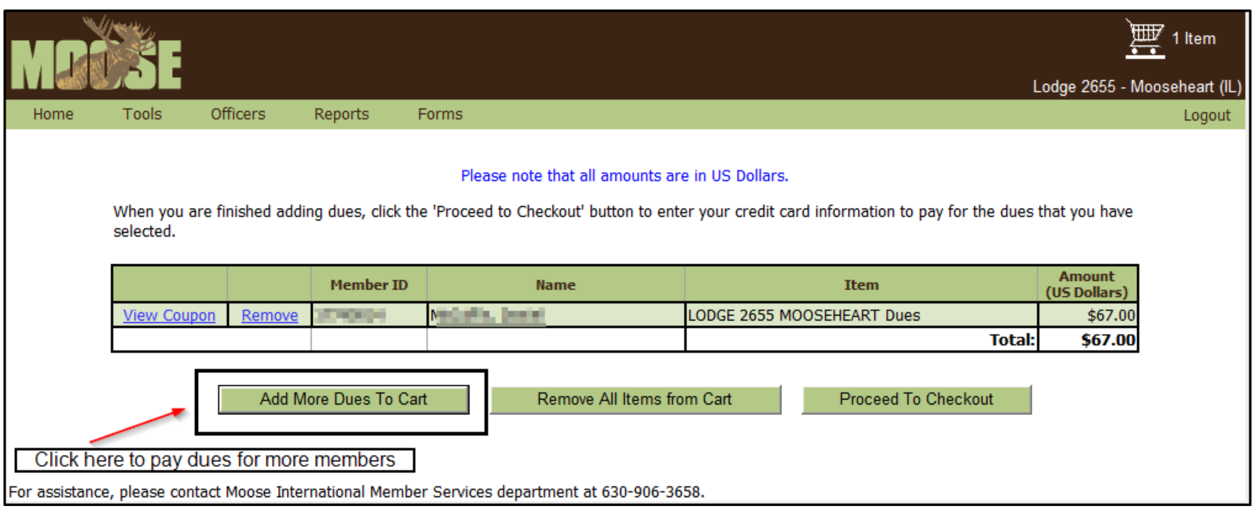


ASK them to turn to Page 80 in their Workbooks.

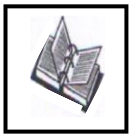
View Coupon – this feature gives you a detailed look at the member's dues. This is especially helpful when a member is also a Moose Legionnaire to see the breakdown of payment due.




Another helpful feature from the *Member Record – Pay Dues Shopping Cart* is the ability to pay dues for more than just one member – up to 15 payments at one time.

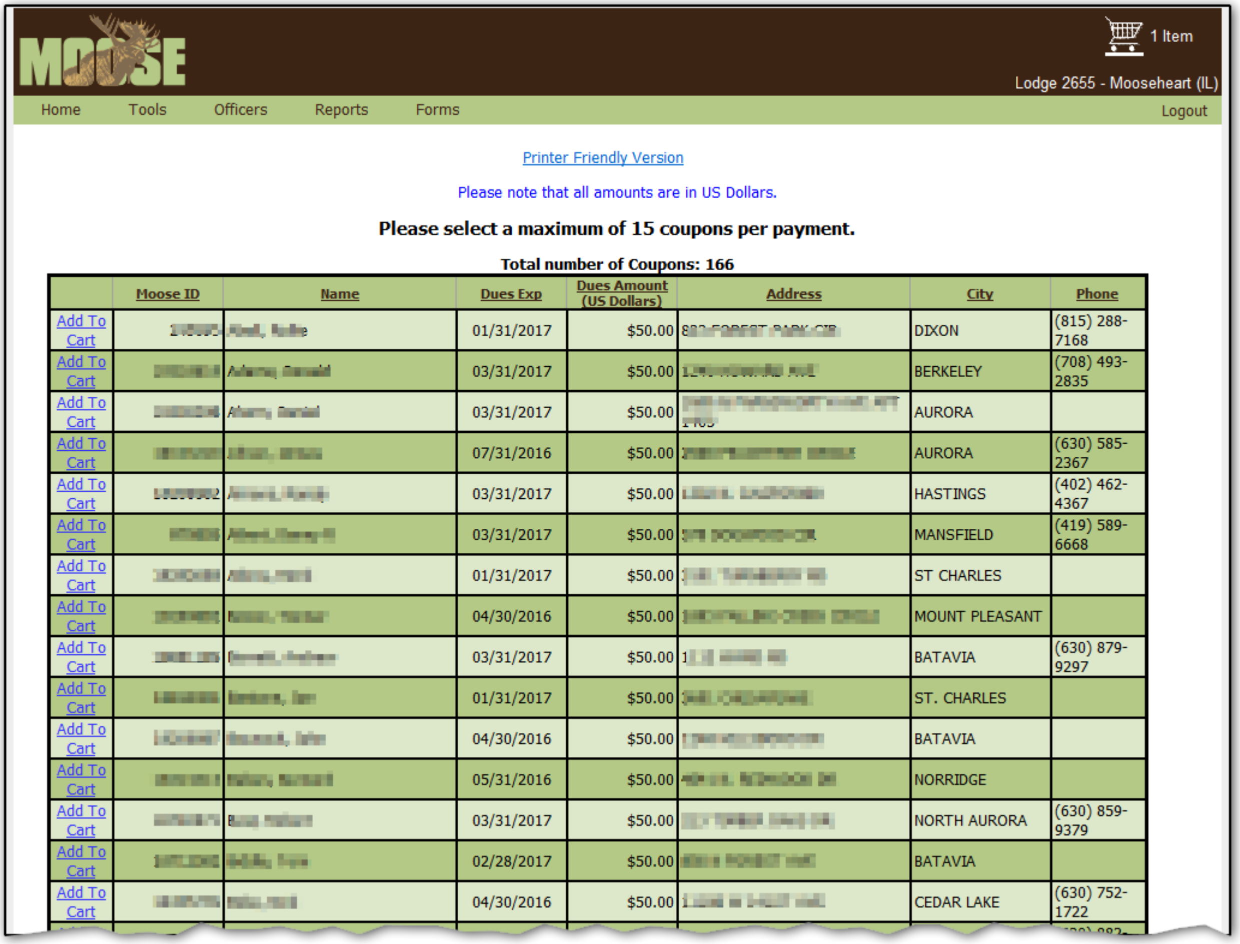



1. Click *Add More Dues* to Cart to pay dues for additional members.



ASK them to turn to Page 81 in their Workbooks.

When you choose this option, a list will be generated of members whose dues are expired and those who will be expiring within 60 days.


MOOSE

1 Item

Lodge 2655 - Mooseheart (IL)

Home Tools Officers Reports Forms Logout

Printer Friendly Version

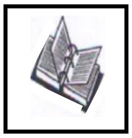
Please note that all amounts are in US Dollars.

**Please select a maximum of 15 coupons per payment.**

**Total number of Coupons: 166**

| | Moose ID | Name | Dues Exp | Dues Amount (US Dollars) | Address | City | Phone |
|---|---|---|---|---|---|---|---|
| Add To Cart | [illegible] | [illegible] | 01/31/2017 | $50.00 | [illegible] | DIXON | (815) 288-7168 |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | BERKELEY | (708) 493-2835 |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | AURORA | |
| Add To Cart | [illegible] | [illegible] | 07/31/2016 | $50.00 | [illegible] | AURORA | (630) 585-2367 |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | HASTINGS | (402) 462-4367 |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | MANSFIELD | (419) 589-6668 |
| Add To Cart | [illegible] | [illegible] | 01/31/2017 | $50.00 | [illegible] | ST CHARLES | |
| Add To Cart | [illegible] | [illegible] | 04/30/2016 | $50.00 | [illegible] | MOUNT PLEASANT | |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | BATAVIA | (630) 879-9297 |
| Add To Cart | [illegible] | [illegible] | 01/31/2017 | $50.00 | [illegible] | ST. CHARLES | |
| Add To Cart | [illegible] | [illegible] | 04/30/2016 | $50.00 | [illegible] | BATAVIA | |
| Add To Cart | [illegible] | [illegible] | 05/31/2016 | $50.00 | [illegible] | NORRIDGE | |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | NORTH AURORA | (630) 859-9379 |
| Add To Cart | [illegible] | [illegible] | 02/28/2017 | $50.00 | [illegible] | BATAVIA | |
| Add To Cart | [illegible] | [illegible] | 04/30/2016 | $50.00 | [illegible] | CEDAR LAKE | (630) 752-1722 |

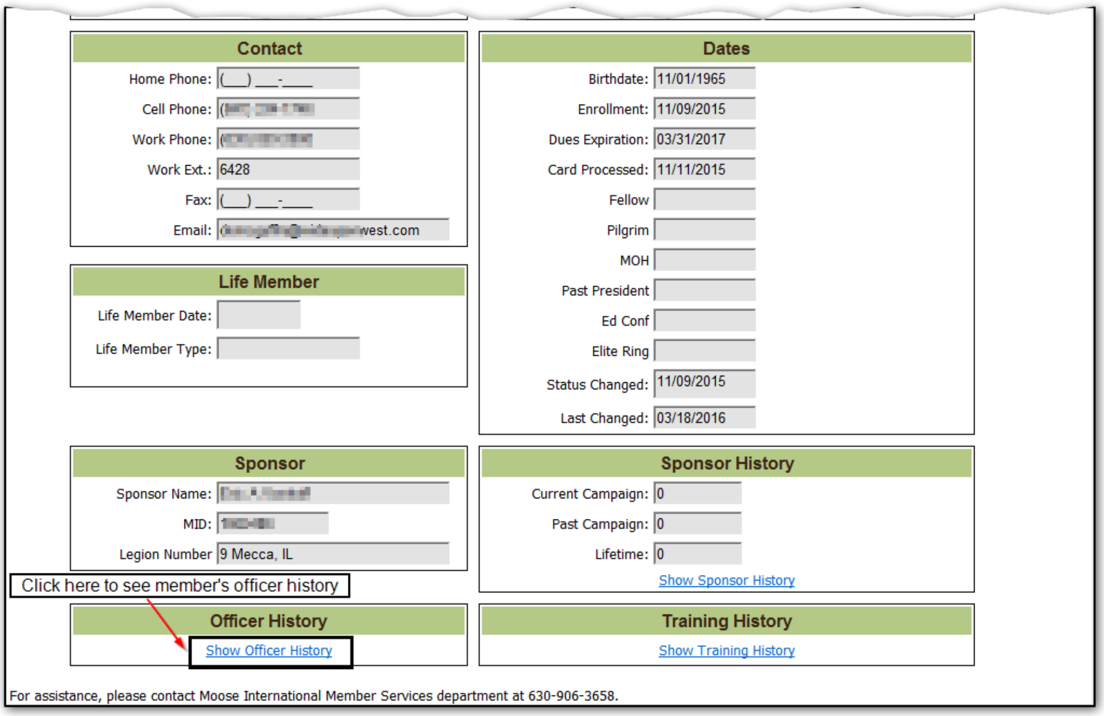
From this list, click Add To Cart to pay dues for up to 15 members total. For Check Out Instructions see the *Pay Dues Section* of this guide.



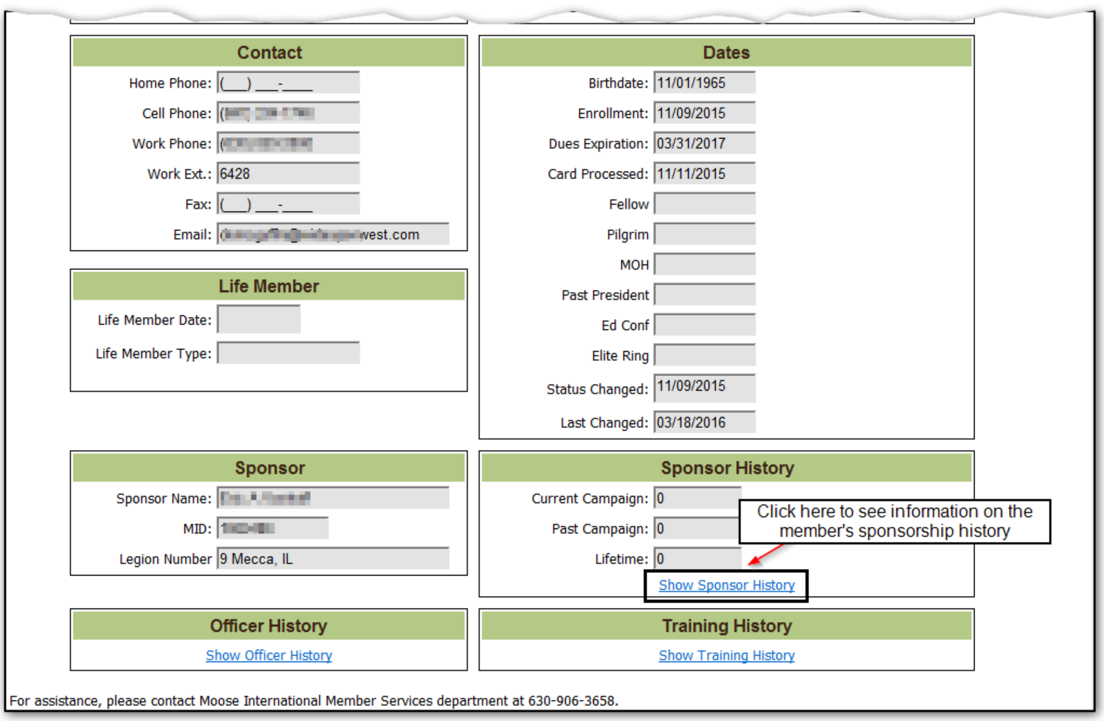
ASK them to turn to Page 82 in their Workbooks.

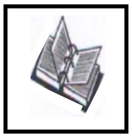
Moose Admin offers several exclusive options from the Member Record view that are not available to you through LCL.net.

Click on *Show Officer History* to print the information displayed on the screen in a format suitable for printing.



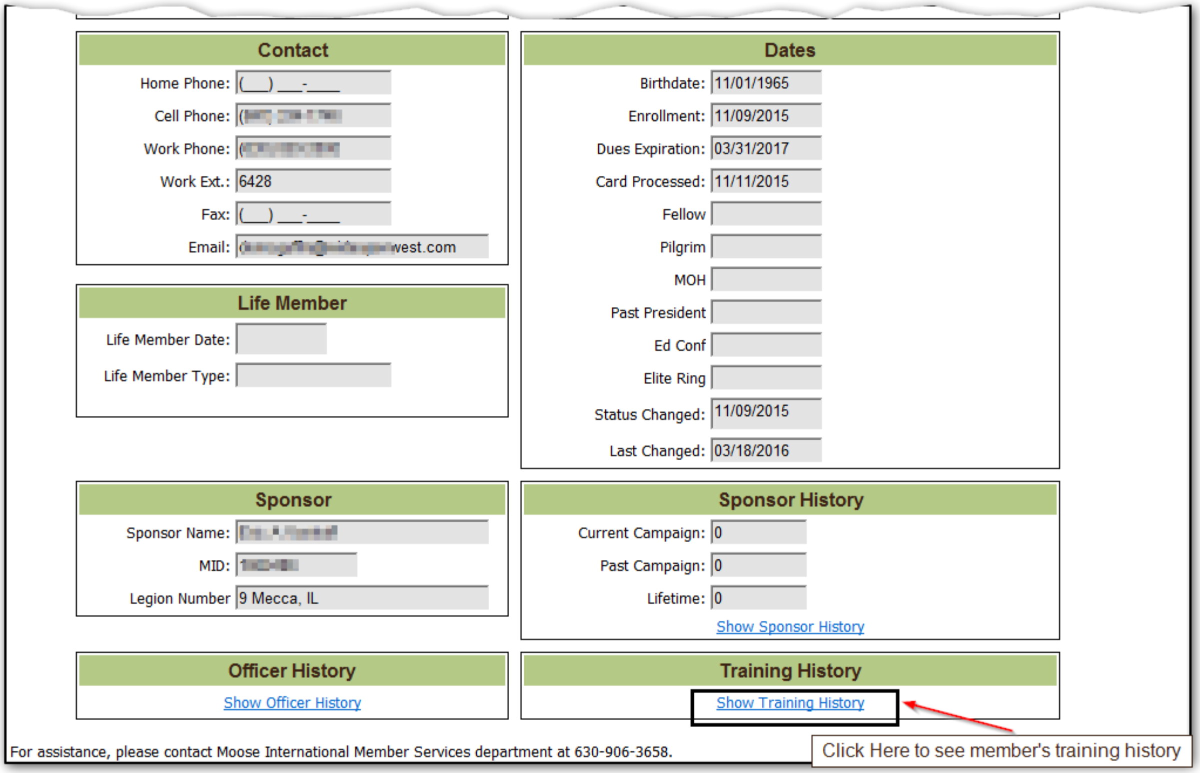

A report listing all those the member has sponsored, including dates and Moose reward points earned can be seen by clicking *Show Sponsor History*.

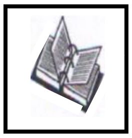




ASK them to turn to Page 83 in their Workbooks.

Finally, you have the ability to see a list of the training the selected member has attended including the date and location of each session. Just click *Show Training History* to create the report. This report will help you when determining which officers need to renew training or attend for the first time.



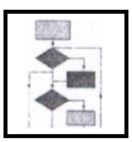


ASK them to turn to Page 84 in their Workbooks.

EXPLAIN how the Pay Dues function can be used.

The Admin menu allows Administrators, Recorders and Secretaries to pay dues online for any member of their unit who has an expired status or whose expiration date is within the next 60 days. The list is populated with members for whom a renewal has been issued as well as those who have expired.

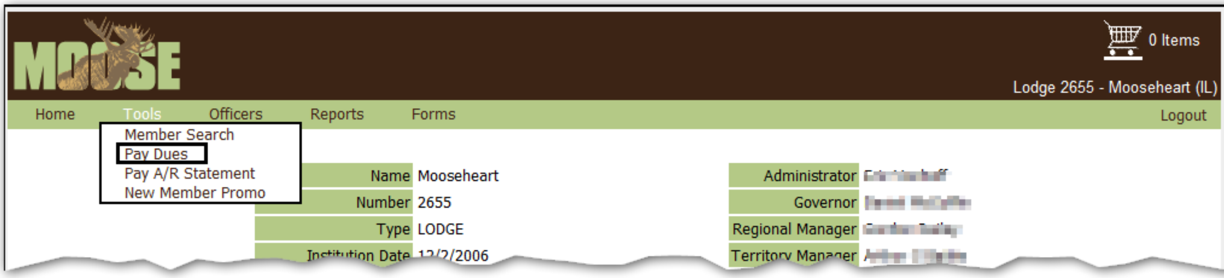
The Admin menu makes it possible to pay just a single member's dues or up to 15 members' dues at one time. *It is necessary to have a credit card for payment.* The card can be the Administrator's, Recorder's or Secretary's personal credit card OR it may be a card issued to the FRU with special dispensation from the General Governor's Office.



SHOW them the steps necessary to Pay Dues through the Tools Menu.

## To Pay Member Dues from Moose Admin

1. From the Tools Drop Down Menu, choose *Pay Dues*.




Admin Menu will automatically create a list of all members of your FRU who have a status of Expired or who will be expiring within the next 60 days.

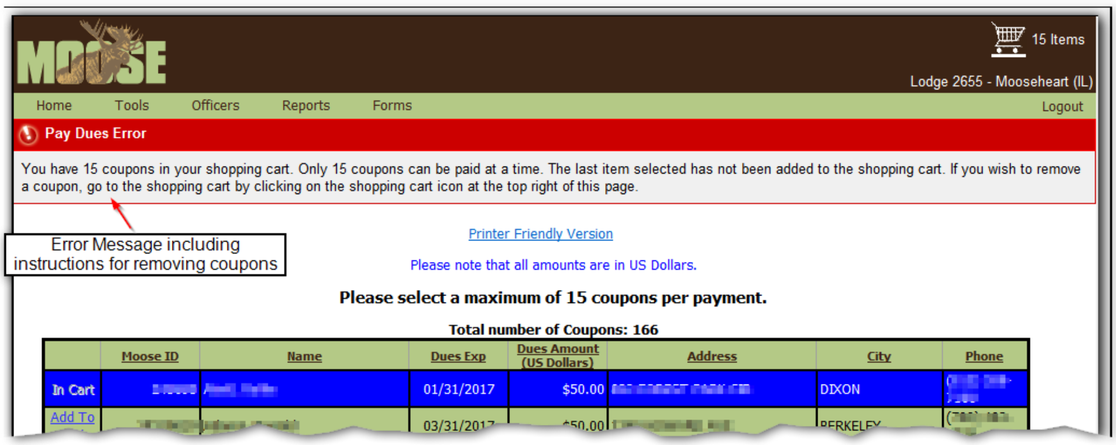

| | Moose ID | Name | Dues Exp | Dues Amount (US Dollars) | Address | City | Phone |
|---|---|---|---|---|---|---|---|
| Add To Cart | [illegible] | [illegible] | 01/31/2017 | $50.00 | [illegible] | DIXON | (815) 288-7168 |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | BERKELEY | (708) 493-2835 |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | AURORA | |
| Add To Cart | [illegible] | [illegible] | 07/31/2016 | $50.00 | [illegible] | AURORA | (630) 585-2367 |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | HASTINGS | (402) 462-4367 |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | MANSFIELD | (419) 589-6668 |
| Add To Cart | [illegible] | [illegible] | 01/31/2017 | $50.00 | [illegible] | ST CHARLES | |
| Add To Cart | [illegible] | [illegible] | 04/30/2016 | $50.00 | [illegible] | MOUNT PLEASANT | |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | BATAVIA | (630) 879-9297 |
| Add To Cart | [illegible] | [illegible] | 01/31/2017 | $50.00 | [illegible] | ST. CHARLES | |
| Add To Cart | [illegible] | [illegible] | 04/30/2016 | $50.00 | [illegible] | BATAVIA | |
| Add To Cart | [illegible] | [illegible] | 05/31/2016 | $50.00 | [illegible] | NORRIDGE | |
| Add To Cart | [illegible] | [illegible] | 03/31/2017 | $50.00 | [illegible] | NORTH AURORA | (630) 859-9379 |
| Add To Cart | [illegible] | [illegible] | 02/28/2017 | $50.00 | [illegible] | BATAVIA | |
| Add To Cart | [illegible] | [illegible] | 04/30/2016 | $50.00 | [illegible] | CEDAR LAKE | (630) 752-1722 |
| Add To Cart | [illegible] | [illegible] | 01/31/2017 | $50.00 | [illegible] | BATAVIA | (630) 882-9187 |
| Add To Cart | [illegible] | [illegible] | 04/30/2016 | $50.00 | [illegible] | LINCOLNSHIRE | (847) 607-8956 |
| Add To Cart | [illegible] | [illegible] | 04/30/2016 | $50.00 | [illegible] | AURORA | |
| Add To Cart | [illegible] | [illegible] | 01/31/2017 | $50.00 | [illegible] | ST. CHARLES | (630) 513-1358 |

ASK them to turn to Page 85 in their Workbooks.

You may pay up to 15 members' dues at one time through Moose Admin.

## Paying Member's Dues

1. From the list created when you chose Pay Dues, click *Add To Cart* for each of the members for whom you wish to pay dues.
2. Each selected member will be highlighted in blue and will read *In Cart*.
3. If more than 15 members are selected you will get the following error message:




4. To remove unwanted items from the cart or to continue the payment process, click on the shopping cart icon, shown at the top right of the screen.

ASK them to turn to Page 86 in their Workbooks.

5. A list of all items in your shopping cart will appear with the following options:


1.*View Coupon* – by choosing this option, you will see the payment details for the member chosen, including Coupon #, Expiration Date, Dues for each unit to which the member belongs, Total Dues Due and a Renewal Mailing Address.

2. *Remove* –allows you to remove one member at a time from the shopping cart.

3. *Add More Dues to Cart* – this feature allows you to go back to the list of renewals and add more to the cart.

4. *Remove All Items from Cart* – by clicking here you will clear out the shopping cart in its entirety.

5. *Proceed to Checkout* – click here when ready to complete the payment process.

6. Click on *Proceed to Checkout* when you are ready to make payments for the items in your cart.

You must enter information in the following fields:

Name

Address 1

City

State

ZIP Code

Payment Type

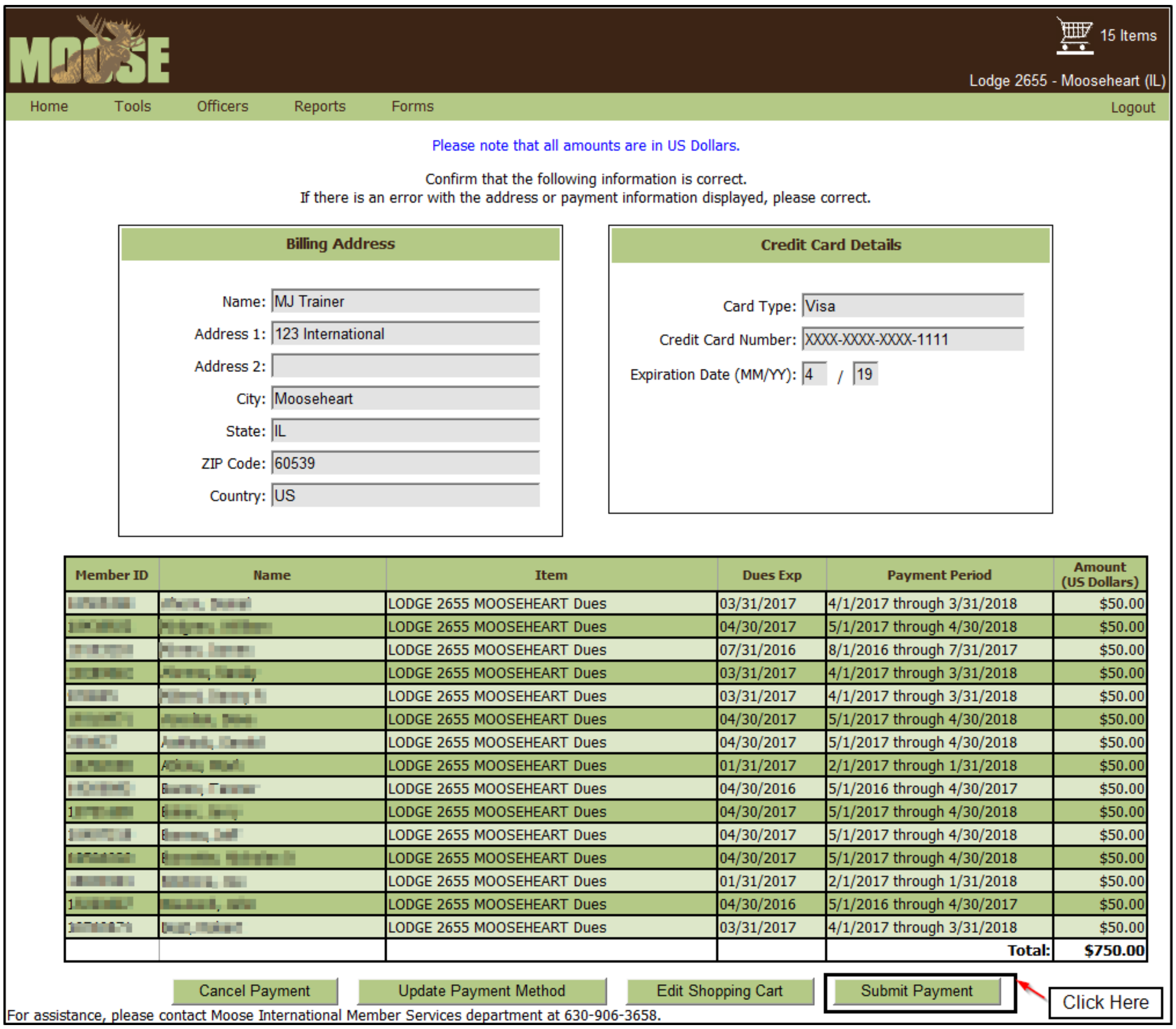
ASK them to turn to Page 87 in their Workbooks.

7. Click *Continue*
8. Finish the payment process by entering information in the following fields:

    Card Type

    Credit Card Number

    Expiration Date
9. Click *Continue*
10. You will be redirected to a confirmation screen where you may choose to:



MOOSE

15 Items

Lodge 2655 - Mooseheart (IL)

Home Tools Officers Reports Forms Logout

Please note that all amounts are in US Dollars.

Confirm that the following information is correct.
If there is an error with the address or payment information displayed, please correct.

**Billing Address**

Name: MJ Trainer
Address 1: 123 International
Address 2:
City: Mooseheart
State: IL
ZIP Code: 60539
Country: US

**Credit Card Details**

Card Type: Visa
Credit Card Number: XXXX-XXXX-XXXX-1111
Expiration Date (MM/YY): 4 / 19

| Member ID | Name | Item | Dues Exp | Payment Period | Amount (US Dollars) |
|---|---|---|---|---|---|
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 03/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 07/31/2016 | 8/1/2016 through 7/31/2017 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 03/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 03/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 01/31/2017 | 2/1/2017 through 1/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2016 | 5/1/2016 through 4/30/2017 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 01/31/2017 | 2/1/2017 through 1/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2016 | 5/1/2016 through 4/30/2017 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 03/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| | | | | Total: | $750.00 |

Cancel Payment Update Payment Method Edit Shopping Cart Submit Payment Click Here

For assistance, please contact Moose International Member Services department at 630-906-3658.

a. Complete payment by clicking *Submit Payment*

b. Cancel payment by clicking *Cancel Payment*

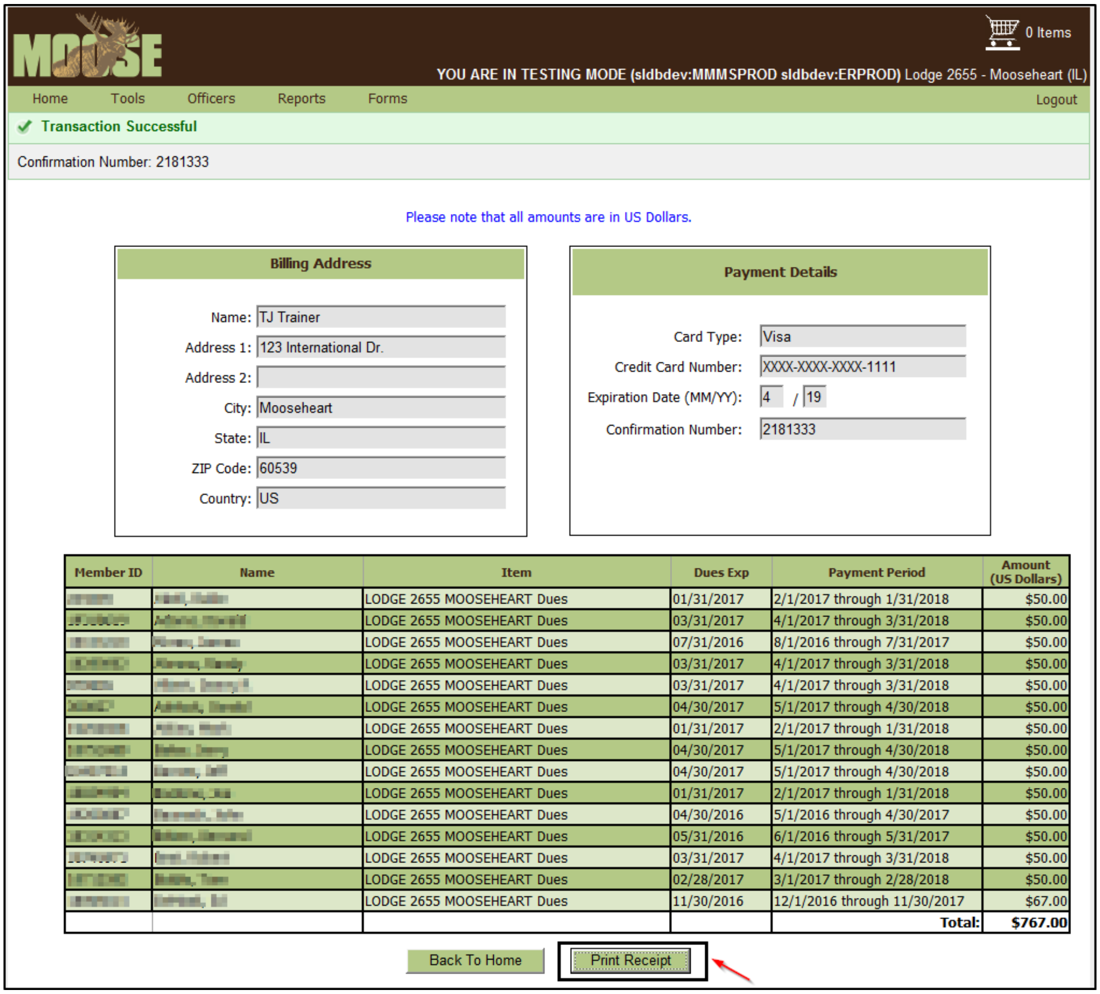
c. Change your credit card information by clicking *Update Payment Method*

d. Remove/Add members for whom you are submitting payment by clicking *Edit Shopping Cart*

11. Once you have confirmed that all of the information shown is correct, to complete the payment, click *Submit Payment*.

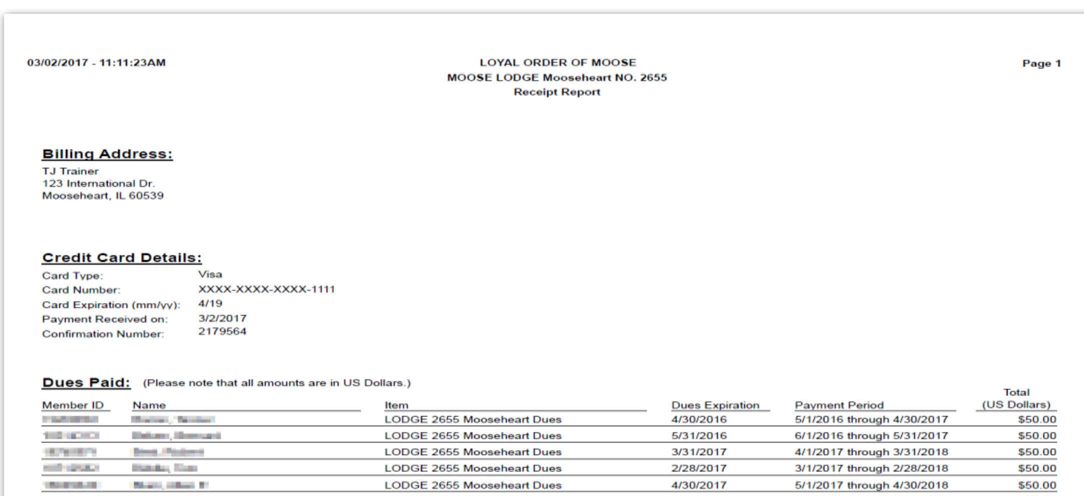
ASK them to turn to Page 88 in their Workbooks.

You will see a Confirmation and Receipt screen, with a confirmation number, indicating you have successfully completed your transaction.




| Member ID | Name | Item | Dues Exp | Payment Period | Amount (US Dollars) |
|---|---|---|---|---|---|
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 01/31/2017 | 2/1/2017 through 1/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 03/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 07/31/2016 | 8/1/2016 through 7/31/2017 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 03/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 03/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 01/31/2017 | 2/1/2017 through 1/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 01/31/2017 | 2/1/2017 through 1/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 04/30/2016 | 5/1/2016 through 4/30/2017 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 05/31/2016 | 6/1/2016 through 5/31/2017 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 03/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 02/28/2017 | 3/1/2017 through 2/28/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 MOOSEHEART Dues | 11/30/2016 | 12/1/2016 through 11/30/2017 | $67.00 |
| | | | | Total: | $767.00 |

12. Click the *Print Receipt* button for your records. You will also need this information when submitting your payment for reimbursement.



03/02/2017 - 11:11:23AM

LOYAL ORDER OF MOOSE
MOOSE LODGE Mooseheart NO. 2655
Receipt Report

Page 1

**Billing Address:**
TJ Trainer
123 International Dr.
Mooseheart, IL 60539

**Credit Card Details:**

| | |
|---|---|
| Card Type: | Visa |
| Card Number: | XXXX-XXXX-XXXX-1111 |
| Card Expiration (mm/yy): | 4/19 |
| Payment Received on: | 3/2/2017 |
| Confirmation Number: | 2179564 |

**Dues Paid:** (Please note that all amounts are in US Dollars.)

| Member ID | Name | Item | Dues Expiration | Payment Period | Total (US Dollars) |
|---|---|---|---|---|---|
| [illegible] | [illegible] | LODGE 2655 Mooseheart Dues | 4/30/2016 | 5/1/2016 through 4/30/2017 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 Mooseheart Dues | 5/31/2016 | 6/1/2016 through 5/31/2017 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 Mooseheart Dues | 3/31/2017 | 4/1/2017 through 3/31/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 Mooseheart Dues | 2/28/2017 | 3/1/2017 through 2/28/2018 | $50.00 |
| [illegible] | [illegible] | LODGE 2655 Mooseheart Dues | 4/30/2017 | 5/1/2017 through 4/30/2018 | $50.00 |

ASK them to turn to Page 89 in their Workbooks.

EXPLAIN how the Pay A/R function can be used.

The Admin menu allows Administrators, Recorders and Secretaries to pay their accounts receivable balance due to Moose International.

The payment is typically applied to the account within two business days. *Please note*: an added convenience to the payment of A/R is the ability to pay by FRU checking account. You will need a copy of a valid check in order to supply the necessary information. Alternately, when choosing to pay by credit card, the card used may be the Administrator’s, Recorder’s or Secretary’s personal credit card OR a card issued to the FRU with special dispensation from the General Governor’s Office.

Point out that this screen will detail the account balance as well as the amount of the last payment.

Also, advice participants that once the payment has been made, the balance will NOT adjust immediately. It will not change until it has been posted by the Finance Department at Moose International.

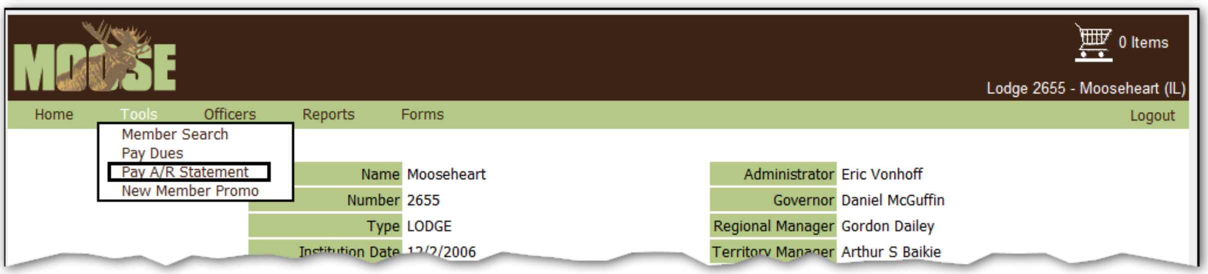
SHOW them the steps necessary to Pay A/R through the Tools Menu using a checking account.

Paying via credit card is the same as described earlier.

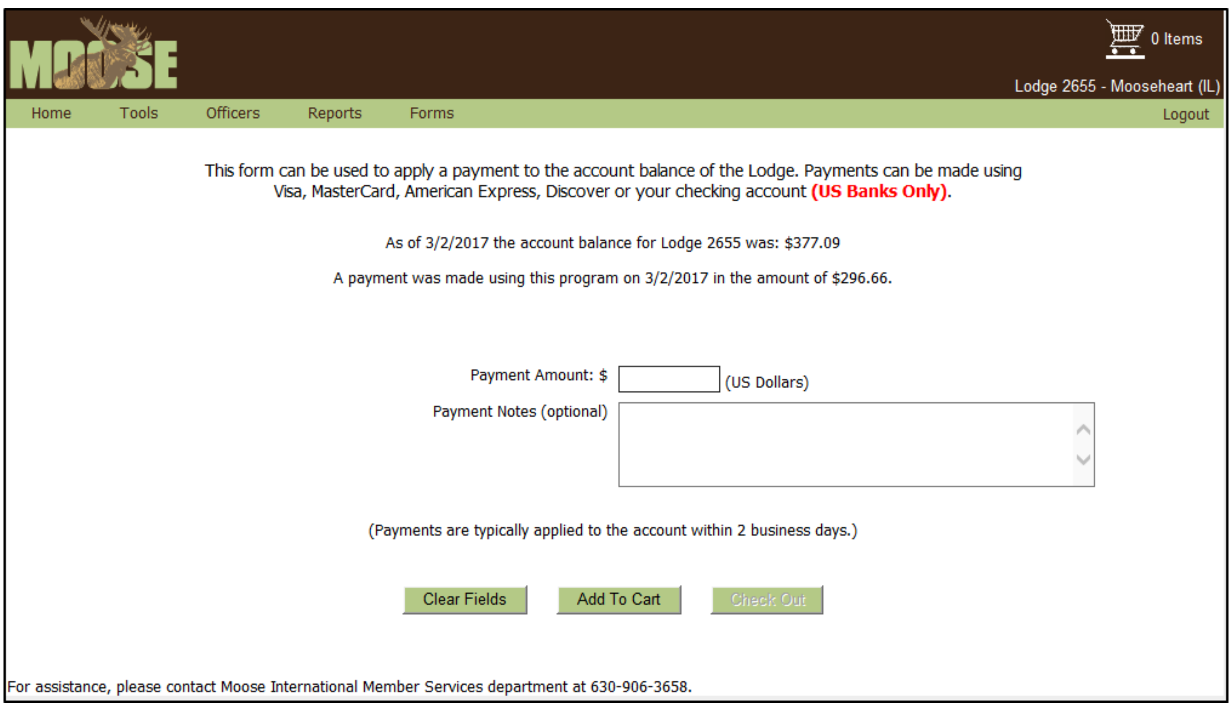
You may use Admin Menu to quickly access your Statement of Account (Accounts Receivable) balance and payment information. You may also choose to make your payments this way rather than sending a check to Moose International.

**To Pay Accounts Receivable from Moose Admin**

1. From the Tools Drop Down Menu, choose Pay A/R Statement.



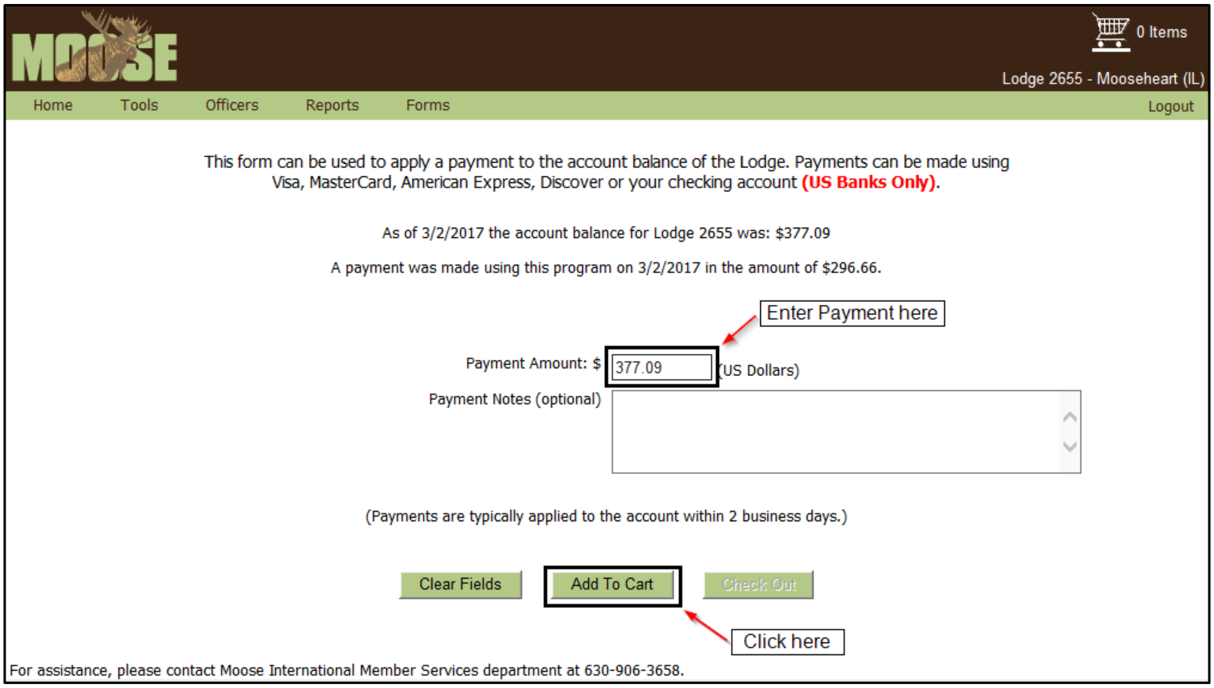

The screen that appears will supply the balance due and most recent payment information.



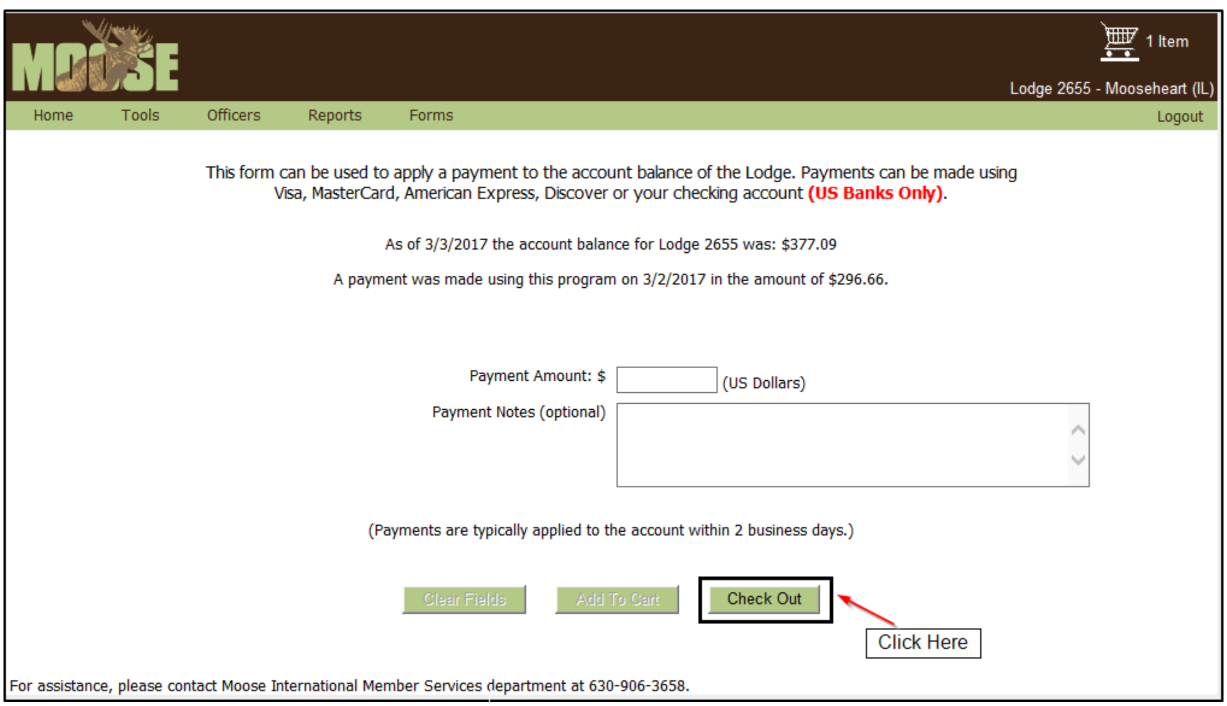
ASK them to turn to Page 90 in their Workbooks.

From here, continue the process of submitting your Statement of Accounts payment.

1. Enter the dollar amount you wish to pay in the *Payment Amount* field.
2. Use the *Payment Notes* field to provide any important information to Moose International about your payment. This field is optional and may be left blank.
3. Click Add to Cart




4. The Payment Amount field will appear blank. Click *Check Out* to continue.



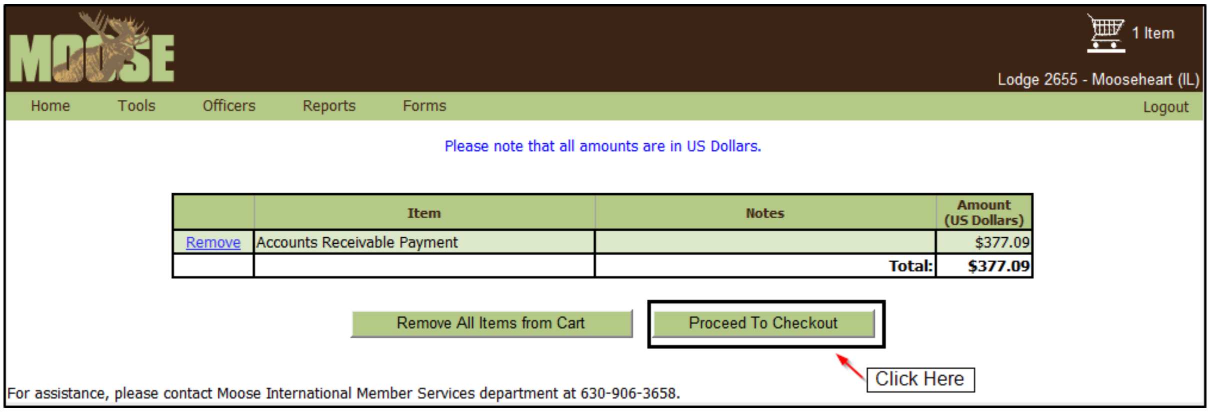
ASK them to turn to Page 91 in their Workbooks.

5. You will see a screen showing what is in your shopping cart. From this screen you may choose to:

   *Remove All Items from Cart*

   *Proceed to Checkout*

6. If the payment information showing is correct, click *Proceed to Checkout*.

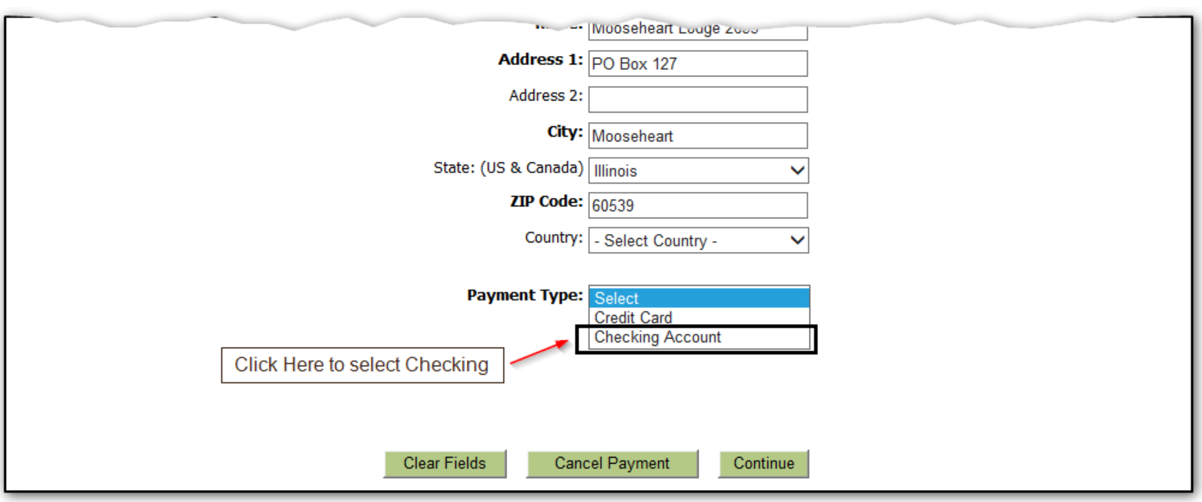



7. Checkout follows the same process as when paying dues. Enter information in the following fields:

   - Name
   - Address 1
   - City
   - State
   - ZIP Code

**NOTE:** The one difference between paying dues and payment of the A/R statement is your choice of payment method. You may choose to pay with your FRU's checking account or by credit card.

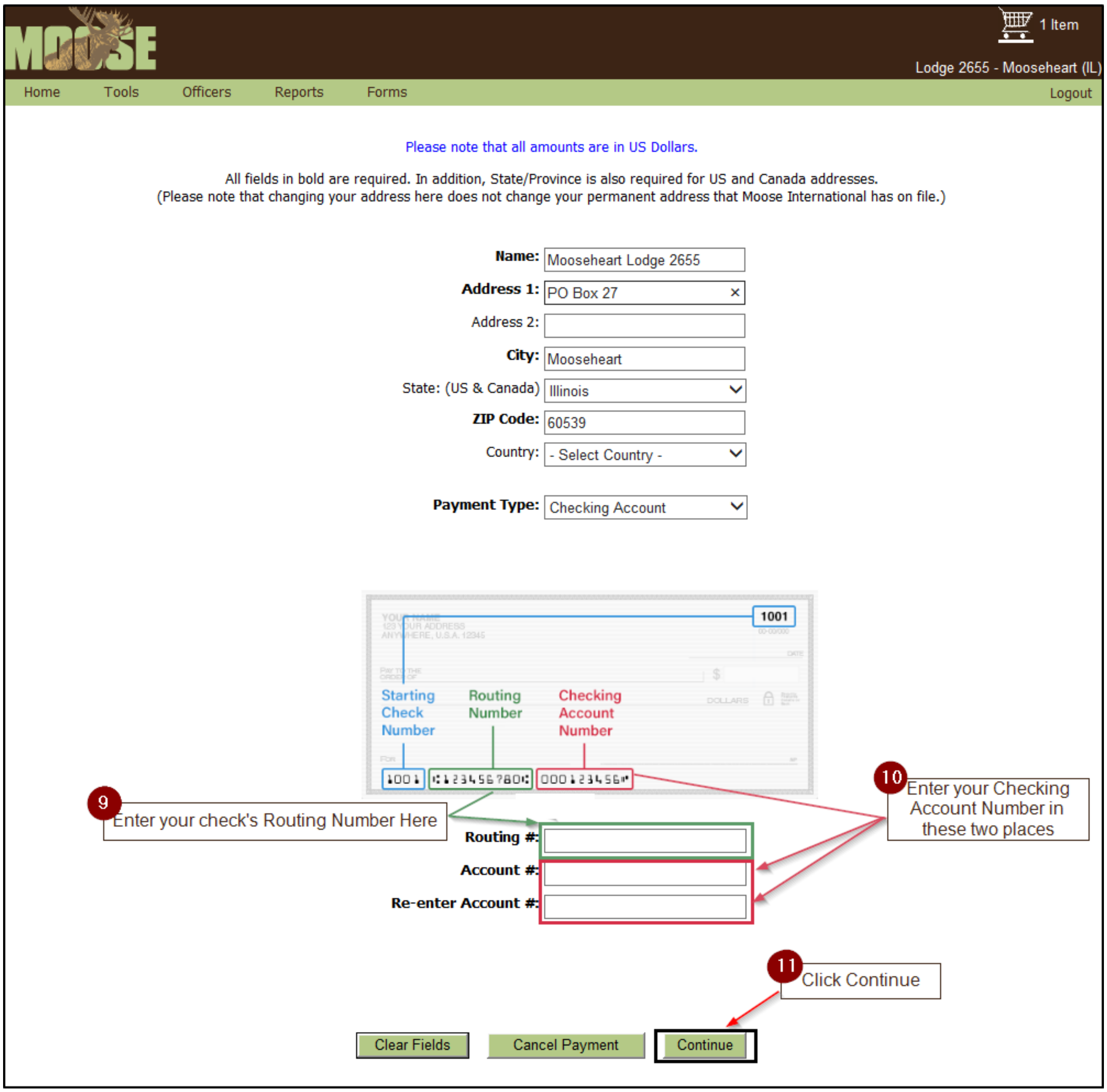
8. Click Payment Type and choose *Checking Account*, to pay by electronic check



ASK them to turn to Page 92 in their Workbooks.

You will be redirected to a screen where you will enter your checking account information for payment. Use the example check shown on the screen to locate the information needed from your FRU's check to complete payment.

9. Find your check's routing number and enter it in the *Routing #* field.
10. Next locate your check's account number and enter it first in the *Account #* field and second in the *Re-enter Account #* field.
11. Click *Continue*

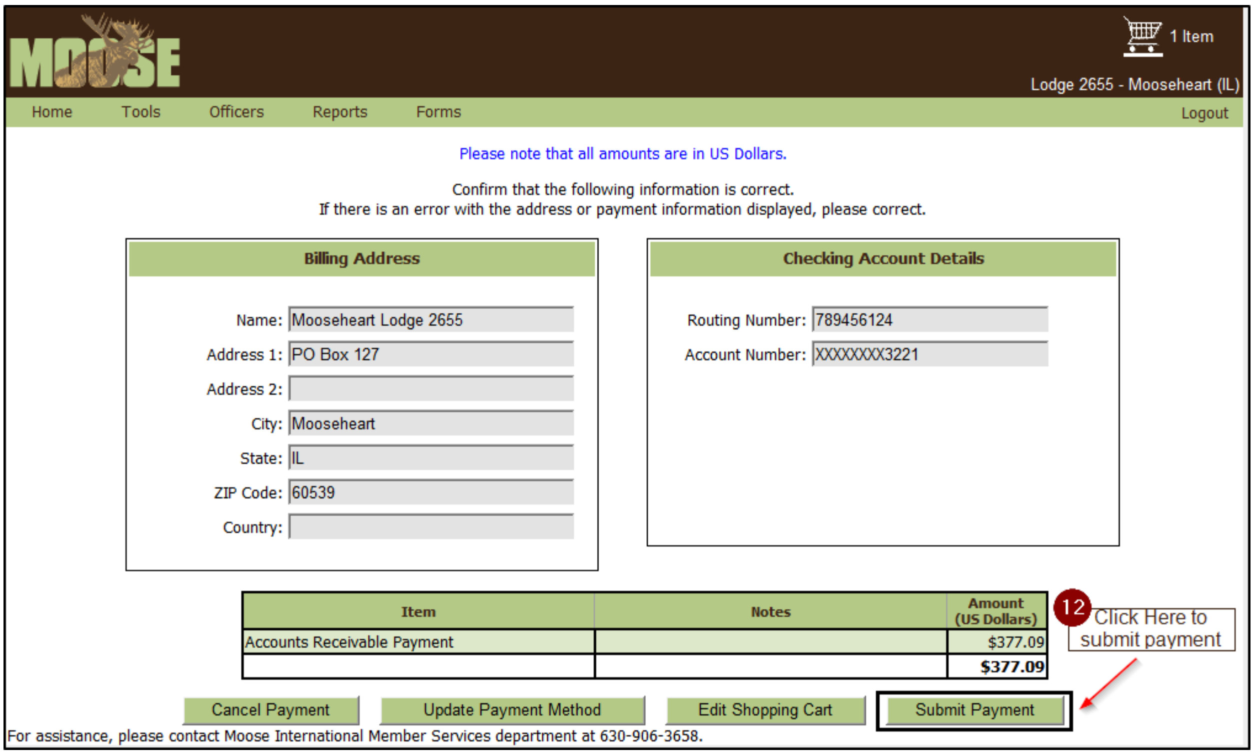


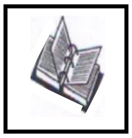
ASK them to turn to Page 93 in their Workbooks.

Just as with the dues payment process, you will be redirected to a confirmation screen where you may choose to:

- Cancel payment by clicking *Cancel Payment*
- Change your payment method by clicking *Update Payment Method*
- Add or remove items in your cart by clicking *Edit Shopping Cart*
- Complete the payment process by clicing *Submit Payment*

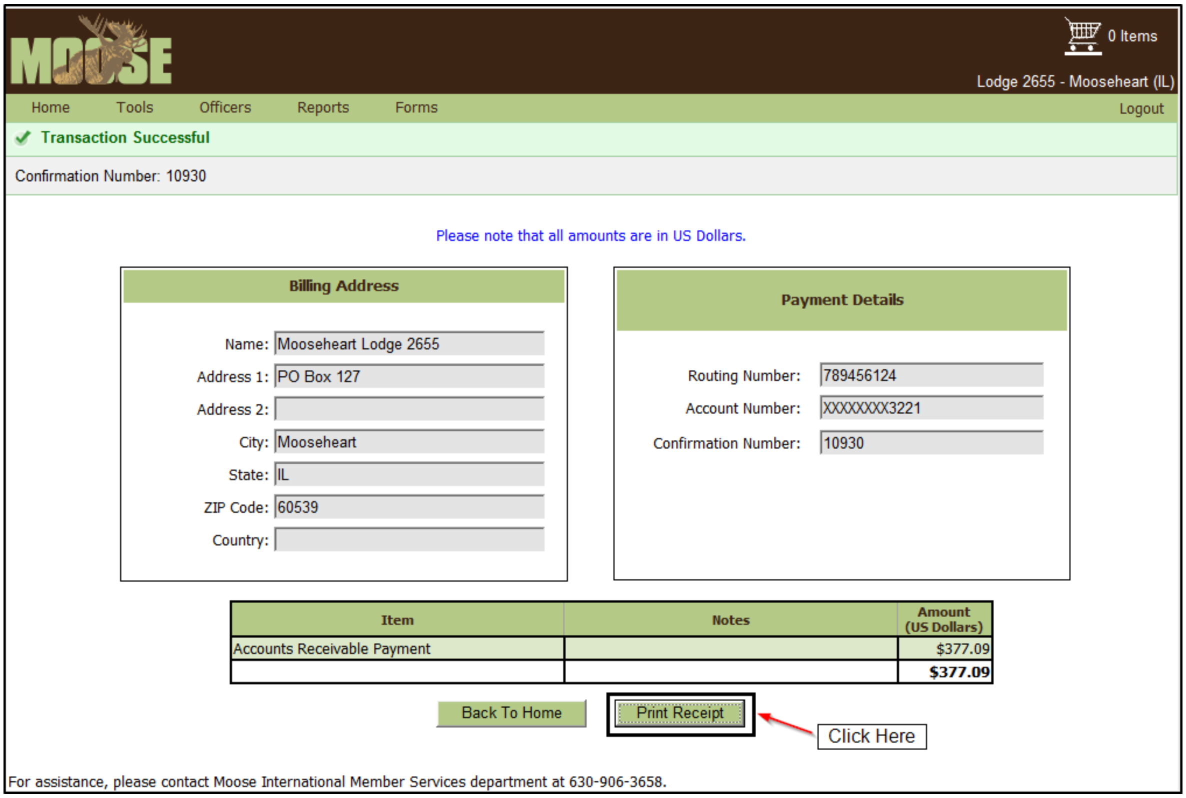
12. Once you have confirmed that all of the information shown is correct, to complete the payment, click *Submit Payment*



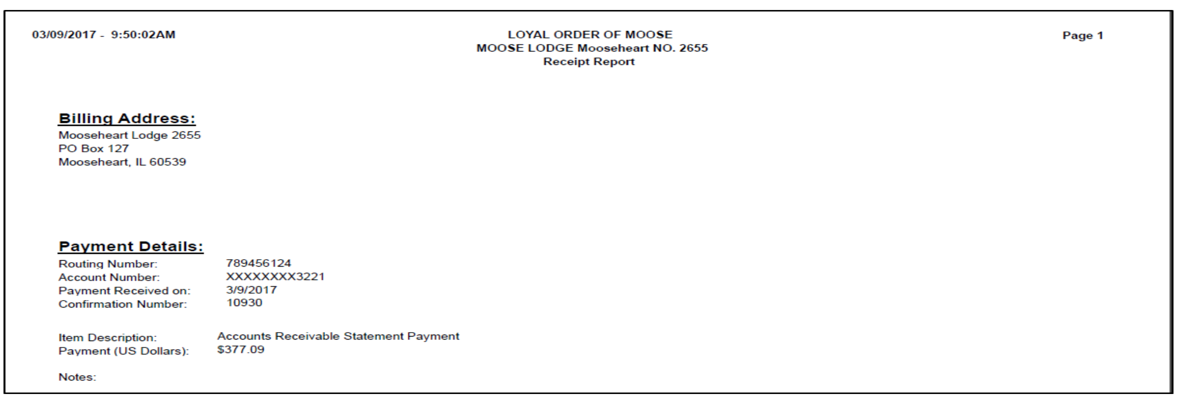


ASK them to turn to Page 94 in their Workbooks.

You will see a Confirmation and Receipt screen, with a confirmation number, indicating you have successfully completed your transaction.




Click the *Print Receipt* button for your records.



03/09/2017 - 9:50:02AM

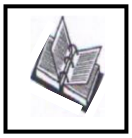
LOYAL ORDER OF MOOSE
MOOSE LODGE Mooseheart NO. 2655
Receipt Report

Page 1

**Billing Address:**
Mooseheart Lodge 2655
PO Box 127
Mooseheart, IL 60539

**Payment Details:**

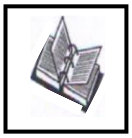
| | |
|---|---|
| Routing Number: | 789456124 |
| Account Number: | XXXXXXXX3221 |
| Payment Received on: | 3/9/2017 |
| Confirmation Number: | 10930 |
| Item Description: | Accounts Receivable Statement Payment |
| Payment (US Dollars): | $377.09 |
| Notes: | |



ASK them to turn to Page 95 in their Workbooks.

EXPLAIN the New Member Promo feature is transitional.  It is for temporary promotions and therefore no instruction will be given at this time due to its likelihood for change.

This feature of Moose Admin is used for temporary promotions. No instruction will be given at this time. Should you ever have questions about how to use this portion of Moose Admin, call the Training Department at 630- 966-2294.

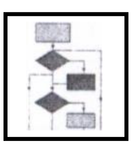


ASK them to turn to Page 96 in their Workbooks.

EXPLAIN that the Officers tool on Moose Admin is to be used to enter new officers at the beginning of the Moose Fiscal year. It is also used to make any changes to officers should they take place outside the ordinary term of the officer.

It is imperative that you no longer enter your officers through LCL.net. Although they will appear in your system, the information will not be transmitted to Moose International. Moose International will alert you in advance regarding the date that new officer entries may be made.

Point out that they will not need to remove any of the previous year's officers nor will they need to supply an end date. Moose International will do both of those things automatically. Each position will read "Vacant" until the Administrator, Recorder or Secretary makes the entries for the new fiscal year. They must wait until the date Moose Intl. specifies to make entries. Start dates will need to be back-dated if the officer began his term before the date of entry.



SHOW them the steps necessary to enter officers.

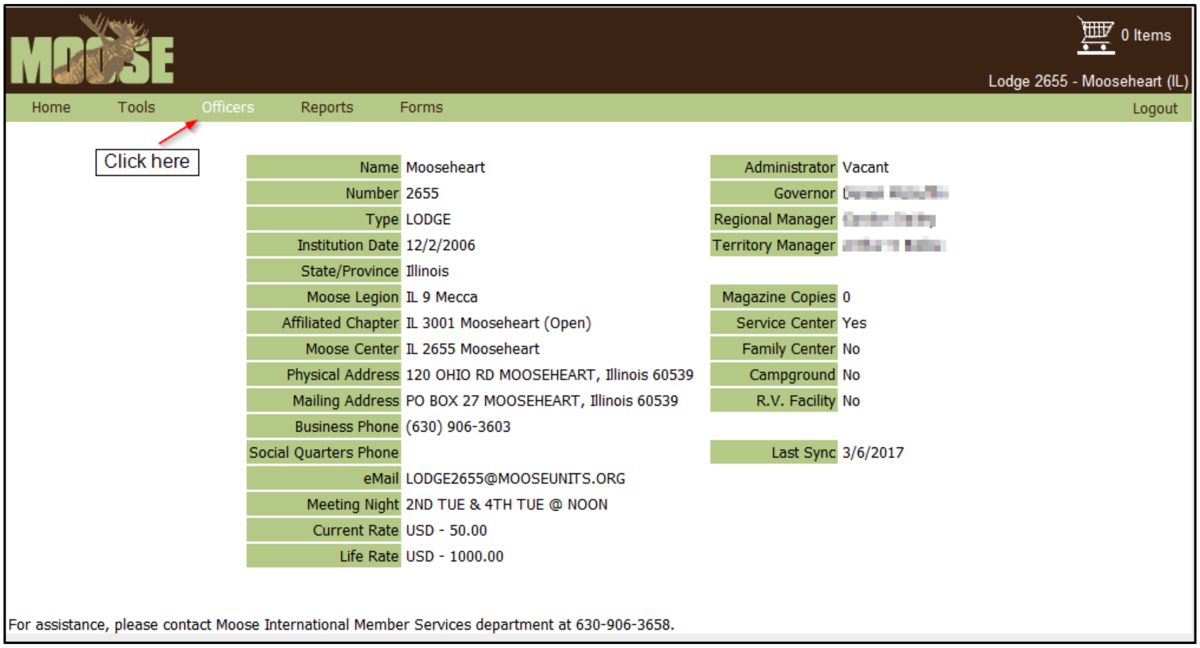
# Officers



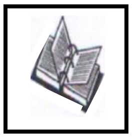
This feature of Moose Admin is used for the entry of new officers at the beginning of the Moose Fiscal year. It may also be used to edit, update or add officers during the year.

## To enter new officers at the beginning of a new Moose Fiscal Year

1. Choose *Officers* from the menu bar.




**NOTE:** This is the only acceptable way to enter new officers or make changes to existing officers. *LCL.net should no longer be used to enter or update officers*.



ASK them to turn to Page 97 in their Workbooks.

Next, you will see a screen showing vacancies for every position. Moose International creates end dates for all former officers and chairmen, at which time a vacancy is created for each position. *You will not need to enter any end dates for officers at the end of the fiscal year.*

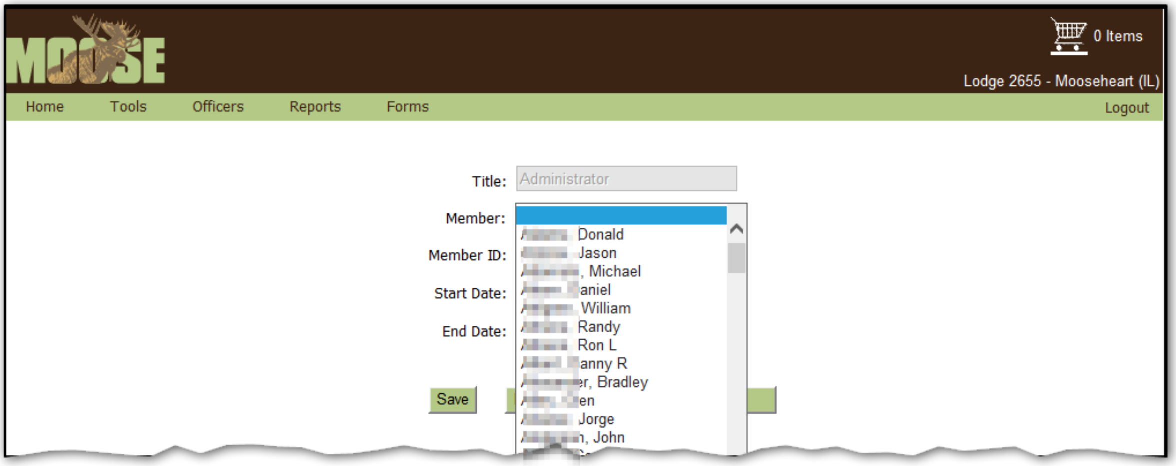
2. Click *Edit* next to the title you wish to fill with the newly elected or appointed officer or chairman.


| | Title | Name | Member ID | Phone / Address | Start Date | End Date | Type |
|---|---|---|---|---|---|---|---|
| Edit | Governor | ** V A C A N T ** | | | | | Officer |
| Edit | Administrator | ** V A C A N T ** | | | | | Officer |
| Edit | Junior Governor | ** V A C A N T ** | | | | | Officer |
| Edit | Treasurer | ** V A C A N T ** | | | | | Officer |
| Edit | Prelate | ** V A C A N T ** | | | | | Officer |
| Edit | Trustee (1 Year) | ** V A C A N T ** | | | | | Officer |
| Edit | Trustee (2 Years) | ** V A C A N T ** | | | | | Officer |
| Edit | Trustee (3 Years) | ** V A C A N T ** | | | | | Officer |
| Edit | Junior Past Governor | ** V A C A N T ** | | | | | Officer |
| Edit | Sergeant At Arms | ** V A C A N T ** | | | | | Appointed Officer |
| Edit | Inner Guard | ** V A C A N T ** | | | | | Appointed Officer |
| Edit | Outer Guard | ** V A C A N T ** | | | | | Appointed Officer |
| Edit | Activities | ** V A C A N T ** | | | | | Chairman |
| Edit | Application Review | ** V A C A N T ** | | | | | Chairman |
| Edit | Auditing | ** V A C A N T ** | | | | | Chairman |
| Edit | Communications | ** V A C A N T ** | | | | | Chairman |
| Edit | Community Service | ** V A C A N T ** | | | | | Chairman |
| Edit | Government Relations | ** V A C A N T ** | | | | | Chairman |
| Edit | Loss Prevention | ** V A C A N T ** | | | | | Chairman |
| Edit | Membership | ** V A C A N T ** | | | | | Chairman |
| Edit | Moose Charities | ** V A C A N T ** | | | | | Chairman |
| Edit | Moose Legion | ** V A C A N T ** | | | | | Chairman |
| Edit | Ritual | ** V A C A N T ** | | | | | Chairman |

**NOTE:** Please do not attempt to enter newly elected officers until the date designated by Moose International.

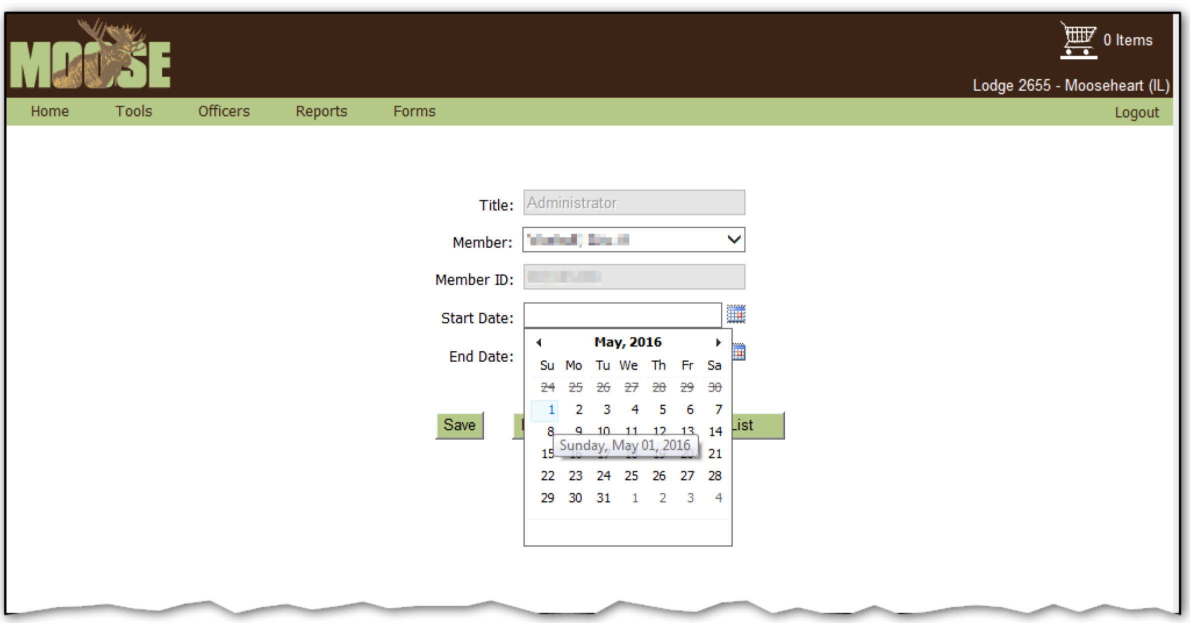
ASK them to turn to Page 98 in their Workbooks.

3. Choose the name of the new officer or chairman from the drop down list.

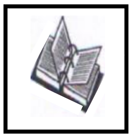



You can type the first letter of the last name of the new officer to advance your cursor or scroll down until you reach the desired member. The Member ID will automatically fill upon selection of the member.

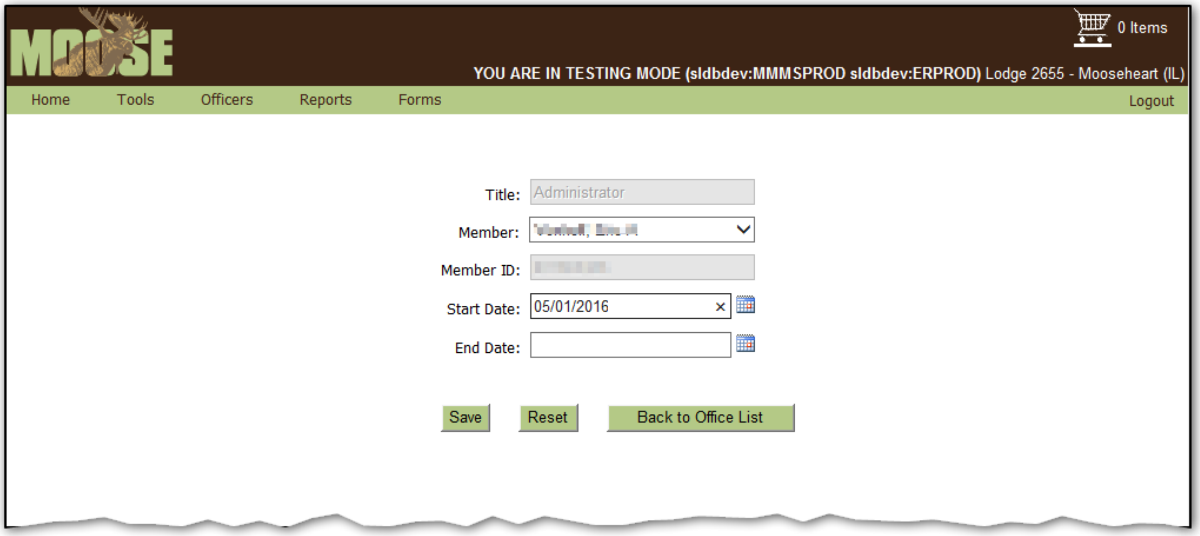
4. Next, select the date the member began his or her term.




**NOTE:** Be sure to backdate to the first day of the member's term of service. It will most likely be different than the date you are entering the officers.



ASK them to turn to Page 99 in their Workbooks.




Once the date has been entered, you will have three choices:

- If all of the information is accurate, you may choose to save the data by clicking *Save*
- When a correction needs to be made to the entry, you may change each entry one at a time or do all at once by choosing *Reset*
- To return to the list of Officers, click *Back to Officer List*

5. Upon choosing Save, you will be redirected to the list of Officers. Click *Edit* for next the position that you need to fill.
6. Repeat the steps above until you have entered all of your new officers and chairmen.

ASK them to turn to Page 100 in their Workbooks.

EXPLAIN that the Reports tool on Moose Admin offers many options. We will go through each option individually.

It is through this feature of Moose Admin that you can run officer and chairmen reports, create labels, get your most up-to-date deposit information from Moose Intl., see a list of your members who have self-identified as a Valued Veteran and also see a history of your unit's financial transmissions.

SHOW them the menu item and its options.

This feature of Moose Admin allows you to access valuable information. From here you can run officer and chairmen reports, create labels sorted by name or zipcode, see the most recent deposit history from Moose Intl., identify which of your members are Valued Veterans as well as see a history of your unit's financial transmissions.

We will go through each component of the Reports Feature individually.

ASK them to turn to Page 101 in their Workbooks.

EXPLAIN that the Reports – Officers feature on Moose Admin can be used to create reports of all current officers and chairmen, officers only, appointed officers only, or only chairmen. It also allows you to create various labels for the same groups above. When creating labels the user has the option to choose a label size as well as to sort the labels on name or zip code. This is also where you can create a zip code report. The zip code report will tabulate how many members of each specified group live in the zip codes represented.

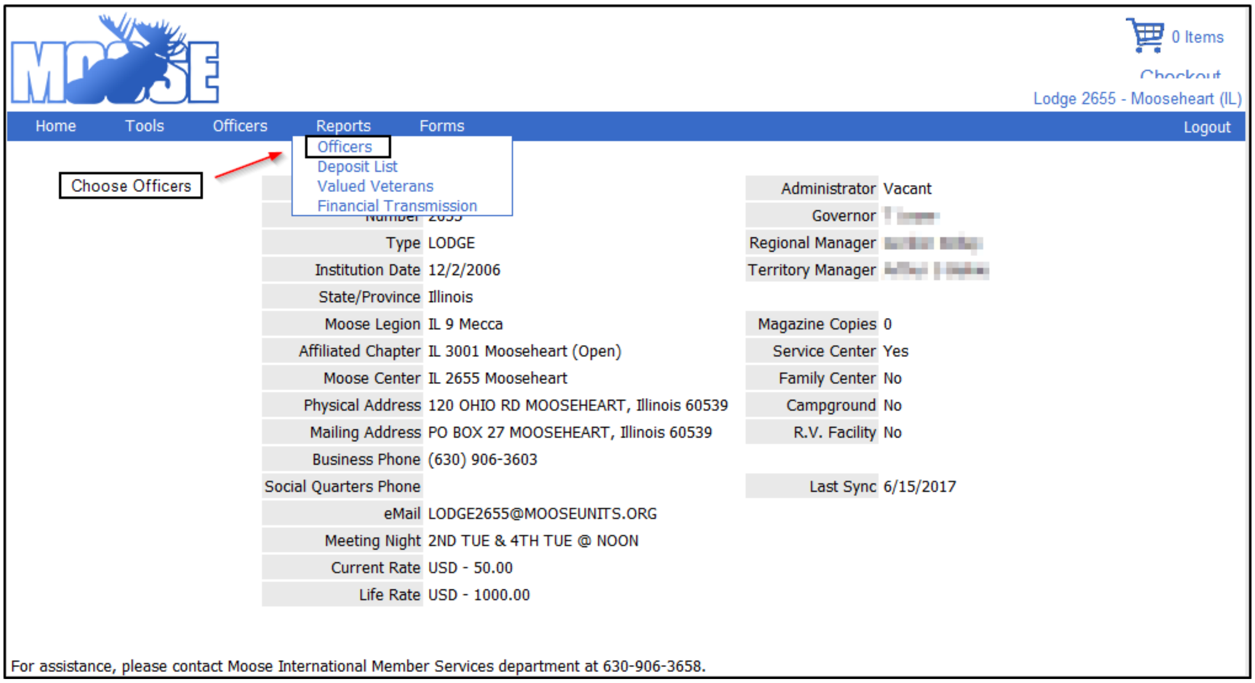
While you can report on officers, appointed officers and chairmen combined or separately, you do not have any options to sort or run reports based on any other specific criteria. However you do have some more options when creating labels. You may sort labels based on name or zip code. You are also able to create a zip code count report from here.

SHOW them the Reports - Officers feature.

This helpful feature of Moose Admin allows Recorders, Secretaries and Administrators to run reports of their current year officers, appointed officers and chairmen. Labels, of various sizes, for these groups can also be produced through this menu item. Additionally, there is an option to create zip code counts.

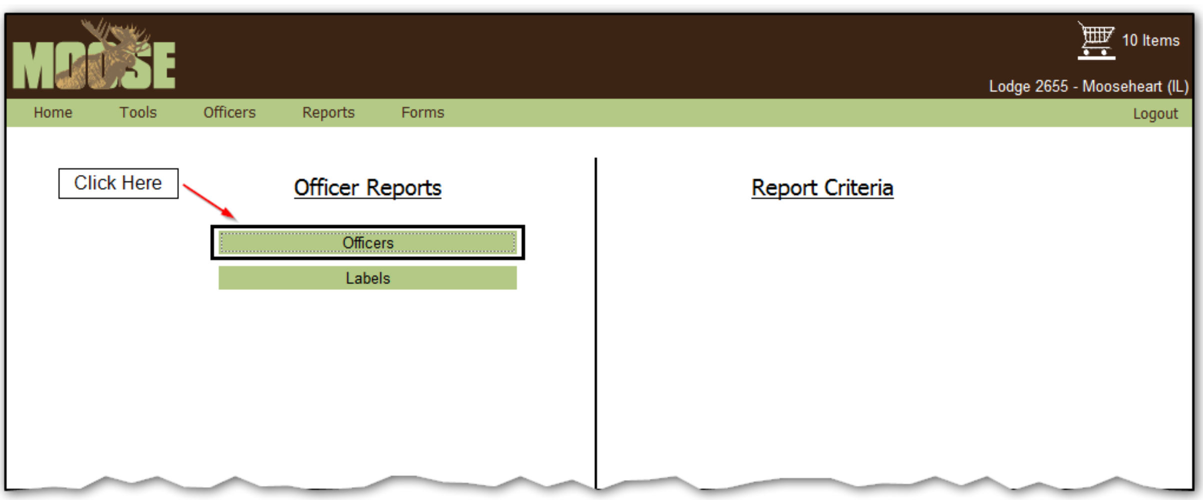
## To create officer reports for your unit from Moose Admin:

1. Click on the *Reports* drop down menu and choose *Officers*



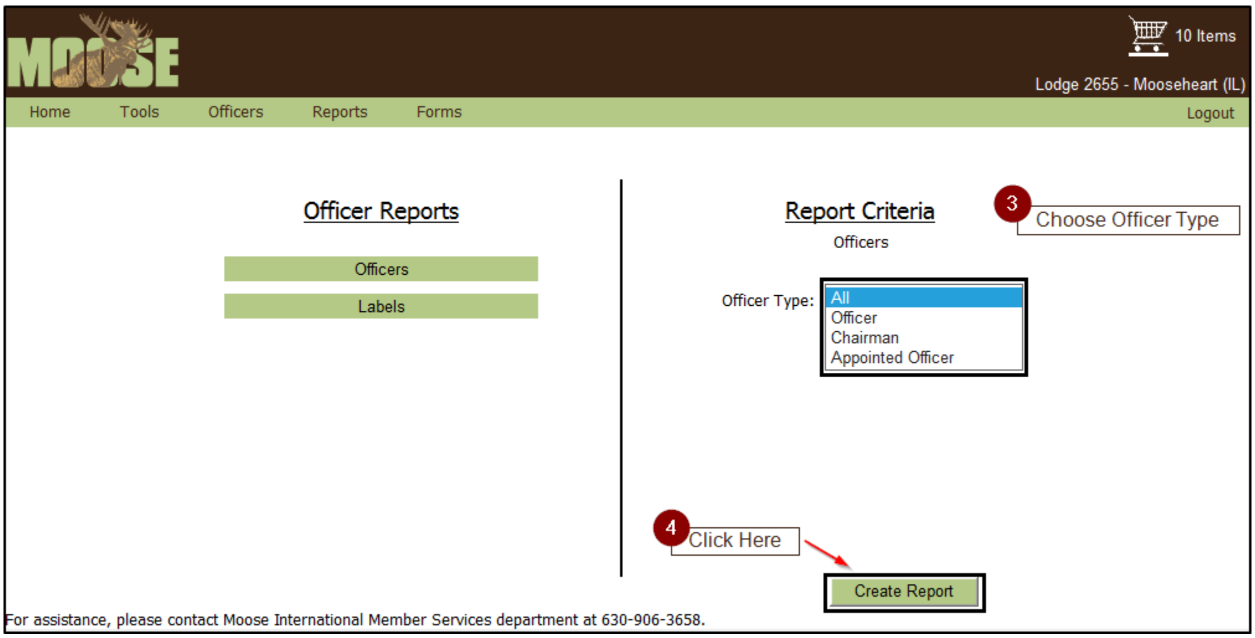

Since you are focusing on reports at this time, ignore the option for labels.

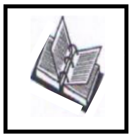
2. Click on *Officers*



ASK them to turn to Page 102 in their Workbooks.

3. From here you may choose what kind of information you would like to report on by clicking on the *Officer Type* drop down menu and doing one of the following:
   - To create a report listing all current year elected officers, appointed officers and chairmen, click on *All*
   - For a report that lists only elected officers, click on *Officers*
   - Click on *Appointed Officers* to create a report of only those who were appointed
   - A report of all chairmen can be created by clicking on *Chairman*
4. Click *Create Report* to see and print your report. Once the report is generated It can be printed by right clicking in the report or using the floating menu.

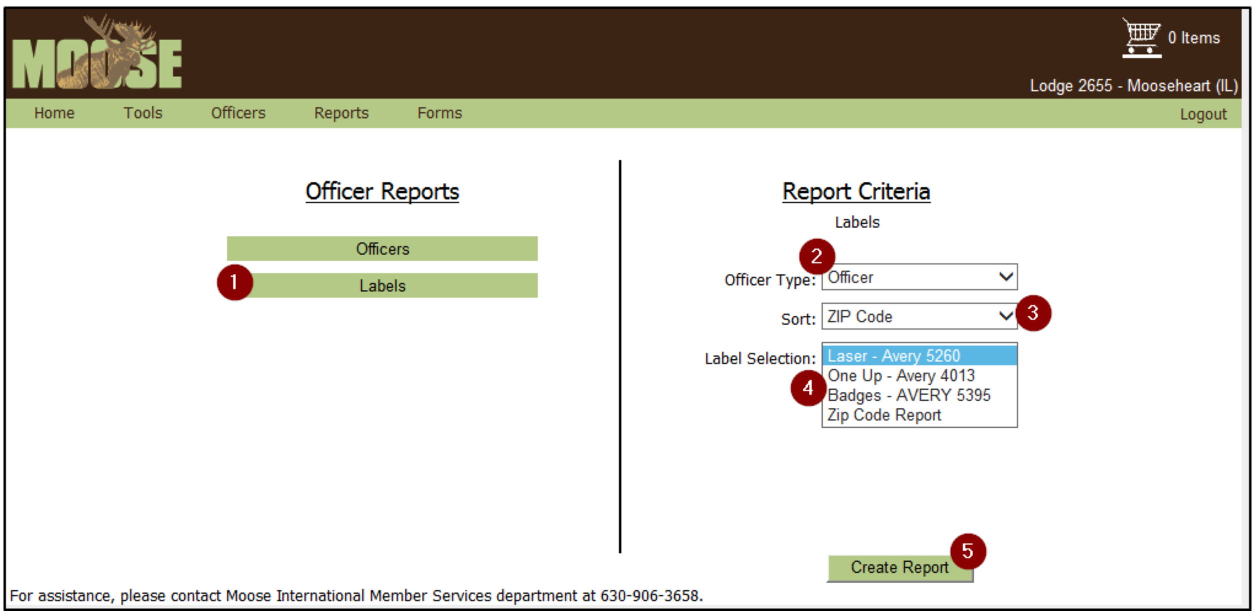




ASK them to turn to Page 103 in their Workbooks.

**To create labels from Moose Admin**

1. Choose *Labels* from the Officer Report options.
2. Click on the *Officer Type* drop down menu to choose the group for which you would like to create labels. You may choose from *All*, *Officer*, *Chairman* or *Appointed Officer* just as with the report feature.
3. You may choose to sort your labels by *Name* or *Zip Code* by clicking on the *Sort* drop down menu.
4. Next, choose the type of labels you would like to print by clicking on the *Label Selection* drop down menu. You may choose from:
   - Laser – Avery 5260
   - One Up – Avery 4013
   - Badges – Avery 5395
   - Zip Code Report
5. Click on the *Create Report* button.




When the report appears, you may click on the floating menu or right click to print.

ASK them to turn to Page 104 in their Workbooks.

EXPLAIN that the Reports – Deposit List feature on Moose Admin lists all of the Membership Dues deposits made to your FRU from Moose International. Reporting is available for previous years. Each deposit can be viewed individually. This information is the most up-to-date and should be used when recording deposits from Moose International.

LCL.net should no longer be used for gathering deposit history information. All units should be using the Deposit List on Moose Admin when entering deposits in QuickBooks.

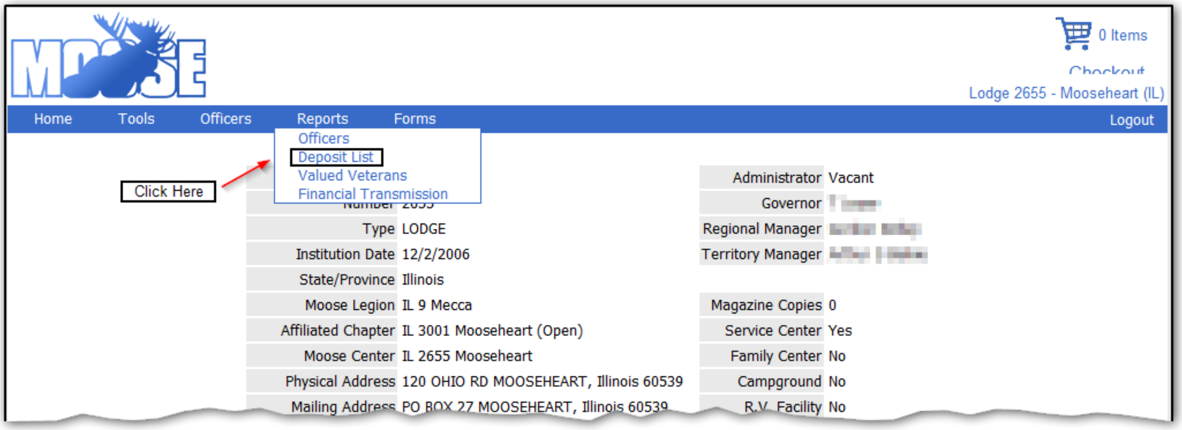
SHOW them the Reports – Deposit List feature.

Explain how to access the data.

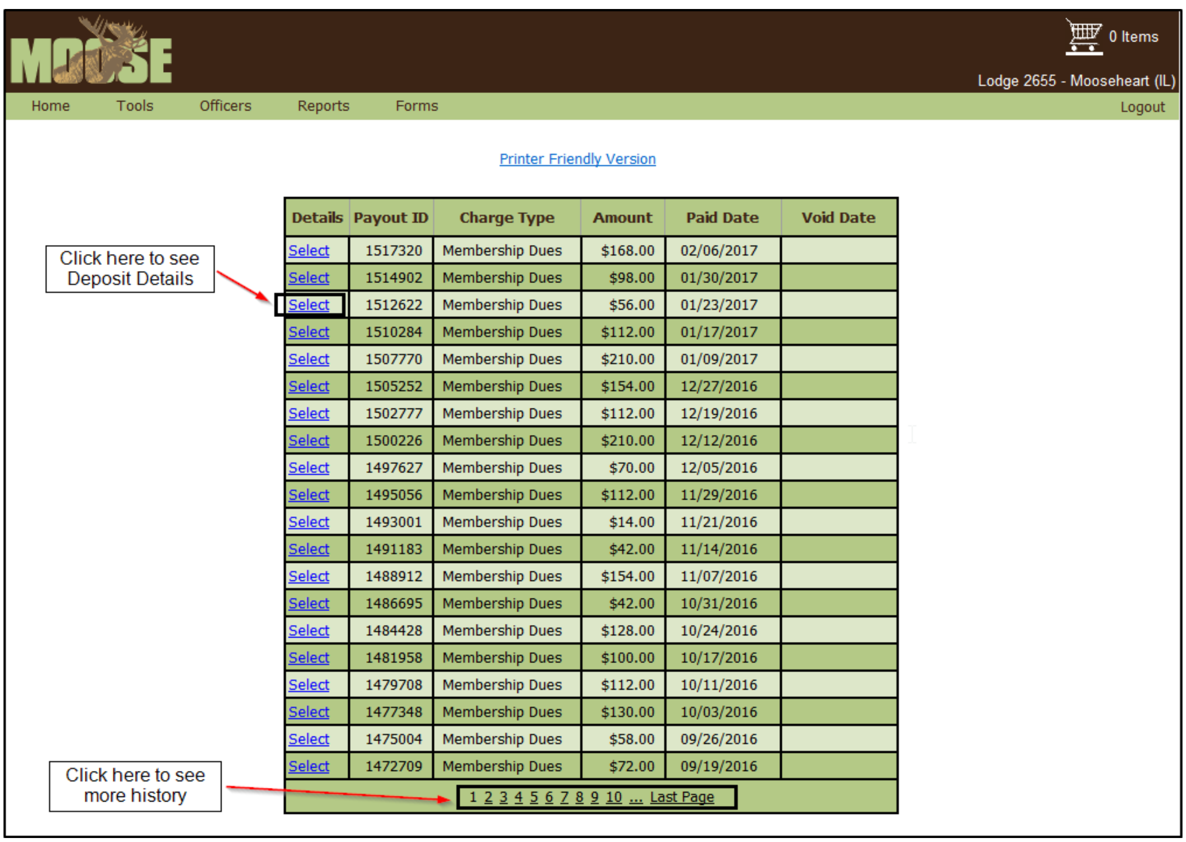
It is critical to the accurate maintenance of your unit's QuickBooks account that you record your Moose International Membership Dues Pay Outs or Deposits. Moose Admin features a Deposit List that is updated weekly. The list contains all deposits made to your FRU, including previous years. Each deposit shown in the list can be viewed for specific details.

**<u>To view your FRU's Deposit List and Deposit Details</u>**

1. Choose *Deposit List* from the *Reports* drop down menu.




2. A screen displaying the last 20 Membership Dues Pay Outs will be shown.

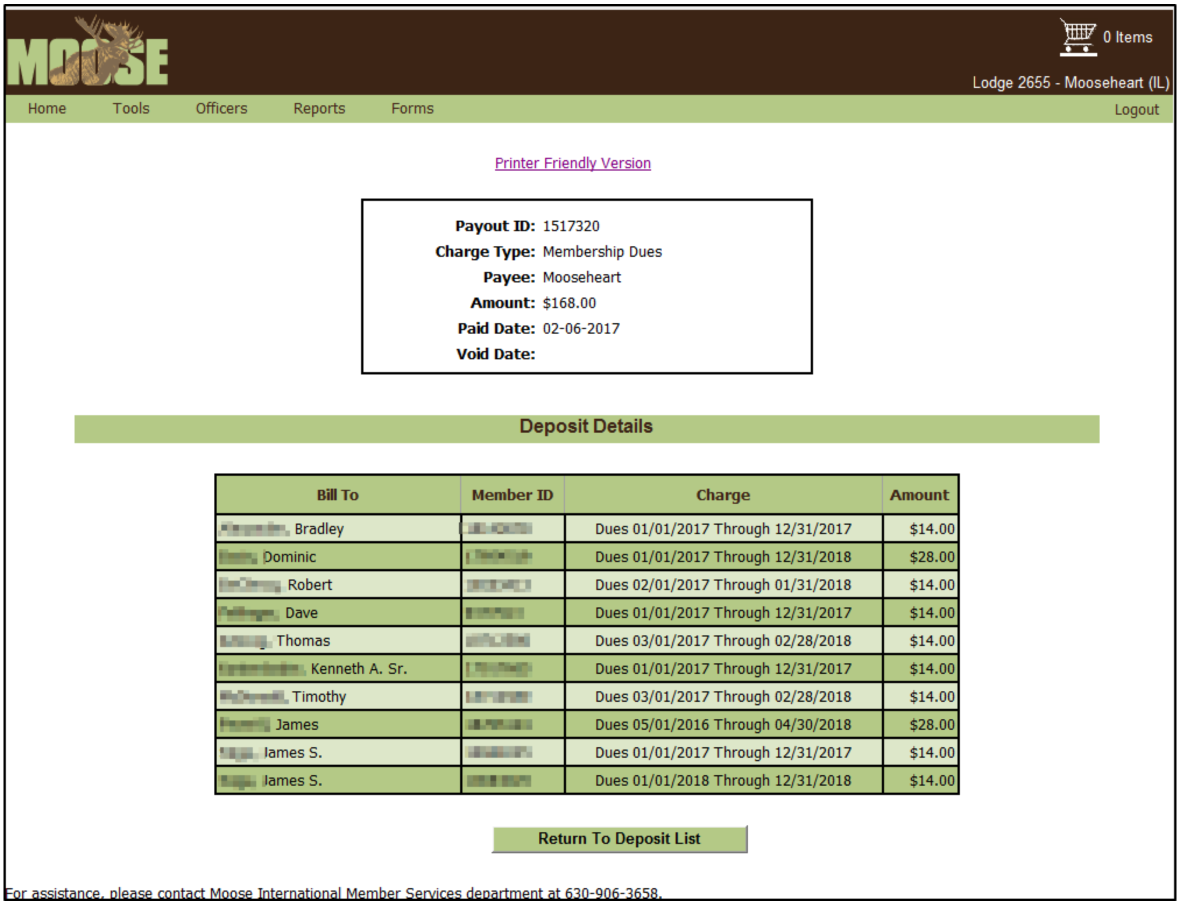



| Details | Payout ID | Charge Type | Amount | Paid Date | Void Date |
|---|---|---|---|---|---|
| Select | 1517320 | Membership Dues | $168.00 | 02/06/2017 | |
| Select | 1514902 | Membership Dues | $98.00 | 01/30/2017 | |
| Select | 1512622 | Membership Dues | $56.00 | 01/23/2017 | |
| Select | 1510284 | Membership Dues | $112.00 | 01/17/2017 | |
| Select | 1507770 | Membership Dues | $210.00 | 01/09/2017 | |
| Select | 1505252 | Membership Dues | $154.00 | 12/27/2016 | |
| Select | 1502777 | Membership Dues | $112.00 | 12/19/2016 | |
| Select | 1500226 | Membership Dues | $210.00 | 12/12/2016 | |
| Select | 1497627 | Membership Dues | $70.00 | 12/05/2016 | |
| Select | 1495056 | Membership Dues | $112.00 | 11/29/2016 | |
| Select | 1493001 | Membership Dues | $14.00 | 11/21/2016 | |
| Select | 1491183 | Membership Dues | $42.00 | 11/14/2016 | |
| Select | 1488912 | Membership Dues | $154.00 | 11/07/2016 | |
| Select | 1486695 | Membership Dues | $42.00 | 10/31/2016 | |
| Select | 1484428 | Membership Dues | $128.00 | 10/24/2016 | |
| Select | 1481958 | Membership Dues | $100.00 | 10/17/2016 | |
| Select | 1479708 | Membership Dues | $112.00 | 10/11/2016 | |
| Select | 1477348 | Membership Dues | $130.00 | 10/03/2016 | |
| Select | 1475004 | Membership Dues | $58.00 | 09/26/2016 | |
| Select | 1472709 | Membership Dues | $72.00 | 09/19/2016 | |

Additionally, you may view earlier deposits by clicking on the page numbers at the bottom.

ASK them to turn to Page 105 in their Workbooks.

3. To view the details of a deposit, click *Select* next to the desired record.




| Bill To | Member ID | Charge | Amount |
|---|---|---|---|
| [redacted], Bradley | [redacted] | Dues 01/01/2017 Through 12/31/2017 | $14.00 |
| [redacted], Dominic | [redacted] | Dues 01/01/2017 Through 12/31/2018 | $28.00 |
| [redacted], Robert | [redacted] | Dues 02/01/2017 Through 01/31/2018 | $14.00 |
| [redacted], Dave | [redacted] | Dues 01/01/2017 Through 12/31/2017 | $14.00 |
| [redacted], Thomas | [redacted] | Dues 03/01/2017 Through 02/28/2018 | $14.00 |
| [redacted], Kenneth A. Sr. | [redacted] | Dues 01/01/2017 Through 12/31/2017 | $14.00 |
| [redacted], Timothy | [redacted] | Dues 03/01/2017 Through 02/28/2018 | $14.00 |
| [redacted], James | [redacted] | Dues 05/01/2016 Through 04/30/2018 | $28.00 |
| [redacted], James S. | [redacted] | Dues 01/01/2017 Through 12/31/2017 | $14.00 |
| [redacted], James S. | [redacted] | Dues 01/01/2018 Through 12/31/2018 | $14.00 |



Each member for whom your unit is receiving a Dues Pay Out is listed in the Deposit Detail.

4. To print an easy to read version of the Deposit Details or the Deposit List, click *Printer Friendly Version*.

**NOTE:** You must use this information found in Moose Admin when creating your deposits in QuickBooks.

ASK them to turn to Page 106 in their Workbooks.

EXPLAIN that the Reports – Valued Veterans feature on Moose Admin lists all of the members of the FRU who have self-identified as a Valued Veteran.

This report lists only those members who have gone into their “My Membership Record” or contacted the Moose International Help Desk to be identified as a Valued Veteran. It does not identify everyone who is a veteran.

Please note: this reporting feature of Moose Admin is not yet available for the Moose Legion. It will be added in the future.

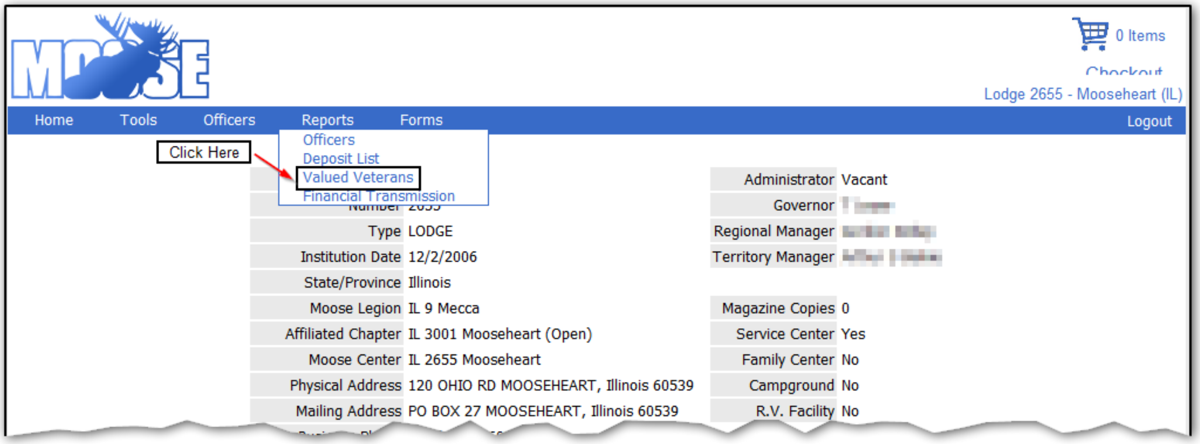
SHOW them the Reports – Valued Veterans List.

Explain how to access the data.

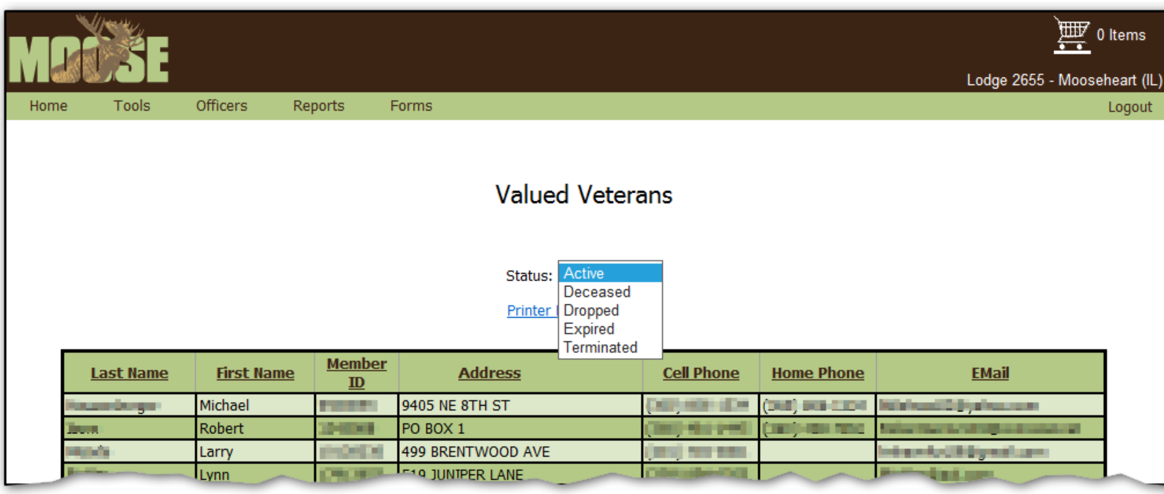
Valued Veterans is a program for veterans of all branches of the U.S. Armed Services as well as those of foreign countries. Members may self-identify as a Veteran and become a Moose Valued Veteran through My Membership Record or by calling the Moose International Help Desk.

**<u>To view a report of your FRU's members who have identified as Valued Veterans:</u>**

1. Choose *Valued Veterans* when accessing the Reports drop down menu.




2. A list of Active Valued Veterans will appear. You have the option to report on other statuses by clicking on the *Status* drop down menu.




To create a report that will print in an easy to read format, click on *Printer Friendly Version*.

ASK them to turn to Page 107 in their Workbooks.

EXPLAIN that the Reports – Financial Transmission feature on Moose Admin lists all of the monthly financial transmissions to Moose International that your unit has made and the date on which they were transmitted.

This report only lists the transmit date, no other data is available.

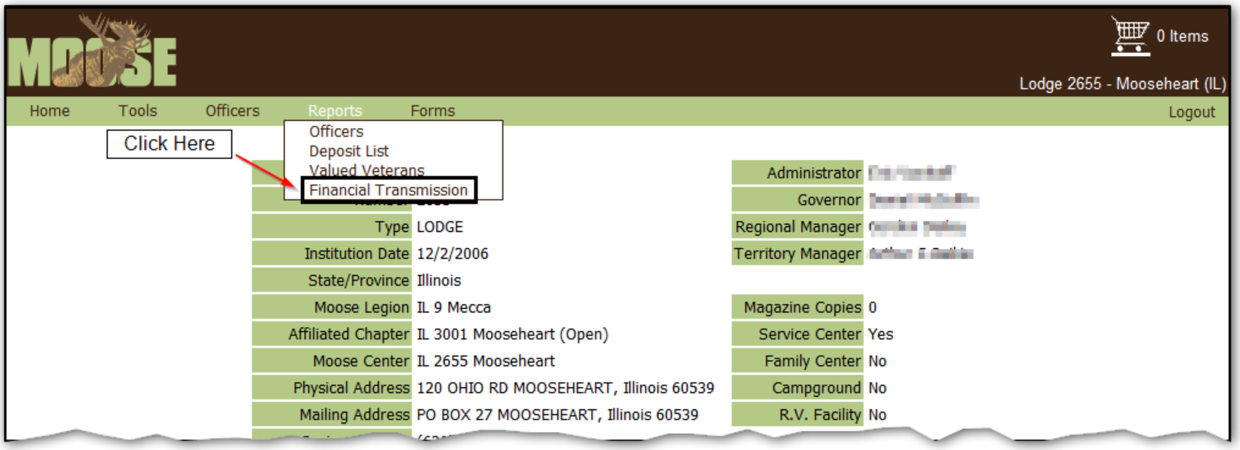
SHOW them the Reports – Financial Transmission.

Explain how to access the data.

Moose Admin Menu allows you to generate a report of your FRU's monthly financial transmissions. The report will supply you with the dates that your monthly reports were transmitted to Moose International.

## To generate a report of your Monthly Financial Transmissions

1. Choose *Financial Transmission* when accessing the Reports drop down menu.




The report will be generated in the format shown below:


| Month | Transmit Date |
|---|---|
| January 2017 | 02/10/2017 |
| December 2016 | 01/13/2017 |
| November 2016 | 12/13/2016 |
| October 2016 | 11/11/2016 |
| September 2016 | 10/10/2016 |
| August 2016 | 09/13/2016 |
| July 2016 | 08/10/2016 |
| June 2016 | 07/07/2016 |
| May 2016 | 06/10/2016 |
| April 2016 | 05/06/2016 |
| March 2016 | 04/08/2016 |
| February 2016 | 03/10/2016 |
| January 2016 | 02/02/2016 |
| December 2015 | 01/08/2016 |
| November 2015 | 12/10/2015 |
| October 2015 | 11/10/2015 |
| September 2015 | 10/08/2015 |
| August 2015 | 09/10/2015 |
| July 2015 | 08/08/2015 |
| June 2015 | 07/10/2015 |
| May 2015 | 06/06/2015 |
| April 2015 | 05/11/2015 |
| March 2015 | 04/11/2015 |
| February 2015 | 03/07/2015 |

ASK them to turn to Page 108 in their Workbooks.

EXPLAIN that the Forms feature on Moose Admin provides access to many different forms which vary by unit type. Moose Legion Secretaries do not have this feature. Administrators and Recorders have access to forms that are *required* to be submitted to Moose International electronically. We will go through each form for LOOM individually. The WOTM Forms will be listed and covered in more detail during WOTM training.

There are several reports for both LOOM and WOTM that MUST be submitted to Moose International through Moose Admin. Paper versions are no longer accepted. Please emphasize this!

Also emphasize the following:

*There are No Forms on Moose Admin for Moose Legion at this time.*

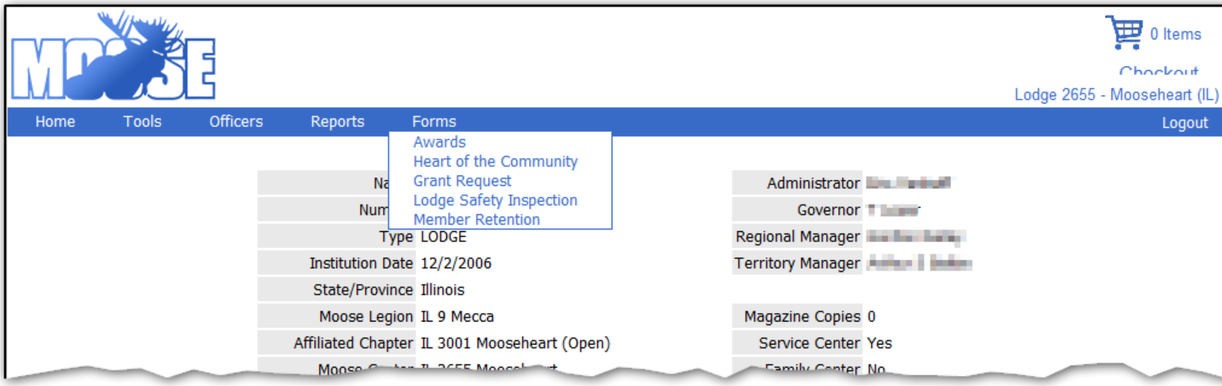
*Also note that while Grant Request appears in the drop down menu, the Supreme Council Grant program is scheduled to end with the 2017-2018 Moose Fiscal Year. There will be no instruction for that form.*

SHOW them the Forms Menu on Moose Admin.

Explain which reports are available by unit type.

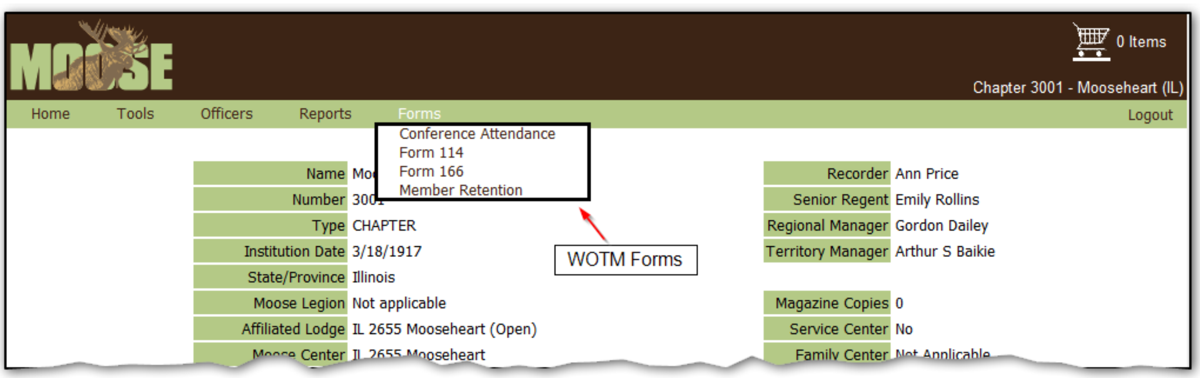
Moose Admin houses forms for both LOOM and WOTM. Currently, there are no reports for Moose Legion found in Moose Admin. The options found under the Forms drop down menu allow your unit to create and submit required forms to Moose International. There are several forms for which it is now a requirement that they are submitted through Moose Admin (electronically.) Paper versions, emailed or faxed versions will no longer be accepted.

**<u>The following LOOM forms are available though the *Forms* drop down menu :</u>**

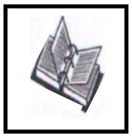



- *Awards* – Moose of the Year
- *Heart of the Community* – Quarterly Heart of the Community Report
- *Grant Request* – Application for Supreme Council Grant Program
- *Lodge Safety Inspection* – Semi-annual report
- *Member Retention* – an optional report for those Lodges that participated in Member Retention Week

**<u>WOTM have different forms accessible through the *Forms* drop down menu:</u>**



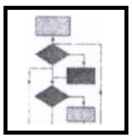

- *Conference Attendance* – MidYear and Annual Conference
- *Form 114* – There are 12 monthly reports and 1 annual
- *Form 166* – There are 12 monthly reports and 1 annual
- *Member Retention* – an optional report for those Chapters that participated in Member Retention Week



ASK them to turn to Page 109 in their Workbooks.

EXPLAIN that the Forms – Awards feature on Moose Admin is where you can enter the Lodge's Moose of the Year nominee.

This feature is only enabled for one month each year, typically June. *This is not applicable to WOTM or Moose Legion.*



SHOW them the Forms - Awards.

Explain how to enter the nominee.

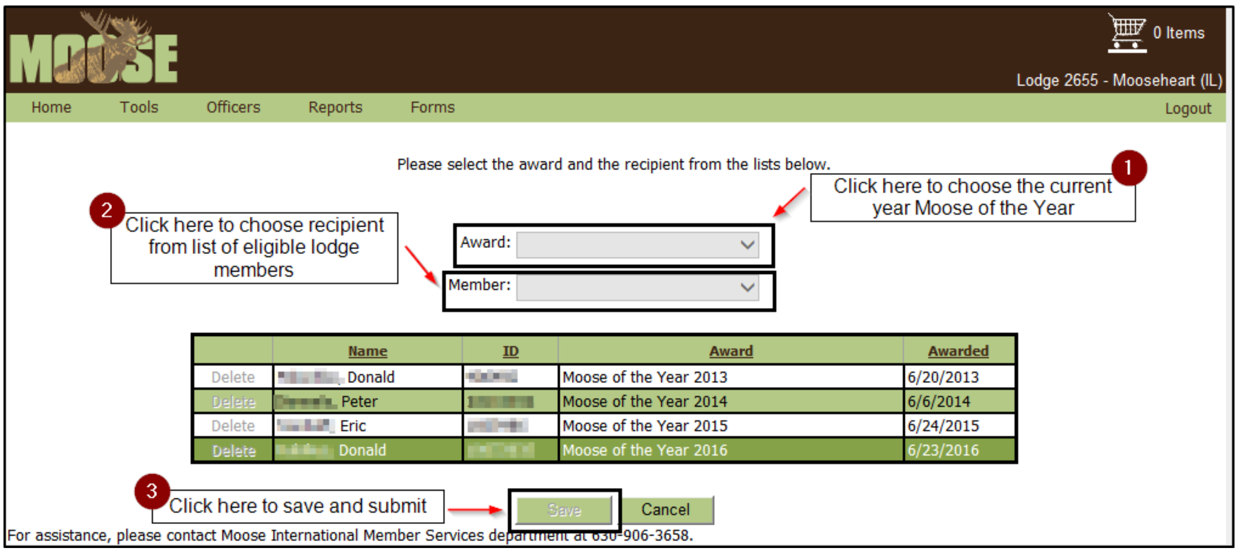
This section of Moose Admin is where administrators are to enter the recipient for their Lodge **Moose of the Year** award to Moose International. This award is a chance for lodges to recognize those members who volunteer their time and effort and contribute in many ways to their lodges and communities.  While all lodges have many members who do this, the recipient should be one who stands apart from the rest in his dedication and commitment.

## To enter your lodge's Moose of the Year nominee:

1.Select the current year Moose of the Year from the *Award* drop down menu.

2. Select the recipient from the *Member* drop down menu.

3. Click *Save* to submit your Moose of the Year recipient to Moose International.




**NOTE:** This is the only valid way in which to submit your Lodge's Moose of the Year award winner to Moose International.

ASK them to turn to Page 110 in their Workbooks.

EXPLAIN that Forms – Heart of the Community on is where you can access the Quarterly Heart of the Community Report. Here you will enter your FRUs quarterly community service information. You may also view previously submitted reports, by fiscal year.

HOC quarterly reports must be submitted through Moose Admin by the 15th of August for 1st Quarter, the 15th of November for Q2, the15th of February for Q3 and the 15th of May for Q4. Timely completion of this report is necessary to be considered for the Premier Lodge Award. Reporting through Moose Admin is now the only acceptable form of submission. *The reports will not be accepted in any other form of submission*. Missing *any* quarterly report makes your lodge ineligible for the Premier Lodge Award. Please keep in mind that reports are graded, a determining factor of the Premier Lodge Award. It’s important to note, in regard to the grading of submitted reports, Moose International will no longer correct any entries. Credit will not be given for incorrect categorization, incomplete information or any work done by WOTM or Moose Legion, to avoid double reporting in the fraternity. Please refer to the resource document, *Heart of the Community Quarterly Reporting Tips*, to aid in the proper completion of this report, found on www.mooseintl.org.

Please note: WOTM & Moose Legion report separately.

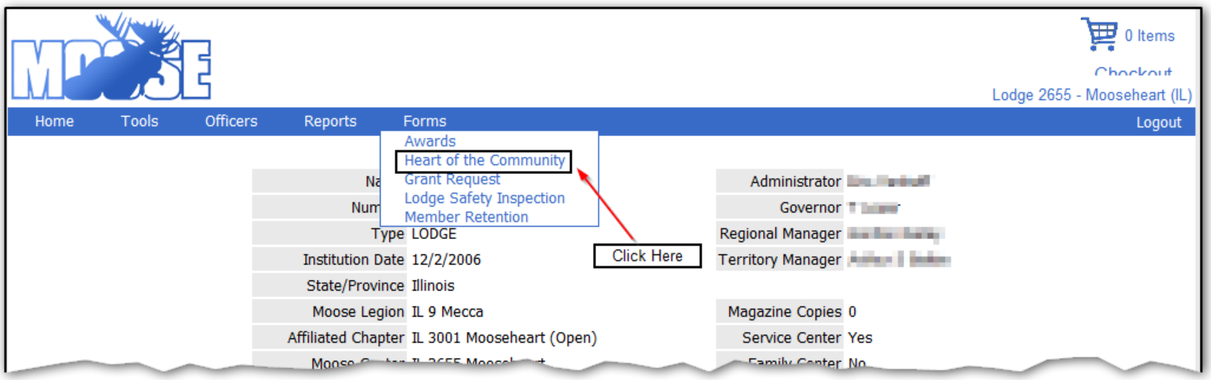
SHOW them the Forms – Heart of the Community.

Walk them through filling out and submitting a report.

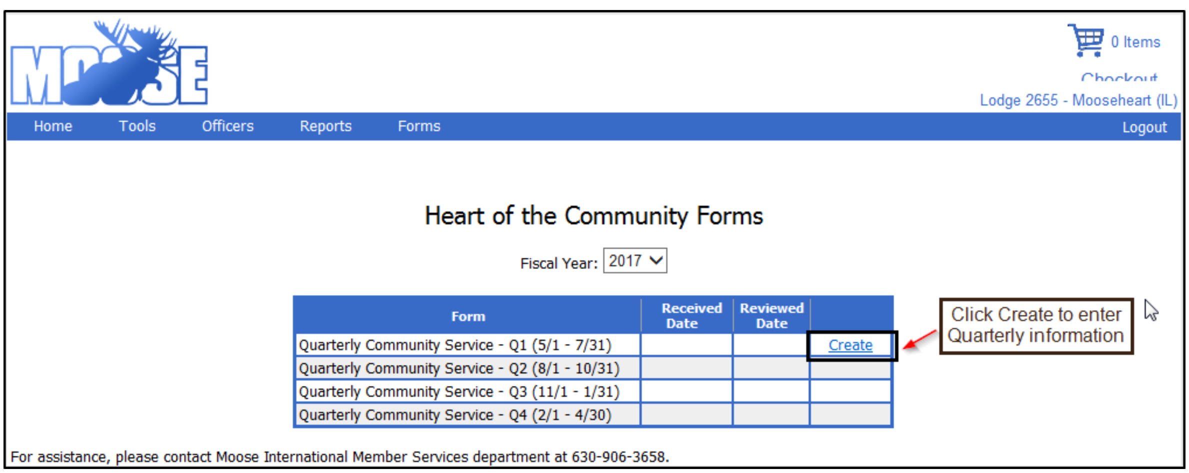
Community service is an excellent way for our FRUs to demonstrate the value their lodge brings to the community. Being involved in the surrounding community enhances the image of your lodge and gives the Moose volunteer(s) an opportunity to give back to and improve his community. Moose International requires that a community service report, known as the Quarterly Heart of the Community Report, be filed once a quarter. These reports are due on August 15th, November 15th, February 15th and May 15th. Completing these reports on time, and in the proper manner, is necessary to be considered for the Premier Lodge Award. Moose International now requires that the Heart of the Community report be submitted through Moose Admin.

**<u>Accessing your Lodge's Quarterly Heart of the Community Report:</u>**

1. Use the *Forms* drop down menu and choose *Heart of the Community*




2. Click *Create* found on the right side of the listing for the quarter you wish to report on.

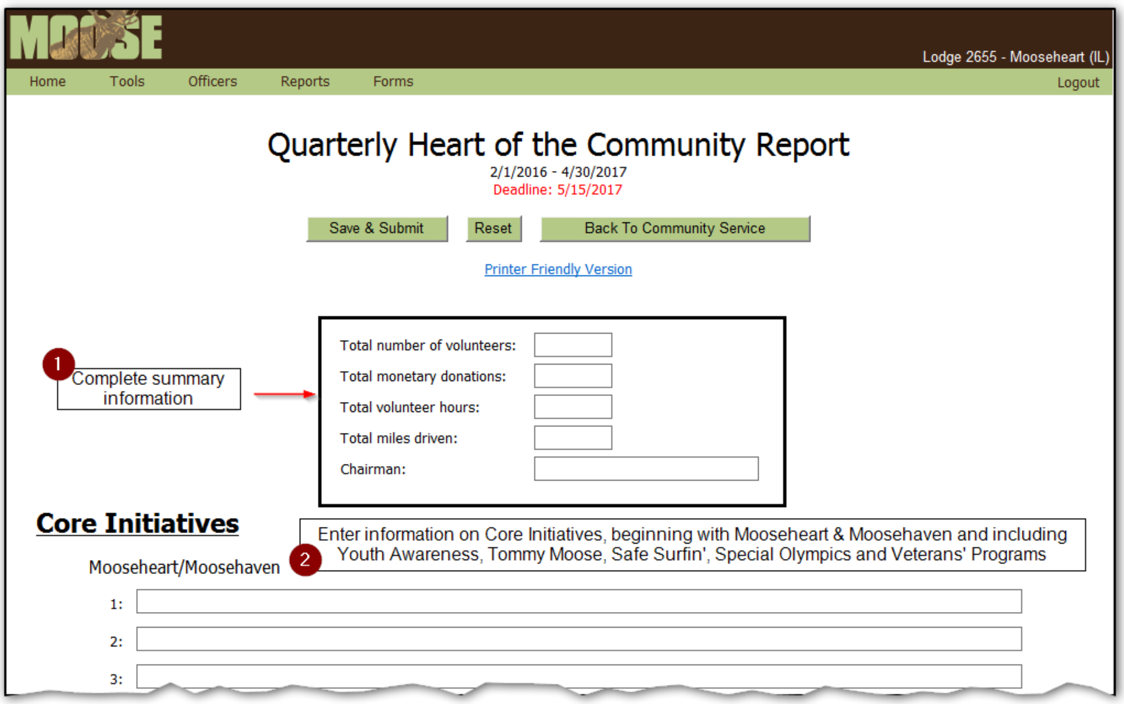


ASK them to turn to Page 111 in their Workbooks.

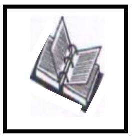
EXPLAIN that Forms – Heart of the Community on Moose Admin will "time out." It is necessary to click "Save and Submit" frequently while completing the form in order to prevent loss of data. The report may be edited as many times as necessary until midnight of the due date.

**Completing & Submitting your Lodge's Quarterly Heart of the Community Report:**

1. Begin the report by first entering the Summary Information. This is where you enter the total number of volunteers from your lodge who participated in community service, the total amount of money that your lodge donated for the quarter, the total number of miles driven by volunteers for community service related activities and the name of the Heart of the Community Chairman.
2. Next, begin describing, in detail, the actions that were taken by your lodge in each of the 6 Core Initiatives. There will be a separate section to complete for each of the Core Initiatives:
    - Mooseheart/Moosehaven
    - Youth Awareness
    - Tommy Moose
    - Safe Surfin'
    - Special Olympics
    - Veterans' Programs

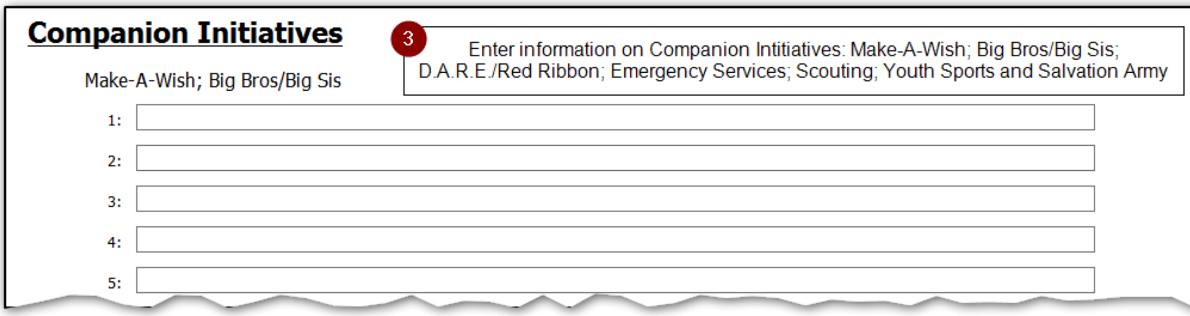



**NOTE:** It is necessary to properly categorize your activities in order to receive credit for your efforts. For example, anything that you enter into Special Olympics must be specifically associated with that organization. Any donation of time or money given to an organization, other than Special Olympics, that serves children with disabilities will need to be entered under "Local Volunteer Services." Moose International will no longer correct any entries that are categorized improperly. For more information about accurate reporting, please see the "Heart of the Community Quarterly Reporting Tips" document which can be found on Moose International's website.

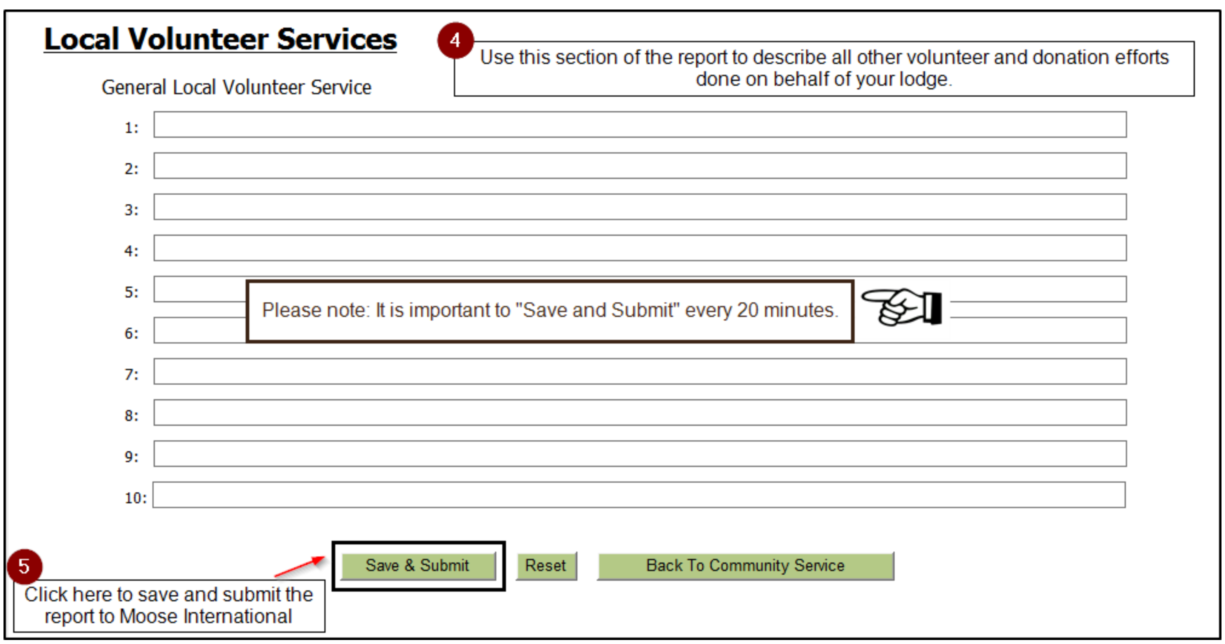


ASK them to turn to Page 112 in their Workbooks.

3. Continue reporting by filling in the activities, contributions or monetary donations that your lodge made to the Companion Initiatives. Those include:
    - Make-A-Wish; Big Bros/Big Sis
    - D.A.R.E.; Red Ribbon
    - Emergency Services (this refers to first responders only)
    - Youth Sports
    - Salvation Army

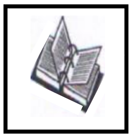



4. The last step in reporting is to complete the Local Volunteer Services section. This is the area of the report where you will enter all other donations, efforts and contributions made on behalf of your lodge to local organizations and causes.
5. Click *Save & Submit* to send the report to Moose International. *The report will not be saved or sent to Moose International without this very important step.*



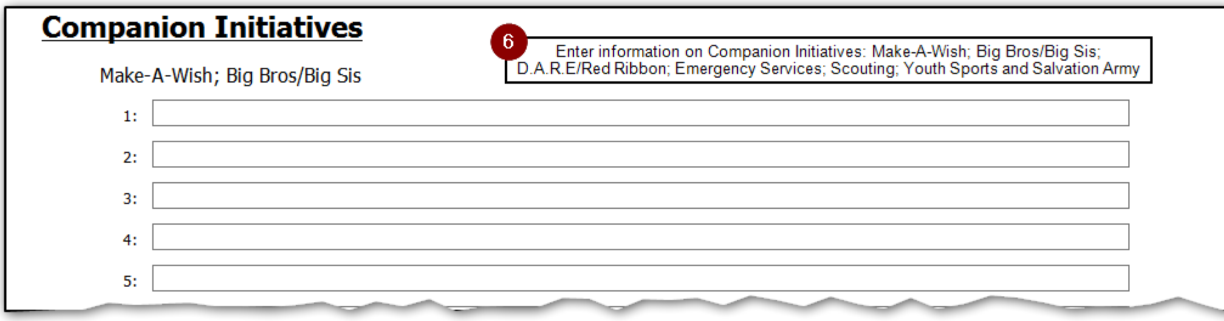

You may print any of the reports that have been submitted by viewing the report and then clicking on the *Printer Friendly Version* (in blue) found at the top of the report.

**NOTE:** All Heart of the Community Quarterly reports must be submitted through Moose Admin on or before midnight on the night of the 15th to receive credit.

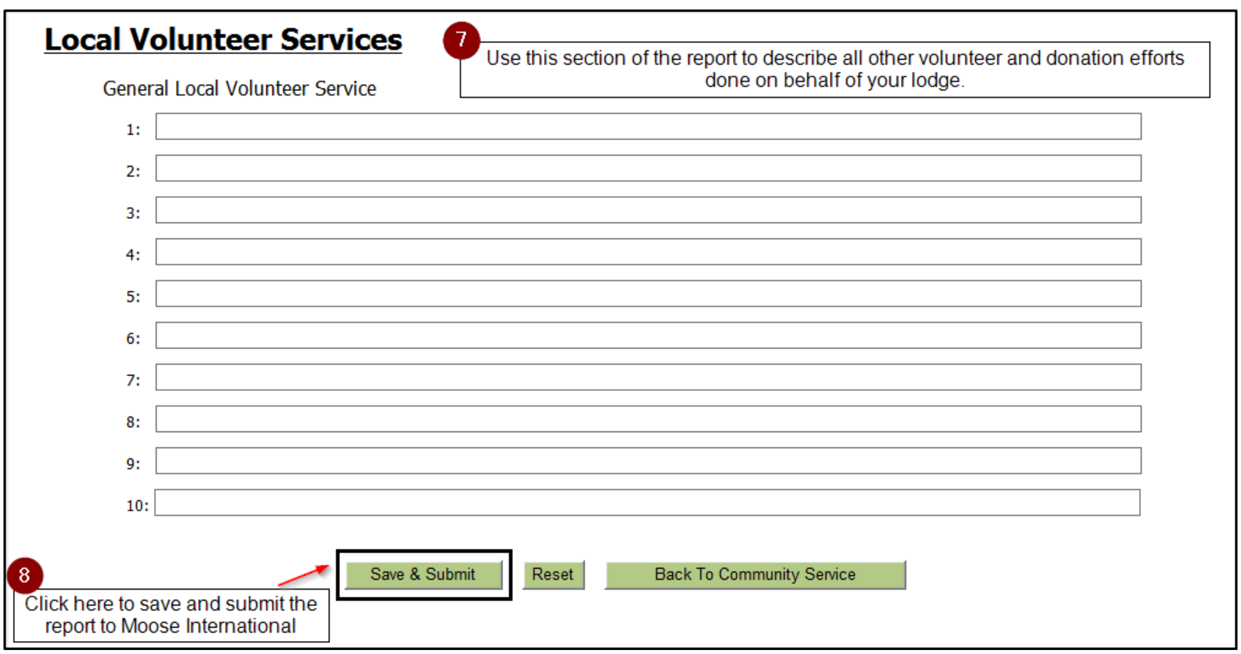


ASK them to turn to Page 113 in their Workbooks.

6. Continue reporting by filling in the activities, contributions or monetary donations that your lodge made to the Companion Initiatives. Those include:
   - Make-A-Wish; Big Bros/Big Sis
   - D.A.R.E.; Red Ribbon
   - Emergency Services (this refers to first responders only)
   - Youth Sports
   - Salvation Army

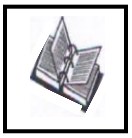



7. The last step in reporting is to complete the Local Volunteer Services section. This is the area of the report where you will enter all other donations, efforts and contributions made on behalf of your lodge to local organizations and causes.
8. Click *Save & Submit* to send the report to Moose International. *The report will not be saved or sent to Moose International without this very important step.*




You may print any of the reports that have been submitted by viewing the report and then clicking on the *Printer Friendly Version* (in blue) found at the top of the report.

**NOTE:** *All Heart of the Community Quarterly must be submitted through Moose Admin and before midnight on the night of the 15th to receive credit.*



ASK them to turn to Page 114 in their Workbooks.

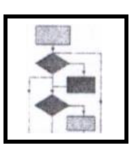
EXPLAIN that Forms – Lodge Safety Inspection on Moose Admin is where you can access and submit your lodge’s annual Lodge Safety Inspection Form.

***Please Note: This form was formerly submitted twice a year. At the time of publication of these documents, Moose Admin had not been updated to reflect the change and screen shots still display information for two submissions. Emphasize that regardless the report is only due once a year. Changes will soon be made to Moose Admin to reflect that.****

The Lodge Safety Inspection is to be completed by your lodge’s officers and the Loss Prevention Committee once a year. There is a checklist that can be printed from Moose Admin to aid in the completion of the form. **Please note**: this is the only acceptable form of submission for this form. The form must be received on or before midnight of May 15th to avoid a compliance modifier.

A link to Risk Management’s Loss Prevention PowerPoint is found on the LSI Form. The PowerPoint serves to educate viewers on all aspects of lodge safety in order to reduce risk. The presentation must be watched.

This is not applicable to WOTM or Moose Legion



SHOW them Forms – Lodge Safety Inspection.

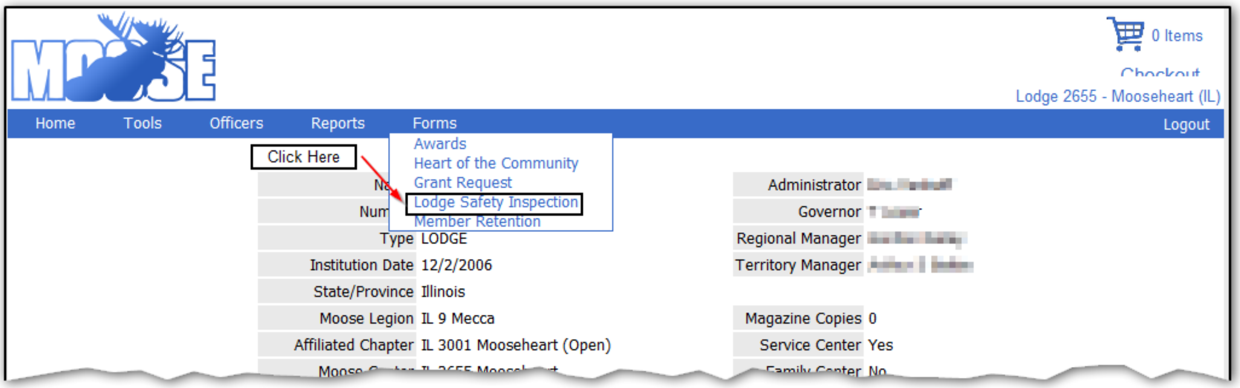
Walk them through filling out and submitting a report.

# Forms – Lodge Safety Inspection PAGE 114

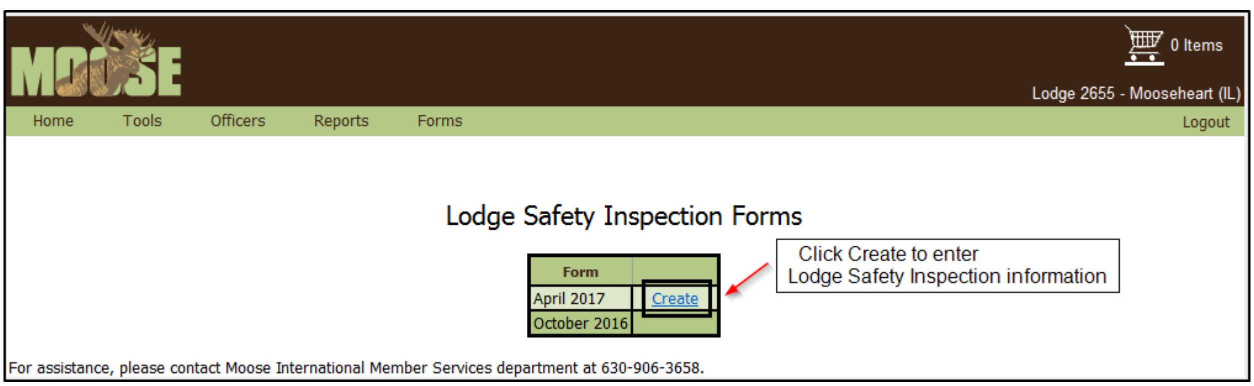
It is the responsibility of the Trustees to make monthly inspections of the physical properties of the lodge. Close attention should be paid to the state of repair and the cleanliness of the lodge and the social quarters. Once a year the trustee, who serves as the Chairman of the Loss Prevention Committee, and the rest of the committee are to complete a Lodge Safety Inspection based upon which the Adminstrator will create and submit a report to Moose International. The Lodge Safety Inspection report is found on Moose Admin and must be submitted electronically on or before midnight of May 15th, every Moose Fiscal year, to avoid a compliance modifier.

**<u>Accessing your Lodge's Semi-Annual Lodge Safety Inspection Report:</u>**

1. Use the *Forms* drop down menu and choose *Lodge Safety Inspection*




2. Click Create, found on the right, to enter the information.

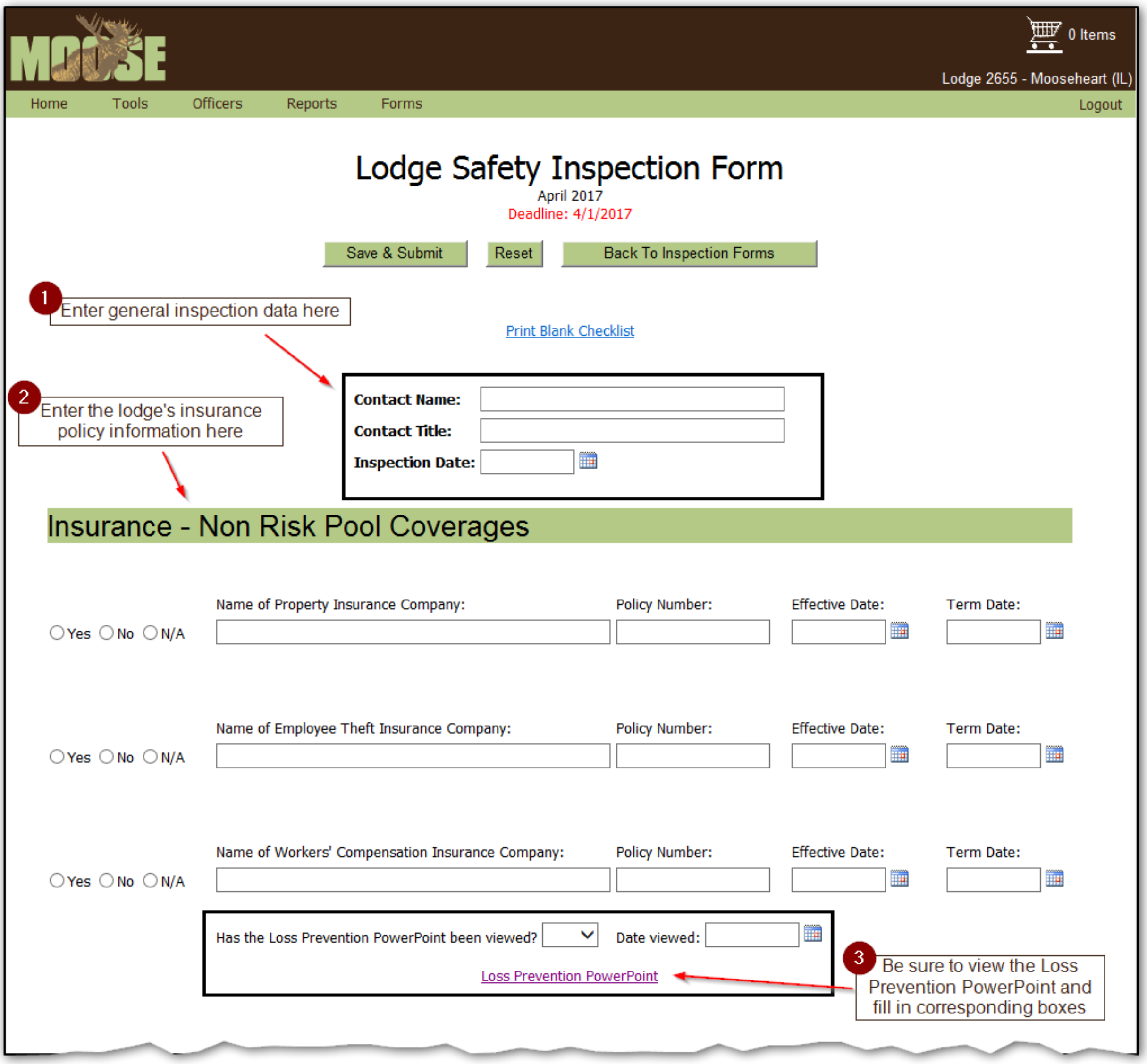



**NOTE:** Despite the screen shot above and ones that follow, Lodges will only submit the Lodge Safety Inspection Form once a year – on May 15th. At the time of publication, Moose Admin screens had not been updated to reflect the change in Lodge Safety Inspection Reporting. Changes to Moose Admin to follow soon.

ASK them to turn to Page 115 in their Workbooks.

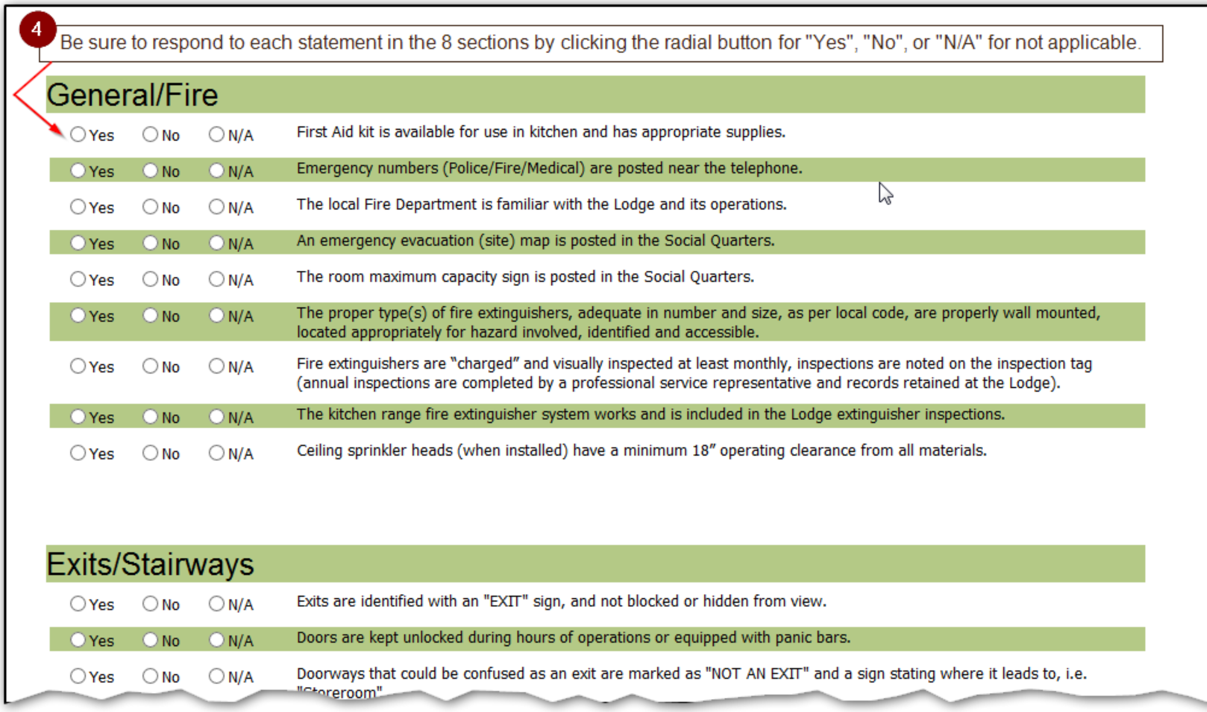
## Completing & Submitting your Lodge Safety Inspection Report:

1. Begin the form by entering general inspection data: the contact name – this should be the Loss Prevention Committee Chairman or the Administrator; the contact person’s title (LPC Chairman, Administrator, etc.); the date the inspection was performed. This form is available for completion beginning April 1st until midnight of May 15th.
2. Enter Insurance information, including policy numbers, effective dates and termination dates.
3. You must review the Loss Prevention PowerPoint, indicate it has been viewed, and enter the viewing date.



ASK them to turn to Page 116 in their Workbooks.

4. The rest of the form is a series of Yes, No or N/A statements categorized into 8 sections. These statements follow the Lodge Safety Inspection Form Checklist verbatim; if the checklist was filled out during inspection, it will be quick and easy to complete the form. Click on the appropriate radio button for each line in the 8 sections.


4 Be sure to respond to each statement in the 8 sections by clicking the radial button for "Yes", "No", or "N/A" for not applicable.

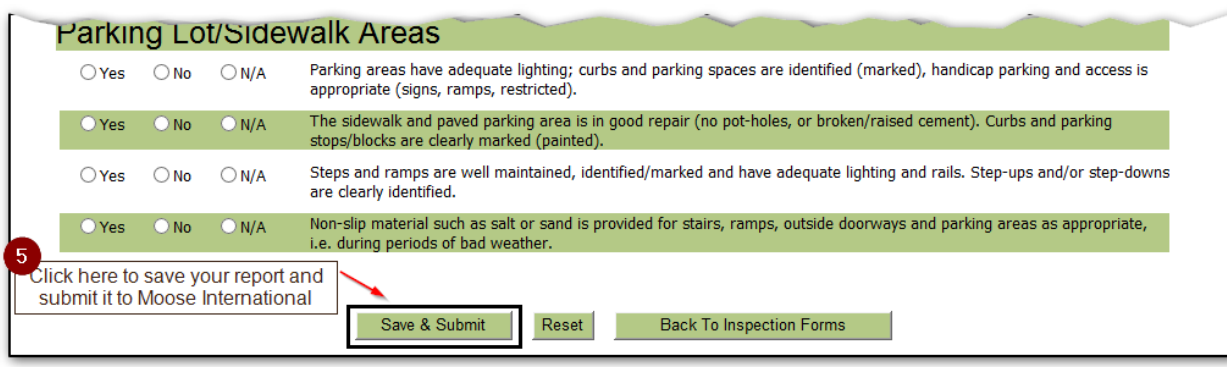
General/Fire

| | | | |
|---|---|---|---|
| Yes | No | N/A | First Aid kit is available for use in kitchen and has appropriate supplies. |
| Yes | No | N/A | Emergency numbers (Police/Fire/Medical) are posted near the telephone. |
| Yes | No | N/A | The local Fire Department is familiar with the Lodge and its operations. |
| Yes | No | N/A | An emergency evacuation (site) map is posted in the Social Quarters. |
| Yes | No | N/A | The room maximum capacity sign is posted in the Social Quarters. |
| Yes | No | N/A | The proper type(s) of fire extinguishers, adequate in number and size, as per local code, are properly wall mounted, located appropriately for hazard involved, identified and accessible. |
| Yes | No | N/A | Fire extinguishers are "charged" and visually inspected at least monthly, inspections are noted on the inspection tag (annual inspections are completed by a professional service representative and records retained at the Lodge). |
| Yes | No | N/A | The kitchen range fire extinguisher system works and is included in the Lodge extinguisher inspections. |
| Yes | No | N/A | Ceiling sprinkler heads (when installed) have a minimum 18" operating clearance from all materials. |

Exits/Stairways

| | | | |
|---|---|---|---|
| Yes | No | N/A | Exits are identified with an "EXIT" sign, and not blocked or hidden from view. |
| Yes | No | N/A | Doors are kept unlocked during hours of operations or equipped with panic bars. |
| Yes | No | N/A | Doorways that could be confused as an exit are marked as "NOT AN EXIT" and a sign stating where it leads to, i.e. "Storeroom" |

5. Upon completion of the general inspection data and responding to every statement, you must click *Save & Submit*, found at the very bottom of the form. This is the only way that the report will be submitted to Moose International.


Parking Lot/Sidewalk Areas

| | | | |
|---|---|---|---|
| Yes | No | N/A | Parking areas have adequate lighting; curbs and parking spaces are identified (marked), handicap parking and access is appropriate (signs, ramps, restricted). |
| Yes | No | N/A | The sidewalk and paved parking area is in good repair (no pot-holes, or broken/raised cement). Curbs and parking stops/blocks are clearly marked (painted). |
| Yes | No | N/A | Steps and ramps are well maintained, identified/marked and have adequate lighting and rails. Step-ups and/or step-downs are clearly identified. |
| Yes | No | N/A | Non-slip material such as salt or sand is provided for stairs, ramps, outside doorways and parking areas as appropriate, i.e. during periods of bad weather. |

5 Click here to save your report and submit it to Moose International

Save & Submit | Reset | Back To Inspection Forms

**NOTE:** It is important, during entry, to to click "Save and Submit" every 20 minutes, to prevent loss of data. Also note: The Lodge Safety Inspection Reports is due May 15th. *Entry and submission through Moose Admin is the only acceptable format.* Lodges will receive a compliance modifier if the report isn't received electronically by midnight of the due date.

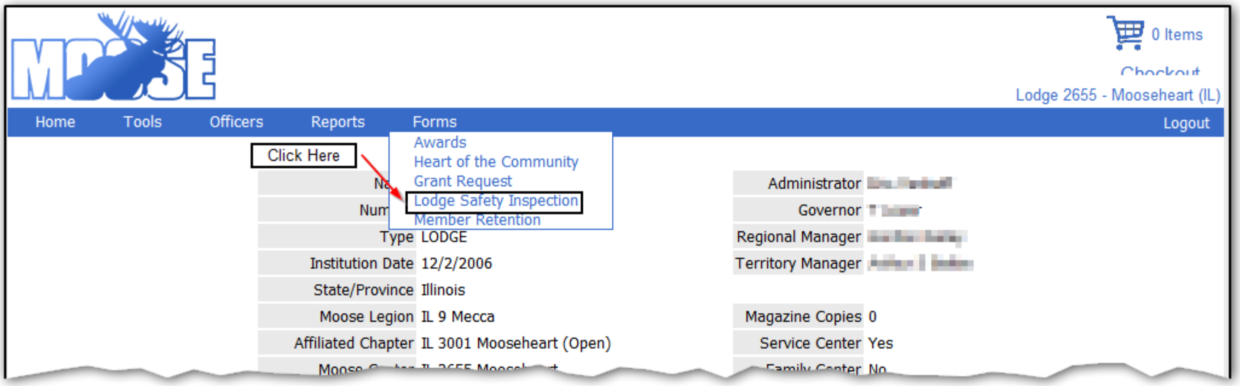
ASK them to turn to Page 117 in their Workbooks.

EXPLAIN that Forms – Lodge Safety Inspection on Moose Admin will “time out.” It is necessary to click “Save and Submit” frequently while completing the form in order to prevent loss of date. The report may be edited as many times as necessary until midnight of the due date.

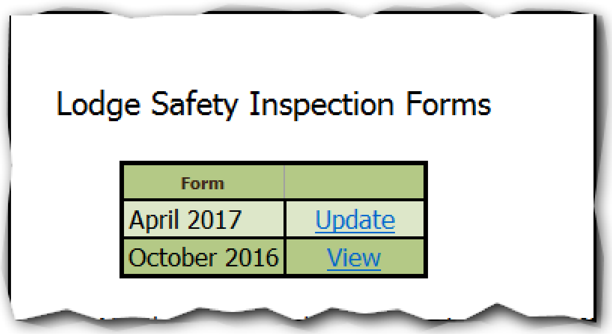
Finally, you may also update, view or print previously submitted forms. You may only update those forms for which the due date has not yet passed. In other words, if you have completed and submitted the form in advance of May 15th, you may make changes to the form until midnight on May 15th.

## To Update, View or Print a Lodge Safety Inspection Form:

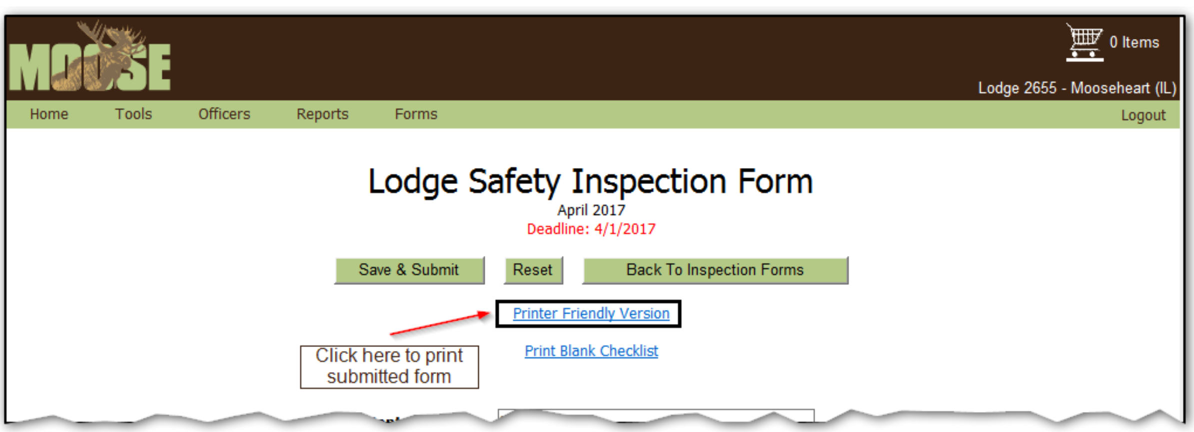
1. Use the *Forms* drop down menu and choose *Lodge Safety Inspection*




2. Next, you may choose to update or view your desired report. Click on *Update* or *View*, found to the right of the desired form.




3. You may also print the completed forms by choosing *Printer Friendly Version* found on the completed forms.



ASK them to turn to Page 118 in their Workbooks.

EXPLAIN that Forms – Member Retention on Moose Admin is where you can access and submit your lodge's annual Member Retention Survey. Moose International sincerely wants to hear about the events your lodge held during Member Retention Week. This is a great opportunity for your lodge to share its creativity, hard work and the results of those efforts with Moose International.

The Member Retention Survey is to be completed by your Membership Committee within the month of November.

SHOW them Forms – Member Retention.

Walk them through filling out and submitting a survey.

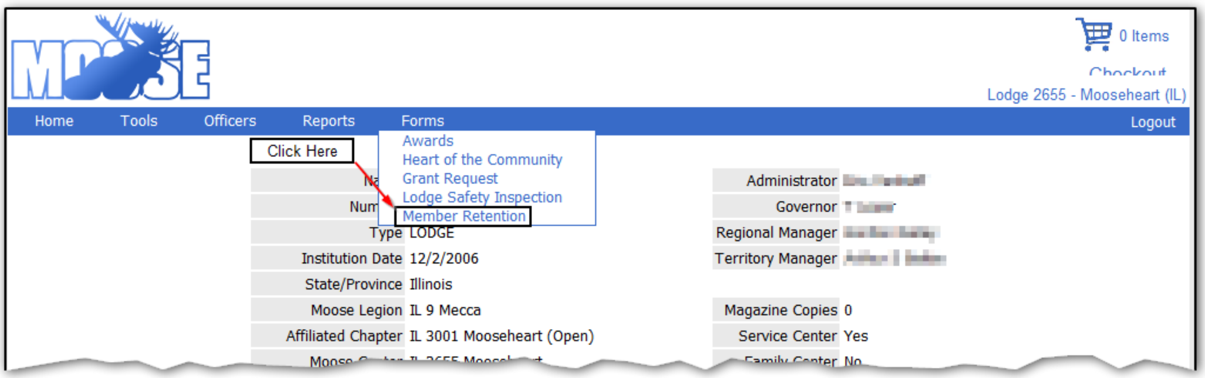
# Forms – Member Retention



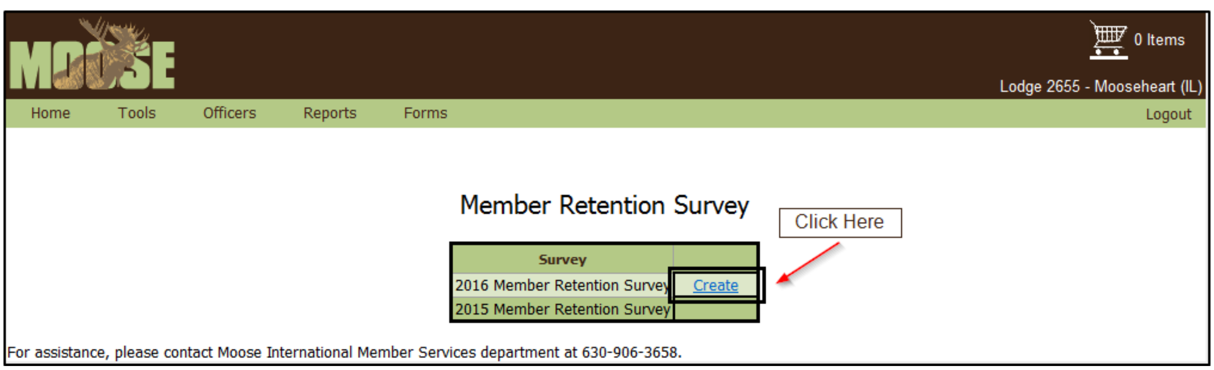
The first week of November is typically designated as Member Retention Week by Moose International. Each FRU is encouraged to actively participate in this fun, event-filled, week long push to retain members.  Moose International wants to hear about your exciting week and learn all of the details of your special events. The best way to share your activities and results is to complete the Member Retention Week Survey.  This an electronically submitted survey accessible on Moose Admin for a limited time after Member Retention Week ends each year – don't delay!

**<u>Accessing your Lodge's Annual Member Retention Survey:</u>**

1. Use the *Forms* drop down menu and choose *Member Retention*



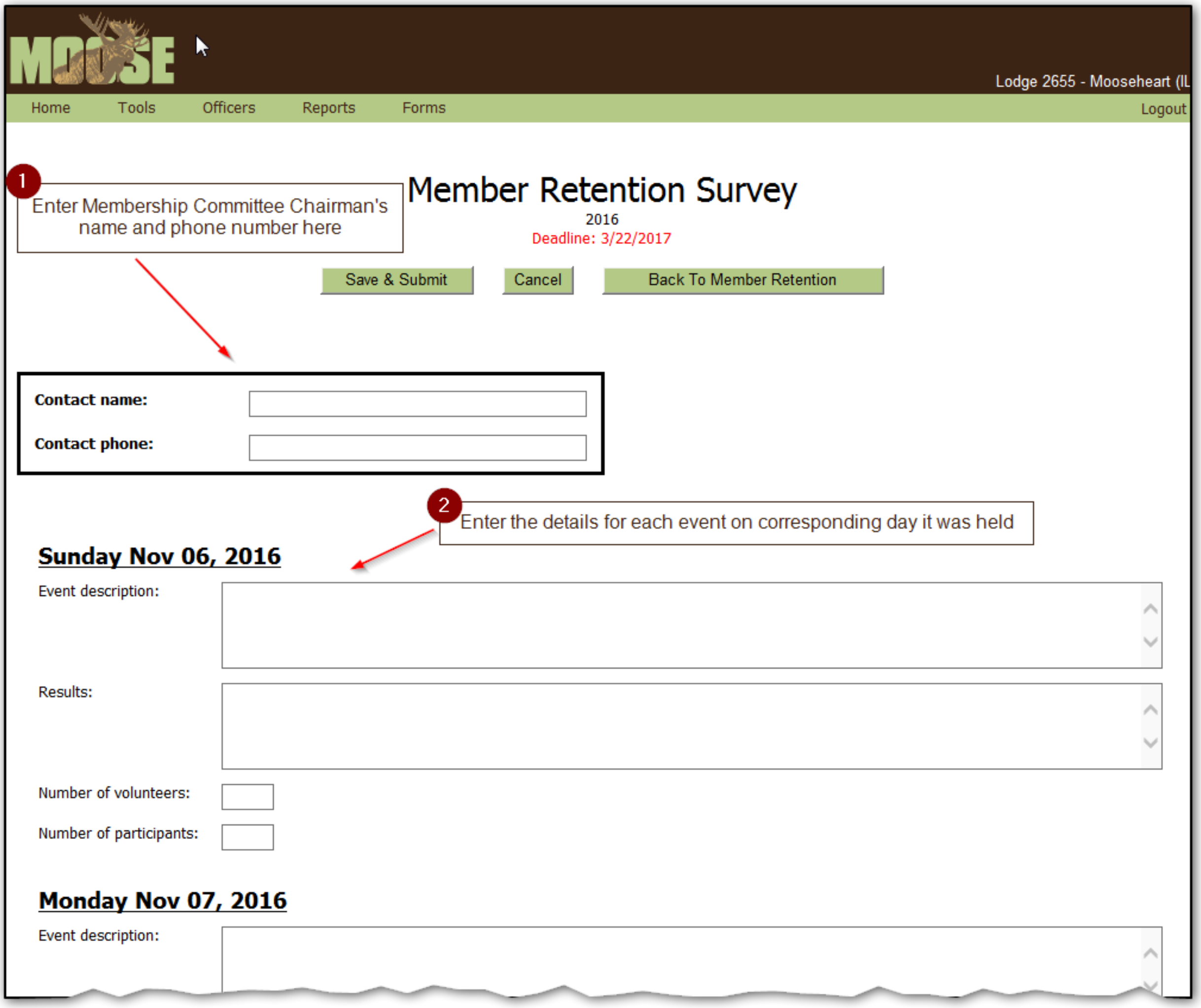

2. Click *Create* found to the right of the survey you wish to complete.

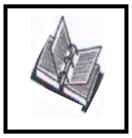


ASK them to turn to Page 119 in their Workbooks.

**<u>Completing and submitting your Member Retention Survey:</u>**

1. Enter the Membership Committee Chairman’s name and phone number.
2. For each day of Member Retention Week, describe the event or activity that your lodge held, detail the results, the number of volunteers that participated and the number of participants.





ASK them to turn to Page 120 in their Workbooks.

Once you have entered the specifics for each event, please provide some summary information.

3. Check the radio button for "Yes" or "No" for the *Overall Success* statement.
4. In the space provided, describe the event your lodge held you found to be the most successful.
5. Please share any suggestions you have regarding Member Retention Week in the *Suggestions* box.
6. Click *Save and Submit*.