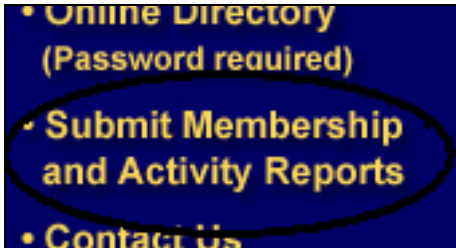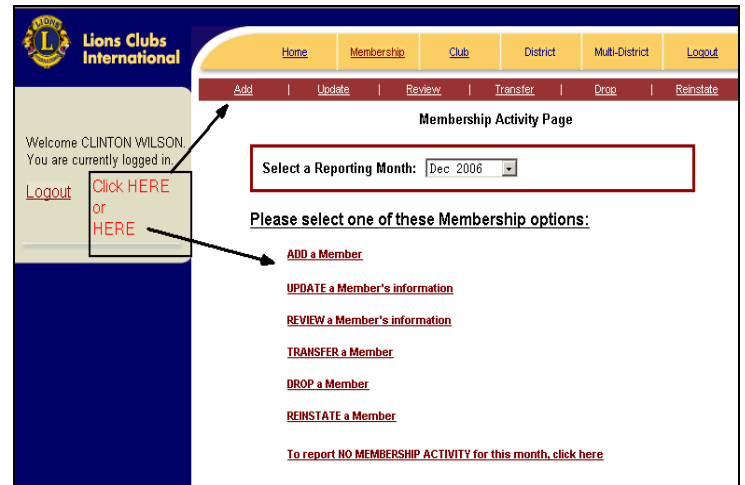# Lions Clubs International
Membership Reporting Quick Reference

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

From the **LCI Home Page**, 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 **Sponso**r 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 11 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

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:

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 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.**

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.

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:

On this screen, select the member that you want to Transfer into you 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 #.

Click on the **Member #** and the following window 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.

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

Enter the desired name changes. You must also enter a reason for the change. When you are done entering the name change, click the **Submit** button. You will receive the following confirmation screen:

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.

Both the **<u>Review</u> and <u>Update</u>** 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:
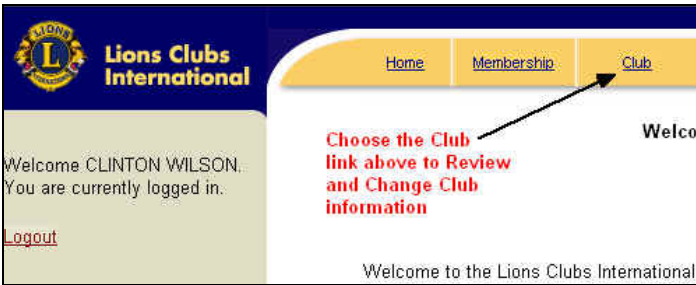
Having chosen that link, the next window opens up:
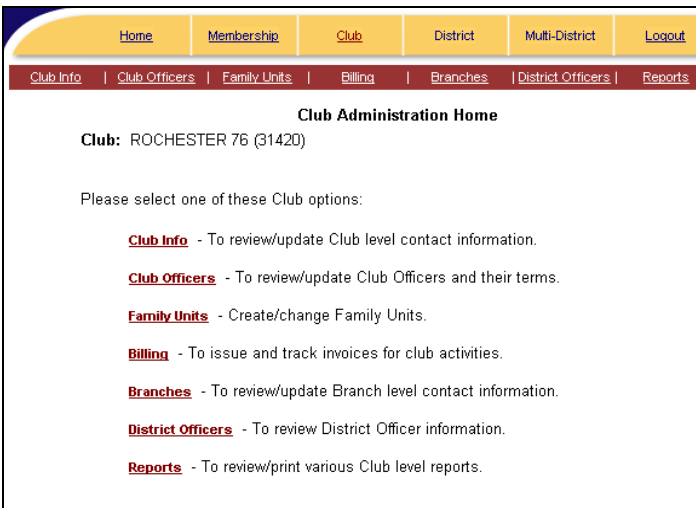
Click on the **Family Units** link to enter a family unit for existing members. Refer to Page 12 for Family Unit instructions.

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.

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.

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

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.

The following window opens:

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

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.

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.

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

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.

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