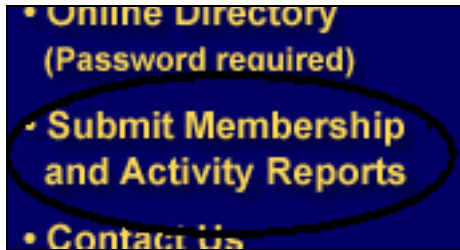


## Lions Clubs International Membership Reporting Quick Reference

To report changes in membership--**adds, drops, reinstates, transfers, and update or review.**

From the **LCI Home Page**, on the navigation bar on the left side of the screen, click on the following link:



The following LOGON screen appears, shown in part:



Type in your **Member Number** and your **Password** .  
Click on the **Go** button.

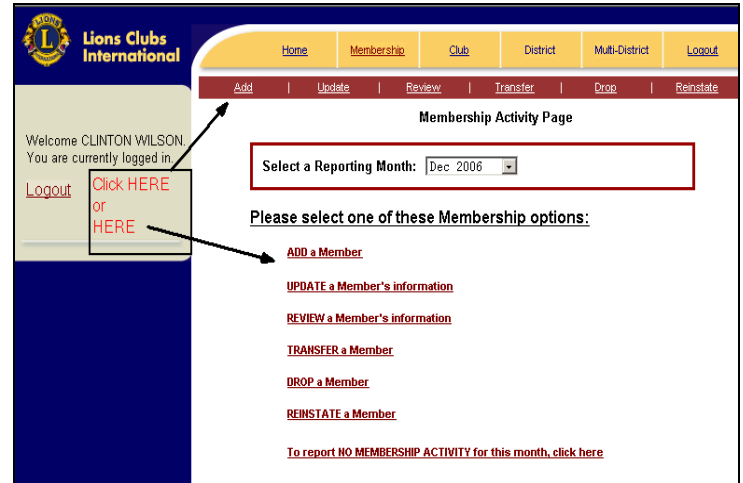
You will be recognized with the following screen:



Click on the **Membership** link shown circled, above.

The next screen will have a Menu Bar like the one shown in the next column, and additional optional text links with the same functions. Notice that the **Report Month** is indicated by the red rectangle at the top of the Membership Activity page.

Select the **Report Month** of the month being reported. Report month choices are current calendar month or up to 4 months prior. The default is current calendar month.



At this time, you are also able to choose to make no changes by clicking on the **To report No Membership Activity for the month click here** link at the bottom of the picture above. Should you decide to do that, the next window is displayed:



Click **OK**, and you will be returned to the **Membership Activity Page**.

If, on the other hand, you have decided to enter a transaction, click on the appropriate link either from the menu bar or the list as shown in the screen at the top of this column.

**Add:**

When you **Click** on the **Add** or **Add a member** link, the following prior member lookup screen is displayed.

If the member you are adding was not a prior member, click the **NO** radio dial, leave the fields blank, and click **Submit**.

If the member was a prior member, leave the **YES** radio dial selected and enter the last name of the prior member. Click **Submit**. Click the member number on the list of prior members that are displayed.

After the successful **submit**, you will get the next dialog box.

Fill in **ALL** of the required fields (\*). In order to move to the next screen, **Click** on the **Sponsor** or **Family Unit** tab at the top, or **Click** on the **Member Sponsor, Family Unit or Save Member**

button. All required fields must be filled. If not, an error message like the one below will be displayed:



When you have completed the **Basic** dialog box, you will need to complete the **Add** by filling in the required fields on the **Sponsor** tab.

The names of the club members will be displayed in the member box. To scroll through the names, click the up or down arrows next to the box. **Click** on the name of the sponsor so that it is highlighted. You can also search for the name by filling in **Last Name, First Name or Member #** in the dialog box and then **Clicking on Search**. **Click on Add** as circled. The successful result will fill in the sponsor name and member number as shown.

If the sponsor is from a different club fill in the information at the bottom of the window.

If the member is part of a family unit, click the **Family Unit** button and enter the Family Unit information. Please refer to **Page 10** of this guide for instructions on entering Family Unit. Once the Family Unit information is entered, click the **Save Member** button. You will get a briefly displayed message that the database is being updated. The new member is added and you are returned to the **Membership Activity Page**.

## Drop:

When you **Click** on the **Drop** link, the following window is shown in part

Member ID:	Member Name:	Address:
1420836	ANDERSON, GREGORY	515 28TH ST NW, ROCHESTER,
1420839	CARLSON, COREY	RR 2 BOX 138 A, KASSON, MN,
1420840	CARLSON, PAULA	RR 2 BOX 138ANUE NW, KASSO
1420842	DOCKTER, GLORIA	3209 KNOLL LANE NW, ROCHE
1420841	DOCKTER, VERN	3209 KNOLL LANE NW, ROCHE
1420843	EDSON, KIMBERLY	1434 DAMON ST SE, ROCHEST
1420844	HILL, JOHN	506 12TH STREET N W, ROCHE
1420845	HOWE, LAWRENCE	525 13TH ST NE, ROCHESTER,
1426196	HYATT, ELIZABETH	140 HAVILAND MILL RD, BROOK

**Click** on the member number listed in the **Active Members** column on the left. **OR** enter the **Last Name** or **Member Number** of the member you wish to drop then click **Search**. When the member is located click on the member number.

The following window opens:

Drop Reason:  field is required.

- Drop Deceased
- Drop Moved
- Drop Non-Attendance
- Drop Non-Attendance & Non-Pymt of Dues
- Drop Non-Pymt of Dues
- Drop Other
- Drop Resigned in Good Standing
- Drop Transferred in Good Standing

**Click** on the Down Arrow to display the drop reason codes. Click on the appropriate drop reason so that it is highlighted. Click the **Drop** button, as circled above, to drop the member.

You will be returned to the “roster” window. **Click** on the **Close** button to return to the **Membership Activity Page**, or, you can choose a new

membership function by **Clicking** on any of the **Red** menu items at the top of the screen.

## Reinstate:

When you **Click** the **Reinstate** link, the program will display a list of members that have been dropped from your club in the last 6 months. **Click** in the box next to the name you want reinstated, and **Click** on **Reinstate Selected**.

Member Name:	Address:	Member ID:	Drop Date:
<input checked="" type="checkbox"/> HOWE, LAWRENCE	525 13TH ST NE, ROCHESTER, MN, 55906 7059, UNITED STATES	1420845	12/01/2006

All members for whom the box was checked will be re-displayed in a confirmation screen. Finish the task by **Clicking** on the **Confirm Reinstatement** button.

Member Name:	Address:	Member ID:	Drop Date:
<input checked="" type="checkbox"/> HOWE, LAWRENCE	525 13TH ST NE, ROCHESTER, MN, 55906 7059, UNITED STATES	1420845	12/01/2006

Remember that you cannot reinstate a member that has been dropped for more than 6 months (they will not be displayed if gone for more than 6 months).

You will be returned to the **Membership Activity Page**.

## Transfers INTO your club:

Click on the **Transfer** link on any screen. The next window is displayed:

Fill in the **Last Name** and the **Member Number** if available. Click **Search**.

The program will look for Lions that have been dropped in the last six months, and display a window like this one:

Member ID:	Member Name:	Address:	Former Club Name:	Reason:
2389793	Miller, Benjamin D	540 Isle Street, Isle, MN, 56342, UNITED STATES	ISLE	Drop Non-Non-Pym
689520	MILLER, BOBBY	49 DILLON DRIVE, MORRILTON, AR, 72110, UNITED STATES	PERRYVILLE	Drop Mox
646499	MILLER, BRANDY L	5942 W KIOWA CREEK RD, ELBERT, CO, 80106, UNITED STATES	CALHAN	Drop Non-Non-Pym

On this screen, select the member that you want to Transfer into your club by **clicking** on the **Member ID** on the left.

The next screen will be displayed.

Enter any address changes. Finally, to complete the transfer, **Click** the **Confirm Transfer** button as circled. The program will take you back to the **Transfer Member Search** screen, from which you can **Close** if you are done transferring members. Closing will return you to the **Membership Activity Page**.

If you cannot locate the member to transfer, **Click** on the **Assistance** button on the **Transfer Member Search** window. The following screen will be displayed:

Fill in the data as well as you can and **Click** on the **Submit Assistance Request** button as circled above.

As indicated in the response window, LCI will process the transfer for you.

**Update/Review:**

Click on the **Update or Review** link on any page. The program will display your roster, in part, with options to view other pages of it or search by last name or member #.

Member #:	Name:	Branch:	Address:
1420838	ANDERSON, GREGORY		515 28th STREET NW ROC
859966	BAILEY, JAN L		508 7TH STREET SE ROC
1420841	DOCKTER, VERN		3209 KNOLL LANE NW ROC
1420842	DOCKTER, GLORIA		3209 KNOLL LANE NW ROC
1420843	EDSON, KIMBERLY		3610 4TH PL N W ROCHE
2075417	HILBURN, MARK		801 12TH AVE NE ROCHE

Click on the **Member #** and the following window is displayed:

After you click the **Change** button next to the name the following name change screen is displayed:

If you choose to **Review**, all the fields will be grayed out, and you will not be able to enter changes. The **Review** function does not require that you choose a reporting month.

If you choose to **Update**, you will then be allowed to Change the appropriate information.

For a name change, click the **Change** button to the right of the name as shown in the screen at the top of the next column.

The name change will be reviewed for proper formatting. The above message will time out after 5 seconds. The Basic Membership screen will be redisplayed for any further changes that you may have.

Click the **Save Member** button when you are done entering your changes.

The screenshot shows a web-based form for 'Basic Member Information'. At the top, there are navigation tabs: 'Add', 'Update', 'Review', 'Transfer', 'Copy', and 'Translate'. Below these are sub-tabs: 'Basic', 'Sponsor', and 'Family Unit'. The form displays the following information:

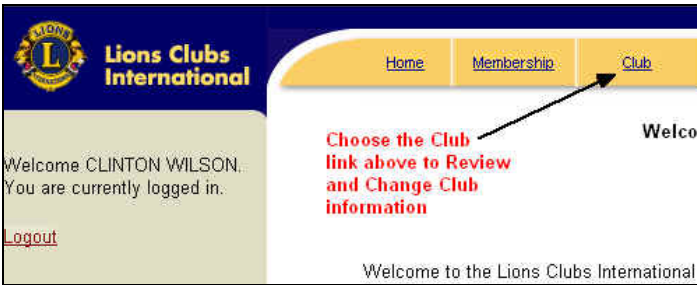
- Club: ROCHESTER 76 (31420)
- Reporting Month: December, 2006
- Member #: 1859966
- Name: Prefix (dropdown), First (JAN), Middle (L), Last Name/Surname (BAILEY), Suffix (dropdown), and a 'Change' button.
- Mailing Address: 506 7TH STREET SE
- City: ROCHESTER
- State/Province: MINNESOTA
- Postal/Zip Code: 55904
- Country: UNITED STATES
- Gender:  Male  Female
- Home Email: j021951@charter.net
- Spouse Name: (empty)
- Branch: (dropdown)
- Member of a Family Unit?:  Yes  No
- Year of Birth: 1951
- Home Phone: 507 289-9258
- Work Phone: (empty)
- Mobile Phone: (empty)
- Fax: (empty)
- Occupation: Medical/Dental/Healthcare
- Work Email: (empty)
- Nickname: (empty)
- Join Date: 10/1/2003

At the bottom of the form, there is a note: 'An asterisk (\*) next to a field indicates that the field is required.' Below the form are buttons for 'Member Sponsor', 'Family Unit', 'Save Member' (highlighted with a red circle), and 'Cancel'.

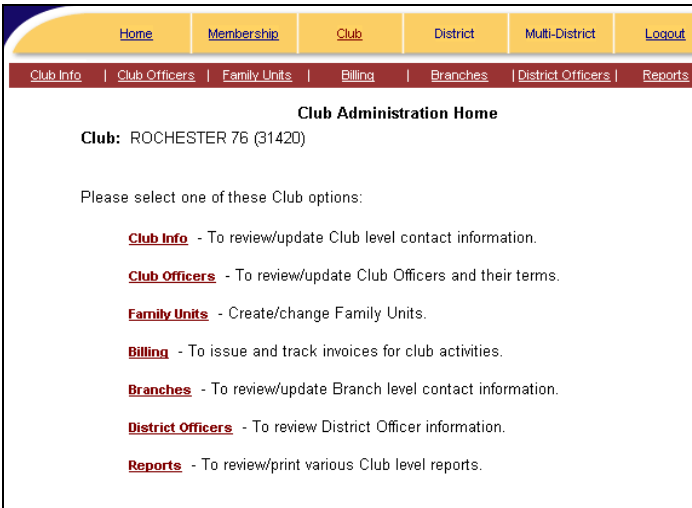
Both the **Review** and **Update** function will allow you to see the **Sponsor** information by clicking on the **Sponsor Tab**, but you may not change the sponsor.

## Club Report Functions

To access reports regarding your Lions club, select the **Club** link on the home page, as shown below:



Having chosen that link, the next window opens up:



Click on the **Family Units** link to enter a family unit for existing members. Refer to Page 11 for Family Unit instructions.

Click on the **Reports** link for a list of reports as shown below:



If you would like to submit the **Monthly/Yearly Activity Report** click the **Go!** button. Instructions for submitting this report are located on page 13 of this guide.

Most of these reports are self-explanatory. Be advised that having the most current version of Adobe Reader is important to your success in printing the reports.

If you choose **Monthly Membership Report**, an additional dialog box opens, as shown below



This report will generate data that is similar to the “old” MMR. A sample is shown below.

MONTHLY MEMBERSHIP REPORT			
December 2006			
(Submitted: 1/18/2007 2:16:14PM)			
ROCHESTER 76 (31420)			
This section under construction			
ACTIVE:	1. 0	RESIGNED IN GOOD STANDING	MEMBERS FROM LAST REPORT 27
MEMBERS AT LARGE:	2. 0	DROPPED FOR NON PAYMENT	A NEW MEMBERS 1
HONORARY:	3. 0	DROPPED FOR NON ATTENDANCE	B REINSTATED MEMBERS 1
LIFE:	4. 0	DROPPED FOR NON PAYMENT AND NON ATTENDANCE	C TRANSFER MEMBERS 0
PRIVILEGED:	5. 0	TRANSFERRED IN GOOD STANDING	TOTAL BEFORE DEDUCTIONS 29
AFFILIATE:	6. 1	MOVED	D DROPPED FROM MEMBERSHIP 1
DO NOT COUNT IN LCI	7. 0	DECEASED	MEMBERS AT CLOSE 28
TOTAL:	8. 0	OTHER	
ASSOCIATE:	9. 1	TOTAL	
IDENT: 0333	CLUB: 31420	NAME OF CLUB: ROCHESTER 76	DIST. NO: 5M1
MONTH: 12	YEAR: 2006	SECRETARY'S NAME: CLINTON WILSON 2305 CORAL CT NE ROCHESTER, MN 55906 5423	Branch Club members Total:

Finally, if you choose the **Membership Data Download**, you will get another dialog box, asking you to agree to some conditions. Having agreed, you will get a comma delimited file, a portion of which is shown below.

```
31420,ROCHESTER 76,1420838,,GREGORY,,ANDERSON,,1303 4TH ST SE,,,RO
31420,ROCHESTER 76,1420839,,COREY,,CARLSON,,RR 2 BOX 138 A,,,KASSON
31420,ROCHESTER 76,1420840,,PAULA,,CARLSON,,RR 2 BOX 138ANUE NW,,,R
31420,ROCHESTER 76,1420841,,VERN,,DOCKTER,,3209 KNOLL LANE NW,,,RO
31420,ROCHESTER 76,1420842,,GLORIA,,DOCKTER,,3209 KNOLL LANE NW,,,R
31420,ROCHESTER 76,1420843,,KIMBERLY,,EDSON,,1434 DAMON ST SE,,,RO
31420,ROCHESTER 76,1420844,,JOHN,,HILL,,506 12TH STREET N W,,,ROCHE
31420,ROCHESTER 76,1420845,,LAWRENCE,,HOWE,,525 13TH ST NE,,,ROCHE
31420,ROCHESTER 76,1420846,,ROBERT,E,HYATT,,140 HAVILAND MILL ROAD,
```

This information can be copied and pasted into a data base or spreadsheet program and used for your club purpose.

## The Club Officer Function

### Add Next Year Officers

The **Club Officer** link on the **Club Administration Home** page can be used to file the new officer information.

Click the **Club Officer** link as shown in the window below.

Club Administration Home  
Club: ROCHESTER 76 (31420)  
Click [HERE](#) or [HERE](#) to update or add club officers.

Please select one of these Club options:

- [Club Info](#) - To review/update Club level contact information.
- [Club Officers](#) - To review/update Club Officers and their terms.
- [Family Units](#) - Create/change Family Units.
- [Billing](#) - To issue and track invoices for club activities.
- [Branches](#) - To review/update Branch level contact information.
- [District Officers](#) - To review District Officer information.
- [Reports](#) - To review/print various Club level reports.

The following window opens:

Officer Terms Recap & Selection List  
Club: ROCHESTER 76 (31420)

Title:	Term Start:	Term End:	Member Number	M
Current				
Membership Chairperson	07/01/2006	06/30/2007	1420842	D
President	07/01/2006	06/30/2007	1859966	B
Secretary	07/01/2006	06/30/2007	1431554	W
Treasurer	07/01/2006	06/30/2007	1420841	D
Next Year				
1				

[Add](#) [Close](#)

Click on the **Add** button as shown above. The following window is displayed:

Club Officer/Chairperson Update

To search club members please enter any known info for Member below:

Club: ROCHESTER 76 (31420)  
Title:  #  
Local Title:  #  
Term Start: 7/1/2006 MM/DD/YYYY\*  
Term End: 6/30/2007 \*  
Member Name:   
Member #:

Last Name:   
First Name:   
Member #:   
Member City:

Search

<< [Add](#) [Remove](#) >>

ANDERSON, GREGORY  
BAILEY, JAN I  
DOCKTER, GLORIA  
DOCKTER, VERN  
EDSON, KIMBERLY  
HILBURN, BRENDA  
HILBURN, MARK

An asterisk (\*) next to a field indicates that the field is required.  
The # symbol next to the title and local title fields indicates that one of these fields is required.

[Submit](#) [Cancel](#)

In that window, select the office to be filled by using the **Down Arrow** next to **Title**. Four choices are possible. Or, place your **Local Title** (one NOT recognized by Lions International; Program Chair, for example) in that field.

Enter the **Term Start** and **Term End** dates field to reflect the dates for this office.

**Scroll** in the names box to find the member that will fill that office, **Click** the name to highlight it, then **Click** the **Add** link to move the name to the left part of the window.

Club Officer/Chairperson Update

To search club members please enter any known info for Member below:

Club: ROCHESTER 76 (31420)  
Title: Secretary #  
Local Title:  #  
Term Start: 7/1/2006 MM/DD/YYYY\*  
Term End: 6/30/2007 \*  
Member Name: HILBURN, BRENDA  
Member #: 2325011\*

Last Name:   
First Name:   
Member #:   
Member City:

Search

<< [Add](#) [Remove](#) >>

HILBURN, BRENDA  
HILBURN, MARK  
HILL, JOHN  
HOWE, LAWRENCE  
HYATT, ROBERT E  
JOHNSON, CURTISS J  
KOHLMAYER, CARL

An asterisk (\*) next to a field indicates that the field is required.  
The # symbol next to the title and local title fields indicates that one of these fields is required.

[Submit](#) [Cancel](#)

Click the **Submit** button. You will be returned to the **Officer Terms Recap and Selection List**. To add another officer click the **Add** button and repeat the above procedure.

When you are done adding the officers for next year, you can print the completed PU-101 form by clicking on the **Reports** link and clicking the **Print** button next to the **Lions Clubs Officer Reporting Form (PU-101)** report.



## Update Current Year Officer

To update the current year officer term end date and enter a replacement officer, click on the **officer title** in the Officer Terms Recap and Selection List.

Title:	Term Start:	Term End:	Member Number	Member Name
<b>Current</b>				
<a href="#">Membership Chairperson</a>	07/01/2006	06/30/2007	1420842	DOCKT
<a href="#">President</a>	07/01/2006	06/30/2007	1859966	BAILEY
<a href="#">Secretary</a>	07/01/2006	06/30/2007	1431554	WILSON
<a href="#">Treasurer</a>	07/01/2006	06/30/2007	1420841	DOCKT
<b>Next Year</b>				
1				

Title:	Term Start:	Term End:	Member Number	Member Name
<b>Current</b>				
<a href="#">Membership Chairperson</a>	01/02/2007	06/30/2007	1426205	PEHR
<a href="#">Membership Chairperson</a>	07/01/2006	01/01/2007	1420842	DOCK
<a href="#">President</a>	07/01/2006	06/30/2007	1859966	BAILE
<a href="#">Secretary</a>	07/01/2006	06/30/2007	1431554	WILSON
<a href="#">Treasurer</a>	07/01/2006	06/30/2007	1420841	DOCK
<b>Next Year</b>				
1				

If you have completed all officer adds or term updates click the **Close** button and you will return to the **Club Administration Home** screen.

Enter the **Term End** date for the existing officer and click **Submit**.

Club: ROCHESTER 76 (31420)  
 Title: [Membership Chairperson](#) #  
 Term Start: 07/01/2006  
 Term End: 06/30/2007  
 Member Name: GLORIA DOCKTER  
 Member #: 1420842\*

To search club members please enter any known info for Member below:

Last Name:   
 First Name:   
 Member #:   
 Member City:

Search: ANDERSON, GREGORY  
 BAILEY, JAN L  
 DOCKTER, GLORIA  
 DOCKTER, VERN  
 EDSON, KIMBERLY  
 HILBURN, BRENDA  
 HILBURN, MARK

<< Add  
 Remove >>

An asterisk (\*) next to a field indicates that the field is required.  
 The # symbol next to the title and local title fields indicates that one of these fields is required.

Submit Cancel

You will be returned to the **Officer Terms Recap and Selection List** window. Click the **Add** button to enter the information for the replacement officer. Make sure the term start date is greater than the term end date of the prior officer. When you are done entering the information for the replacement officer click **Submit**.

You will be returned to the **Officer Terms Recap and Selection List** window. The updated list will show the previous officer as well as the replacement officer as shown in the next screen.

## Family Unit Reporting Screens

Family Units can be reported in two ways:

1. Add or Update membership screen. See documentation below.
2. Club – Family Unit link. Go to page 11 of this document.

**TIP:** Enter the Head of Household first. Enter Family members belonging to the Head of Household after the Head of Household record is processed.

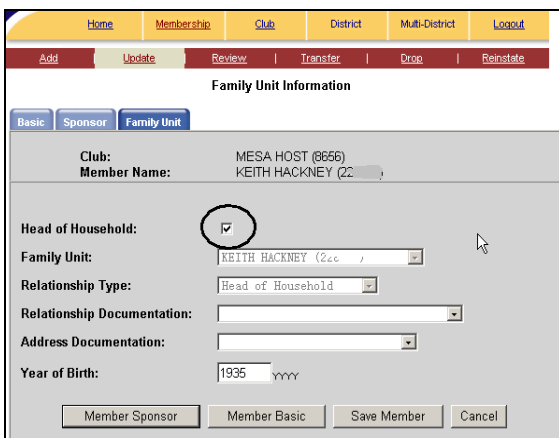
### Membership – Family Unit

#### Add a New Club Member

To add a new member to the roster, click [Add a Member](#) link. On the Basic information screen you will need to click Yes or No for Family Unit. If the new member is part of a Family Unit do the following:

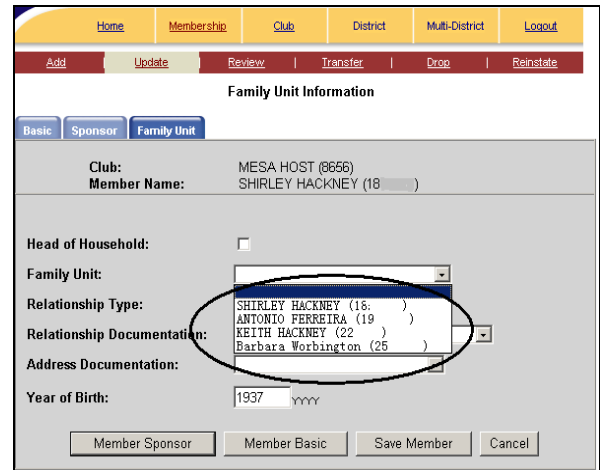
- Click on the Yes radio button for Family Unit and proceed to fill in the information for the new member.
- When done entering the Basic member information click on the Save Member button or Family Unit tab.

The Family Unit screen is now displayed. If the member is the Head of Household, click the Head of Household box as shown below.



The screenshot shows the 'Family Unit Information' screen. At the top, there are navigation tabs: Home, Membership, Club, District, Multi-District, and Logout. Below these are action buttons: Add, Update, Review, Transfer, Drop, and Reinstale. The main content area has tabs for Basic, Sponsor, and Family Unit. The 'Family Unit' tab is active. The form displays the following information: Club: MESA HOST (8656), Member Name: KEITH HACKNEY (22). The 'Head of Household' checkbox is checked. The 'Family Unit' dropdown menu is open, showing a list of names: SHIRLEY HACKNEY (18), ANTONIO FERREIRA (19), KEITH HACKNEY (22), and Barbara Worthington (25). The 'Relationship Type' is set to 'Head of Household'. The 'Year of Birth' is 1935. At the bottom, there are buttons for Member Sponsor, Member Basic, Save Member, and Cancel.

If the family unit member is not the Head of Household, click the down arrow by the Family Unit box and click the name of the Head of Household in the list as shown in the screen below:



The screenshot shows the 'Family Unit Information' screen. At the top, there are navigation tabs: Home, Membership, Club, District, Multi-District, and Logout. Below these are action buttons: Add, Update, Review, Transfer, Drop, and Reinstale. The main content area has tabs for Basic, Sponsor, and Family Unit. The 'Family Unit' tab is active. The form displays the following information: Club: MESA HOST (8656), Member Name: SHIRLEY HACKNEY (18). The 'Head of Household' checkbox is unchecked. The 'Family Unit' dropdown menu is open, showing a list of names: SHIRLEY HACKNEY (18), ANTONIO FERREIRA (19), KEITH HACKNEY (22), and Barbara Worthington (25). The 'Relationship Type' is set to 'Head of Household'. The 'Year of Birth' is 1937. At the bottom, there are buttons for Member Sponsor, Member Basic, Save Member, and Cancel.

Enter the Relationship Type, Relationship Documentation and Address Documentation. Enter the Year of Birth if not already displayed.

To complete adding the new member:

- Click Member Sponsor button and enter the new member sponsor information.
- Click Save Member.

The new member will be added to your club roster as well as the Family Unit.

#### Update Existing Member

To Update an existing member as belonging to a Family Unit do the following:

- Click on [Update a Member's Information](#) link
- Click the Yes radio button by Member of a Family Unit.
- Click the Family Unit tab or Save Member button.
- Select Head of Household and enter Family Unit verification.
- Click Save Member.

The Membership selection screen will display when the update process is complete

## Club – Family Unit

Click the Club link. Click the Family Units link.  
The Family Unit page is displayed.

### Creating New Family Units

To enter a new Family Unit click on the New button as shown below.

The screenshot shows the 'Family Unit Home' page for Club: MESA HOST (8656). It features a navigation bar with 'Home', 'Membership', 'Club', 'District', 'Multi-District', and 'Logout'. Below the navigation bar are links for 'Club Info', 'Club Officers', 'Family Units', 'Billing', 'Branches', 'District Officers', and 'Reports'. The main content area has a heading 'Family Unit Home' and 'Club: MESA HOST (8656)'. There are two main sections: 'Create a new Family Unit:' with a 'New' button circled in red, and 'Select a Head of Household to update a Family Unit:' with a list of members including 'ANTONIO FERREIRA (19)' and an 'Update' button. A 'Return' button is at the bottom.

The Family Unit Maintenance screen is displayed as shown below.

The screenshot shows the 'Family Unit Maintenance' screen. It includes instructions: 'To create a new Family Unit: 1. Select a new Head of Household. 2. Add members to the Family Unit by checking their checkboxes (Up to 5 members). 3. Click the Save button.' Below the instructions is a table with columns: 'Head of Household', 'Member Name', 'Add To / Remove From Family Unit', and 'Documentation'. Two members are listed: 'GERRIT BOOK' and 'WARREN CASEY', both with checkboxes in the 'Add To / Remove From Family Unit' column. The 'Documentation' column contains dropdown menus for 'Family Relation', 'Relationship Verification Documentation', 'Address Verification Documentation', and 'Birth Year' for each member.

To create a Family Unit:

- First select the Head of Household by scrolling through the list of members and clicking on the Head of Household radio button. Select the appropriate verifications and enter the birth year if it is not filled in.
- Next scroll through the list and click on the square check box to select members that belong to this family unit. Select the appropriate verifications and enter the birth year if it is not filled in.

- Scroll to the bottom of the screen and click the Save button as shown below.

The screenshot shows the Family Unit form for two members: 'Barbara Worbington' and 'William Worbington'. Each member has a 'Family Relation' dropdown menu, a 'Relationship Verification Documentation' dropdown menu, an 'Address Verification Documentation' dropdown menu, and a 'Birth Year' text field. The 'Save' button is circled in red at the bottom of the form. A note below the form states: 'An asterisk (\*) next to a field indicates that the field is required.'

**TIP:** Complete one Family Unit at a time. Up to five members, including the Head of Household, can be selected per Family Unit.

Once the Family Unit is Saved you will be returned to the Family Unit Home page. Enter another Family Unit or click the Return button to go back to the Club Administration Home page.

### Update Existing Family Unit

You can add or delete family members from a Family Unit by clicking on the Update button as shown below.

The screenshot shows the 'Family Unit Home' page for Club: MESA HOST (8656). It features a navigation bar with 'Home', 'Membership', 'Club', 'District', 'Multi-District', and 'Logout'. Below the navigation bar are links for 'Club Info', 'Club Officers', 'Family Units', 'Billing', 'Branches', 'District Officers', and 'Reports'. The main content area has a heading 'Family Unit Home' and 'Club: MESA HOST (8656)'. There are two main sections: 'Create a new Family Unit:' with a 'New' button, and 'Select a Head of Household to update a Family Unit:' with a list of members including 'ANTONIO FERREIRA (193)' and 'Barbara Worbington (254)'. The 'Update' button for 'ANTONIO FERREIRA (193)' is circled in red. A 'Return' button is at the bottom.

Select additional Family Unit members by clicking the “Add To/Remove From Family Unit” check box. Or you can remove Family Unit members by clicking on this checkbox. Click the Save button when you are done with your Family Unit updates.

## Deselect Head of Household

The Head of Household can be deselected by doing the following:

- Click on the Update button for the Head of Household you wish to deselect.
- Deselect all members in this Family Unit and click the Save button
- After the deselected members are done processing, deselect the Head of Household.
- Click the Save button.

The Head of Household unit will no longer be listed on the Family Unit Home page.

# MONTHLY / YEARLY ACTIVITY REPORTING SCREEN

## Guidelines

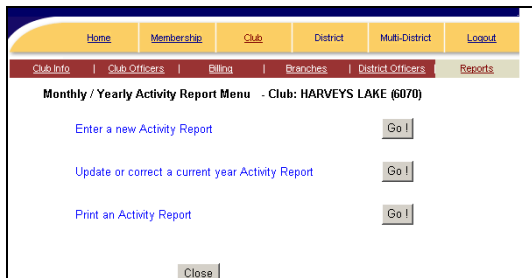
This report is filled out at any interval you wish (monthly, quarterly, semi-annual or yearly) but you must select a month in order to enter information. The information entered will be accumulated at the end of the lionistic year to produce the Annual Activity Report. Please remember that monetary amounts and hours should be entered in **whole numbers only – no commas, no decimal points and no dollar signs.**

## Getting Started

To report your club activity, click the **Go!** button next to “Monthly/Yearly Activity Report” on the Club Report Selection screen.

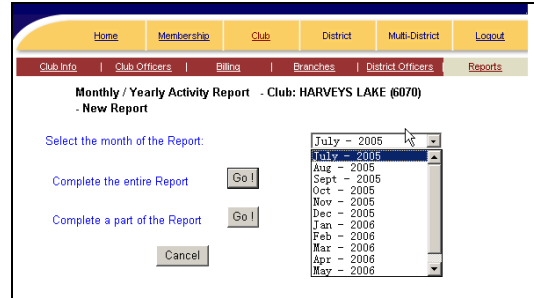


There are 3 options on the Monthly/Yearly Report Activity Menu. Click the **Go!** button next to your selection.



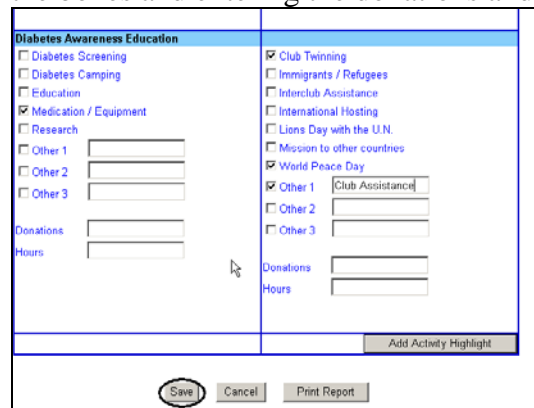
## Enter a New Activity Report

Select the month you wish to report from the drop down menu. Only months that have not been reported will be displayed. Click the **Go!** button next to “Complete the entire Report” or click the **Go!** button next to “Complete a part of the Report.”

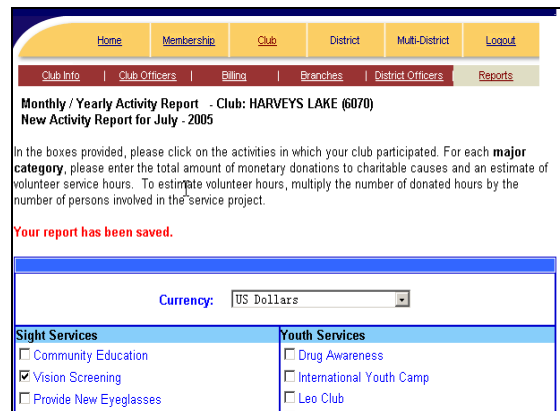


Click in the box of the activity you wish to report. Enter any monetary donations. **Remember:** All numeric fields are entered as whole numbers. NO commas, decimal points or dollar signs.

Click the **Save** button when you are done checking the boxes and entering the donations and hours.



You will receive a confirmation with the statement “Your report has been saved.” in red at the top of the form



After you have saved your activity form you can click the **Cancel** button to return to the Annual Activity Month Selection screen or you can click

the **Add Activity Highlight** button on the bottom of the form.

### Activity Highlight

The Activity Highlights can be entered after saving the activity form or the highlights can be entered without entering activity on the form.

Enter your Activity Highlight narrative. When you are done click the **Save** button. You will receive a confirmation with the statement “Your report has been saved.” in red at the top of the form

You can now click **Cancel** to return to the Annual Activity Month Selection screen or you can click the **Print Report** button.

### Print Report

A report can be printed for this year or for last year only if the report was entered on the WMMR site. Click on the type of report you wish to print.

### Print Monthly Report

Clicking on this button will display the following screen:

Select the months you wish to print. You can only select the months that have reported information. Months not reported will be grayed out and you will not be able to select them. Click the **Print** button.

The monthly report will be displayed. You can now print the report or save it to your hard drive. The saved report can be attached in an email to your district officer.

Click the browsers back arrow button to return to the monthly selection screen. Click **Cancel** to return to the Print menu.

### Update or Correct a Current Year Activity Report

To update or correct a current year monthly report, click on the **Go!** button next to this option.

Click the down arrow to select the month you wish to update. Click on the month to select it. Click the **Go!** button next to full form or form section.

Enter the changes you wish to make. Click the **Save** button when you are done. You will receive a confirmation with the statement “Your report has been saved.” in red at the top of the form

You can now click **Cancel** to return to the Annual Activity Month Selection screen or you can click the **Print Report** button.