

Membership Reporting

Web Monthly Membership Reporting WMMR

Complete Reference Guide

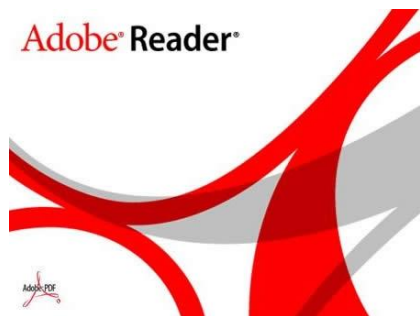
Lions Clubs International



Instructions:

- To view a particular part of the guide, click the corresponding link in the table of contents.
- To print a particular part of the guide
 - Go to File and then Print
 - Click "Pages", and enter the page range of the pages you wish to print.
 - The page range can be determined using the table of contents as a guide. For example, enter 32-35 to print the Club Officer Functions.

Table of Contents	Page #
1. How to Log in	2
2. How to Add a Member	6
3. How to Drop a Member	9
4. How to Reinstate a Member	11
5. How to Transfer a Member	12
6. How to Update or Review a Member's Information	14
7. Club Report Functions	17
a. Monthly Membership Reports	18
b. Membership Data Download	20
c. Lions Club Service Activity Report	21
d. Membership Cards	29
8. The Club Officer Function – How to Add, Update, Delete an Officer	32
9. How to Add or Remove a Family Unit	36



You must have the latest version of Adobe Acrobat Reader installed to view and run the print version of the reports in the WMMR website.

Membership Reporting – How to Add, Drop, Reinstate, Transfer, Update or Review

Here's How

What You'll See

1. Go to www.lionsclubs.org

Find a Club Shop **Submit Reports** Contact Us Donate Search

Lions Clubs International

About Lions Becoming a Lion The Foundation Our Work Our Impact News and Events **Member Center**

LIONS IN ACTION

Bag-A-Burger
Helping Kids and the Environment >>

Clean Water **Bag-A-Burger** Philippines Library

Who are Lions?
Our members are very different in many ways, but we share a core belief: community is what we make it.

Our Impact
A young girl in the Philippines. A mother in West Africa. A burn victim in the United States.
Meet the people we help.

News and Events

- See How Preschoolers Laugh and Learn in Uganda
- View Peace Poster Winners
- Find Out About Lions, LCIF Response to Midwest U.S. Flooding
- Learn More About Our New Web Site
- Review Frequently Asked Questions About Our Web Site
- More News and Events

How Do I ...

- Find a Club Near Me?
- Download Lions Logos and Forms?
- Request Assistance?
- Become a Member?
- Submit Membership and Activity Reports?

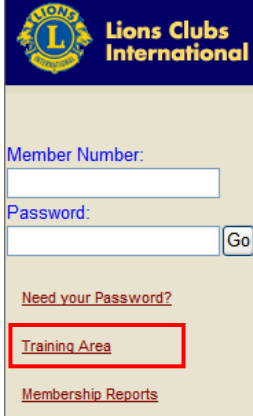
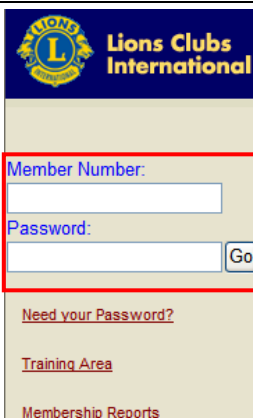
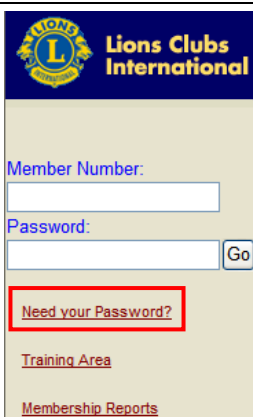
2. Click on **Submit Reports**.



Find a Club Shop **Submit Reports** Contact Us

Lions Clubs International

3. Click on **Lion Officers Login Here**.

Lion Officers Login Here

Here's How	What You'll See	
<p>4. Click on the Training Area if you want to obtain training.</p> <p>5. On the next screen, click Go.</p> <p>***Note: You can click on the Training Area and use it with no password</p>	 <p>The screenshot shows the Lions Clubs International login page. It features a header with the Lions Clubs International logo and name. Below the header, there are input fields for 'Member Number' and 'Password', followed by a 'Go' button. A link for 'Need your Password?' is visible. The 'Training Area' link is highlighted with a red rectangular box.</p>	<p>System backups are performed daily between 6:15 a.m. and 7:15 a.m. Central Standard Time (CST-USA). (November thru February 1215 to 1315 GMT and March thru October 1115 to 1215 GMT.) The membership web site is not accessible during this time period.</p> <p>March 4, 2009</p> <p>At the request of the International Activities & Program Planning Division (Program Development Department) the New Activity Report format was released in December of 2008.</p> <p>Since the initial release, we have implemented additional upgrades to improve the reporting process including printing. Therefore, the current report is available on the WMMR site in English only. We are currently working to get all reports translated and</p>
<p>6. To proceed to editing part of WMMR, enter your Member Number and Password.</p> <p>***Note: Password is needed for this area.</p>	 <p>The screenshot shows the Lions Clubs International login page. The input fields for 'Member Number' and 'Password', along with the 'Go' button, are highlighted with a red rectangular box.</p>	<p>System backups are performed daily between 6:15 a.m. and 7:15 a.m. Central Standard Time (CST-USA). (November thru February 1215 to 1315 GMT and March thru October 1115 to 1215 GMT.) The membership web site is not accessible during this time period.</p> <p>March 4, 2009</p> <p>At the request of the International Activities & Program Planning Division (Program Development Department) the New Activity Report format was released in December of 2008.</p> <p>Since the initial release, we have implemented additional upgrades to improve the reporting process including printing. Therefore, the current report is available on the WMMR site in English only. We are currently working to get all reports translated and</p>
<p>7. In order to get your Password, click on the Need your Password? Link.</p> <p>***Note: You must have a valid e-mail address on record with International Headquarters to receive your password using the Need your Password link.</p>	 <p>The screenshot shows the Lions Clubs International login page. The 'Need your Password?' link is highlighted with a red rectangular box.</p>	<p>System backups are performed daily between 6:15 a.m. and 7:15 a.m. Central Standard Time (CST-USA). (November thru February 1215 to 1315 GMT and March thru October 1115 to 1215 GMT.) The membership web site is not accessible during this time period.</p> <p>March 4, 2009</p> <p>At the request of the International Activities & Program Planning Division (Program Development Department) the New Activity Report format was released in December of 2008.</p> <p>Since the initial release, we have implemented additional upgrades to improve the reporting process including printing. Therefore, the current report is available on the WMMR site in English only. We are currently working to get all reports translated and</p>

Here's How	What You'll See
8. Enter your Member # and click Submit .	<p style="text-align: center;">Member Password Lookup</p> <div style="border: 1px solid gray; padding: 10px; background-color: #f0f0f0;"><p>If you are a current Lions Club officer and you would like to receive your password by email, please enter your member number; then click the "Submit" button.</p><p style="text-align: center;">Member #: <input style="width: 150px; height: 20px;" type="text"/></p></div> <p style="text-align: center;"><input style="border: 1px solid red; width: 50px; height: 20px;" type="button" value="Submit"/> <input style="border: 1px solid gray; width: 50px; height: 20px;" type="button" value="Cancel"/></p>
9. Type in your Member Number and Password and click Go to continue to the member reporting area.	<div style="text-align: center;"><p>Lions Clubs International</p></div> <div style="border: 1px solid gray; padding: 10px; background-color: #f0f0f0;"><p>Member Number: <input style="width: 150px; height: 20px;" type="text" value="114136"/></p><p>Password: <input style="width: 150px; height: 20px;" type="password" value="••••••"/></p><p style="text-align: right;"><input style="border: 1px solid red; width: 40px; height: 20px;" type="button" value="Go"/></p></div>
10. After you log in, click on the Membership Tab.	<div style="text-align: center;"><p>Lions Clubs International</p></div> <div style="border: 1px solid gray; padding: 10px; background-color: #f0f0f0;"><p style="text-align: right;">Home <input style="border: 1px solid red; width: 60px; height: 20px;" type="button" value="Membership"/></p><p>Welcome Martha Bing You are currently logged in.</p><p>Logout</p></div>

Here's How **What You'll See**

11. Select the **Report Month** being reported. Notice that the **Report Month** is indicated in the red rectangle.

***** Note: Report month choices are current calendar month or up to 2 months prior. The default is the current calendar month.**

All prior reporting months require paper copies to be submitted to the Club Officer & Record Administration Department at the International Headquarters.

Home	Membership	Club	Zone	Region	District	Multi-District	Logout
Add	Update	Review	Transfer	Drop	Reinstate		

Membership Activity Page

Select a Reporting Month:

Please select one of these Membership options:

- [ADD a Member](#)
- [UPDATE a Member's information](#)
- [REVIEW a Member's information](#)
- [TRANSFER a Member](#)
- [DROP a Member](#)
- [REINSTATE a Member](#)
- [To report NO MEMBERSHIP ACTIVITY for this month, click here](#)

12. If you want to report **NO membership activity**, click the appropriate option located at the bottom of the list.

13. The MMR Report Status screen will appear to confirm your submission.

14. Click OK to return to the Membership Activity Page.

Please select one of these Membership options:

- [ADD a Member](#)
- [UPDATE a Member's information](#)
- [REVIEW a Member's information](#)
- [TRANSFER a Member](#)
- [DROP a Member](#)
- [REINSTATE a Member](#)
- [To report NO MEMBERSHIP ACTIVITY for this month, click here](#)



Here's How **What You'll See**

How to Add a Member

- 1. Click on **Add** or **Add a Member**.

FRANKLIN (11330)

Home | Membership | Club | Zone | Region | District | Multi-District | Logout

Add | Update | Review | Transfer | Drop | Reinstate

Membership Activity Page

Welcome Tony R Angel. You are currently logged in.
[Logout](#)

Select a Reporting Month: Apr 2009

Please select one of these Membership options:

- ADD a Member**
- UPDATE a Member's information
- REVIEW a Member's information
- TRANSFER a Member
- DROP a Member
- REINSTATE a Member
- To report NO MEMBERSHIP ACTIVITY for this month, click here

- 2. If the person you are adding was not a prior member, click the **No** circle, and click **Submit**

***Note: Leave the rest of the fields blank.

Inactive Member Search

Search

Club: FRANKLIN (11330)

Prior Member: Yes **No**

If yes, then please fill in known fields below and click on 'Submit'.
Otherwise, leave blank and click on 'Submit'

Member Last Name:

Member First Name:

Member #:

Former Club #:

Former Club Name:

City:

State/Province:

Country:

Submit Cancel

Here's How **What You'll See**

- If the member you are adding was a prior member, select **Yes**. Enter the last name of prior member and any additional information you have about the member (or what you know about an existing or prior Lion) and click **Submit**.

*****Note: Enter only the member number, if available, and click Submit.**

Inactive Member Search

- Basic Member Information** page will open
- Fill in **ALL** of the required fields marked with (*).
- After entering all of the necessary information on the Basic form, click on **Member Sponsor, or Sponsor** tab to continue.

*****Note: If not all of the required fields are filled in, an error message will display.**

Basic Member Information

Here's How **What You'll See**

7. Select a sponsor using the Sponsor Lookup window.
8. If the sponsor is from the same club, members will display in the box.
 - a. To scroll through the names, click the up or down arrows next to the box.
 - b. OR search for a sponsor within the club, fill in **Last** and **First Name** or **Member #** in the dialog box and click **Search**.
9. Click the name of the sponsor to highlight it, then click **Add**.
10. If the sponsor is from a different club, fill in the information in the **Different Club** window located at the bottom of the Sponsor Window.
11. Once you have selected a sponsor, click **Save Member**.

Sponsor Information

Basic **Sponsor**

Club: FRANKLIN (11330)
Member Name:
 Please choose either a sponsor from the same club using the sponsor lookup feature below or enter the sponsor name, sponsor member number (if known) and club number of the sponsor if the sponsor is from another club.

Same Club:

Sponsor Member #:

Sponsor Name:

Sponsor Lookup

Last Name:

First Name:

Member #:

Search

<< Add
Remove >>

Allen, Carl H (2568851)	▲
Angel, Tony R (2377101)	
BEAMAN, BERTON DWIGHT (411321)	
BEAMAN, BETTE A (411322)	▼

Different Club:

Sponsor Club #:

Sponsor Name:

Sponsor Member #:

Member Basic Family Unit **Save Member** Cancel

Sponsor Lookup

Last Name:

First Name:

Member #:

Search

<< Add
Remove >>

ROGERS, JOANNA M (427445)	▲
Rogers, Joyce A. (2443461)	
ROGERS, ROBERT R (427444)	▼

12. If the member is a part of a family unit, click the **Family Unit** button, and enter the Family Unit information.
13. Once the Family Unit information is entered, click the **Save Member** button.

Family Unit Information

Basic **Sponsor** **Family Unit**

Club: FRANKLIN (11330)
Member Name: (New)

Head of Household:

Family Unit: *

Relationship Type: *

Relationship Documentation: *

Address Documentation: *

Year of Birth: * yyy

Member Sponsor Member Basic **Save Member** Cancel

An asterisk (*) next to a field indicates that the field is required.

Here's How	What You'll See
-------------------	------------------------

How to Drop a Member

1. Click on the **Drop** or **Drop a Member**.

FRANKLIN (11330)

Home | Membership | Club | Zone | Region | District | Multi-District | Logout

Add | Update | Review | Transfer | **Drop** | Reinstate

Membership Activity Page

Select a Reporting Month: Apr 2009

Please select one of these Membership options:

[ADD a Member](#)

[UPDATE a Member's information](#)

[REVIEW a Member's information](#)

[TRANSFER a Member](#)

[DROP a Member](#)

[REINSTATE a Member](#)

[To report NO MEMBERSHIP ACTIVITY for this month, click here](#)

2. Click on the **Member ID**, in the member **column**, of the member you want to drop.
3. OR fill in the Last Name or Member # and click **Search**.

Add | Update | Review | Transfer | Drop | Reinstate

Select for Drop/Recap List

Club: Franklin Reporting Month: 4/2009

Last Name:

Member #:

Search Close

Member ID:	Member Name:	Address:
111186	Bing Martha	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111184	Brookenfeild, Peter	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111188	Brown, Jarod	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111183	O'Reilly, Michael	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111182	Rits, David	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111187	Smith, Elizabeth	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111181	Smith, John	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111185	Tingle, Suzanne	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES

Here's How **What You'll See**

- 4. Click on the **Drop Reason** drop down list.
- 5. **Highlight** an appropriate reason by clicking on it.

Drop Reason

Drop Reason

Club: FRANKLIN (11330)
Reporting Month: 4/2009
Name: WILLIAM G DAVIDSON
Member #: 416688
Mailing Address: 775 COUNTRY CLUB DRD

City: FRANKLIN
State/Province: NC
Postal/Zip Code: 28734
Country: UNITED STATES

Join Date: 5/1/1995

Drop Reason: *

- 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

is required.

- 6. Click the **Drop** button to drop the selected member.

Drop Reason

Drop Reason

Club: FRANKLIN (11330)
Reporting Month: 4/2009
Name: WILLIAM G DAVIDSON
Member #: 416688
Mailing Address: 775 COUNTRY CLUB DRD

City: FRANKLIN
State/Province: NC
Postal/Zip Code: 28734
Country: UNITED STATES

Join Date: 5/1/1995

Drop Reason: *

An asterisk (*) next to a field indicates that the field is required.

Here's How **What You'll See**

How to Reinstate a Member

1. Click on **Reinstate** or **Reinstate a Member**.

FRANKLIN (11330)

Home | Membership | Club | Zone | Region | District | Multi-District | Logout

Add | Update | Review | Transfer | Drop | **Reinstate**

Membership Activity Page

Select a Reporting Month: Apr 2009

Please select one of these Membership options:

[ADD a Member](#)

[UPDATE a Member's information](#)

[REVIEW a Member's information](#)

[TRANSFER a Member](#)

[DROP a Member](#)

[REINSTATE a Member](#)

[To report NO MEMBERSHIP ACTIVITY for this month, click here](#)

2. Click on the **box** next to the member you want to reinstate then click **Reinstate Selected**.
3. All members you selected will re-display in a confirmation screen.
4. Click on the **Confirmation Reinstatement** to finish.

Select for Reinstatement

Club: ROCHESTER 76 (31420)

Member Name:	Address:
<input type="checkbox"/> LANGANKI, MARVIN	1320 6TH AVE NE, ROCHESTER, MN, 55906 7003, UNITED STATES
<input checked="" type="checkbox"/> Mouse, Mickey M	1234 56th Street N
<input type="checkbox"/> Mouse, Mickey M	1234, Orlando, MN, 5, UNITED STATES

1

Reinstate Selected | Cancel

***Note: More than one member can be reinstated at a time

***Note: Only the members who have been dropped from your club in the last 12 months will display.

Here's How **What You'll See**

How to Transfer a Member (Into your club)

1. Click on **Transfer** or **Transfer a Member**.

2. Fill in the **Last Name** or the **Member #** if available and click **Search**.

3. All members who match the search will be displayed.
4. Click on the **Member #** of the member that you want to transfer.

Member #:	Name:	Branch:	Address:
Processing...	Brookenfeild, Peter		
112066	Bing, Martha		1001 NORTH AVE OAK BROOK IL 60523
112068	Brown, Jarod		1001 NORTH AVE OAK BROOK IL 60523
112063	O'Reilly, Michael		1001 NORTH AVE OAK BROOK IL 60523
112062	Rita, David		1001 NORTH AVE OAK BROOK IL 60523
112067	Smith, Elizabeth		1001 NORTH AVE OAK BROOK IL 60523
112061	Smith, John		1001 NORTH AVE OAK BROOK IL 60523
112065	Tingle, Suzanne		1001 NORTH AVE OAK BROOK IL 60523
1			

Here's How **What You'll See**

- 5. Make sure that all of the information on the screen is correct; make changes if necessary.
- 6. Click **Confirm Transfer**.

- 7. If you are not able to locate the member to transfer, click **Assistance**.

- 8. Fill in the data requested, and then click **Submit Assistance Request**.

*****Note: LCI headquarters staff will process the transfer for you.**

Here's How **What You'll See**

How to Update or Review a Member's Information

1. Click **Update or Update Member's Information** if you want to make any changes.

*****Note: Review and Review Member's Information are used for viewing only.**

2. Click on the **Member #** of the member, whose information you want to change.

Member ID:	Member Name:	Address:
111186	Bing Martha	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111184	Brookenfeild, Peter	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111188	Brown, Jarod	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111183	O'Reilly, Michael	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111182	Rita, David	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111187	Smith, Elizabeth	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111181	Smith, John	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES
111185	Tingle, Suzanne	1001 NORTH AVE, OAK BROOK, IL, 60523, UNITED STATES

Here's How

What You'll See

3. Change/Update the member's information and click **Save Member**.

Basic Member Information

Club: TA Club 11206 (11206) Reporting Month: April, 2009
 Member #: 112068

Basic Sponsor **Family Unit**

Prefix	First	Middle	Last Name/Surname	Suffix
▼	Jarod *	TA	Brown11206 *	▼

Change

Mailing Address: 1001 NORTH AVE *

City: OAK BROOK *

State/Province: ILLINOIS ▼ *

Postal/Zip Code: 60523 *

Country: UNITED STATES ▼ *

Gender: Male Female *

Year of Birth: 1959 * YYYY

Join Date: 9/13/2004 * MM/DD/YYYY

Home Phone: Country Code Area Code Phone Number

Work Phone: Country Code Area Code Phone Number

Mobile Phone: Country Code Area Code Phone Number

Fax: Country Code Area Code Phone Number

Home Email: Country Code Area Code Phone Number

Work Email: Country Code Area Code Phone Number

Spouse Name: Country Code Area Code Phone Number

Nickname: Country Code Area Code Phone Number

Occupation: Country Code Area Code Phone Number

Member of a Family Unit?: Yes No *

Member Type: Regular Member ▼ *

Branch: ▼

Status: Regular Member

Charter Member:

An asterisk (*) next to a field indicates that the field is required.

Member Sponsor Family Unit **Save Member** Cancel

4. If you want to change the member's name, click on the **Change** button.

Prefix	First	Middle	Last Name/Surname	Suffix
▼	Jarod *	TA	Brown11206 *	▼

Change

5. Enter desired changes and a reason for change and Click **Submit**.

Change Member Name Request

Current Name: Jarod Brown

One of the following name changes is required:

First Name:

Middle Name:

Last Name:

Reason for name change (required):

Email address of the person to contact in case of questions (required):

Submit Previous Screen

6. This confirmation screen will appear. The name change will be submitted to LCI headquarters for review

Add **Update** Review | Transfer | Drop | Reinstate

Change Member Name Request

Request has been submitted to LCI - Club Records and Billing Department

***Note: This message will time out after 5 seconds.

Here's How

- 7. If you want to review sponsor information, click on the **Sponsor** Tab.

*****Note: Sponsor changes can only be updated by the Membership Operations Department staff. Please contact them at: memberops@lionsclubs.org**

What You'll See

Basic Member Information

Basic **Sponsor** Family Unit

Club: Franklin Member #: 112068 Reporting Month: April, 2009

Name: Prefix: [v] First: Jerod * Middle: TA Last Name/Surname: Brown11206 * Suffix: [v] Change

Mailing Address: 1001 NORTH AVE *
Country Code Area Code Phone Number

City: OAK BROOK * Home Phone: [][][] [][][]
State/Province: ILLINOIS * Work Phone: [][][] [][][]
Postal/Zip Code: 60523 * Mobile Phone: [][][] [][][]
Country: UNITED STATES * Fax: [][][] [][][]
Gender: Male Female * Home Email: [][][] [][][] [][][] [][][]
Year of Birth: 1959 * YYYY Work Email: [][][] [][][] [][][] [][][]
Join Date: 9/13/2004 * MM/DD/YYYY Spouse Name: [][][] [][][]
Member of a Family Unit?: Yes No * Nickname: [][][] [][][]
Member Type: Regular Member * Occupation: [][][] [][][] [][][] [][][] [][][] [][][] [][][] [][][]
Branch: [v] Status: Regular Member
Charter Member:

An asterisk (*) next to a field indicates that the field is required.

Member Sponsor Family Unit Save Member Cancel

Here's How **What You'll See**

Monthly Membership Report

- 1. To view or print a Monthly Membership Report, click on the **Print** button.

[Club Info](#) | [Club Officers](#) | [Family Units](#) | [Billing](#) | [Branches](#) | [District Officers](#) | [Reports](#)

Club Report Selection

Club: FRANKLIN (11330)

Report

Club Roster With Address	<input type="button" value="Print"/>
Club Roster Without Address	<input type="button" value="Print"/>
Club Attendance Sheet	<input type="button" value="Print"/>
Club Directory	<input type="button" value="Print"/>
Club Monthly Reporting History	<input type="button" value="Print"/>
Monthly Membership Report	<input type="button" value="Print"/>
Lions Clubs Officer Reporting Form (PU-101)	<input type="button" value="Print"/>
Family Unit Report	<input type="button" value="Print"/>
Membership Data Download	<input type="button" value="View"/>
Membership Cards	<input type="button" value="Print"/>
Lions Club Activity Report	<input type="button" value="Go !"/>

Forms

[New Member Form](#)

- 2. Type in a Month and a Year of the report you want to view in the following format mm/yyyy, then click **Run Report**.

[Home](#) | [Membership](#) | [Club](#) | [Zone](#) | [Region](#) | [District](#) | [Multi-District](#) | [Logout](#)

Monthly Membership Report

Please specify a reporting month and year.

MM/YYYY

Here's How **What You'll See**

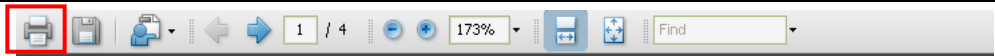
- 3. A report will be generated for the month you selected.
- 4. Save a copy of the monthly report for your club's records.

MONTHLY MEMBERSHIP REPORT - January 2009

This section under construction			
ACTIVE:	1.	0 RESIGNED IN GOOD STANDING	MEMBERS FROM LAST REPORT 24
MEMBERS AT LARGE:	2.	0 DROPPED FOR NON PAYMENT	A NEW MEMBERS 0
HONORARY:	3.	0 DROPPED FOR NON ATTENDANCE	B REINSTATED MEMBERS 0
LIFE:	4.	0 DROPPED FOR NON PAYMENT AND NON ATTENDANCE	C TRANSFER MEMBERS 1
PRIVILEGED:	5.	0 TRANSFERRED IN GOOD STANDING	TOTAL BEFORE DEDUCTIONS 25
AFFILIATE:	6.	0 MOVED	D DROPPED FROM MEMBERSHIP 0
DO NOT COUNT IN LCI TOTAL:	7.	0 DECEASED	MEMBERS AT CLOSE 25
ASSOCIATE	8.	0 OTHER	
	9.	0 TOTAL	

IDENT.	CLUB	NAME OF CLUB	DIST. NO.
0333		SECRETARY'S NAME	5M1
MONTH	YEAR	Branch Club members	
		Total:	

- 5. While viewing the report, click the **Print Icon**.



Here's How **What You'll See**

Membership Data Download

1. Click on **View** button next to the Membership Data Download to get appropriate data.

[Club Info](#) | [Club Officers](#) | [Family Units](#) | [Billing](#) | [Branches](#) | [District Officers](#) | [Reports](#)

Club Report Selection

Club: FRANKLIN (11330)

Report	
Club Roster With Address	<input type="button" value="Print"/>
Club Roster Without Address	<input type="button" value="Print"/>
Club Attendance Sheet	<input type="button" value="Print"/>
Club Directory	<input type="button" value="Print"/>
Club Monthly Reporting History	<input type="button" value="Print"/>
Monthly Membership Report	<input type="button" value="Print"/>
Lions Clubs Officer Reporting Form (PU-101)	<input type="button" value="Print"/>
Family Unit Report	<input type="button" value="Print"/>
Membership Data Download	<input type="button" value="View"/>
Membership Cards	<input type="button" value="Print"/>
Lions Club Activity Report	<input type="button" value="Go !"/>

Forms
[New Member Form](#)

2. To ensure privacy, the following screen will appear.
3. Click on **I Agree** button to continue.

Data Download

This data is provided for official Lions Clubs business only. By clicking the "I Agree" button below you indicate that the data will only be used for this purpose.

Club: Franklin

4. A comma delimited file will be displayed.
5. You can copy and paste this information into a data base or spreadsheet program and use for your club purposes, such as mailing labels.

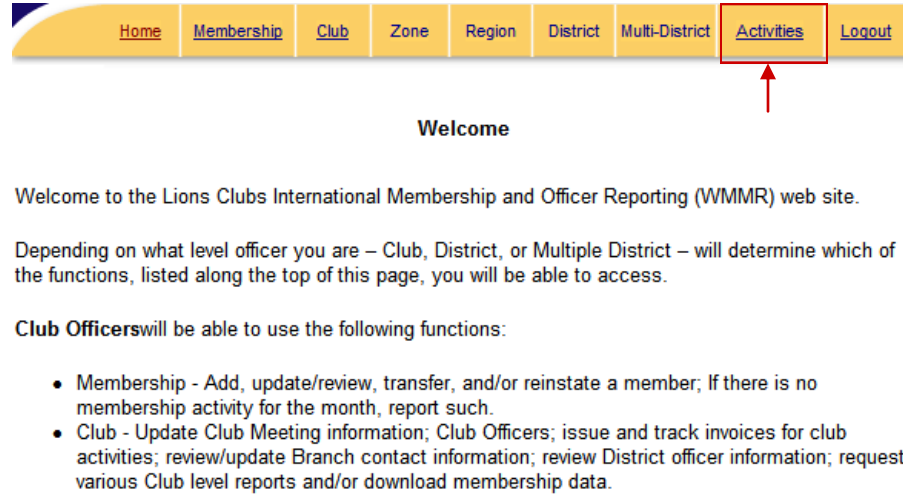
```

"Club ID","Club Name","Member ID","Prefix","First Name","Middle Name","Last Name","Suffix","Home I
"11206","TA Club 11206","112066","","Martha","TA","Bing11206","","1001 NORTH AVE","","","OAK BROOK
"11206","TA Club 11206","112064","","Peter","TA","Brookenfeild11206","","1001 NORTH AVE","","","OJ
"11206","TA Club 11206","112068","","Jarod","TA","Brown11206","","1001 NORTH AVE","","","OAK BROOK
"11206","TA Club 11206","112063","","Michael","TA","O'Reilly11206","","1001 NORTH AVE","","","OAK
"11206","TA Club 11206","112062","","David","TA","Rita11206","","1001 NORTH AVE","","","OAK BROOK'
"11206","TA Club 11206","112061","","John","TA","Smith11206","","1001 NORTH AVE","","","OAK BROOK'
"11206","TA Club 11206","112067","","Elizabeth","TA","Smith11206","","1001 NORTH AVE","","","OAK E
"11206","TA Club 11206","112065","","Suzanne","TA","Tingle11206","","1001 NORTH AVE","","","OAK BE
    
```

Here's How	What You'll See
-------------------	------------------------

Lions Club Service Activity Report

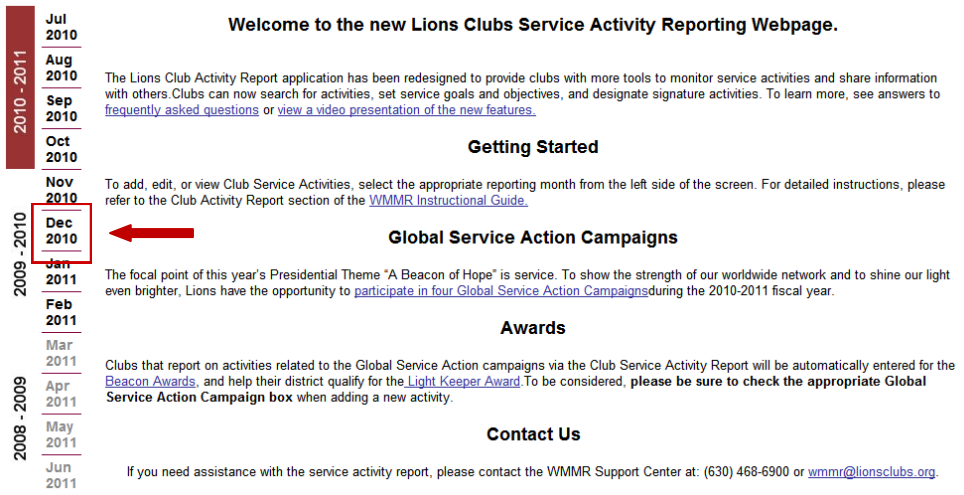
1. Click on the **Activities** tab at the top of the screen to report a Lions Club Activity. Next you will see the Welcome screen.



2. To add a new activity, select the appropriate month using the tabs on the left side of your screen.

The Welcome Page will contain information on upcoming events such as your district's signature projects and/or global service action campaigns.

You may choose to learn more about these initiatives and access additional resources by clicking on the appropriate links.



Here's How **What You'll See**

3. Click on the **Add New** link.

*** NOTE: Months with activities entered will display with a gold tab.



4. Enter a **title** and **description** of your activity. You may include as much or as little information as you wish.


***NOTE: The activity title and description you provide will be visible to all WMMR users with a valid password if you choose to **Share this Story** with others. (See step 10 for more information.)



Here's How **What You'll See**

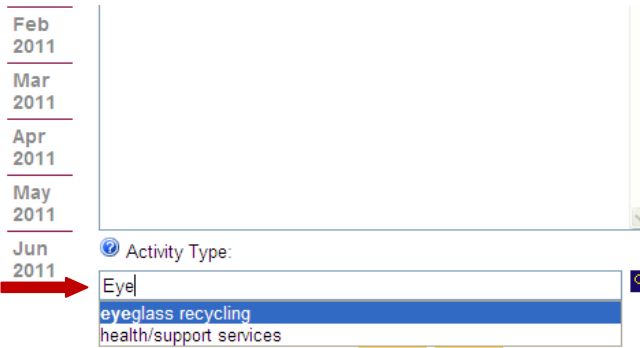
5. To enter the **activity type**, start typing in the box and a list of suggested activity types will be displayed (see Option 1).

Example:
Eyeglass recycling



If you do not see the appropriate activity type, you may click on the  icon to choose an activity type from a list (see Option 2).

Please choose one that most closely matches the activity that you are entering.

Option 1



Check any of the following that apply:

- Relieving the Hunger campaign
- District-wide Activity 
- Share this story 

Option 2



Health & Wellness

- [diabetes awareness / education](#)
- [diabetes screening](#)
- [Strides Walk](#)
- [hearing aid recycling](#)
- [hearing screening](#)
- [vision screening](#)
- [hearing ear dogs](#)
- [guide dogs](#)
- [eyeglass recycling](#)
- [health/support services](#)
- [health education](#)
- [medical mission](#)
- [other health & wellness](#)

Assistance to Individuals

- [aid to the elderly/disabled](#)
- [aid to the vision / hearing impaired](#)
- [aid to disadvantaged children](#)
- [aid to homeless](#)
- [scholarship](#)
- [other assistance to individuals](#)

Tip: use the scroll bar to see the entire list.

Here's How **What You'll See**

6. Enter the appropriate numerical data for each activity. You can only enter whole numbers (no decimals, commas, or symbols.)

Example: For eyeglass recycling, you would enter:

- **Number of Lions** involved in this activity.
- **Number of Lion Hours** dedicated to this activity.
- **Number of Eyeglasses Collected.**

***NOTE: If there are items that do not apply to your activity, you may leave the boxes blank. Use your local currency when entering funds raised/donated.



Activity Type:

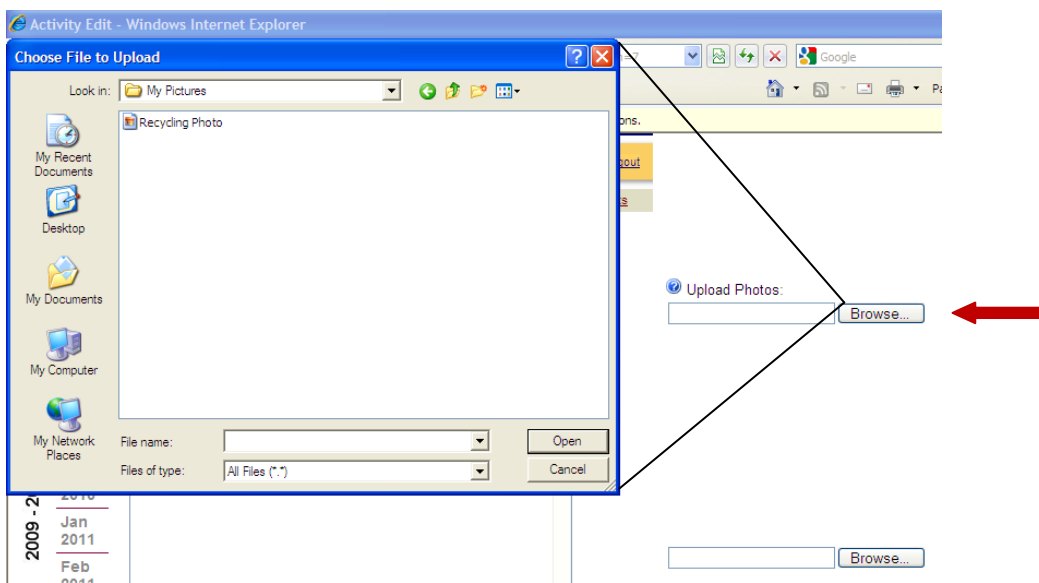
eyeglass recycling

10	Number Of Lions
20	Number Of Lion Hours
2500	Number Of Eyeglasses Collected

7. To upload a photo for your activity (optional):

- Click on the Browse button.
- Select the photo file you wish to upload from your computer. Supported photo file types include: JPEG, GIF, and PNG. The size of your photo must be less than 4 MB.
- Click Open.

*** NOTE: You may upload up to two photos.



Here's How **What You'll See**

8. Check the **District wide activity** box if this is a district-wide activity.
9. Check the **Share this Story** box if you would like to share this activity information with others.
10. Click **Save** when done. This adds the project to your activity list.

*** NOTE: By checking the **Share this Story** box, you will be able to share the title, description, and photos for this activity with other WMMR users with a valid password.

Activity Type: eyeglass recycling

10 Number Of Lions
20 Number Of Lion Hours
2500 Number Of Eyeglasses Collected

Save Cancel

Tip: If you will need more than 20 minutes to enter your activity information, please be sure to save your work before you finish! This will prevent you from losing your information if you are logged off.

Check any of the following that apply:

District wide activity
 Share this story

After you save your information, a summary of your activity will appear in the monthly activity list page.

To enter another activity for this month, click on **Add New** and follow steps 1-11 above.

If you would like to edit/change any information you have entered, click on the **Edit** button or simply edit the text directly on the monthly activity list page.

Home | Membership | Club | Zone | Region | District | Multi-District | Logout

Club Info | Club Officers | Family Units | Billing | Branches | District Officers | Reports

July 2010 **July Activities for Fiscal Year 2010 - 2011**

[Add New](#)

Aug 2010

Sep 2010 **Elmhurst Community Basketball Tournament** [View](#) [Edit](#)

Oct 2010 30 Number Of Lions
15 Number Of Lion Hours
150 Total Participants

Nov 2010 Share This Story

Dec 2010

2010 - 2011

Jan 2011

Feb 2011 **Elmhurst Eyeglass Recycling** [View](#) [Edit](#)

Here's How **What You'll See**

1. To add a signature activity (a re-occurring activity that your club organizes on an on-going basis) click the **Signature Activities** link at the top of the page.

2. Click on **Add New**

3. Enter an activity **title** and **description**, and enter the **activity type** by typing in the box or using the search icon.

4. Click **Active** to add a repeated signature activity.

5. Click **Save**.

Note: This will help you simplify the monthly reporting process by being able to choose these activities from a drop down menu in the monthly report.



Signature Activities

[Add New](#)

Title:

Description:

Activity Type:

Signature Activity Active / Inactive

Active ←

↑

6. To add **Goals & Objectives**, click on the link at the top of the page.

7. Then click on **Add New**.

8. To set a service goal, choose a **service category** (from the drop down menu) that you would like to increase service. Example: Disaster Preparedness & Relief.



Service Goals for Fiscal Year 2010-2011

[Add New](#) ←

- Assistance to Individuals
- Community & Cultural Activity
- Disaster Preparedness & Relief
- Donations
- Environmental Services
- Fundraising
- Health & Wellness
- International Relations

Here's How **What You'll See**

9. Choose an **activity type** (from the drop down menu) in which you would like to increase service. Example: Shelter Services

10. Enter a numeric value for the indicator that you would like to achieve by the end of the year. Example: 175 people. Then click **Save**.

Note: Your goal, objective, and indicator will be shown on the summary page. This will allow you to track your progress toward achieving your goal.

11. To add more Goals click on **Add New**.

12. To make changes to the goal and objective you have added, click on **Edit**.

blood collection
 food bank/food distribution
shelter services
 physical reconstruction
 disaster preparedness planning
 emergency health services
 other disaster preparedness & relief

Number of Lion Hours
Number of People Served

Service Goals for Fiscal Year 2010-2011

[Add New](#) ←

[Print Activity Goals Report](#)

Goal: To increase club participation in Disaster Preparedness & Relief service projects during the 2010-2011 fiscal year.

Activity Type	Indicator	Target	Actual	Percentage Achieved	Edit
shelter services	Number of People Served	175	50	28	Edit ←

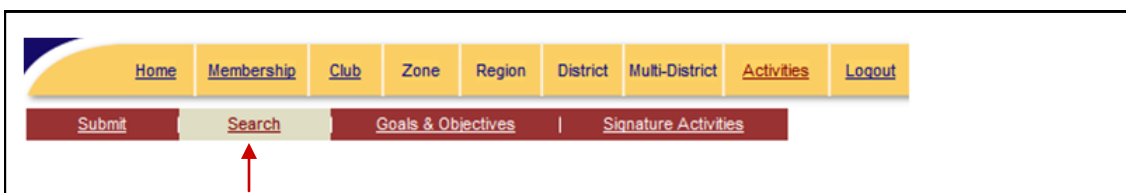
In this example:

- The goal is to increase the club's participation in Disaster Preparedness & Relief service projects during the current fiscal year.
- The club chose to focus on providing shelter services in support of this goal.
- They will strive to provide shelter services for a total of 175 or more people during the current fiscal year.
- To date, this club has already served 50 people, achieving 28% of their objective.

New Feature: Searching Activities:

Clubs can now search for their activities, as well as activities that other clubs choose to share with others.

1. To search your club's activities, click on the **Search** link at the top of the page.



NOTE: You will see all of your club’s activities that have been entered into the system (your club’s name will automatically appear on the search page as shown below).

The screenshot shows a search form with the following fields and values:

- Constitutional Area: U.S. and Affiliates, Bermuda and Bahamas
- Multiple District: Multiple District 1
- District: District 1 CS
- Club: JOHNSTON CITY (highlighted with a red box)
- Fiscal Year: 2010-2011
- Month: Any
- Signature Activity: Any
- District-wide Activity: Any
- Campaign Activity: Any
- Activity Category: Any
- Activity Type: Any
- Search Text: (empty)

2. To narrow down your search, you may use any of the following criteria:
- **Fiscal Year** – view activities that have been entered during a specific fiscal year (please note that only activities dating back to the 2010-11 will be displayed).
 - **Month** – view activities that have been entered during a specific month of the selected fiscal year (please note that only activities dating back to the 2010-11 will be displayed).
 - **Signature activity** – view activities that have been designated as “signature activities” for your club (see the Signature Activities section for more information).
 - **District-wide activity** – view district-wide activities in which your club has participated.
 - **Campaign activity** – view activities that were part of the president’s global service action campaigns: *Engaging Our Youth, Sharing the Vision, Relieving the Hunger, or Protecting our Environment.*
 - **Activity category** – view activities under specific service category such as Environmental Services, Health & Wellness, Disaster Preparedness & Relief, etc.
 - **Activity type** – view specific type of activities such as tree planting, eyeglass recycling, vision screening, art/cultural event, disaster preparedness planning, etc.
 - **Key Word** – view activities that contain your key word in the title or description.

To search other club’s activities, choose “any” for **club**. You will see all shared activities that have been entered by clubs in your district. You can further refine your search by selecting a specific district, multiple district, or constitutional area.

The screenshot shows the search form with the following fields and values:

- Constitutional Area: U.S. and Affiliates, Bermuda and Bahamas
- Multiple District: Multiple District 1
- District: District 1 CS
- Club: Any (highlighted with a red box)
- Fiscal Year: 2010-2011
- Month: Any
- Signature Activity: Any
- District-wide Activity: Any
- Campaign Activity: Any
- Activity Category: Any
- Activity Type: Any
- Search Text: (empty)

Membership Cards

1. Click on **Print** button next to **Membership Cards**.

Club Report Selection

Club Franklin

Report

Club Roster With Address	<input type="button" value="Print"/>
Club Roster Without Address	<input type="button" value="Print"/>
Club Attendance Sheet	<input type="button" value="Print"/>
Club Directory	<input type="button" value="Print"/>
Club Monthly Reporting History	<input type="button" value="Print"/>
Monthly Membership Report	<input type="button" value="Print"/>
Lions Clubs Officer Reporting Form (PU-101)	<input type="button" value="Print"/>
Family Unit Report	<input type="button" value="Print"/>
Membership Data Download	<input type="button" value="View"/>
Membership Cards	<input type="button" value="Print"/>
Lions Club Activity Report	<input type="button" value="Go !"/>

2. Select your Paper Size, Cards Per Page, Print In, and Good Standing month.

Membership Cards

Please select a paper size:

Cards Per Page:	Print In:
<input type="radio"/> 8 - 85 x 54 mm cards per page	<input checked="" type="radio"/> Color
<input checked="" type="radio"/> 10 - 85 x 54 mm cards per page	<input type="radio"/> Black & White

Selected Members will be in good standing until:

- If you want to print membership cards for ALL members, click the



double arrow

button; if you made a mistake and want to move ALL members back, click the **reverse double arrow**

button

- Click **Run Report**.

Membership Cards

Please select a paper size: A4

Cards Per Page:
 8 - 85 x 54 mm cards per page
 10 - 85 x 54 mm cards per page

Print In:
 Color
 Black & White

Selected Members will be in good standing until: 06/2009

Please select members:
 John, Jameson
 Kelly, Google
 Peter, Huges
 Jane, Stover

Members Selected:
 (Empty list)

13 Members Available
 0 Members Selected
 (1 page(s) with 10 blank card(s))

Run Report Close

- If you want to print membership cards for a few members, use the scroll bar.

- Click on the member(s) you want to print a card for, then click the **single arrow**



button

- If you made a mistake, select the member from Members Selected and click the **reverse arrow**

button

- Click **Run Report**.

Membership Cards

Please select a paper size: A4

Cards Per Page:
 8 - 85 x 54 mm cards per page
 10 - 85 x 54 mm cards per page

Print In:
 Color
 Black & White

Selected Members will be in good standing until: 06/2009

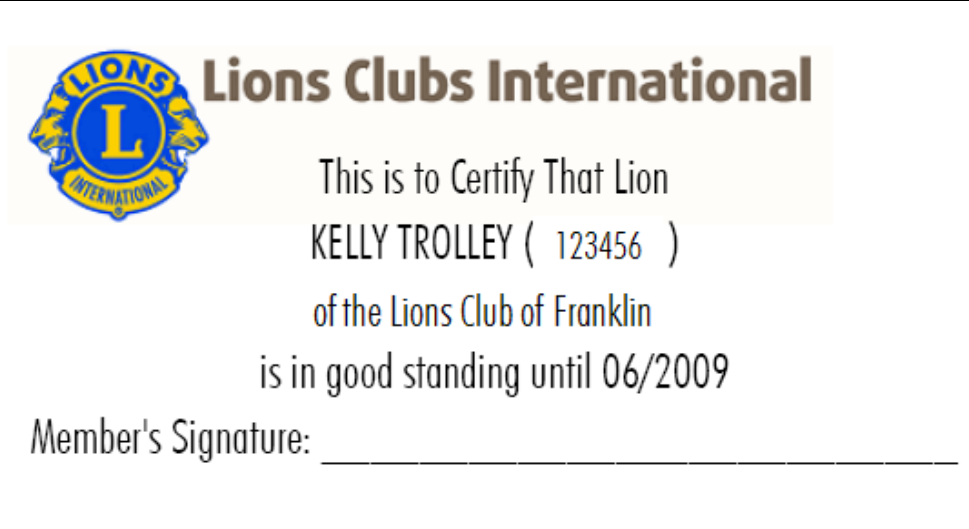
Please select members:
 John, Jameson
 Kelly, Google
 Peter, Huges
 Jane, Stover

Members Selected:
 John, James
 Kelly, Trolley

13 Members Available
 0 Members Selected
 (1 page(s) with 10 blank card(s))

Run Report Close

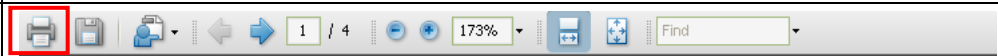
9. Membership cards will be generated. Insert card stock. Click on Print icon to print cards.



*****Note: Any 8 per page or 10 per page business card labels/stock can be used.**

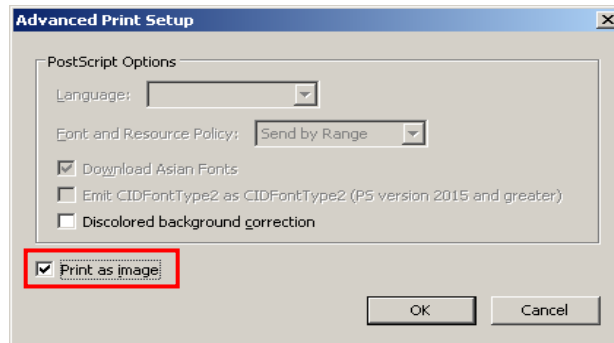
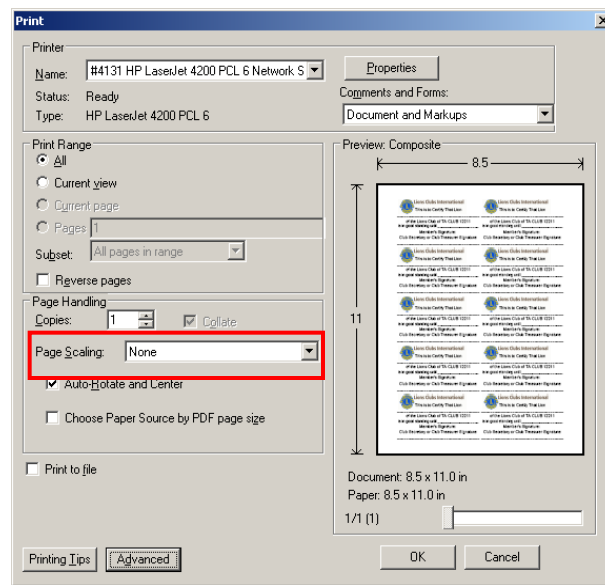
Club Secretary or Club Treasurer Signature

10. While in the report, click the **Print Icon** to print a paper copy.



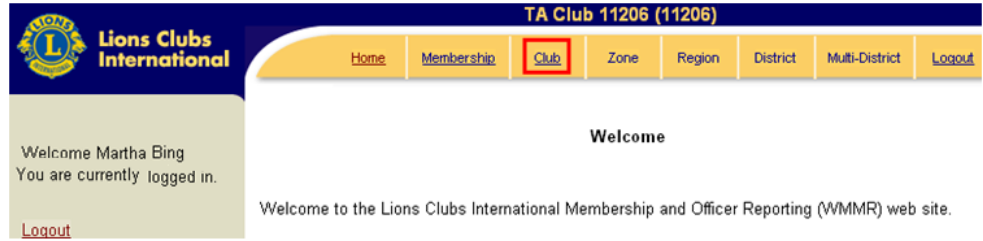
*****Note: IMPORTANT - Set Page Scaling to None to ensure cards print correctly.**

Some user may need to select **PRINT AS IMAGE**, by clicking on the **Advanced tab**, then check **Print as Image**.



The Club Officer Function – How to Edit Officers

1. Click on the **Club** link on the WMMR welcome page.



2. Click on the **Club Officers** link to update or add club officer information.



3. Click on the **Office Title** of the officer you wish to update.



- 4. Select a new individual you wish to replace the current officer with by scrolling through the list, and then clicking on the name.
- 5. Click **Save** to finalize your selection.

ASSIGN OFFICERS
Franklin

To assign a member to this office, select a club and a member and click "Save". To replace an officer with another member, select the new member and click "Save". To end the term of an officer, click the "End Term" button.

2008-2009
President
Currently Assigned Member: Smith, John

Select a Member to serve in this position:

Brown, Jarod	▲
O'Reilly, Michael	■
* Rita, David	▼
* Smith, John	▼

* Member is currently serving as an officer.

- 6. After you click **Save**, an updated officer list will appear.

Officers
Franklin

Select the appropriate Lionistic Year and Officer Type. Click on the Office Title to add or change the officer.

Lionistic Year: 2008-2009 ▼ **Officer Type:** Officers ▼

2008-2009

<u>Office Title</u>	<u>Member Name</u>
President	Michael O'Reilly
Secretary	Martha Bing
Treasurer	David Rita
Membership Chairperson	

- 7. If you wish to end the term of an officer, for whom you do not have a replacement yet, select that individual from the list.
- 8. Click **End Term**.

ASSIGN OFFICERS
Franklin

To assign a member to this office, select a club and a member and click "Save". To replace an officer with another member, select the new member and click "Save". To end the term of an officer, click the "End Term" button.

2008-2009
Treasurer
Currently Assigned Member: Rita ██████, David

Select a Member to serve in this position:

Brookenfeild	, Peter	▲
Brown	, Jarod	■
* O'Reilly	Michael	▼
* Rita	, David	▼

** Member is currently serving as an officer.*

- 9. An updated officer list will appear.

Officers
Franklin

Select the appropriate Lionistic Year and Officer Type. Click on the Office Title to add or change the officer.

Lionistic Year: 2008-2009 ▼ Officer Type: Officers ▼

2008-2009

Office Title	Member Name
President	Michael O'Reilly
Secretary	Martha Bing
Treasurer	
Membership Chairperson	

10. To add an officer to your list, click on the **Office Title**, select a new officer from the list.

11. Click **Save**.

Officers
Franklin

Select the appropriate Lionistic Year and Officer Type. Click on the Office Title to add or change the officer.

Lionistic Year:
2008-2009 ▼
Officer Type
Officers ▼

2008-2009

<u>Office Title</u>	<u>Member Name</u>
President	Michael O'Reilly
Secretary	Martha Bing
Treasurer	David Rita
Membership Chairperson	

12. An updated officer list will appear as a confirmation.

*****Note: to confirm, review, and/or print a copy of your submitted club officers:**

- Click on the yellow banner tab - CLUB link
- Click Reports
- Click the Print button next to the Officer Reporting Form (PU-101)
- Select either current or next year
- Click run report

Officers
Franklin

Select the appropriate Lionistic Year and Officer Type. Click on the Office Title to add or change the officer.

Lionistic Year:
2008-2009 ▼
Officer Type
Officers ▼

2008-2009

<u>Office Title</u>	<u>Member Name</u>
President	Michael O'Reilly
Secretary	Martha Bing
Treasurer	Suzanne Tingle
Membership Chairperson	

How to Add a Family Unit

There are two ways to enter Family Units

- Add or Update Membership Screen (**Option 1**)
- Club – Family Unit link - (**Option 2**)

*****Note: Users are required to complete an entire Family Unit in a single session. Incomplete Family Units will be removed.**

Helpful Tips

- Enter the Head of Household first.
- Enter Family members belonging to the Head of Household after the Head of Household record is processed.
- Complete one Family Unit at a time.
- Up to five members, including the Head of Household, can be selected per Family Unit.

Option 1: Using Add or Update Membership Screen

1. Follow Steps 1-4 from the How to Add a Member Section (refer to page 6-7).
2. Click on the **Family Unit** tab or button.

Add | Update | Review | Transfer | Drop | Reinstate

Basic Member Information

Basic | Sponsor | Family Unit

Club: TA Club 11312 (11312) Reporting Month: April, 2009

Name: Prefix: First: * Middle: Last Name/Surname: * Suffix:

Mailing Address: * Country/Area Code: Phone Code: Number:

City: * Home Phone:

Country: * Work Phone:

Gender: Male Female * Mobile Phone:

Year of Birth: * YYYY Fax:

Join Date: * MM/DD/YYYY Home Email:

(Valid Date Range: 04/01/09 - 04/30/09) Work Email:

Member of a Family Unit?: Yes No * Spouse Name:

Member Type: Regular Member * Nickname:

Occupation:

Branch:

Status: Regular Member

Charter Member:

An asterisk (*) next to a field indicates that the field is required.

Member Sponsor | Family Unit | Save Member | Cancel

- If the member is the Head of Household, click the Head of Household box.

[Add](#) | [Update](#) | [Review](#) | [Transfer](#) | [Drop](#) | [Reinstate](#)

Family Unit Information

[Basic](#) | [Sponsor](#) | [Family Unit](#)

Club: TA Club 11312 (11312)
Member Name: Martha TA Bing11312 (113126)

Head of Household:

Family Unit: Martha Bing11312 (113126) *

Relationship Type: Head of Household *

Relationship Documentation: [Dropdown] *

Address Documentation: [Dropdown] *

Year of Birth: 1959 * YYYY

[Member Sponsor](#) | [Member Basic](#) | [Save Member](#) | [Cancel](#)

An asterisk (*) next to a field indicates that the field is required.

- If the family unit member is not the Head of Household, click the **down arrow** by the Family Unit box.
- Select the name of the Head of Household from the list by clicking on it.

[Add](#) | [Update](#) | [Review](#) | [Transfer](#) | [Drop](#) | [Reinstate](#)

Family Unit Information

[Basic](#) | [Sponsor](#) | [Family Unit](#)

Club: TA Club 11312 (11312)
Member Name: Martha TA Bing11312 (113126)

Head of Household:

Family Unit: [Dropdown] *

Relationship Type: Martha Bing11312 (113126)

Relationship Documentation: [Dropdown] *

Address Documentation: [Dropdown] *

Year of Birth: 1959 * YYYY

[Member Sponsor](#) | [Member Basic](#) | [Save Member](#) | [Cancel](#)

An asterisk (*) next to a field indicates that the field is required.

6. Enter Relationship Documentation, Address Documentation, and Year of Birth if not displayed.
7. Click **Member Sponsor** button.

[Add](#) | [Update](#) | [Review](#) | [Transfer](#) | [Drop](#) | [Reinstate](#)

Family Unit Information

[Basic](#) | [Sponsor](#) | [Family Unit](#)

Club: TA Club 11312 (11312)
Member Name: Martha TA Bing11312 (113126)

Head of Household:

Family Unit: Martha Bing11312 (113126) *

Relationship Type: Head of Household *

Relationship Documentation: [Dropdown] *

Address Documentation: [Dropdown] *

Year of Birth: 1959 * YYYY

Member Sponsor | Member Basic | Save Member | Cancel

An asterisk (*) next to a field indicates that the field is required.

8. The following message will be displayed.
9. Click on **Save Member** to finish. The new member will be added to your club roster as well as the Family Unit.

[Add](#) | [Update](#) | [Review](#) | [Transfer](#) | [Drop](#) | [Reinstate](#)

Sponsor Information

[Basic](#) | [Sponsor](#)

Club: TA Club 11316 (11316)
Member Name: Jarod TA Brown11316
Member #: 113168

LCI back-office will enter Sponsor information.

Member Basic | Family Unit | Save Member | Cancel

10. To update existing Family Unit information:
 - Start with steps 1-3 from How to Update or Review a Member (refer to page 15-16)
 - Follow the steps from How to Family Unit Section.

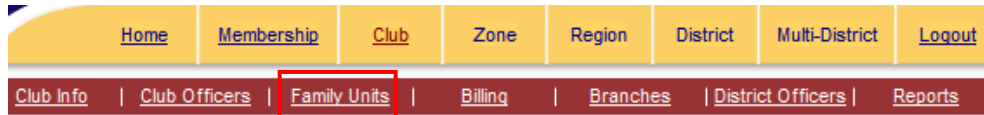
How to Update or Review a Member

Option 2: Using Club – Family Unit link

1. Click on **Club** link.



2. Click on **Family Units** link.



Club Administration Home

Club: TA Club 11319 (11319)

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.

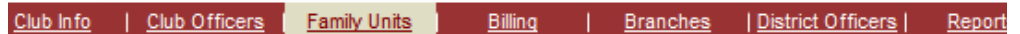
[Billing](#) - To issue and track invoices for club activities.

[Branches](#) - To review/update Branch level contact information.

[District Officers](#) - To review District Officer information.

[Reports](#) - To review/print various Club level reports.

3. Click on **New** to enter a new Family Unit.



Family Unit Home
Club: TA Club 11319 (11319)

Create a new Family Unit:



New

Return

4. Select the Head of Household by scrolling through the list of members.

Family Unit Maintenance

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.

Head of Household	Member Name	Add To / Remove From Family Unit	Documentation
<input checked="" type="radio"/>	Martha Bing11317	<input checked="" type="checkbox"/>	Family Relation: <input type="text" value="Head of Household"/> * Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Birth Year: <input type="text" value="1959"/> *
<input type="radio"/>	Peter Brookenfeild11317	<input type="checkbox"/>	Family Relation: <input type="text"/> * Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Birth Year: <input type="text" value="1959"/> *
<input type="radio"/>	Jarod Brown11317	<input type="checkbox"/>	Family Relation: <input type="text"/> * Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Birth Year: <input type="text" value="1959"/> *

5. Click on the Head of Household button to select the Head of Household.

Head of Household	Member Name	Add To / Remove From Family Unit	Documentation
<input checked="" type="radio"/>	Martha Bing11317	<input checked="" type="checkbox"/>	Family Relation: <input type="text" value="Head of Household"/> * Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Birth Year: <input type="text" value="1959"/> *

6. Select **Relationship Verification Documentation** from the drop down list.

Head of Household	Member Name	Add To / Remove From Family Unit	Documentation
<input checked="" type="radio"/>	Martha Bing11319	<input checked="" type="checkbox"/>	Family Relation: <input type="text" value="Head of Household"/> * Relationship Verification Documentation: <input type="text"/> * Birth Certificate Marriage License Notary Other Forms of Verification Certificate of Religious Sacrament

7. Select **Address Verification Documentation** from the drop down list.

Head of Household	Member Name	Add To / Remove From Family Unit	Documentation
<input checked="" type="radio"/>	Martha Bing11317	<input checked="" type="checkbox"/>	Family Relation: <input type="text" value="Head of Household"/> * Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Bill Bank Statement Drivers License Notary Other Forms of Verification Passport Government Issued ID

8. Scroll through the list of Members and Click on the square check box to select members that belong to this family unit.

9. Fill out all of the required (*)information for each family member.

Head of Household	Member Name	Add To / Remove From Family Unit	Documentation
<input checked="" type="radio"/>	Martha Bing11317	<input checked="" type="checkbox"/>	Family Relation: <input type="text" value="Head of Household"/> * Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Birth Year: <input type="text" value="1959"/> *
<input type="radio"/>	Peter Brookenfeild11317	<input checked="" type="checkbox"/>	Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Birth Year: <input type="text" value="1959"/> *
<input type="radio"/>	Jarod Brown11317	<input checked="" type="checkbox"/>	Family Relation: <input type="text"/> * Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Birth Year: <input type="text" value="1959"/> *
<input type="radio"/>	Michael O'Reilly11317	<input checked="" type="checkbox"/>	Family Relation: <input type="text"/> * Relationship Verification Documentation: <input type="text"/> * Address Verification Documentation: <input type="text"/> * Birth Year: <input type="text" value="1959"/> *

10. Scroll to the bottom of the screen.

11. Click **Save**.

<input type="radio"/>	David Rita11319	<input checked="" type="checkbox"/>	Family Relation: <input type="text" value="Child"/> * Relationship Verification Documentation: <input type="text"/> * Birth Certificate Address Verification Documentation: <input type="text" value="Notary"/> * Birth Year: <input type="text" value="1959"/> *
-----------------------	-----------------	-------------------------------------	---

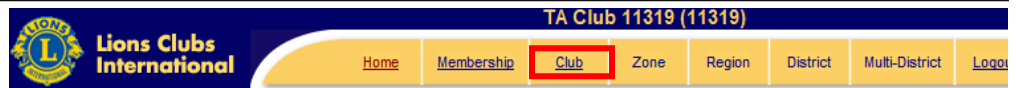
How to Remove a Family Unit

Helpful Tips

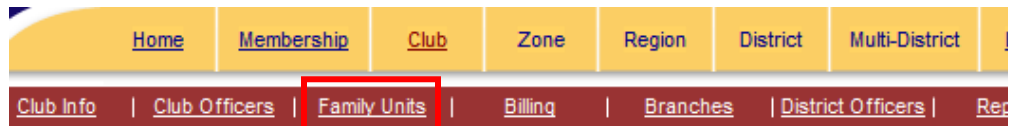
- Remove all of the members in the family unit first.
- Then remove the Head of Household (HOH)

Removing a Member of a Family Unit

1. Click on Club link.



2. Click on Family Units.



Club Administration Home

Club: TA Club 11319 (11319)

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.

- Choose the family unit to which the member belongs to and click Update.

- Click on the square next to the name to deselect.

***Note: all of the information fields next to the member's name will appear blank.

- Click Save at the bottom of the page.

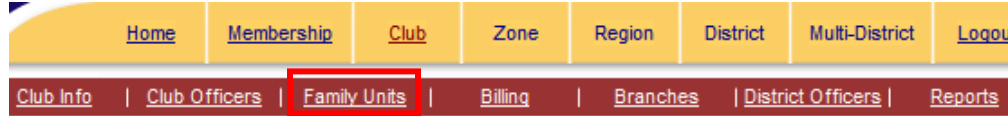
***Note: after all members of the household have been dropped, the check box for the Head of Household member will be available to deselect.

Removing Head of Household

1. Click on Club link.



2. Click on Family Units.



Club Administration Home

Club: TA Club 11319 (11319)

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.

3. Click Update next to the Head of Household name you wish to remove.

***Note: all family unit members must be removed before you remove and/or replace the Head of Household.

6. Click on the circle to select a new Head of Household.

***Note: the information fields for the former Head of Household will appear blank

7. Click Save at the bottom of the page.