Women of the Moose

Educating Treasurers in LCL & Quickbooks

LCL Web
Chapter Student Guide

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COURSE DESIGN

Welcome to the Chapter LCL Web Hands-on Technical Training. This course has been designed to overview “how” and “when” Chapter Treasurer’s will use LCL Web to track and record their Fraternal Unit’s (FRU’s) Membership and Moose International (MI) Reporting Data.

This course will be presented via a combination of Instructor lecture and demonstration.

Course Goal

At the end of this course, you should be able to access LCL Web to enter, maintain, and report Membership data associated with a Fraternal Unit, Export Membership data for other uses, and complete reports and forms for Moose International.

Course Materials

Chapter LCL Web Learner Workbook.

Objectives

At the end of this lesson, you will be able to:

- Access LCL Web and become familiar with basic screens and menu options.
- Access the Moose International Reports for information that may be needed for FRU operations, including an Export function for extra member information.
- Access the Moose International Forms for reporting specific information to Moose International.

TOPICS

The following topics are covered in this lesson:

- About LCL Web
- Accessing LCL Web
- LCL Web Home View
- LCL Web Menus

Definition

LCL Web is a "cloud-based program" that is used at all FRUs *(Fraternal Units)* to track FRU membership data and reports for the FRU and Moose International. Using the procedures correctly will help ensure membership is kept up to date and help the FRU to earn honors and awards.

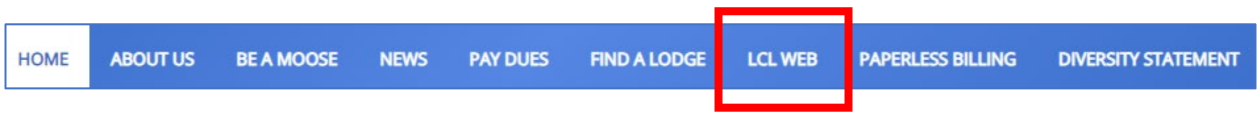
LCL Web Features

Refer to the table below to learn more about LCL Web Features:

Membership Database	A membership database stores information about the members of The Moose that are important to the member, the FRU, and Moose International: • LCL Web keeps all of the information about a member and their accomplishments in a way that makes that information readily available. • Reports and Exports about membership can help us to communicate with our members and keep them more easily.
Forms	There are times that Moose International requests information from an FRU and this menu gives a simple way to gather that information: • Some Forms are to gather the information used to give out awards or acknowledgements. • Some Forms are used for information that is used for the Risk Pool (Insurance purposes). • Some Forms are used to request funding by the different Grant programs.
Membership Dues and MI Payments	Membership Dues, both payments and deposits, and Moose International Billing Statements can be paid and seen in LCL Web: • Membership Dues can be paid for many people at the same time. • The deposit that Moose International makes to the FRU can be seen. • The Moose International Billing Statement can be paid by Credit Card/Debit Card or Bank Account.

Open a new tab in your Internet Browser *(preferably Google Chrome*) and type www.mooseintl.org to go to the Moose International website.

Once on the home page, click on LCL Web found in the blue ribbon at the top of the screen.

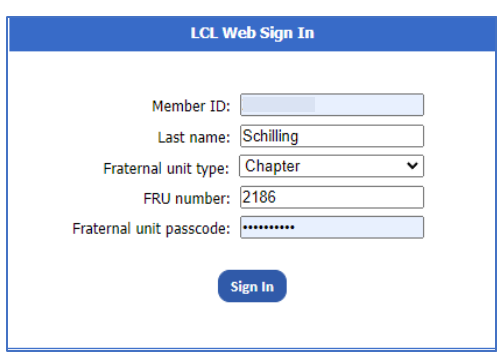


Logging into LCL Web

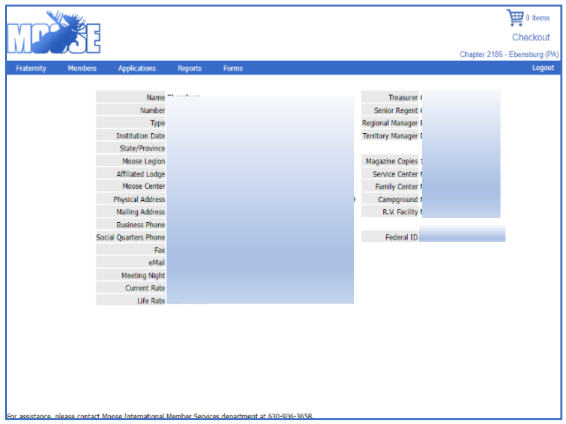
A Fraternal Unit Passcode is required for log in.

NOTE: If the FRU Passcode is unknown contact the Territory Manager for the FRU unit passcode. *(The Fraternal Unit Passcode is unique to every FRU)*

Enter your MID in the ***Member ID*** (MID) field *(do not enter the preceding zeros)*, enter your ***Last Name***, select the ***Fraternal Unit type*** from the drop-down *(for Chapters it will be Chapter)*, enter your ***FRU number*** followed by your ***Fraternal Unit Passcode***.
Click ***Sign In***.



Once logged in, the program opens to the LCL Web Home Screen. This screen displays information specific to your Fraternal Unit, however, the information cannot be edited from this screen.



The LCL Web Home Screen is broken down into individual information boxes. Each of these boxes contains specific FRU information, which will include the following boxes for every FRU:

- Name (FRU Name)
- Number (FRU Number)
- Type (FRU Type)
- Institution Date
- State/Province
- Physical Address
- Mailing Address
- Business Phone
- Social Quarters Phone
- Fax
- E-Mail
- Meeting Night
- Current Rate (Membership Dues)
- Life Rate (Life Membership Dues)
- Regional Manager
- Territory Manager
- Federal ID (FRU Tax ID Number)

NOTE: You may come back to the Home Screen and view at any time by clicking on the Fraternity tab and clicking on Fraternal Unit Info on the submenu. This screen allows you to make changes if needed.

To move throughout LCL Web, use the Menu Ribbon shown below:

Each Menu item contains drop-down submenus that will take you to pages that will either have more information about the specific submenu item or will be an area where information can be changed or added to the system:

Fraternity – *Information or Edit* – Information regarding the FRU, Officers, Local Officers, Dues Rates, Membership Totals, Categories/Activities and Pay A/R Statement.

Members – *Search for Members or Pay Dues* – You can search for any member whether they are active, inactive, expired, dropped or terminated and you can pay Renewal Dues for members who paid through the Chapter.

Applications – *Search* for applications already entered or *Entry* for new member applications.

Reports – You will be able to run reports on Officers, the Deposit List, Valued Veterans, or you can Export specific database information that is needed.

Forms – You will be able to view or enter certain information on these submenu items. Awards that members receive, Received Forms that Moose International has received from the Chapter, Form 114 and Form 166 *(monthly forms due to WOTM Headquarters)*. Form 114 will show if the form and payment has been received by WOTM Headquarters and Form 166 is to be entered in this section.

NOTE: The Forms section is different for each of the three (3) different types of FRU's *(Lodge, Chapter, Moose Legion)*.

Objectives

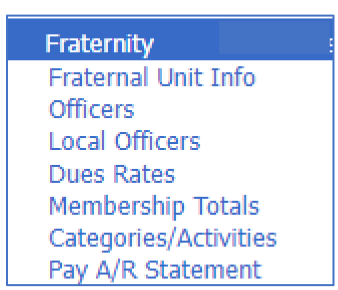
At the end of this lesson, you will be able to:

- Update Fraternal Unit Information.
- Update FRU Standing and Local Officers, both Elected and Appointed.
- View Dues Rates.
- Check the Membership Totals of the FRU.
- Enter Categories/Activities for your FRU.
- Pay Moose International (MI) Account Receivable (A/R) Statement online.

Topics

The following topics are covered in this lesson:

- Fraternity Sub-Menu Fraternal Unit Information
- Fraternity Sub-Menu Officers
- Fraternity Sub-Menu Local Officers
- Fraternity Sub-Menu Dues Rates
- Fraternity Sub-Menu Membership Totals
- Fraternity Sub-Menu Categories/Activities
- Fraternity Sub-Menu Pay A/R Statement

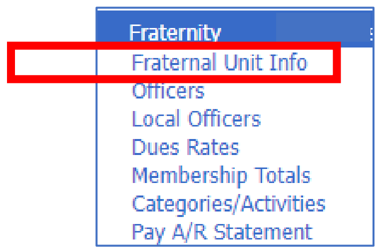


When to use

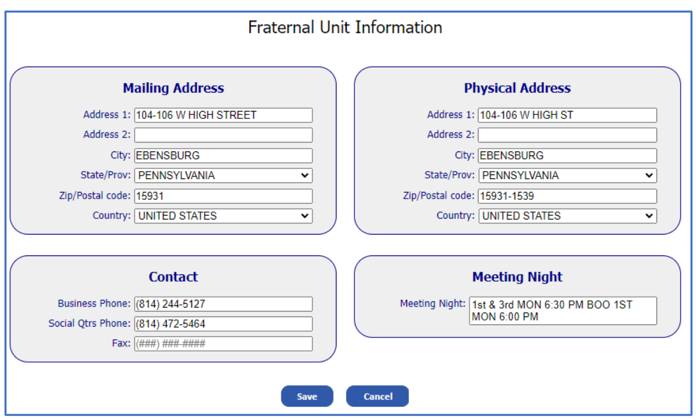
Anytime an FRU needs to update Mailing Address, Physical Address, Contact Information or Meeting night and times.

To enter or update the Fraternal Unit Information:

1. ***Float*** your cursor over the Fraternity menu item and click on Fraternal Unit Info on the Sub-menu.



2. This page contains information on your Mailing Address, Physical Address, Contact Information and Meeting night and times. You can add or edit any information in the white fields.



3. Click on ***Save*** to save your updates or click on ***Cancel*** to leave the screen without saving the updated information.

When to use

Anytime an FRU needs to update their standing Officers – Elected or appointed.

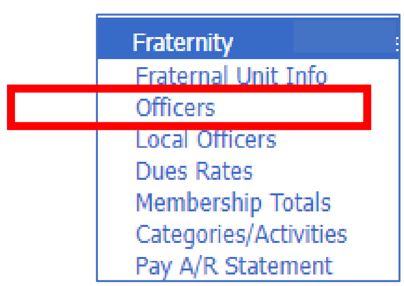
- The new FRU Officers must be entered after the beginning of the FRU Fiscal Year (Moose year), which starts on May 1st each year.
- When an Officer position is vacated.
- When an Officer position is filled.

NOTE: At the start of a Moose Year, ***DO NOT*** enter Officers until the date designated by MI.

To Enter or Update an Officer:

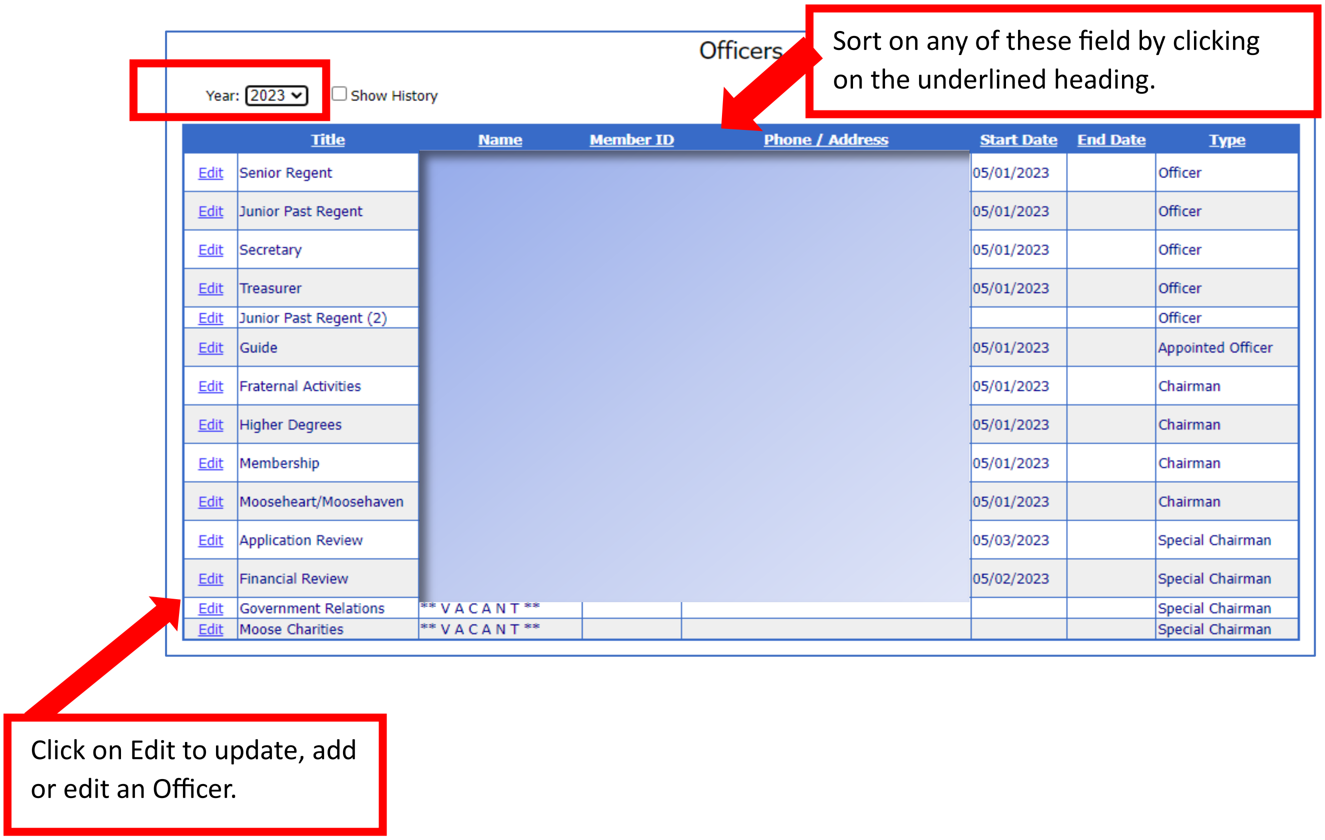
Follow the steps below to enter or update and Officer:

1. ***Float*** your cursor over the Fraternity menu item and click on Officers on the Sub-menu.



2. ***Choose*** the Year you want to edit.

NOTE: You can sort the Officer list by clicking on the column Title header you wish to serve as the basis of the sort.



	Title	Name	Member ID	Phone / Address	Start Date	End Date	Type
Edit	Senior Regent				05/01/2023		Officer
Edit	Junior Past Regent				05/01/2023		Officer
Edit	Secretary				05/01/2023		Officer
Edit	Treasurer				05/01/2023		Officer
Edit	Junior Past Regent (2)						Officer
Edit	Guide				05/01/2023		Appointed Officer
Edit	Fraternal Activities				05/01/2023		Chairman
Edit	Higher Degrees				05/01/2023		Chairman
Edit	Membership				05/01/2023		Chairman
Edit	Mooseheart/Moosehaven				05/01/2023		Chairman
Edit	Application Review				05/03/2023		Special Chairman
Edit	Financial Review				05/02/2023		Special Chairman
Edit	Government Relations	** V A C A N T **					Special Chairman
Edit	Moose Charities	** V A C A N T **					Special Chairman

3. Click on the word ***Edit*** at the beginning of the row that requires an Officer change.

4. A pop-up box will appear that either has no information other than the Officer position title in it or with the information of the current officer position's holder information.

5. If blank, enter the Member (member name), by selecting from the drop-down list. *(Only **Active** members will appear in this drop-down list.)*

NOTE: The ***Member ID*** field will automatically prefill when the member's name is chosen.

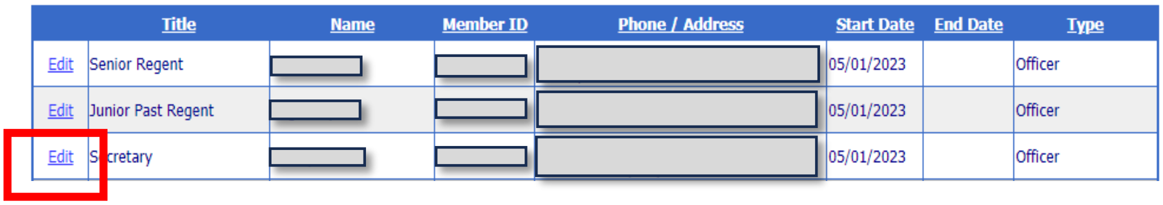
6. If blank, enter the ***Start Date*** (for the officer position held).
7. If you remove someone from an officer position, enter the End Date *(for the officer position held*). ***DO NOT*** enter an ***End Date*** when entering a new officer.

8. Once the correct information appears in the pop-up box, click on ***Save*** and the updated information will be saved for the officer position.
    a. When no changes are needed or the wrong officer position has been selected, click on ***Cancel*** to leave the popup box with no changes.

NOTE: It is important to add and remove officers as they are brought into and vacated from officer positions, in order to make sure that the appropriate credit is given to the person holding the officer position. The credit for the officer position may be needed for further advancement as an officer or for other honors *(such as Past Regent)*.

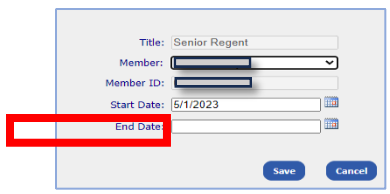
NOTE: The list of members that can qualify for a position may be extensive dependent upon the total membership of the FRU. Please make sure to double-check that you have the correct Member ID in the pop-up box prior to saving.

1. Open ***Officers Entry*** page by clicking on *Officers* on the Fraternity Tab. The following screen will appear if you have officers already listed. If a position needs to be edited, click on the ***Edit*** button on the left side of the screen.



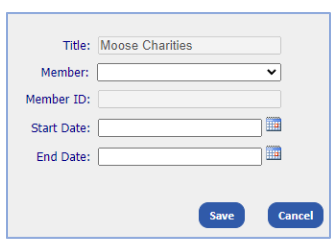
	Title	Name	Member ID	Phone / Address	Start Date	End Date	Type
Edit	Senior Regent				05/01/2023		Officer
Edit	Junior Past Regent				05/01/2023		Officer
Edit	Secretary				05/01/2023		Officer

2. The following pop-up box will appear. If this member is no longer an officer, you will need to enter an ***End Date***. This is the date the member was removed or resigned from the position. Click ***Save***.



The line on the Officers page will now say ***Vacant***.

3. Enter a new Officer. Click on ***Edit*** on the line of the Vacant officer position. A pop-up box will appear. Enter the member's name in the ***Member field***. The Member ID will automatically prefill with the member's MID number. Enter the ***Start Date*** *(the date the member was installed into this particular office*) of the new officer. Click ***Save***.



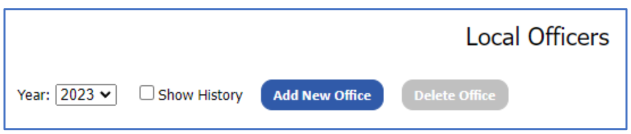
The line on the Officer's page will now show the new member in the Officer's position line.

Local Officers:

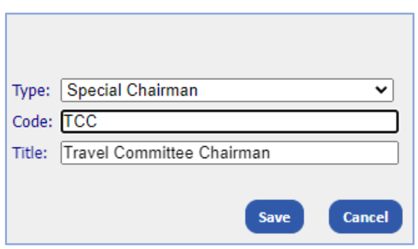
Local Officer entry is unique to the LCL Web feature. It allows you to enter Committee information that is specific to your unit. Click on ***Add New Office*** to enter the Special Chairman and Officers. Enter a ***Title*** *for the position you created*, i.e., *Sunshine Chairman*.

To Enter a Local Officer:

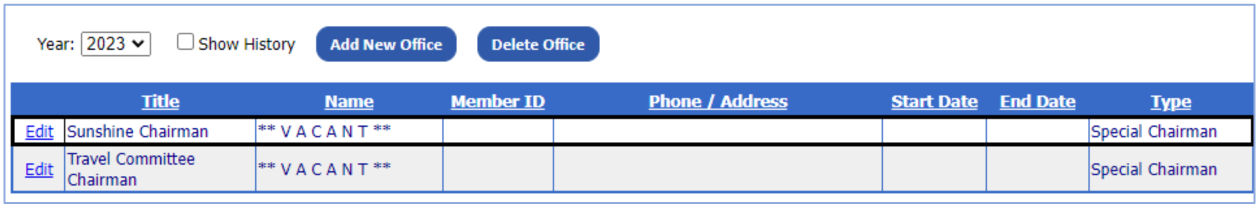
1. Click on ***Local Officer*** on the Fraternity Tab. The following pop-up box will appear.



2. Click on ***Add New Office***.
3. Choose the ***Type*** *(Type has a Choice of Officer, Chairman, Appointed Officer, Escort & Special Chairman)*
4. Enter ***Code*** *(Code is an abbreviation for the position created)*
5. Enter the ***Title***
6. Click ***Save***



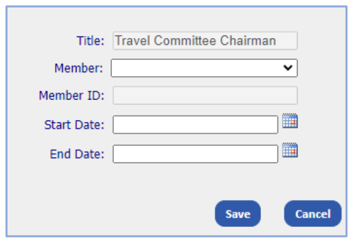
Enter a member's name to the newly created Local Office:



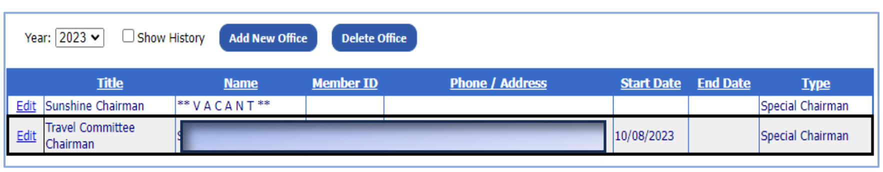
Year: 2023 | Show History | Add New Office | Delete Office

	Title	Name	Member ID	Phone / Address	Start Date	End Date	Type
Edit	Sunshine Chairman	** V A C A N T **					Special Chairman
Edit	Travel Committee Chairman	** V A C A N T **					Special Chairman

1. Click on ***Edit***. The following pop-up box will appear.



2. ***Choose*** the members' name from the drop down list. The member's MID will automatically pre-fill.
3. Enter the ***Start Date***.
4. Leave the ***End Date*** blank.
5. Click ***Save***.

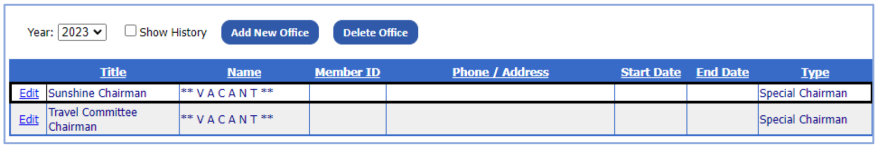


Year: 2023 | Show History | Add New Office | Delete Office

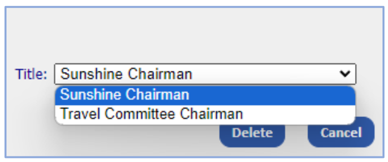
	Title	Name	Member ID	Phone / Address	Start Date	End Date	Type
Edit	Sunshine Chairman	** V A C A N T **					Special Chairman
Edit	Travel Committee Chairman				10/08/2023		Special Chairman

To Delete a Local Office:

1. On the Local Office Screen, click on Delete Office:



2. The following pop-up box will appear.



3. Click on the drop-down arrow beside ***Title*** and choose the Office you want to delete.

4. Click ***Delete***.

NOTE: If you have assigned a member to the Local Office, you will not be able to delete the Local Office until the member's name is removed. Just remove the member by adding an ***END DATE*** to the current member's name. Then follow the steps above to remove the Local Office.

Dues Rate

A history of Dues rates for Annual Membership and Life Membership can be seen here. Attempts to edit current Dues Rates will be met with the following error message:

Error

You cannot edit this Fraternal Unit Rate because there are Membership Dues tied to it.

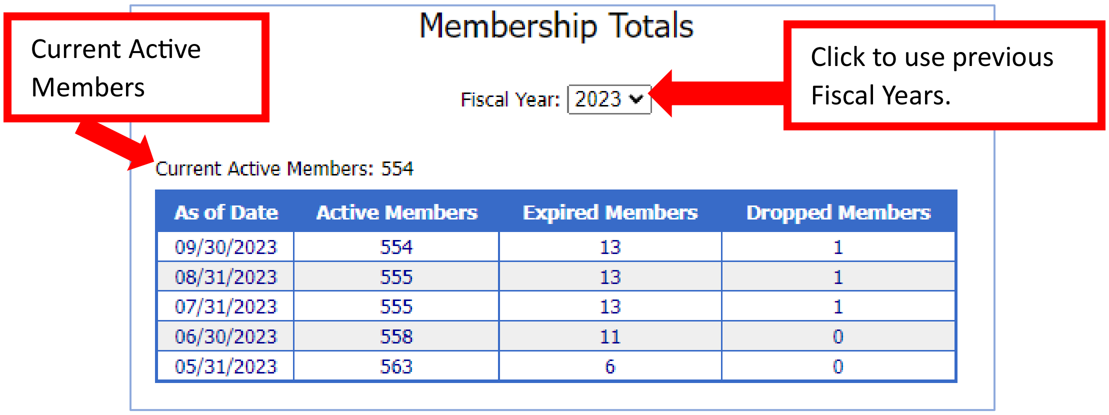
Dues Rates are for viewing purposes only:

Dues Rates

Type	Start Date	End Date	Moose Intl. Amout	Fraternal Unit Amount	Total Amount	Currency
Dues	05/01/2021		10.00	5.00	15.00	USD
Dues	06/01/2015	04/30/2021	22.00	8.00	30.00	USD
Dues	06/01/2010	05/31/2015	20.00	10.00	30.00	USD
Dues	10/01/2008	05/31/2015	20.00	0.00	20.00	USD
Dues	05/01/2006	09/30/2008	12.00	8.00	20.00	USD
Dues	09/24/2000	04/30/2006	10.00	10.00	20.00	USD
Life Member (40-44)	08/01/2019	04/30/2021	75.00	75.00	150.00	USD
Life Member (35-39)	08/01/2019	04/30/2021	100.00	100.00	200.00	USD
Life Member (30-34)	05/01/2021		125.00	125.00	250.00	USD
Life Member (30-34)	08/01/2019	04/30/2021	125.00	125.00	250.00	USD
Life Member (25-29)	05/01/2021		150.00	150.00	300.00	USD
Life Member (25-29)	08/01/2019	04/30/2021	150.00	150.00	300.00	USD
Life Member (20-24)	05/01/2021		175.00	175.00	350.00	USD
Life Member (20-24)	08/01/2019	04/30/2021	175.00	175.00	350.00	USD
Life Member (15-19)	05/01/2021		200.00	200.00	400.00	USD
Life Member (15-19)	08/01/2019	04/30/2021	200.00	200.00	400.00	USD
Life Member	05/01/2021		250.00	250.00	500.00	USD
Life Member	08/01/2019	04/30/2021	300.00	300.00	600.00	USD
Life Member	01/01/1900	07/31/2019	250.00	150.00	400.00	USD

Membership Totals

1. Click on Membership Totals on the Fraternity Tab:



As of Date	Active Members	Expired Members	Dropped Members
09/30/2023	554	13	1
08/31/2023	555	13	1
07/31/2023	555	13	1
06/30/2023	558	11	0
05/31/2023	563	6	0

2. Click on the ***Fiscal Year*** drop-down arrow to see previous years' information.

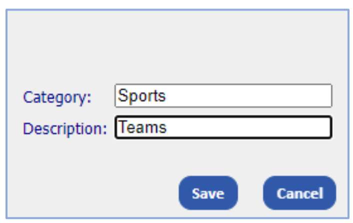
3. The ***Current Active Members*** number is your actual membership total as of today's date.

Categories and Activities

1. Click on the Categories/Activities link on the Fraternity Tab.
2. Any entries entered in the old LCL net did not transfer to the LCL Web application. All entries will need to be re-entered and then added to member records where appropriate.

Create a New Category

1. Click on ***Add New Category***
2. Enter a ***Category*** and ***Description*** *(both boxes must contain information)*



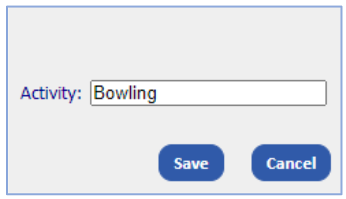
3. In the Category box enter Sports
4. In the Description enter Teams

5. Click ***Save***

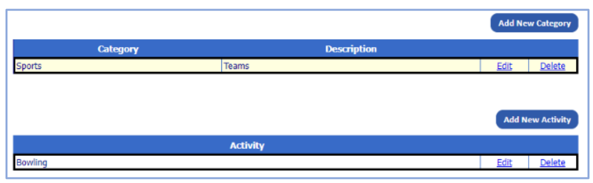
Create a New Activity

1. Highlight the **Category**, by clicking on the row, and then click **Add** New Activity.

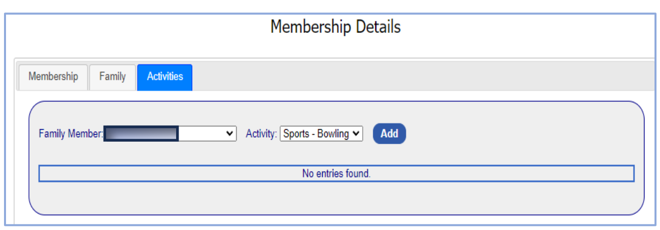
2. The New Activity pop-up box will appear. Enter the name of the activity in the box, i.e., ***Bowling***.



3. Click ***Save***



4. Access each member associated with the Category/Activity you have chosen. *(The Family tab needs to be completed, especially if you are tracking the children of the family)* Click on the ***Activities*** tab. Choose the family member and activity and click ***Add***.



When to Use

To pay the Monthly Billing Statement from MI, when a physical check is not being mailed.

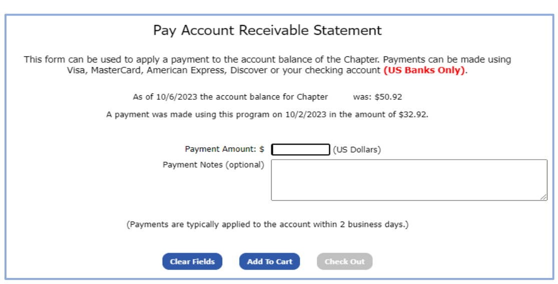
- The Monthly Billing or ***A/R Statement*** from MI will be found in the FRU Smartermail on a monthly basis*. (Usually, the first week of the following month)*
- When making payments on the Monthly Billing Statement from MI, you are able to use a Credit Card or directly from your Checking Account.

NOTE: The payment process is not complete until payment has been made through the *Shopping Cart/Checkout* portion of the process.

To Pay A/R Statement:

Follow the steps below to create the item for paying the MI Monthly Billing Statement:

1. ***Float*** your cursor over the Fraternity menu item on the Menu Ribbon and then click on the ***Pay A/R Statement*** sub-menu.
2. View the balance due.



1. Enter the ***Payment Amount*** that the FRU has decided to pay at this time.

2. Enter any ***Payment Notes*** needed for the FRU.

3. If any of the information is incorrect and you wish to start over, click on ***Clear Fields***.

4. Once all of the information entered is correct, click on ***Add to Cart***.

   NOTE: Once you have clicked on *Add to Cart*, the fields on the screen will become blank as at the beginning of the process.

   NOTE: This does not complete the payment process.

5. Click on ***Check Out*** at the bottom of the screen or the ***Shopping Cart*** at the top of the screen.

6. To complete the payment process, go to *Shopping Cart/Checkout* on Page 26.

When to Use

To complete payment, when a physical check is not being mailed:

- Anything paid through LCL Web portal will need to have the payment finalized through the ***Shopping Cart***.

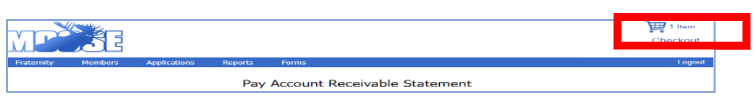
- When making payments to MI, using a credit card or directly from a checking account.

NOTE: Every item in the *Shopping Cart* will be paid at the same time.

To Complete Payment of Items:

Follow the steps below to complete payment of items in the Shopping Cart:

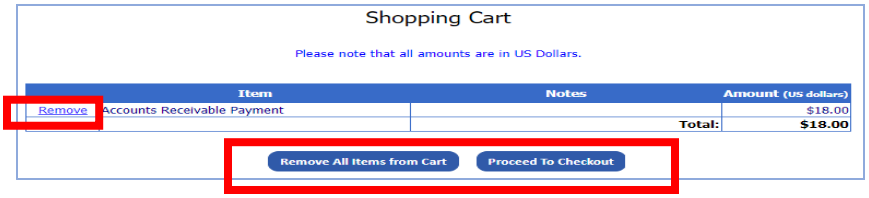
1. Click on ***Check Out*** at the bottom of the screen or the ***Shopping Cart*** at the top of the screen.



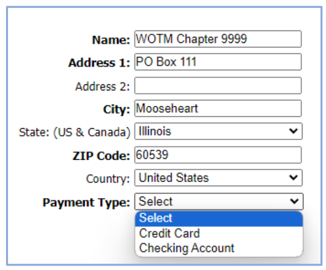
2. Verify that the payment ***Item*** and ***Amount*** are correct in the Shopping Cart.

3. If the information in the Shopping Cart is not correct, click on ***Remove*** at the beginning of the row for the specific Item that is not correct, or click ***Remove All Items from Cart*** to empty the Shopping Cart completely.

4. If the Shopping Cart information is correct, then click on ***Proceed to Checkout***.



5. Complete the ***Payment Information*** screen as completely as possible, making sure to choose the appropriate payment method.



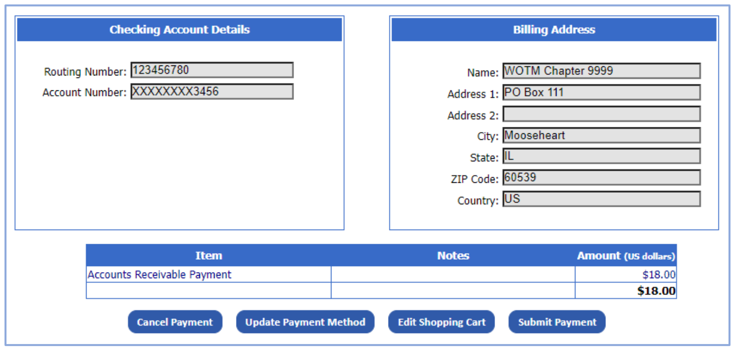
6. Most Chapters will be paying by using their Checking Account. When you click on Checking Account the screen below will appear.

7. Complete the Chapter's Bank information as shown on the sample check.

8. If the payment information is not correct you can click on either ***Clear Fields*** to start over or ***Cancel payment*** and go back to the previous screen.

9. Once the payment information is correct, click on ***Continue***.

10. On the ***Payment Confirmation*** screen, verify that all of the payment information is correct.



11. If the payment information is not correct, you can either click on ***Cancel Payment*** and start over, click on ***Update Payment Method*** and change the payment information, or click on ***Edit Shopping Cart*** and change the Items to be paid.

12. If all of the payment information is correct, click on ***Submit Payment***.

13. Once the payment is complete you should click ***Print Receipt*** and either print or save as a file, the payment receipt.

Objectives

At the end of this lesson, you will be able to:

- Find individual Member information.
- Pay Member Renewal Dues.

Topics

The following topics are covered in this lesson:

- Members Sub-Menu Member Search
- Members Sub-Menu Pay Dues

When to Use

Find a Member of the FRU, get specific information about the Member, and edit information about a Member:

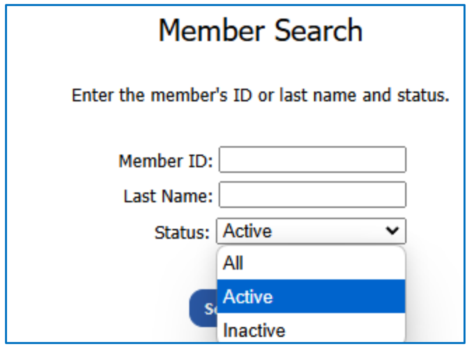
- There are many times that an FRU may need specific information about a Member, such as if they are ***Active*** or not.
- This is the simplest method to gain information about a single member at a time.
- ***Editing*** information about a Member, such as contact information updates, can be completed through the Member Search.

NOTE: Make sure to double-check that the Moose ID number (MID), matches the information for the person, especially if you are Editing the information.

To Perform a Member Search:

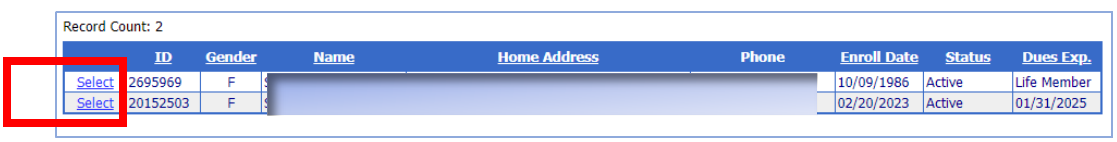
Follow the steps below to find and edit Member information:

1. Float your cursor over the *Members* menu item on the Menu Ribbon and then click on the Member Search sub-menu.
2. Enter the Member ID number, if available, of the person that you are trying to find. *(No leading zeros need to be entered for the MID in the search)*.
3. If you do not have the MID, enter at least part of the *Last Name* of the member.



4. Choose the ***Status*** of the member's membership.
    a. ***All*** – for any status
    b. ***Active*** – for currently active member *(meaning dues are current)*
    c. ***Inactive*** – for members whose dues have expired, terminated or dropped.

5. Click on ***Search***, which will bring up a list of members that meet the member Search criteria that you have entered.

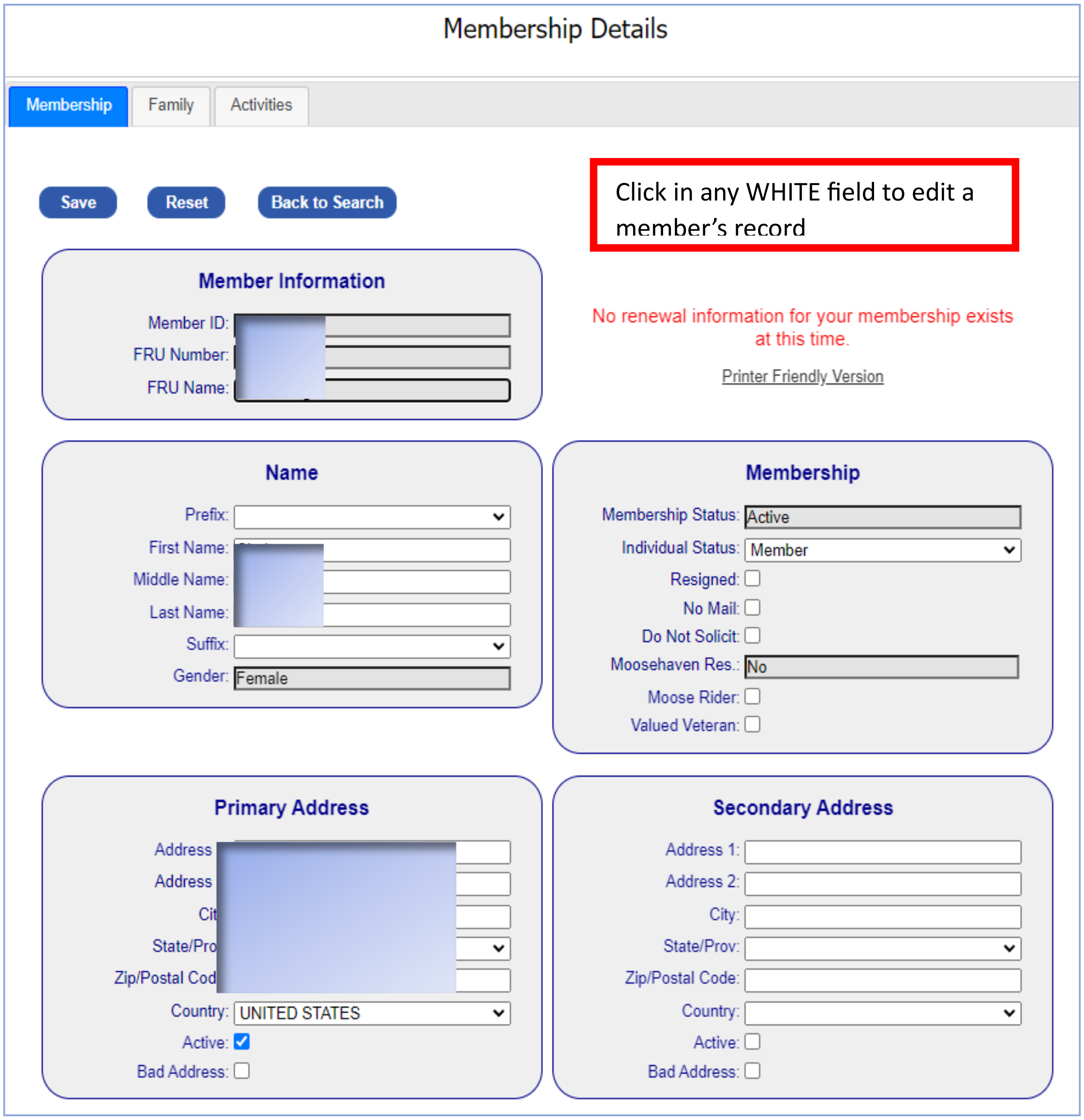


6. Click on ***Select*** on the row of the member you wish to view.

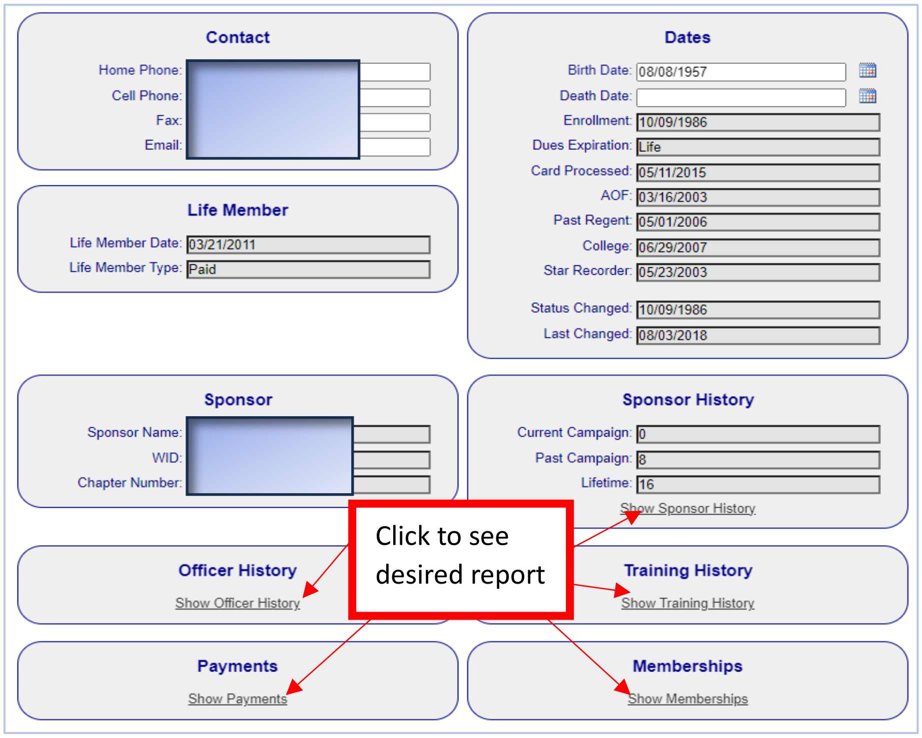
7. If you need to change the criteria of the ***Member Search***, or if the person that you are searching for does not appear, click on ***Reset***, which will clear the search criteria, and you can start the search over.

8. Once the Membership Details appear on the screen, you are able to view and edit different portions of the Membership Record.

9. Any field or checkbox that is white can be changed, as necessary.



10. Once any member information is updated, click ***Save*** to keep the changes or click on ***Reset*** to discard the changes and keep viewing the Membership Details for the member.



11. If you want to view extra report information on the member, ***click*** on the appropriate link under that section.

12. The selected report will open a new tab in your browser, acting as a pop-up. *(Make sure to allow pop-ups in your browser for this website in order to view Membership Detail reports).*

13. If this is either not the correct member record or if the previously entered search criteria will be the same for another Member Search click on ***Back to Search*** at the top of the screen.

14. If you want to begin another search start over from the first step of ***Member Search*** on page 30.

When to Use

To pay membership renewal dues for members that pay for their dues at the FRU:

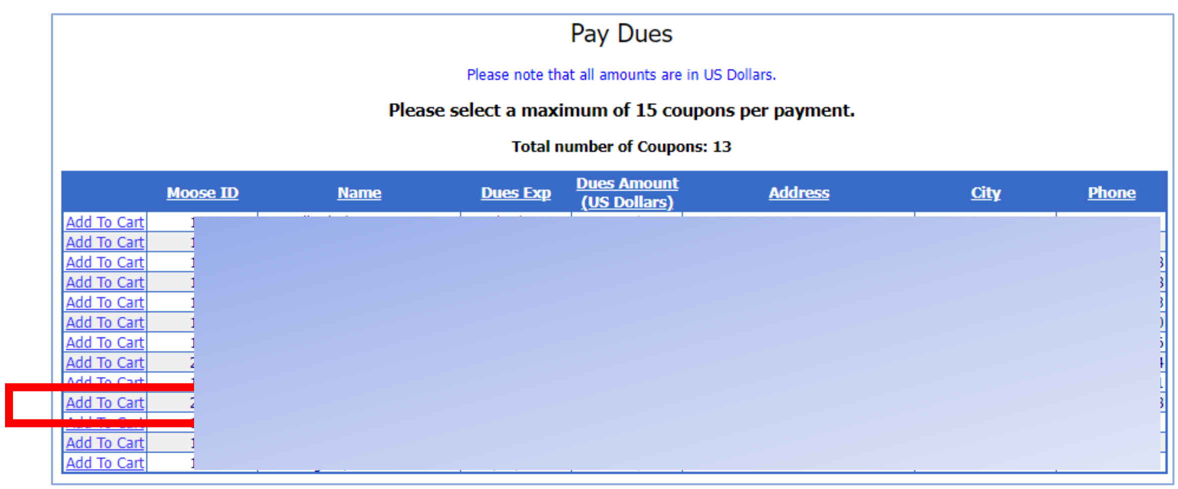
- If a member insists on paying for their membership renewal dues.
- When making a payment on membership renewal dues, using a credit/debit card.

To Pay Membership Renewal Dues:

Follow the steps below to select members that need their dues renewed:

1. Float your cursor over the ***Members*** menu item on the Menu Ribbon and then click on the ***Pay Dues*** sub-menu.

2. Find the member that you want to renew then click on ***Add to Cart***, at the beginning of the row for the member.



3. To make finding the member that you wish to renew easier, you can sort the Pay Dues member list by clicking on the title at the header of the column you want to sort by.

4. Once you have selected all of the FRU members that need their memberships renewed, you will need to follow the *Shopping Cart/Checkout* process on Page 26.

NOTE: No more than fifteen (15) membership renewals can be added to the Shopping Cart before completing the payment process per session.

Objectives

At the end of this lesson, you will be able to:

- Find entered application information.
- Enter member applications.
- Review online applications

Topics

The following topics are covered in this lesson:

- Application Sub-Menu Search
- Applications Sub-Menu Entry
- Applications Sub-Menu Review Online Applications

When to Use

To search for a membership application, to view, edit, or update status:

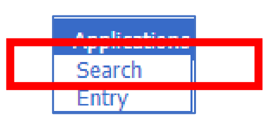
- The membership ***Application Review Committee*** may ask for more information on a membership application.
- The membership application may need to be edited because of changes to the information on the applicant.
- The membership application will need to be ***enrolled*** once the membership has voted to approve the application.
- The membership application will need to be ***rejected*** if the membership has voted and rejected the application.

NOTE: Enrolling membership applications is the only way for the FRU to bring in new members.

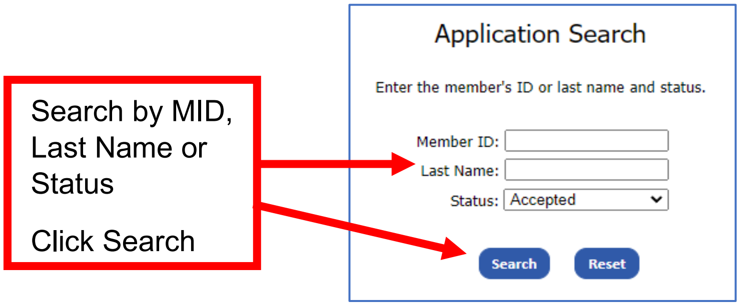
To Search for a Membership Application:

Follow the steps below to search for a membership application that has already been entered Into LCL Web:

1. Float your cursor over the ***Applications*** menu item on the Menu Ribbon and then click on the ***Search*** sub-menu.



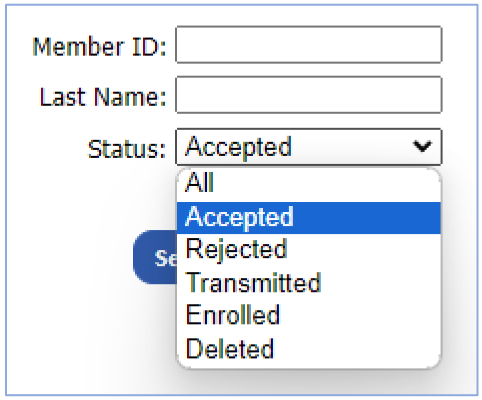
2. On the Application Search screen enter search information, if available, and click on ***Search***.



3. Leave the Member ID and Last Name search fields blank to view all member applications of a specific *Status*.

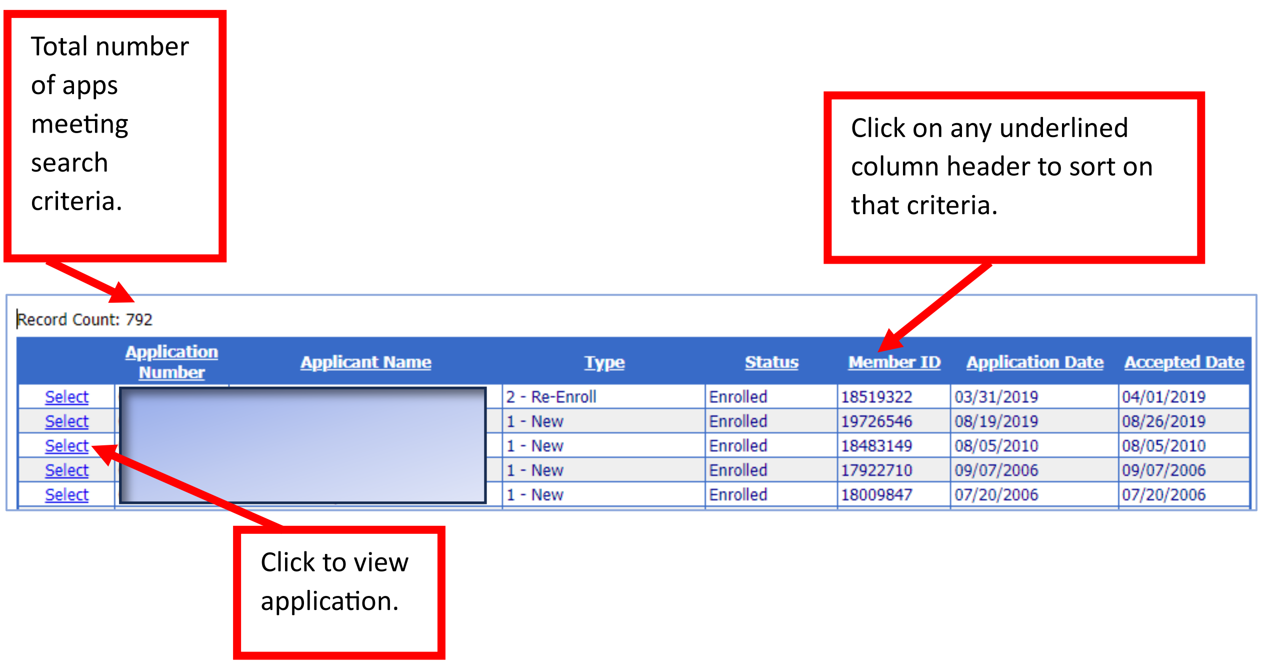
   a. ***ALL*** – Will list every membership application entered for the FRU for all time.
   b. ***ACCEPTED*** – Will list all currently Accepted membership applications that have not been changed to another status after the vote of the FRU membership.
   c. ***REJECTED*** – Will list the Rejected membership applications for the FRU for all time.
   d. ***TRANSMITTED*** – Will list membership applications that have been entered but have not completed the MI acceptance process. ***NOTE***: A membership application can take up to 24 hours to be changed to Accepted in LCL Web.
   e. ***ENROLLED*** – Will list membership applications that have been voted as approved by the FRU membership and processed confirming the person as a member of the FRU.
   f. ***DELETED*** – Will list membership applications that have been removed from LCL Web prior to further processing.

NOTE: This is usually because the application was entered in error.



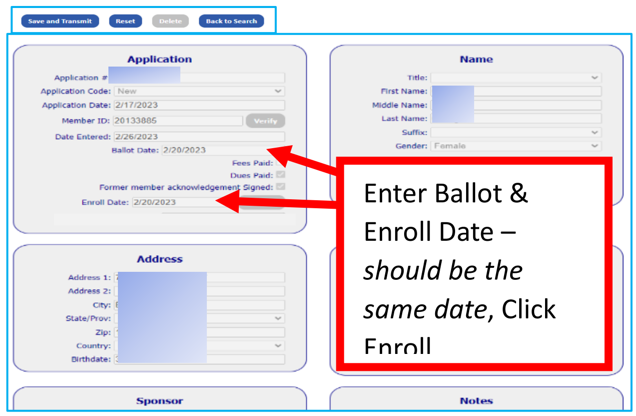
4. Click on Reset in order to start over on the Application Search process.

5. Once the Application Search list appears, you can sort the list by clicking on the column Title header you wish to serve as the basis of the sort.



6. To view a membership application, click on Select on the row of the application that you want to view.

7. The Application Entry Screen will appear with most or all fields pre-filled.



NOTE: Only fields that still show in white can be updated.

8. To Enroll a new member, enter the ***Enroll Date***, as the date that the membership application was voted on and approved during a membership meeting of the FRU. Enter the ***Ballot Date*** – *this will be the same date as the Enroll Date*.

NOTE: A membership application cannot be enrolled until it has a status of *Accepted*.

9. Once any update has been completed click on ***Save and Transmit*** to send the updated information to MI.

NOTE: If you click on any other Menu Item your changes will not be saved.

10. If the updates are not correct or do not need to be completed, click on either ***Reset*** to clear any changes on the membership application or click on ***Back to Search*** to search again.

To Search for a Membership Application:

Follow the steps below to search for a membership application that has already been entered Into LCL Web:

NOTE: Do not change any information in your application as this will affect your live database.

1. Float your cursor over the *Applications* menu item on the Menu Ribbon and then click on the *Search* sub-menu.
2. On the Application Search screen, select *Enrolled* as the Status.
3. Click on *Search*
4. Click on the hyperlink header *Accepted Date*. The list will be sorted by the date accepted. If it is sorted A-Z the oldest will appear first. Click on the hyperlink again and it will sort Z-A so that you can see the most current Enrolled Applications.
5. You can also sort by the Applicant's name. Click on the header, Applicant name and it will sort for you. You may have to click again, to sort in the A-Z order.

When to Use

To enter a membership application, for people wanting to become members of the FRU, who have turned in a physical membership application.

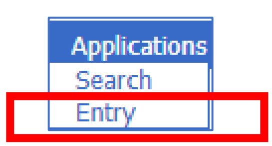
- Only enter a membership application once the application has been accepted and enrolled by a Lodge. (*All Chapter members must be a Lodge member before they can become a Chapter member*). You will need the MID given to the applicant to enter the proposed member.
- Only enter the application if it is filled out completely and correctly.
- All of the signature blocks on the application must be signed including the ***Former Member Acknowledgement*** (*if necessary for former FRU members*), ***Endorser's Signature*** (*a current member of the Chapter*) and the ***Obligation of Membership*** (*found on the back of the physical membership application*).

NOTE: Once a membership application has been entered it may take up to 24 hours for the membership application to be *Accepted* by MI. The membership application cannot be *Enrolled* until after it has changed to the *Accepted* Status in LCL Web.

To enter a membership application:

Follow the steps below to ***Enter*** a membership application:

1. Float your cursor over the Applications menu item on the Menu Ribbon and then click on the Entry sub-menu.



2. Choose an Application Code by clicking on the Application Code drop-down menu and clicking on the appropriate Application Code:

    1. ***New*** – this has been a person who has never been a member of the FRU type before (i.e., Lodge, Chapter, or Moose Legion).

    2. ***Multimember*** – This is no longer used in the Chapter or the Moose Legion.

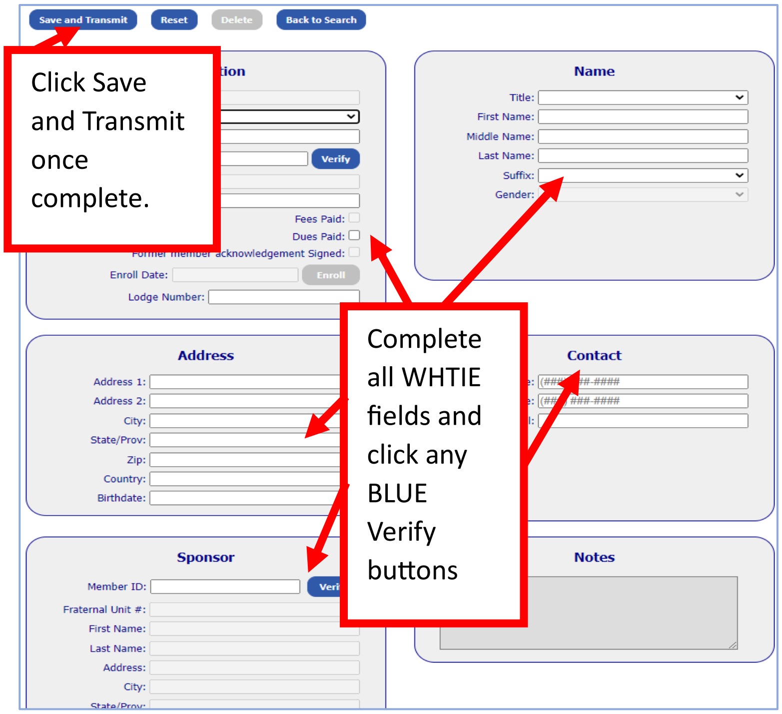
    3. ***Re-enroll*** – This is for someone that was formerly a member of the FRU type but went to a status of Expired (6 to 12 months), Dropped or Terminated for nonpayment of member dues.

    4. ***Reinstate*** – This can only be done for a member in a Dropped status that does not want to lose their year count as a member of the FRU and is willing to pay for the missed year of membership dues.

    5. ***Transfer In*** – For a member of an FRU that wishes to move their membership to another FRU of the same type.

3. Enter the date the application was completed.

4. Enter the Member ID and click *Verify*. The member information should auto populate.



5. Make sure to complete all of the white fields on the Application Entry screen, which are not prefilled.

6. In the ***Sponsor*** section of the Application Entry screen enter the Sponsor Member ID and click on Verify to auto populate the Sponsor information.

7. Once the Application Entry screen is complete and correct (double-check spelling), click the ***Save and Transmit*** button at the top of the screen.

8. If the information on the Application Entry screen is not correct or you want to start over without saving the current information, click on ***Reset*** at the top of the screen to remove the entered information.

When to Use

To review online membership applications, for people wanting to become members of the FRU, who have used the *Be A Moose* webpage to apply for membership:

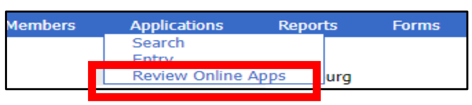
- Review the online membership applications and process the applications to send the applications to the next stage of the membership process.
- Try to check for online membership applications for review at least bi-weekly.
- This is the first stage of membership in the FRU.

NOTE: Once an online membership application has been reviewed it may take up to 24 hours for the membership application to be Accepted by MI. The membership application cannot be Enrolled until after it has changed to the Accepted Status in LCL Web.

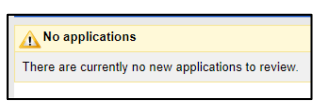
To Review an online membership application:

Follow the steps below to Enter a membership application:

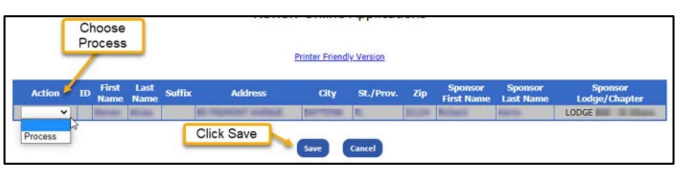
1. Float your cursor over the *Applications* menu item on the Menu Ribbon and then click on the *Review Online Apps* sub-menu



2. The message *No applications* will appear if there are no new online membership applications.



3. When there are applications listed in the *Review Online Application* screen, click on the Printer Friendly version and print the online membership application list.



4. After all of the online member application's Action boxes have been changed to Process, click on Save.

5. If you click on anything other than Save, on the Review Online Applications screen, the online membership applications will not be processed.

NOTE: If the online membership applications are not reviewed and processed, they will remain in the *Review Online Applications* page indefinitely.

NOTE: Online membership applications still need to be *enrolled* after the FRU membership meeting votes to approve the applications.

Objectives

At the end of this lesson, you will be able to:

- Run Reports / Labels on Elected, Appointed Officers, and Chairman.
- Run the member dues Deposit List Report.
- Run a list of the Valued Veteran’s in your FRU.
- Run an Export Report.

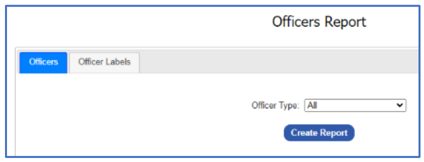
Topics

The following topics are covered in this lesson:

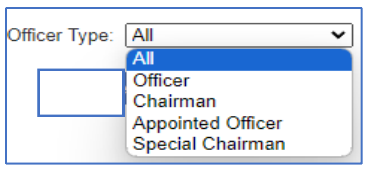
- Reports Sub-Menu Officer’s List
- Reports Sub-Menu Deposit List
- Reports Sub-Menu Valued Veteran’s
- Reports Sub-Menu Export

When to Use

Run reports of current year officers, appointed officers, chairmen. Labels of various sizes, for these groups, can also be produced through this menu item. Additionally, there is an option to create zip code counts. Click on Reports > Officers.



Choose All, Officers, Chairman or Appointed Officers from the Officer Type drop-down menu. Click Create Report.



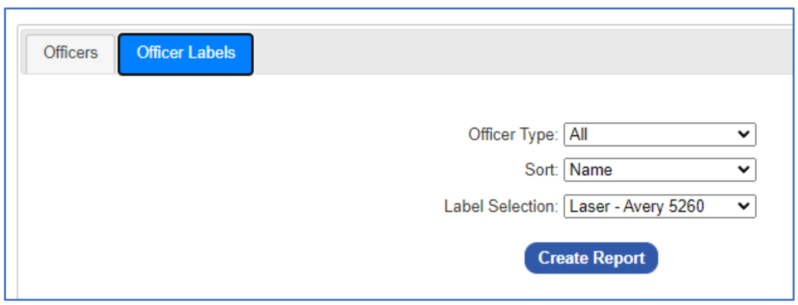
NOTE: If you have pop-up blockers enabled, you will get the following message.

To disable pop-up blockers, go to your browser settings. Pop-up blockers are found in the Privacy and Security section in Google Chrome, under Site Settings. Click the arrow next to Pop-ups and redirects. Click on the radio button in front of Sites can send pop ups and use redirects. Once disabled, your data will appear as a pdf which can be printed or downloaded and saved.

NOTE: You may want to enable Pop-up blockers once reporting is complete.

Create labels by clicking the ***Officer*** Labels tab. Click on the ***Officer Type*** drop-down menu to choose the group for which you wish to create labels. You may choose from *All, Officer, Chairman or Apported Officer* just as with the report feature.

Labels may be sorted by Name or Zip Code by clicking on the ***Sort*** drop down menu. Next, choose the type of labels you would like to print by clicking on the ***Label*** Selection drop down menu. You may choose from Laser – Avery 5260, One Up 4013. Badges – Avery 5395, or Zip Code Report. Click on ***the Create Report*** button.



The labels will be in a pdf format, ready to print. Click on the print icon found at the top, the same as with the report.

When to Use

To have the documentation to create the centralized dues deposit from Moose International.

- The ***Deposit List*** is the amount that is deposited from Moose International to the FRU's bank account as their part of the annual renewals of FRU membership dues.

- The ***Deposit List Details*** show the individual members renewal dues that are a part of each deposit.

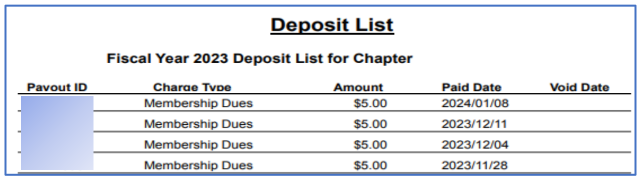
NOTE: The amount shown for each deposit on the Deposit List should exactly match the deposit on the FRU's bank statement.

To View and Print the Deposit List and the Deposit List Details:

Follow the steps below ***to View and Print*** the Deposit List and the Deposit List Details:

1. Float your cursor over the Reports menu item on the Menu Ribbon and then click on the ***Deposit List*** sub-menu.

2. If you want to print the Deposit List, click on ***Printer Friendly Version*** on the Deposit List screen, and print the first page of the Deposit List for the newest deposits.

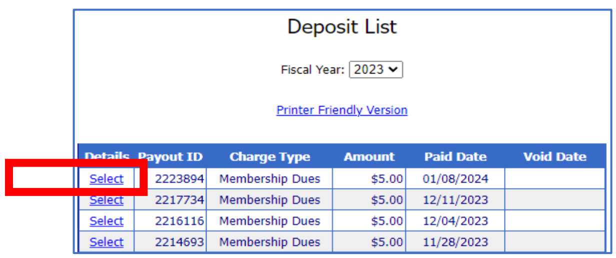


Deposit List

Fiscal Year 2023 Deposit List for Chapter

Payout ID	Charge Type	Amount	Paid Date	Void Date
	Membership Dues	$5.00	2024/01/08	
	Membership Dues	$5.00	2023/12/11	
	Membership Dues	$5.00	2023/12/04	
	Membership Dues	$5.00	2023/11/28	

3. Click on ***Select*** to see the deposit details, next to the corresponding deposit.



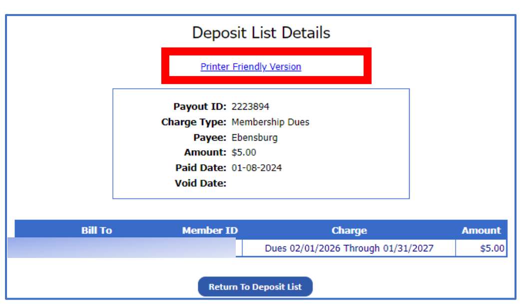
Deposit List

Fiscal Year: 2023

Printer Friendly Version

Details	Payout ID	Charge Type	Amount	Paid Date	Void Date
Select	2223894	Membership Dues	$5.00	01/08/2024	
Select	2217734	Membership Dues	$5.00	12/11/2023	
Select	2216116	Membership Dues	$5.00	12/04/2023	
Select	2214693	Membership Dues	$5.00	11/28/2023	

4. Click on ***Printer Friendly Version*** on the Deposit List Details screen if you need the Deposit List Details of the specific amount.



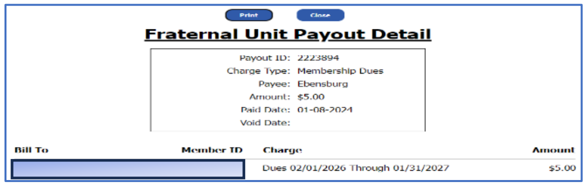
Deposit List Details

Printer Friendly Version

Payout ID: 2223894
Charge Type: Membership Dues
Payee: Ebensburg
Amount: $5.00
Paid Date: 01-08-2024
Void Date:

Bill To	Member ID	Charge	Amount
		Dues 02/01/2026 Through 01/31/2027	$5.00

Return To Deposit List

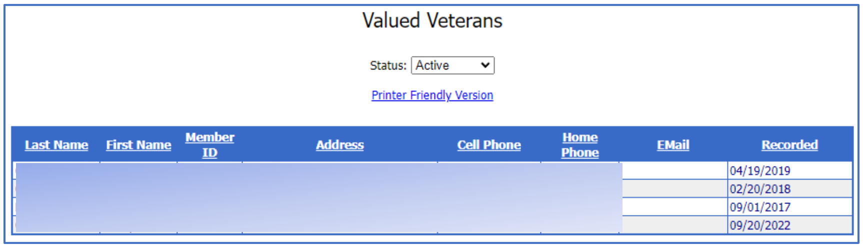


5. Click on ***Print*** to send the page to the printer or click on ***Close*** to leave the page and go back to the Deposit List Details Page.

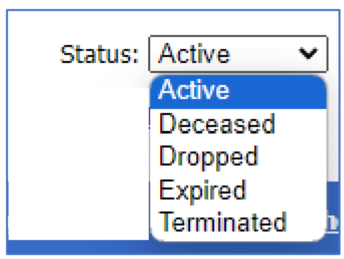
6. Click on ***Return to Deposit List*** at the bottom of the Deposit List Details Screen to return to the Deposit List screen.

When to Use

The ***Valued Veterans*** list contains a listing of all members who have self-identified as a Valued Veteran in their membership record.



1. You have the option to report on other statuses: Active, Deceased, Dropped, Expired or Terminated.

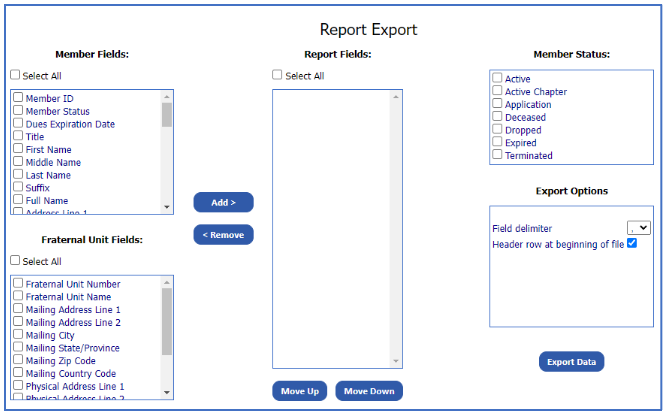


2. To create a report that will be printed in an easy-to-read format, click on ***Printer Friendly Version***.

3. Click on ***Print*** to send the page to the printer or click on ***Close*** to leave the page and go back to the Valued Veteran's page.

When to Use

The Export feature is used to run FRU reports. Click ***Reports > Export***.



1. Choose the information or data needed by clicking all appliable items found in ***Member Fields*** or click *Select All > Click Add*.

2. The order of the Report Fields can be changed by clicking the box to the left of the field and then clicking the ***Move Up*** or ***Move Down*** button.

3. Fields can also be removed by clicking the box next to the item and then ***Remove***.

4. Choose one or more Member Status to be reported by clicking on the box to the left of the status.

5. Leave ***Export Options*** as their default settings.

6. Click ***Export Data*** to download the report as an Excel Spreadsheet.

NOTE: The only way to print the report is to open the downloaded file in Excel. From there, the data can be sorted and manipulated any way you need it.

Objectives

At the end of this lesson, you will be able to:

- Enter an FRU member for an Award
- Review the Received Forms
- View the Forms 114 that were submitted and received by Moose International
- Enter and View Forms 166

Topics

The following topics are covered in this lesson:

- Forms Sub-Menu Awards
- Forms Sub-Menu Received Forms
- Forms Sub-Menu Form 114
- Forms Sub-Menu Form 166

When to Use

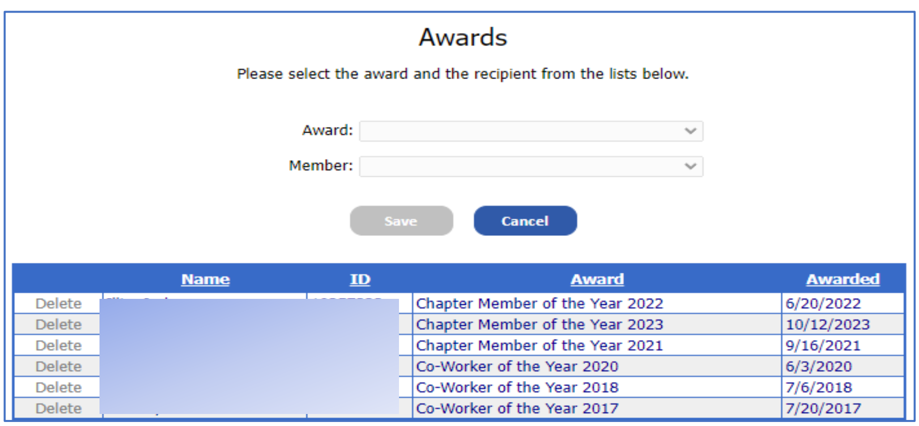
The options found under the Forms drop-down menu allow your unit to create and submit the required forms to Moose International.

Forms – Awards

This section of LCL Web is where Chapter Treasurers are to enter the recipient for their Chapter's Member of the Year. (*Formerly Co-Worker of the Year*)

Click the drop-down arrow in the Award box. Select the Award you want to complete.

Click the drop-down arrow in the Member box and select the member you want to receive the Award.


Awards

Please select the award and the recipient from the lists below.

Award:

Member:

Save Cancel

	Name	ID	Award	Awarded
Delete	[illegible]	[illegible]	Chapter Member of the Year 2022	6/20/2022
Delete	[illegible]	[illegible]	Chapter Member of the Year 2023	10/12/2023
Delete	[illegible]	[illegible]	Chapter Member of the Year 2021	9/16/2021
Delete	[illegible]	[illegible]	Co-Worker of the Year 2020	6/3/2020
Delete	[illegible]	[illegible]	Co-Worker of the Year 2018	7/6/2018
Delete	[illegible]	[illegible]	Co-Worker of the Year 2017	7/20/2017

NOTE: Chapter Member of the Year can only be entered from July 1st through October 31st.

When to Use

The options found under the Forms drop-down menu allow your unit to view when Chapter Audit Reports were received by WOTM Headquarters and if the Chapter attended Chapter Rally Days.

Received Forms

Fiscal Year: 2023

Form	Received Date
Audit Report - 1st Qtr (August)	08/04/2023
Audit Report - 2nd Qtr (November)	11/03/2023
Audit Report - 3rd Qtr (February)	
Audit Report - 4th Qtr (May)	
Chapter Rally Day Attendance	11/10/2023

When to Use

The options found under the Form 114 drop-down menu allow your unit to view when the Chapter's Form 114 was received by WOTM Headquarters and if the Chapter checks were accepted or not.

NOTE: If the Chapter checks were not accepted it most likely indicates that the amount sent in was not the minimum amount required.

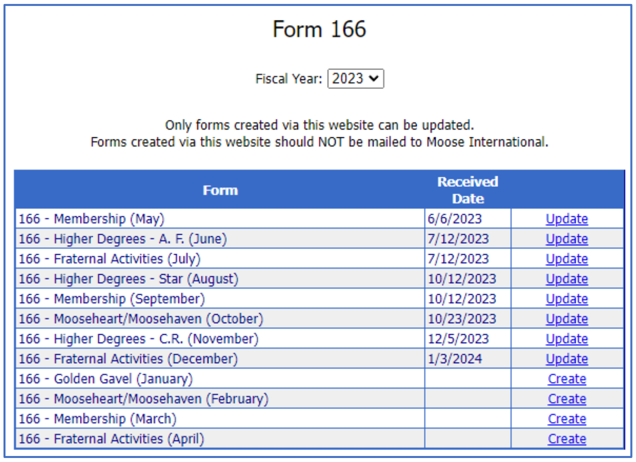
Form 114

Fiscal Year: 2023

Form	Received Date	Check(s) Accepted
114 - Membership (May)	6/13/2023	Yes
114 - Higher Degrees - A. F. (June)	7/19/2023	Yes
114 - Fraternal Activities (July)	7/19/2023	Yes
114 - Higher Degrees - Star (August)	8/28/2023	Yes
114 - Membership (September)	10/13/2023	Yes
114 - Mooseheart/Moosehaven (October)	10/31/2023	Yes
114 - Higher Degrees - C.R. (November)	12/12/2023	Yes
114 - Fraternal Activities (December)	1/10/2024	Yes
114 - Golden Gavel (January)		
114 - Mooseheart/Moosehaven (February)		
114 - Membership (March)		
114 - Fraternal Activities (April)		

When to Use

The options found under the Form 166 drop-down menu allow your unit to enter information from the paper Form 166.



Form 166

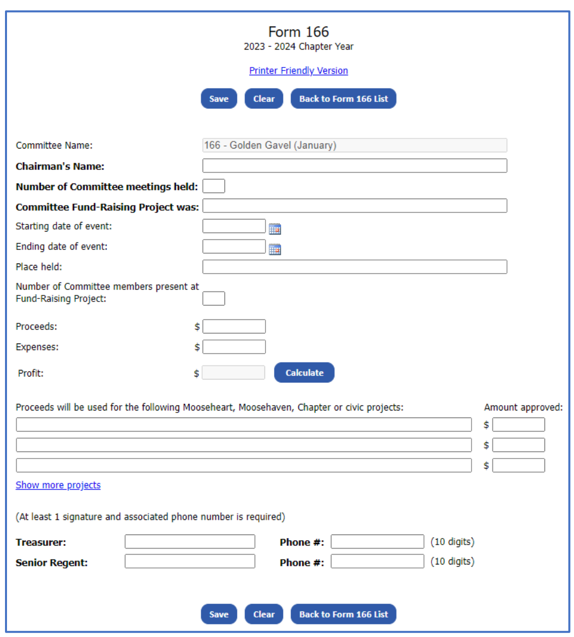
Fiscal Year: 2023

Only forms created via this website can be updated.
Forms created via this website should NOT be mailed to Moose International.

Form	Received Date	
166 - Membership (May)	6/6/2023	Update
166 - Higher Degrees - A. F. (June)	7/12/2023	Update
166 - Fraternal Activities (July)	7/12/2023	Update
166 - Higher Degrees - Star (August)	10/12/2023	Update
166 - Membership (September)	10/12/2023	Update
166 - Mooseheart/Moosehaven (October)	10/23/2023	Update
166 - Higher Degrees - C.R. (November)	12/5/2023	Update
166 - Fraternal Activities (December)	1/3/2024	Update
166 - Golden Gavel (January)		Create
166 - Mooseheart/Moosehaven (February)		Create
166 - Membership (March)		Create
166 - Fraternal Activities (April)		Create

Follow the steps below create a Form 166:

1. Click on Create beside the month to be reported.



Form 166
2023 - 2024 Chapter Year

Printer Friendly Version

Save Clear Back to Form 166 List

Committee Name: 166 - Golden Gavel (January)
Chairman's Name:
Number of Committee meetings held:
Committee Fund-Raising Project was:
Starting date of event:
Ending date of event:
Place held:
Number of Committee members present at Fund-Raising Project:
Proceeds: $
Expenses: $
Profit: $ Calculate

Proceeds will be used for the following Mooseheart, Moosehaven, Chapter or civic projects: Amount approved:
$
$
$

Show more projects

(At least 1 signature and associated phone number is required)

Treasurer: Phone #: (10 digits)
Senior Regent: Phone #: (10 digits)

Save Clear Back to Form 166 List

2. Enter the information directly from the paper Form 166.

   Committee Name: Prefilled for you.

   Chairman's Name: Enter the Chairman for the Committee for the month you are reporting.

   Number of Committee Meetings Held: Enter how many meetings the committee met to discuss their fundraiser.

   Committee Fund-Raising Project was: Enter what the committee fundraiser was.

   Starting date of the Event: Enter the beginning date of the fundraiser.

   Ending date of the Event: Enter the ending date of the fundraiser.

   Place Held: Enter where the fundraiser was held. *i.e., Moose Home*

   Number of Committee Members Present at Fund-raising Project: Enter how many of the members that helped with the Fundraising Project.

   Proceeds: Enter the total amount collected from the Fundraising Project.

   Expenses: Enter the total amount of expenses for the Fundraising Project.

   Profit: This will be what the Chapter made from the Fundraising Project. Click on Calculate for the system to take the expenses from the Proceeds to give you the Net Profit of the fundraiser.

Proceeds will be used for the following Mooseheart, Moosehaven or Chapter civic projects: Enter where the money was proposed to go and enter the amount approved. i.e., Scholarship and Maintenance – Amount $20 *(minimal amount);* Name the Project for that particular month – Amount $30 *(minimal amount)*. Enter where the remainder of the funds will be going. i.e., General Fund, community project, etc. and then enter the amount left over.

Enter the Treasurer and Senior Regent's Name and Phone Numbers.

Click ***Save*** to submit the form.

Click ***Clear*** to remove all data from the form and to start over.

Click ***Back to Form 166*** List to return to the previous screen. Any information entered will be lost.

NOTE: All entries should be taken from the paper FORM 166 which the Chairman completed, and all amounts should be what the Chairman's proposal stated for where all funds were to be applied to.