BILLING AND MEMBERSHIP RETENTION PROCESS

Ontario State Membership Retention Director

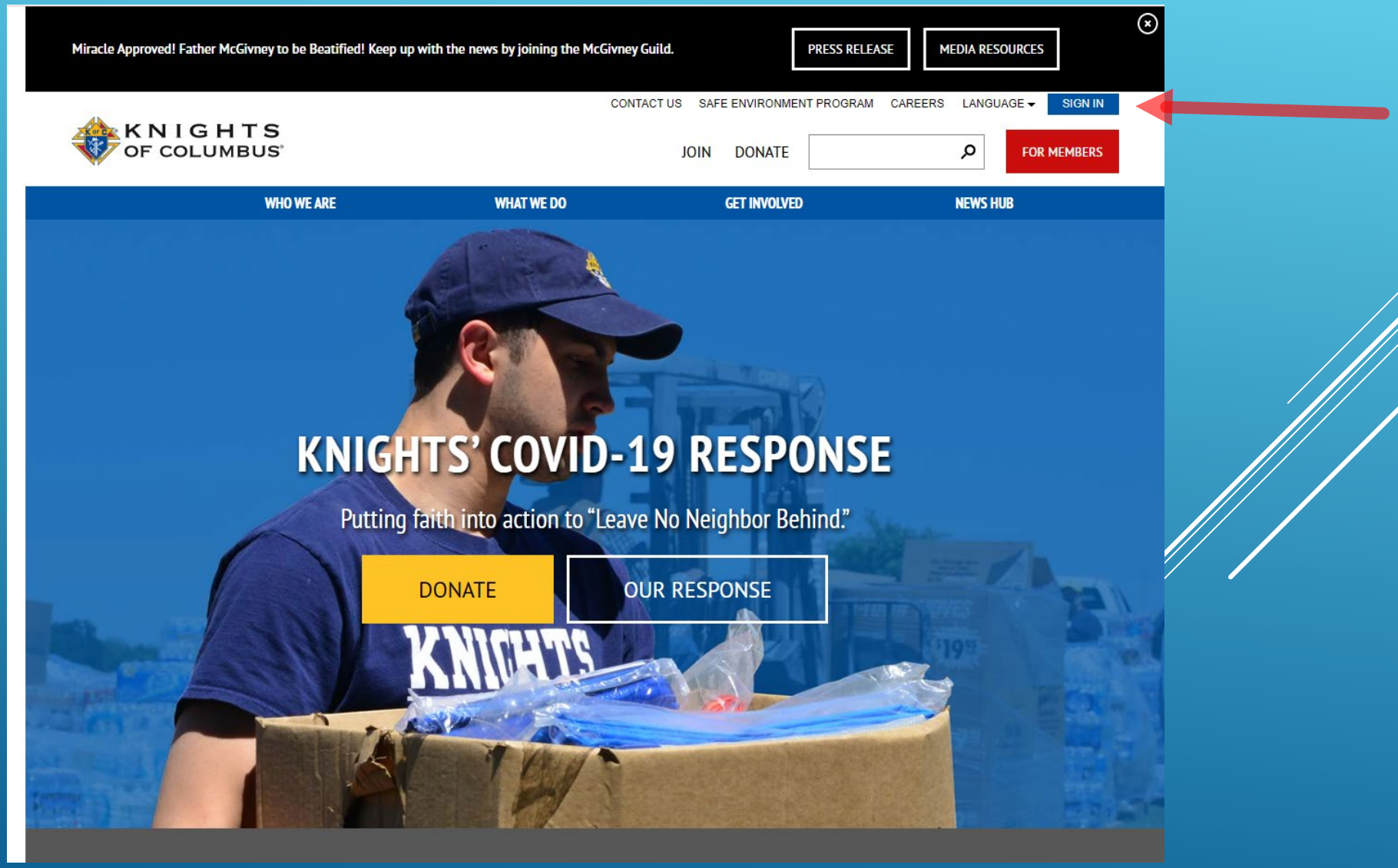
Jesmond Tabone

December 5, 2020

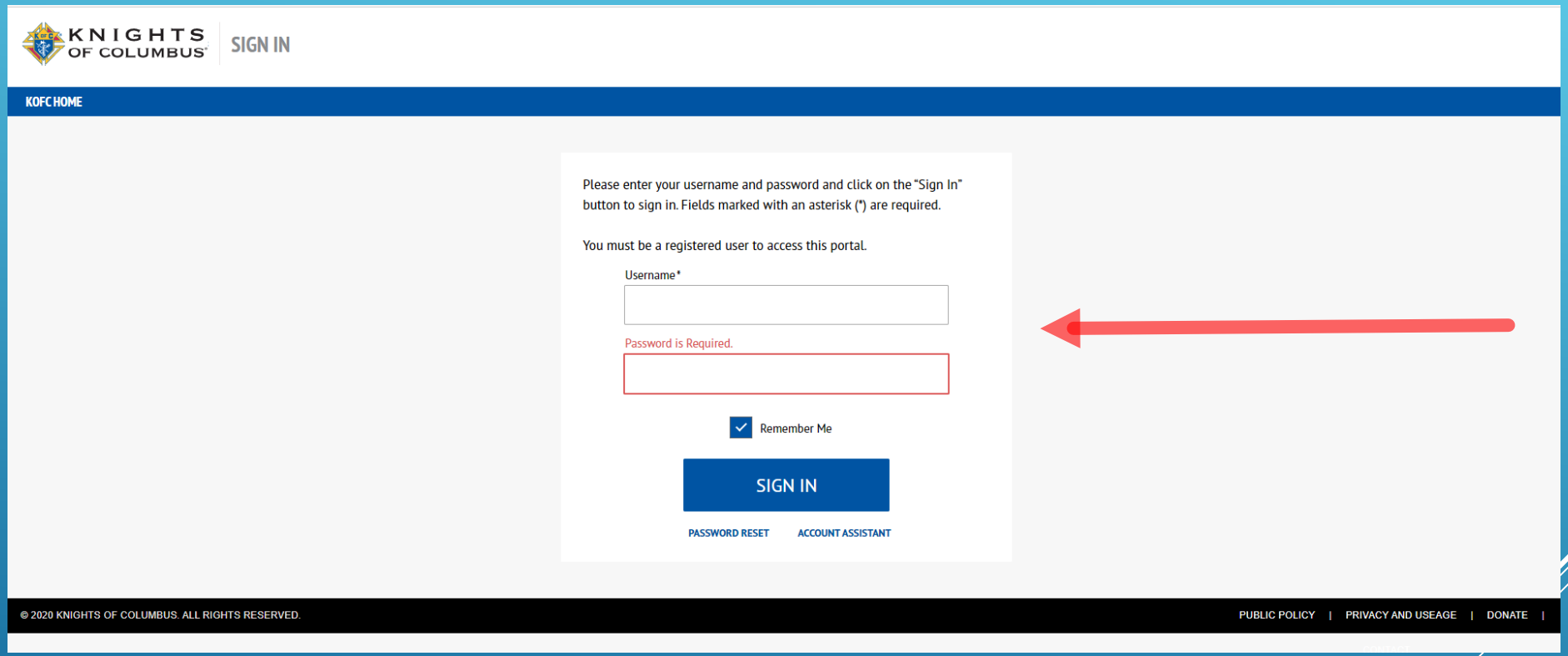
Ontario State Membership Retention Process.

Step 1. Go to www.kofc.org

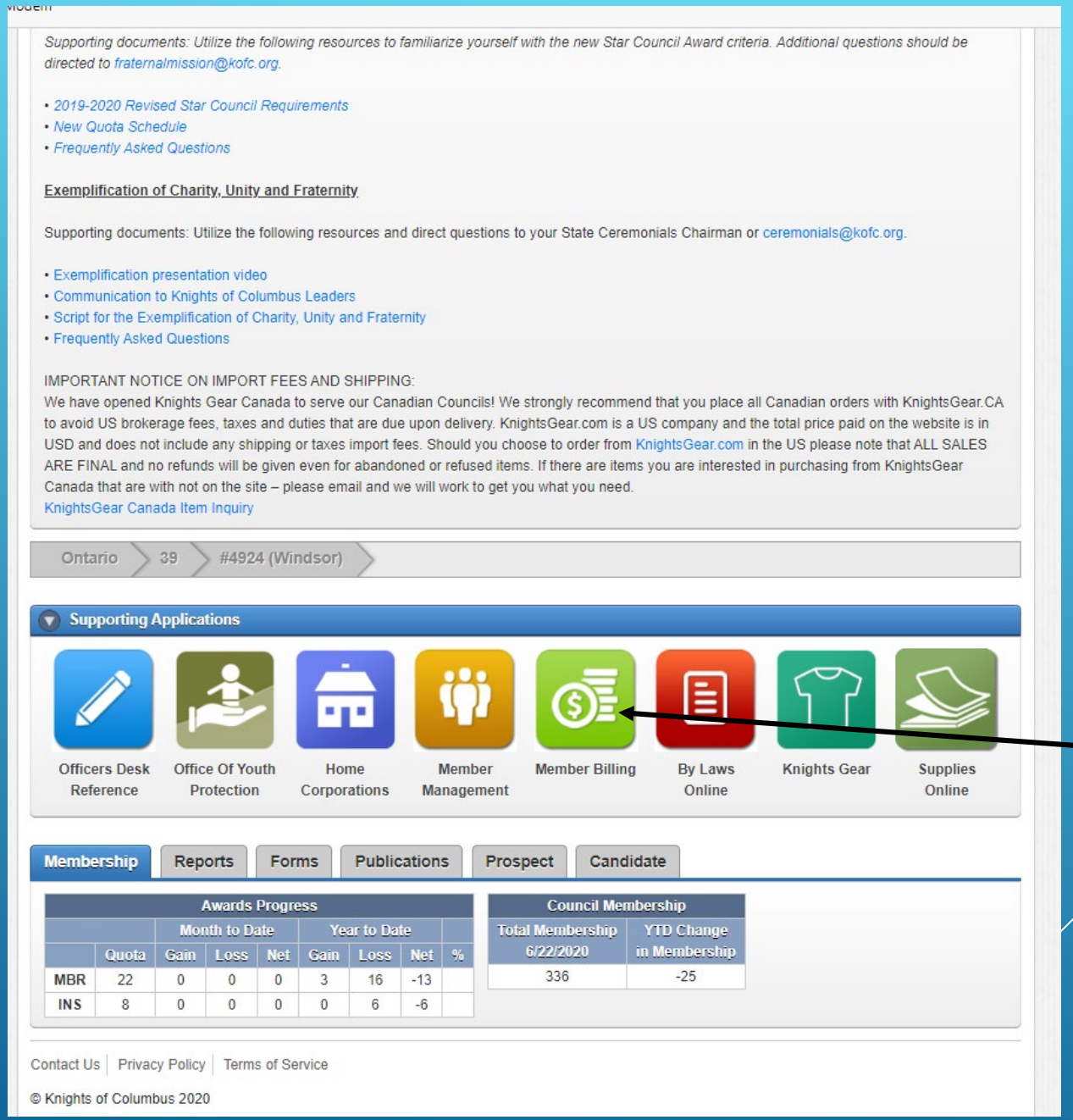
Step 2. Click on 'click on the blue box that says 'sign in''



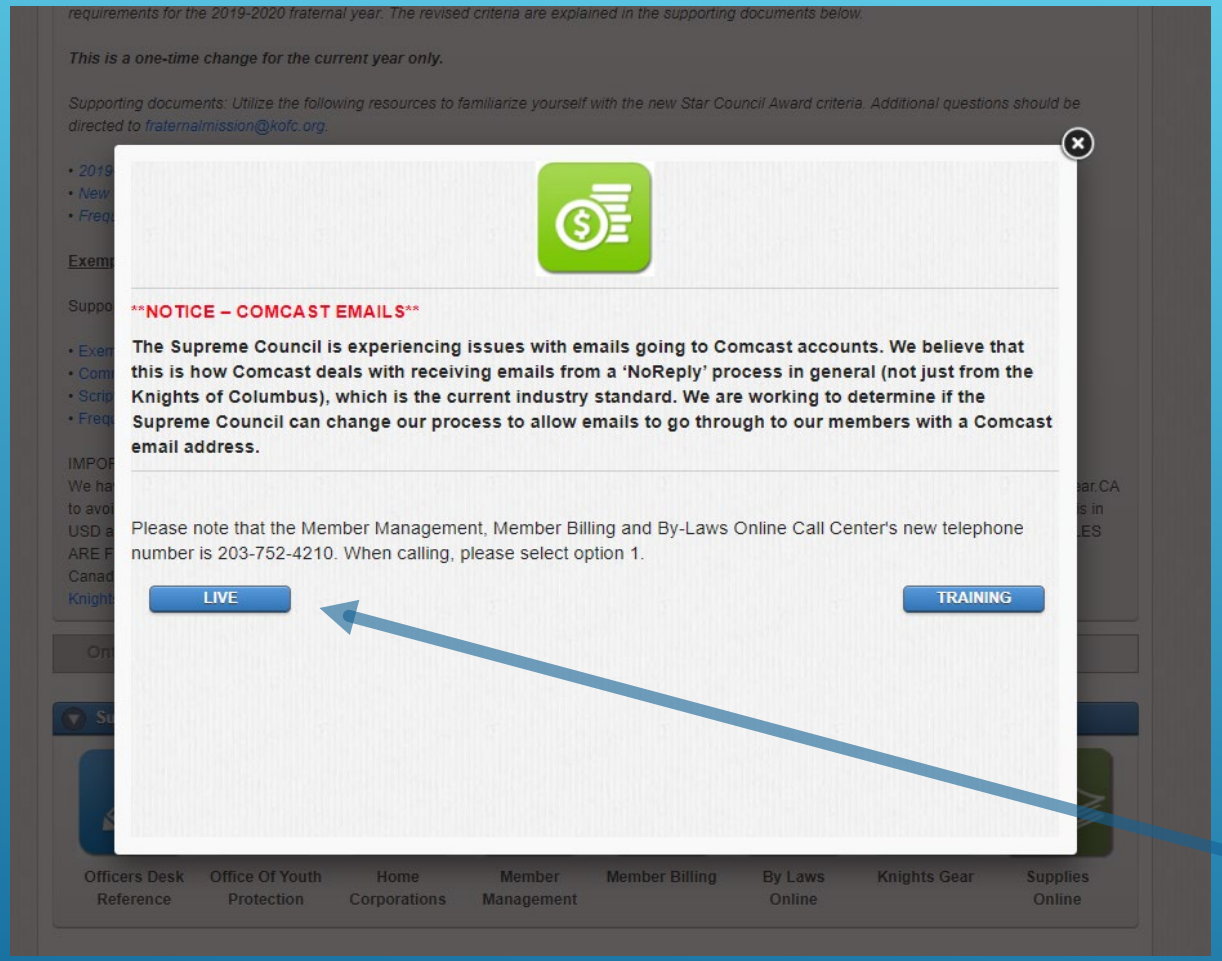
STEP 3. ENTER USERNAME & PASSWORD, CLICK ON SIGN IN



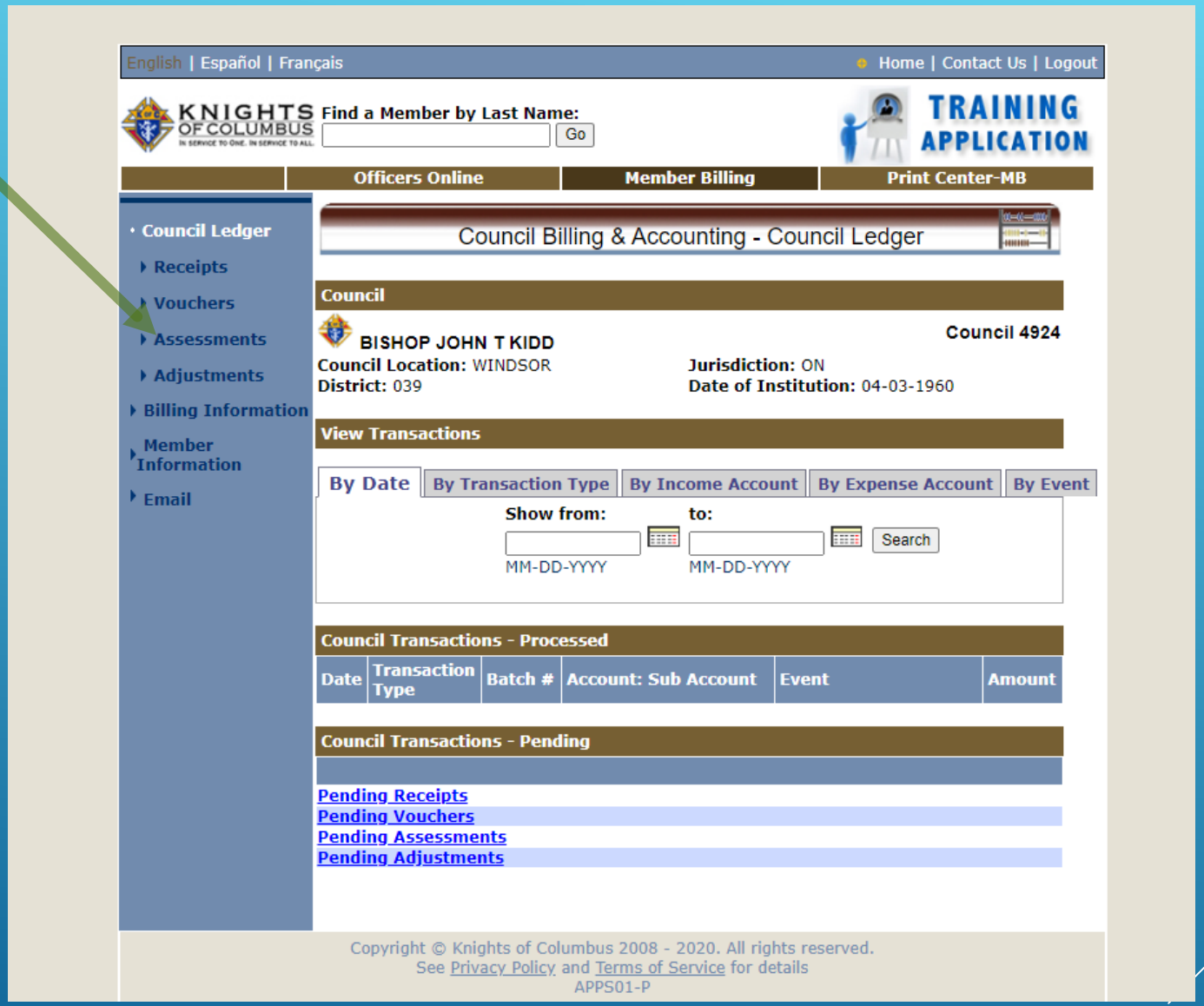
STEP 4 CLICK ON MEMBER BILLING



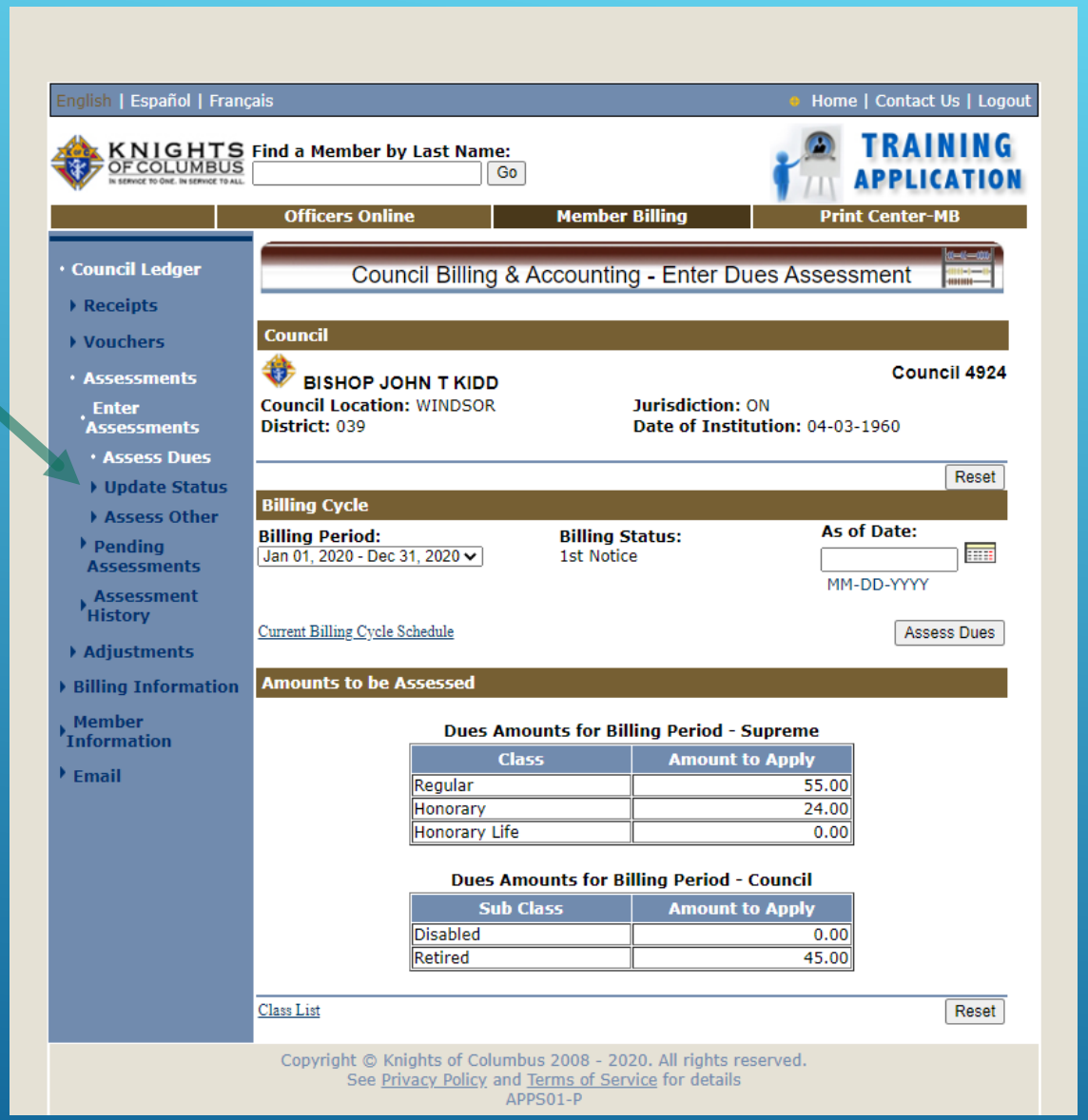
STEP 5 CLICK ON LIVE



STEP 6 CLICK ON ASSESSMENTS



STEP 7 CLICK ON UPDATE STATUS



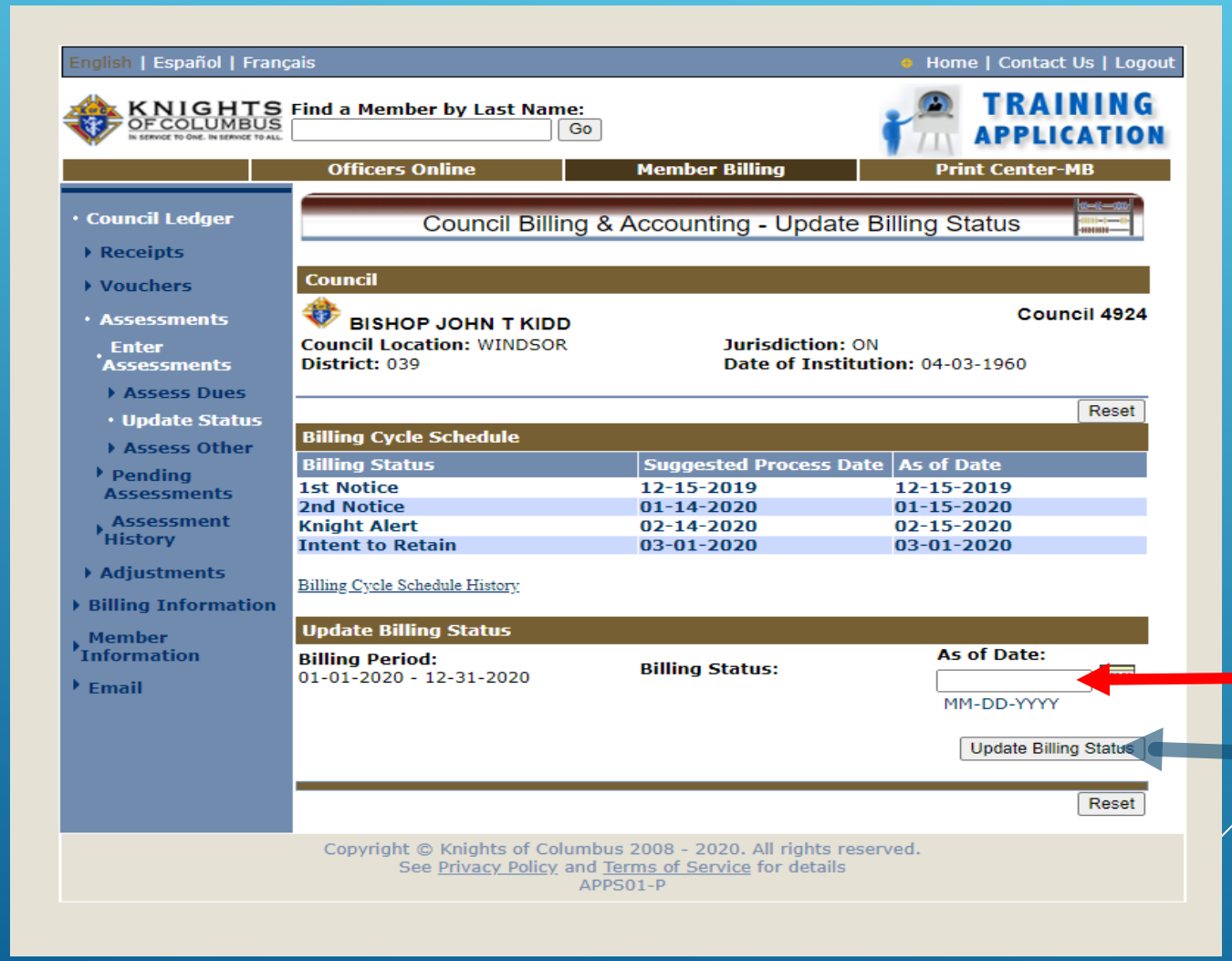
STEP 8, ON THIS SCREEN YOU WILL SEE ALL 4 NOTICES (BILLING CYCLE SCHEDULE)

ENTER THE **"AS OF DATE"** ENTER CURRENT DATE (AS LONG AS IT IS 30 OR 15 DAYS PAST LAST NOTICE)

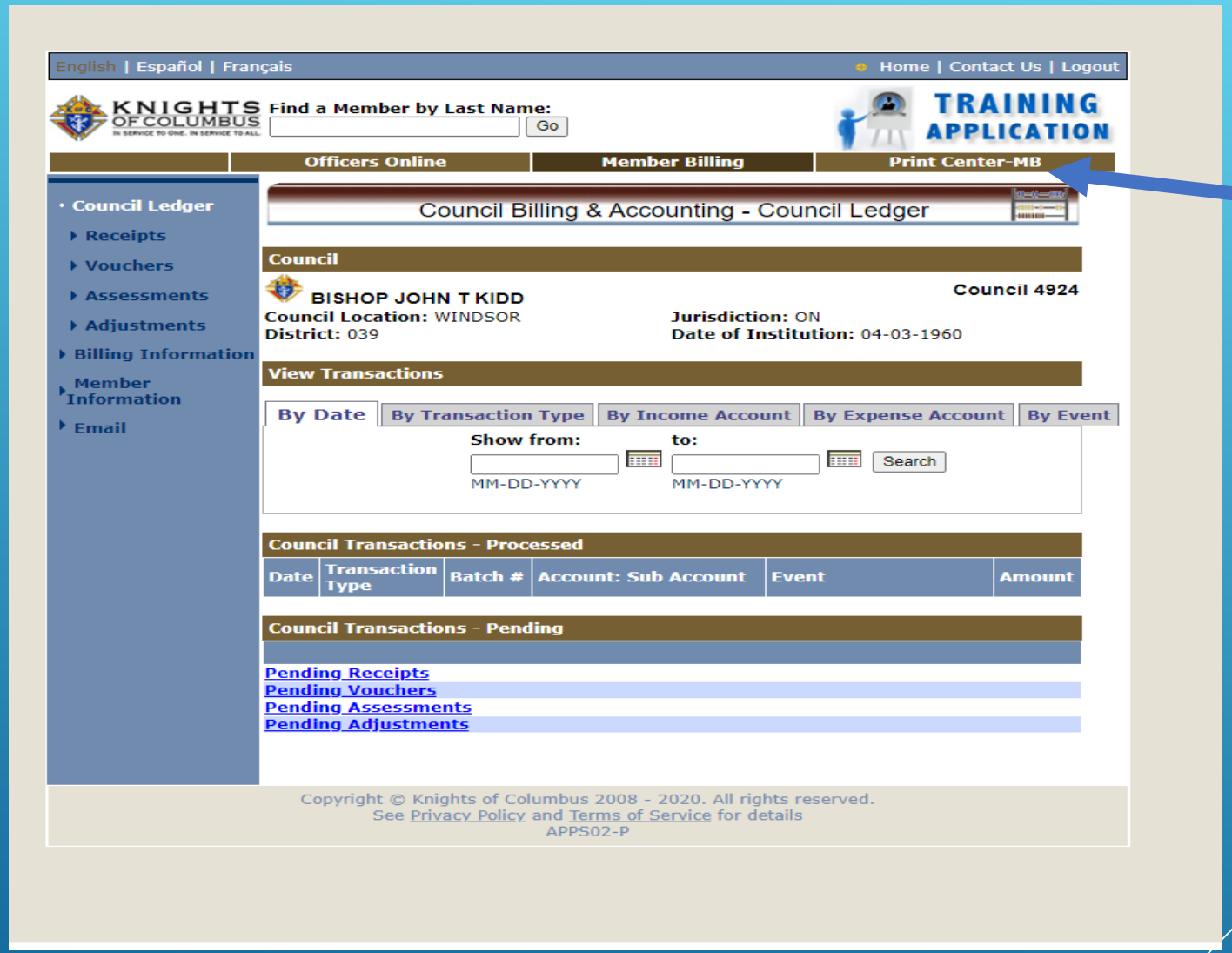
ONCE ENTERED, SELECT **UPDATE BILLING STATUS**

THE ABOVE STEPS NEEDS TO BE DONE FOR ALL BILLINGS LETTERS.

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



STEP 9 CLICK ON PRINTER CENTER-MB



STEP 10 CLICK ON BILLING



STEP 11- CLICK ON & CREATE FIRST NOTICE



STEP 12

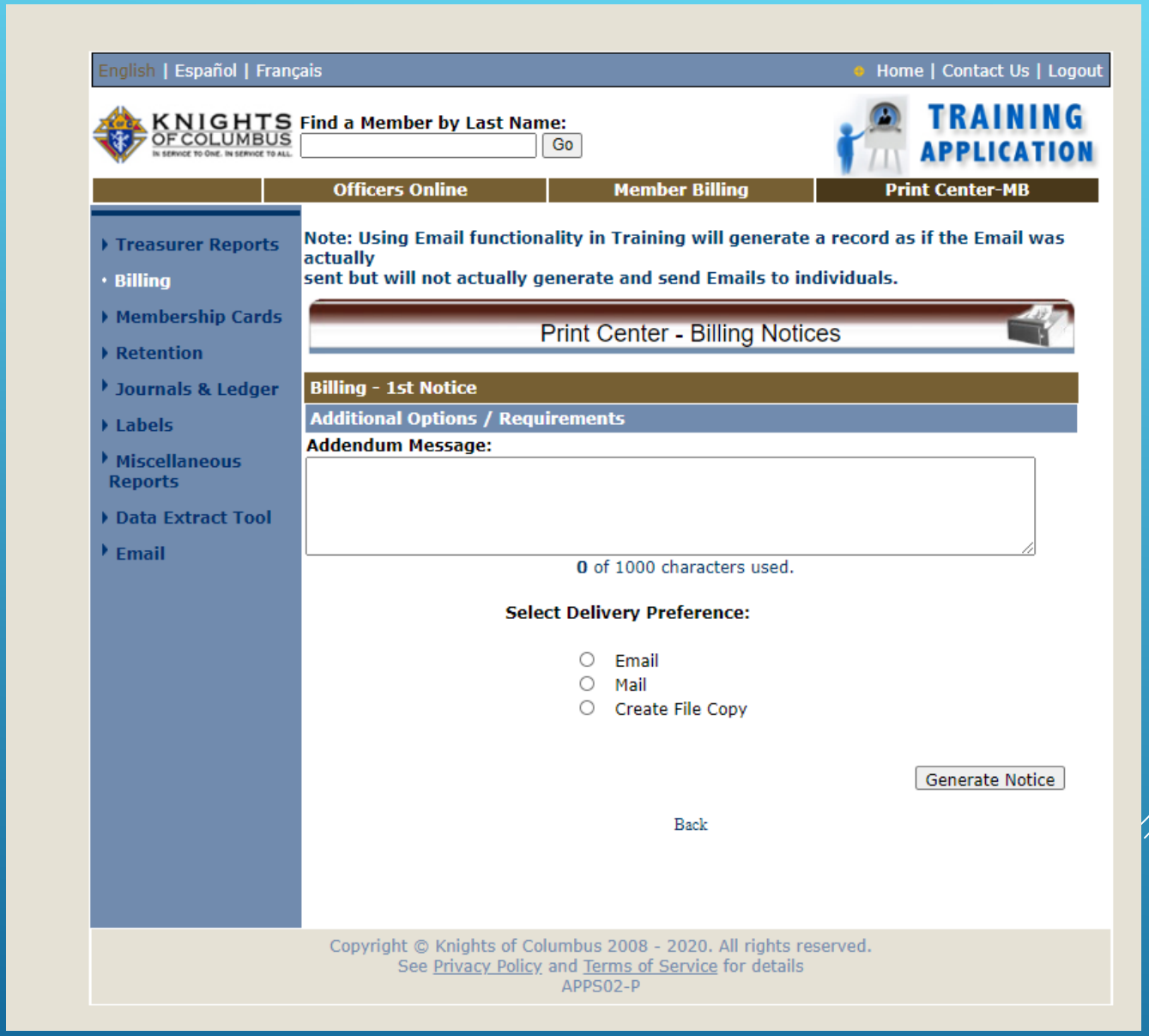
REFER TO STEP 8, PRIOR TO GENERATING THIS NOTICE

ADD ADDENDUM MESSAGE

SELECT DELIVERY PREFERENCE

CREATE FILE COPY

CLICK ON GENERATE NOTICE



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

STEP 14. REFER TO STEP 8, PRIOR TO GENERATING THIS NOTICE

ENTER THE **"AS OF DATE"** ENTER CURRENT DATE (AS LONG AS IT IS 30 DAYS PAST LAST NOTICE)

ONCE ENTERED, SELECT **UPDATE BILLING STATUS**

THE ABOVE STEPS NEEDS TO BE DONE FOR ALL BILLINGS LETTERS.

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

30 DAYS AFTER THE FIRST NOTICE WAS SENT OUT CLICK ON AND CREATE SECOND NOTICE.

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

*ADD ADDENDUM MESSAGE

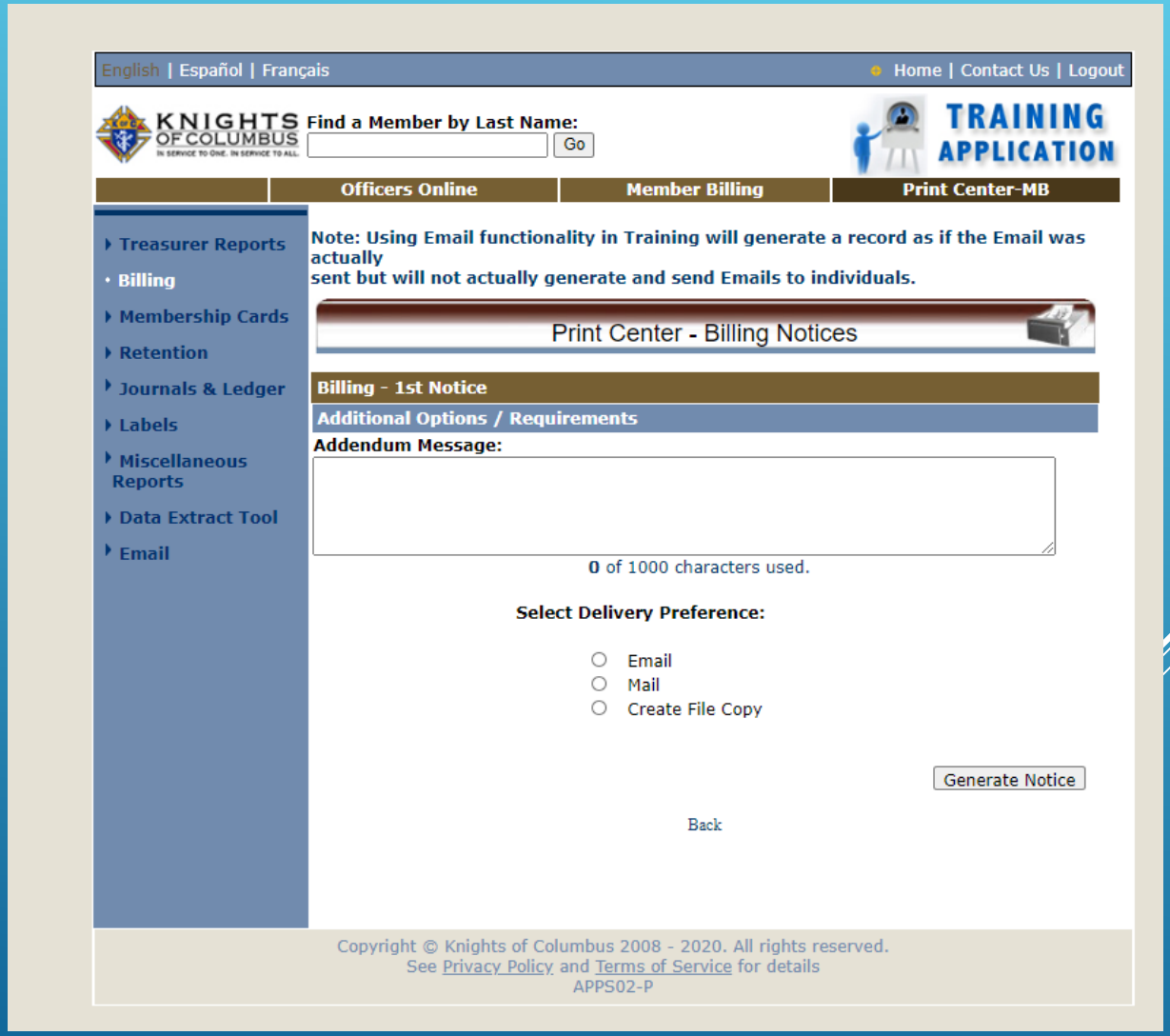
*CREATE FILE COPY

*CLICK ON GENERATE NOTICE

*SELECT DELIVERY PREFERENCE



* CLICK ON GENERATE NOTICE



STEP 15 REFER TO STEP 8 PRIOR TO THIS STEP

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

ADD ADDENDUM MESSAGE

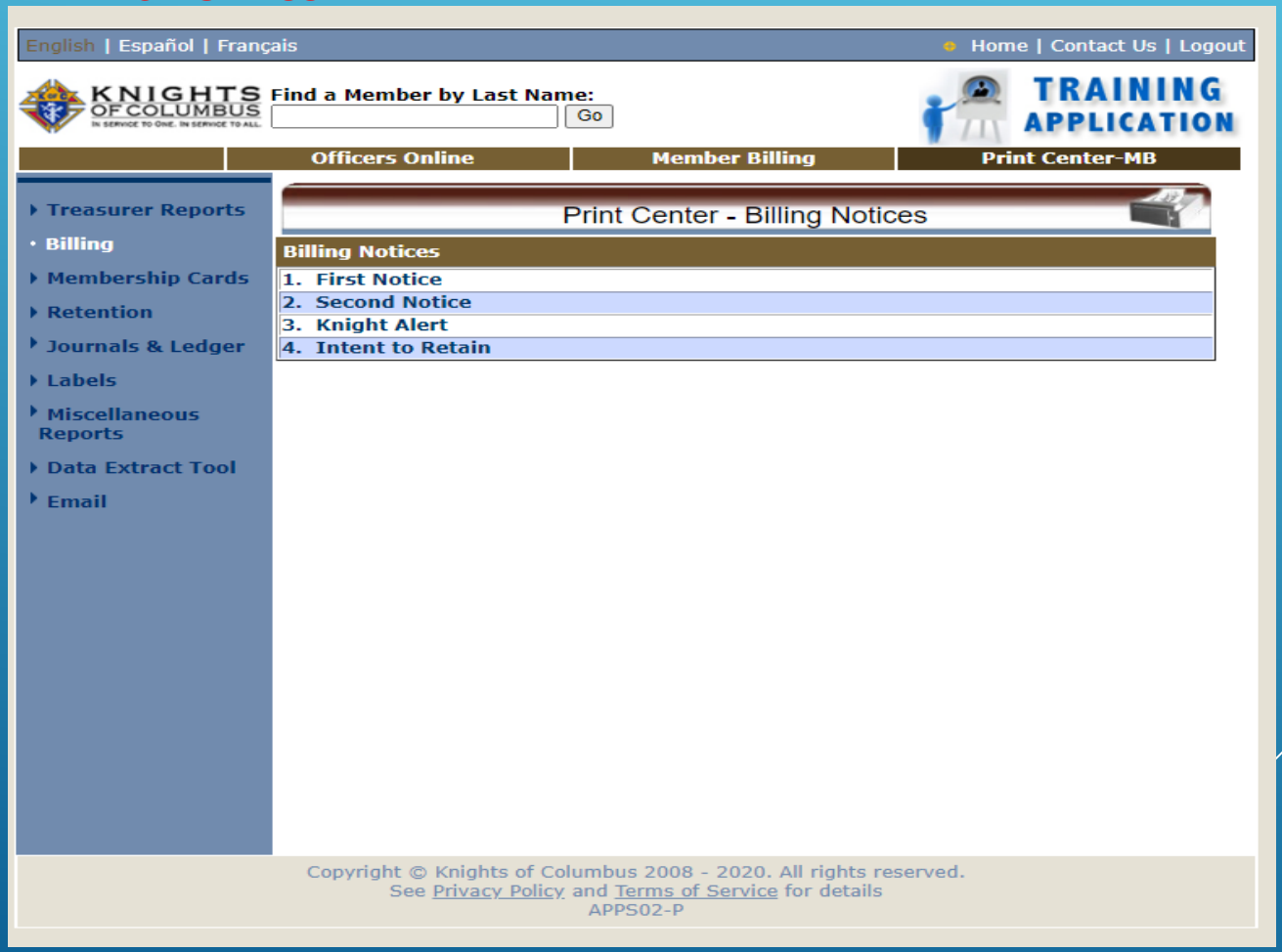
CREATE FILE COPY

CLICK ON GENERATE NOTICE

SELECT DELIVERY PREFERENCE

CLICK ON GENERATE NOTICE **30 DAYS AFTER THE SECOND NOTICE WAS SENT OUT CLICK ON AND CREATE SECOND NOTICE.**

MAIL LETTERS OUT. THIS IS A MUST . EMAIL IS NOT ACCEPTABLE HERE



STEP 16.

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

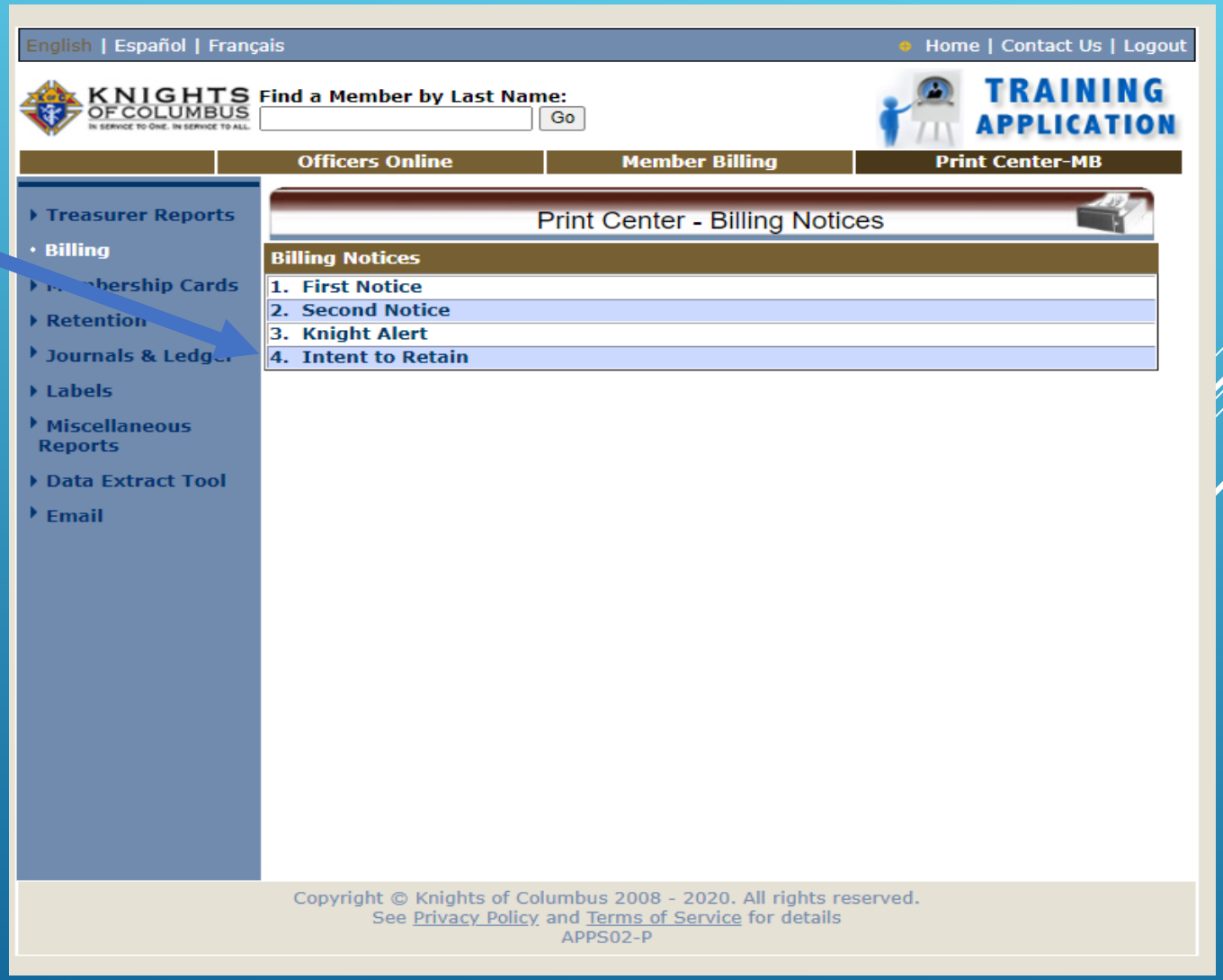
15 DAYS AFTER THE KNIGHT ALERT WAS SENT OUT CLICK AND CREATE INTENT TO RETAIN

SAVE A PDF OR ELECTRONIC COPY TO YOUR COMPUTER.

PRINT LETTER AND HAVE SIGNED BY GK AND FS

MAIL LETTERS OUT. THIS IS A MUST EMAIL IS NOT ACCEPTABLE HERE

SEND COPY TO ONTARIO MEMBERSHIP RETENTION DIRECTOR AT MEMBERSHIPRETENTIONDIRECTOR@ONTARIOKOFC.CA WITH SO47



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

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

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

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

FROM: WOOD, ROBIN L <ROBIN.WOOD@KOFC.ORG>
SENT:
TO: DAVIDPETERS123@ROGERS.COM
CC: JESMOND TABONE <JTABONE@OUTLOOK.COM>
SUBJECT: FW: #### ON # OF FORM 100

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

REGARDS,
ROBIN

PLEASE INCLUDE A COPY OF THIS EMAIL WHEN REPLYING.

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

STEP 22. ALL DONE.

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

THANKS FOR YOUR TIME.