Online member transfer process

Worthy State and Council Leaders:
Please note the latest innovation from Supreme for transferring Online members into local councils with the process shown in the attachments. Those of you with access to the online membership "Prospect" tab should now be able to use it. Either Michigan Online Membership Director Carson Mantooth or I will continue forwarding eMembership member information to appropriate grand knights, financial secretaries and district deputies as they are sent to us. So far Michigan has about 25 eMembers for which I have forwarded information about contacting and transferring these members to local councils. If you have questions, call Carson or me.
Fraternally, Ken Krause
Michigan State Membership Director

Worthy State Deputies, State Membership Directors, and Online Membership Coordinators,

After months of work, this morning we launched our new prospect tracking, assigning and transferring system in Officers Online. This great, easy-to-use system does two really important things.

(1) It makes it a whole lot easier for you to manage online members in your jurisdiction.

(2) Councils can transfer (or what we call "convert") online members into their councils *without* filling out and submitting paperwork and waiting for it to be processed. The process is simple and instantaneous.

This new system does a whole lot more than that though. It allows you to assign online member prospects to councils. It allows you to track progress on online members who you have previously assigned. It allows you to get detailed information on the online member prospects, and much more.

Since this is live as of this morning, I would ask that you do two things as soon as you can. First, please read the two training documents that are attached. This will help you understand in detail what this new system does. Second, please forward the LOCAL training document to all grand knights, financial secretaries and district deputies in your jurisdiction. As detailed in the document, other officer roles will not have this functionality.

A note for our online membership coordinators: We have a few bits of work left to do before you begin seeing this system in your view in Officers Online. It's coming soon, and I'll let you know as soon as it's live.

We are really excited about this new system, and we know you've been looking forward to it too. Please read up on it. Use it. And let us know how it's going!

Thank you, as always, for your continued leadership.

Best,

Matthew A. St. John
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Finding, Tracking and Transferring Online Members in Officers Online

Beginning Thursday, March 8, 2018, you can now find, track and transfer Online Members in Officers Online.

You can **assign** online members as **member-prospects** to a specific local council based on where they live, or where they attend Church.

And, if the council **accepts** that member's application for transfer, they can **complete the transfer process without submitting a Form 100**. All you have to do enter the member's First Degree date in Officers Online.

Only state deputies, state membership directors, online membership coordinators, district deputies, grand knights and financial secretaries will have access to this new functionality. Their visibility will be as follows:

State Deputy: View Assigned Prospects, View Unassigned Prospects, Track Prospects, Assign Prospects to Councils, Reject Prospects, Reassign Prospects Once Rejected By A Council

State Membership Director: View Assigned Prospects, View Unassigned Prospects, Track Prospects, Assign Prospects to Councils, Reject Prospects, Reassign Prospects Once Rejected By A Council

Online Membership Coordinator: View Assigned Prospects, View Unassigned Prospects, Track Prospects, Assign Prospects to Councils, Reject Prospects, Reassign Prospects Once Rejected By A Council

**District Deputy**: View Assigned Prospects for councils within District

Grand Knight: View Assigned Prospects, Transfer Prospects, Reject Prospects

Financial Secretary: View Assigned Prospects, Transfer Prospects, Reject Prospects

This brief guide will show you how it works.

Finding and Assigning Online Members

All **Online Members who express interest in joining a local counci**l will appear under the new "Prospect" tab in Officers Online.
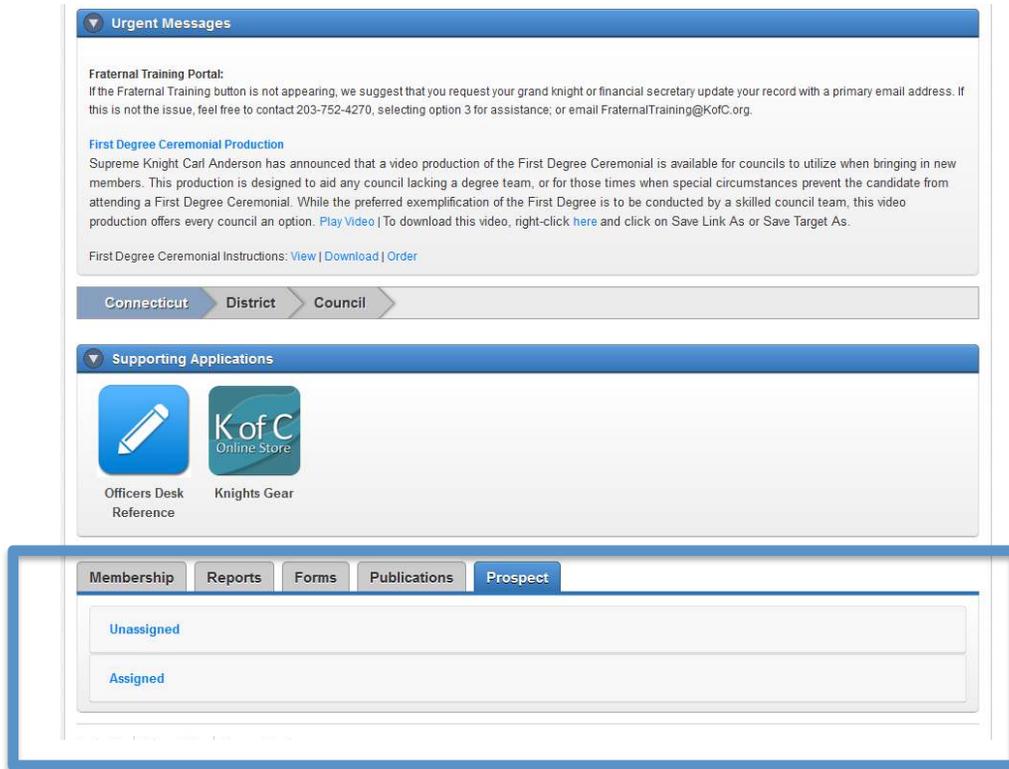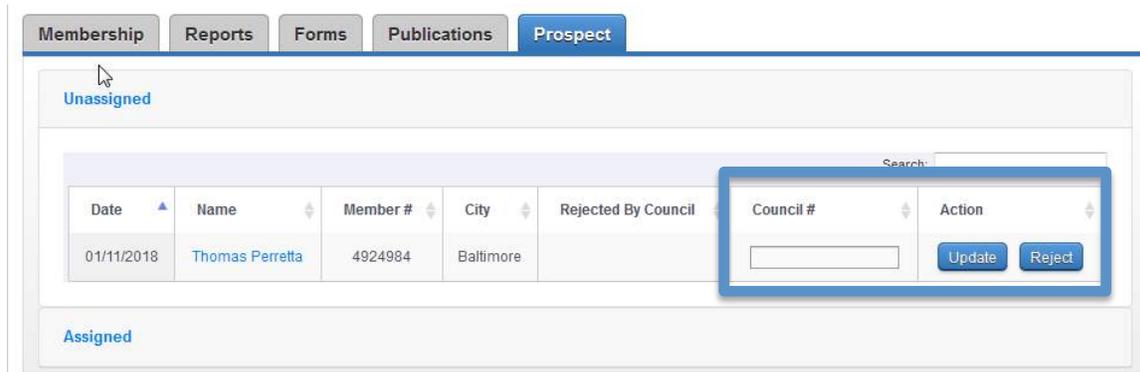

The prospect tab has two lists, "Unassigned" and "Assigned."

The "Unassigned" list will include online members who have expressed interest in joining locally, but have *not* indicated a specific council number. The "Assigned" list will include Online Members who have expressed interest in joining locally, but *have* included a specific number. These members are automatically "Assigned" to the council number they entered.

Unassigned Prospects

For those prospects that are **unassigned**, the state deputy, state membership coordinator, and online membership coordinator will be able to **"assign" them to a specific council by entering a council number into the "Council #" box**, and clicking "Update."

This will move the member to the "Assigned" section for the state, and will place the member on the "Assigned" list for the specified council.

To **view additional information** about the member to help you determine what council is appropriate, you can **click the member's name**, and an info window will pop up.

Transferring Online Members

Online Members "assigned" as prospects to councils will appear in the council's Prospect tab in Officers Online. This tab will only be seen by grand knights and financial secretaries. Councils will not have an "Unassigned" tab.

Once the council has gone through the admissions process, and the member has taken his First Degree, they can transfer him by simply adding the date read in the "Grand Knight Approval (Date Read)" section, and the First Degree date in the "Financial Secretary (Ceremonial Date)" section, and clicking the update button. These two dates can be added separately, but once the First Degree date is added, the transfer will be processed.

Once the update is submitted, the member will be automatically transferred into his new council. The council *will not* need to submit a Form 100.

Remember: councils will receive a +1 membership quota credit when an Online Member converts into their council. If the Online Member is an insurance client, the council will also receive a +1 insurance quota credit for member.

Rejecting Transfers

If, for some reason, the Online Member is not going to transfer into the assigned council, the council may "reject" the member by clicking "reject" and selecting a reason from the drop-down menu.
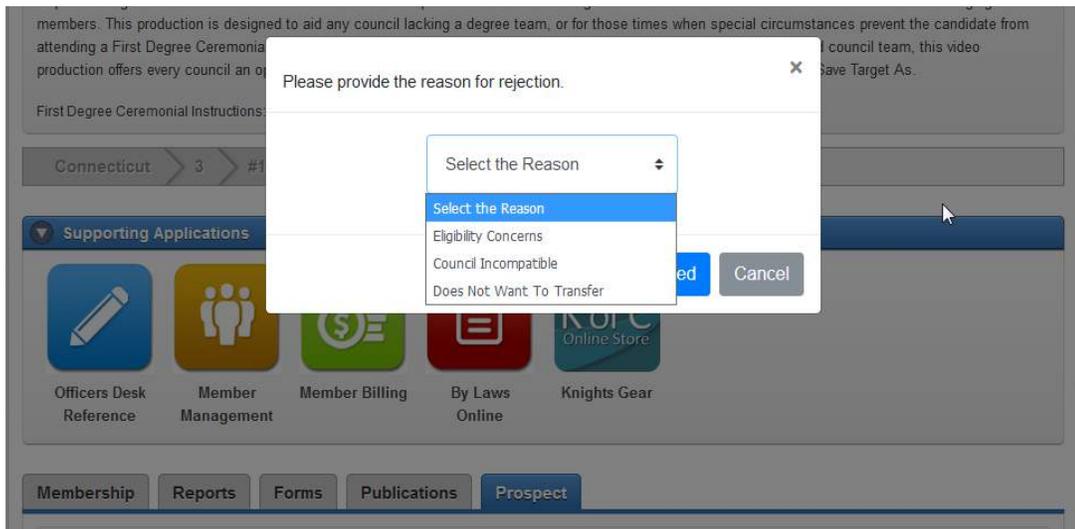
Rejecting an Online Member for transfer will result in the member reappearing in the "Unassigned" section of the state's "Prospect" tab. A rejection will *not* trigger an email to state officers.
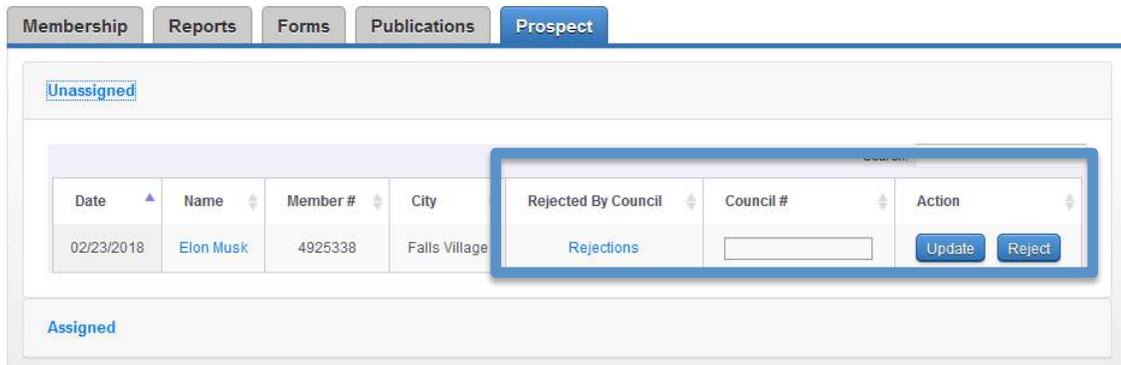
The state team can see who rejected the member and why by clicking the "Rejections" link in the "Rejected By Council" section.
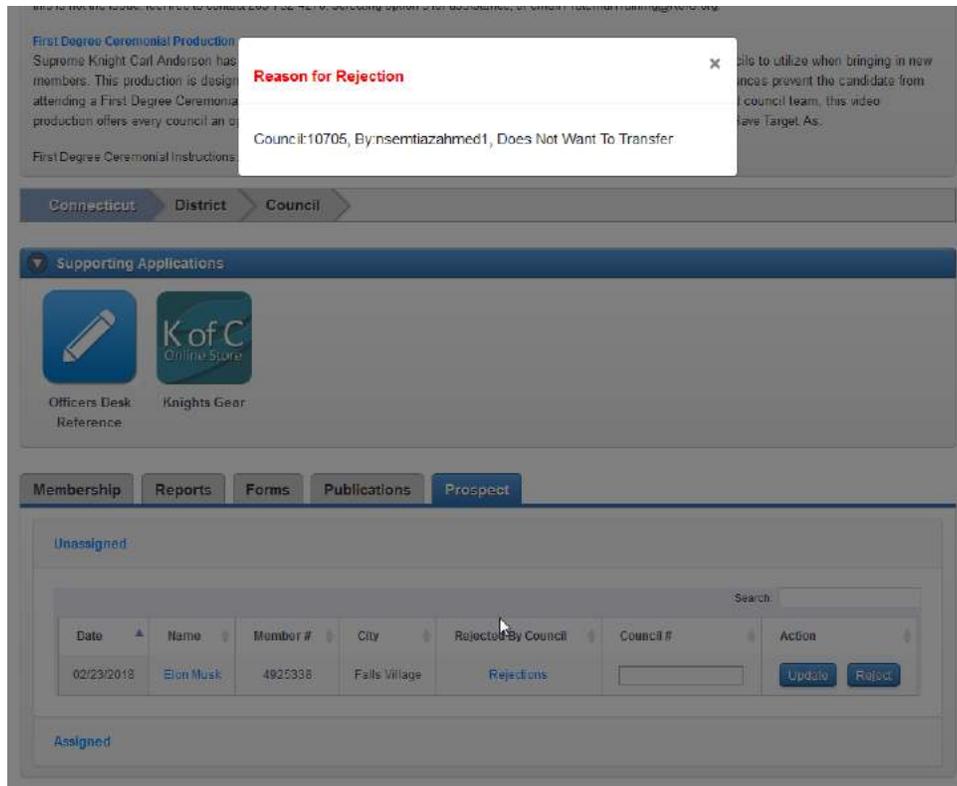
After researching the issue further, the state team can either reassign the member to another council, or can reject the member for local council membership by clicking the "Reject" button and choosing a reason from the drop-down menu. This will trigger an email to Supreme Council staff so that we may address the issue as needed.

Tracking Online Members

The state deputy, state membership director and online membership coordinator can track the status of their assigned prospects by referencing the "Assigned" tab. There they can see the date the member was assigned and the council he is assigned to. They can also use the "Search" field to find a specific record. This should help state teams facilitate conversations with local council officers if the state feels like the transfer process is taking too long. District deputies will also be able to view all "Assigned" Online Members for councils in their district.
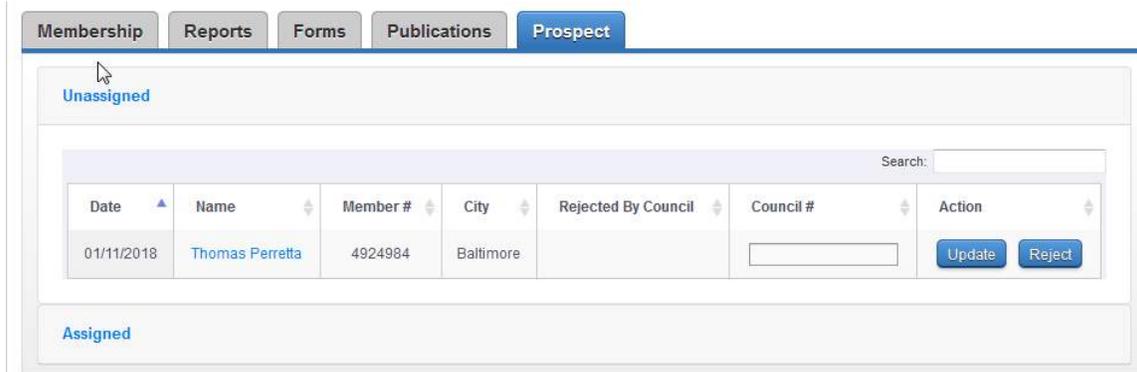
Knights of Columbus Online Membership
Finding, Tracking and Transferring Online Members in Officers Online

Beginning Thursday, March 8, 2018, you can now find, track and transfer Online Members in Officers Online.

Online members will be assigned to your council as **member-prospects** if the member indicates that they'd like to join your council, or if your state team has assigned them to you as a member-prospect

And, if your council **accepts** that member's application for transfer, you can **complete the transfer process without submitting a Form 100**. All you have to do enter the member's first degree date in Officers Online.

This brief guide will show you how it works.

Finding and Transferring Online Members

All **Online Members who express interest in joining a local counci**l will appear under the new "Prospect" tab in Officers Online.

The prospect tab has two lists for state teams, "Unassigned" and "Assigned." Councils will only have an "Assigned" section.

Online Members "assigned" as prospects to your council will appear in the your prospect tab in Officers Online. This tab will only be seen by grand knights and financial secretaries. District deputies will also have the ability to view assigned member-prospects for councils in their districts.

This "Assigned" list will include online members who have expressed interest in joining locally, and *have* said that they want to convert to **your** council. These members are automatically "assigned" to the council number they entered. The list may also include members who have been assigned to your council by your state team. This can occur when a member indicates that he wants to convert to a local council, but doesn't know which council to join. The state will assign prospects based on where the member lives and which parish he belongs to.
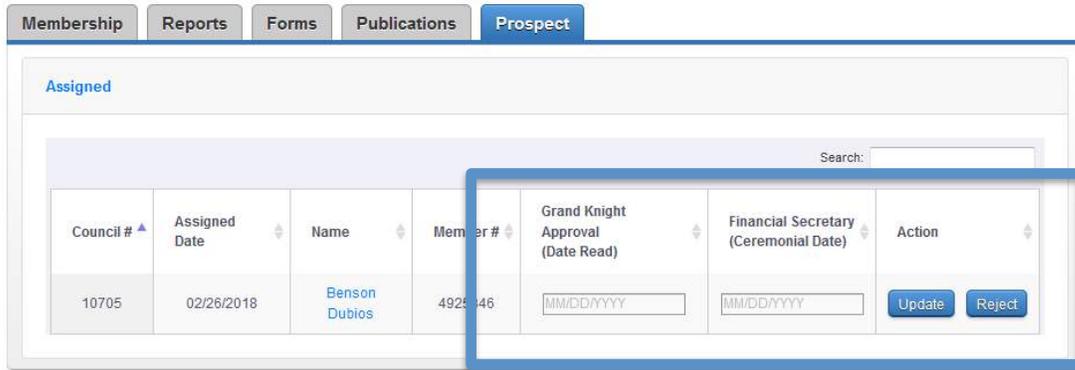
To **view additional information** about the member, including contact information, you can **click the member's name**, and an info window will pop up.

Name			
Title			
First Name	Jon	**Initial**	
Last Name	Smith	**Suffix**	

Current Address			
Street Address	950 Mix Ave	**City**	Hamden
State/Province	CT	**Zip/Postal Code**	065145156
Country			

Contact Information			
Cell Phone	614-286-5900	**Email Address**	SJ@TEST.COM

Current Council Information			
Current Council	98006	**Age**	24
Parish	church	**Years of Service**	1

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Transferring (Or "Converting") Online Members

Once your council has gone through the admissions process, and the member has taken his first degree, you can transfer him by simply adding the date read in the "Grand Knight Approval" section, and the first degree date in the "Financial Secretary (Ceremonial Update)" section, and clicking the update button. These two dates can be added separately, but once the first degree date is added, the transfer will be processed.

Once the update is submitted, the member will be automatically transferred into his new council. You *will not* need to submit a Form 100. The member will no longer appear in the "Prospect" tab.

Remember: councils will receive a +1 membership quota credit when an online member converts into their council. If the online member is an insurance client, the council will also receive a +1 insurance quota credit for that member.

Rejecting Transfers

If, for some reason, the online member is not going to transfer into the assigned council, you may "reject" the member by clicking "reject" and selecting a reason from the drop-down menu.

Rejecting an online member for transfer will result in the member reappearing in the "Unassigned" section of the state's "Prospect" tab, where the state can look into the matter further, and inform Supreme Council staff as needed.