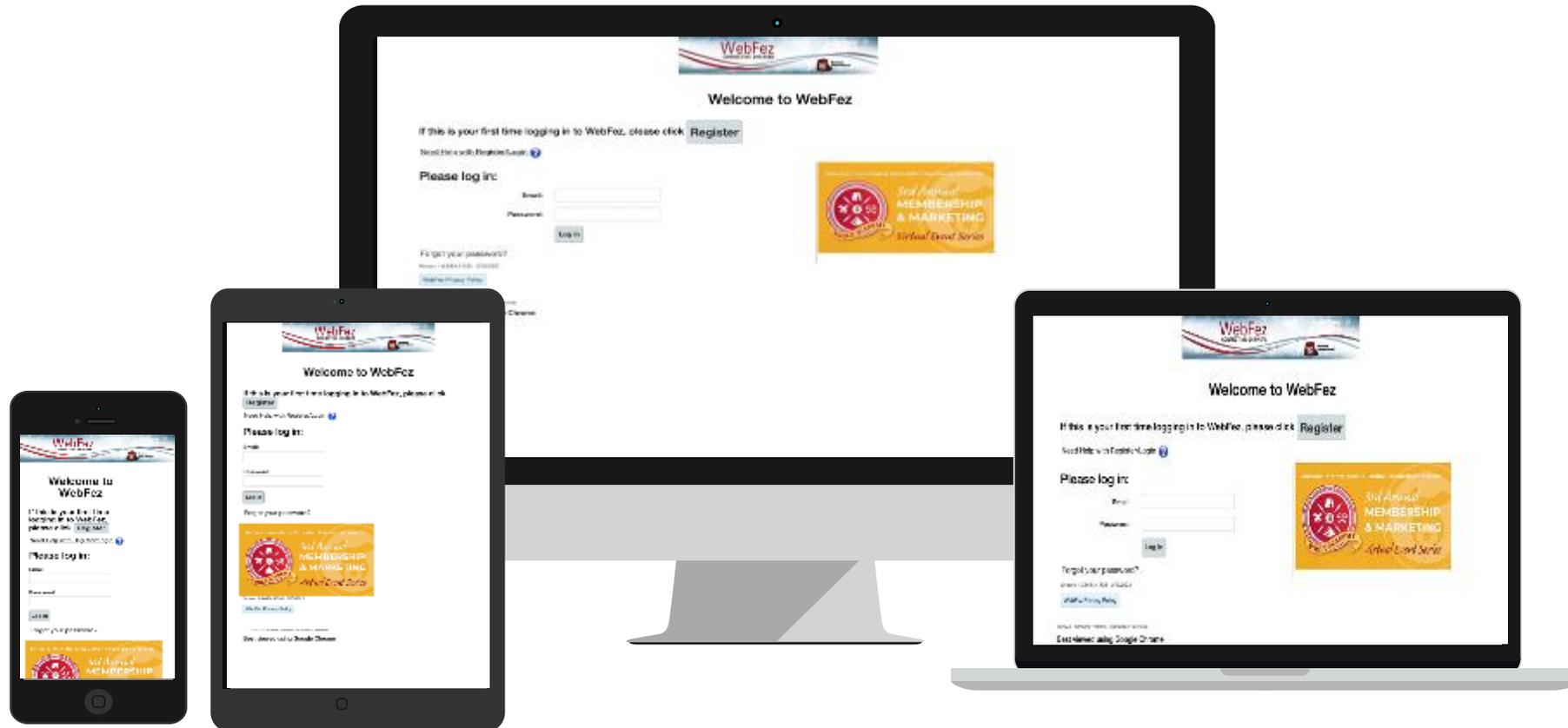


FRATERNAL INFORMATION SERVICES

Shriners International Headquarters

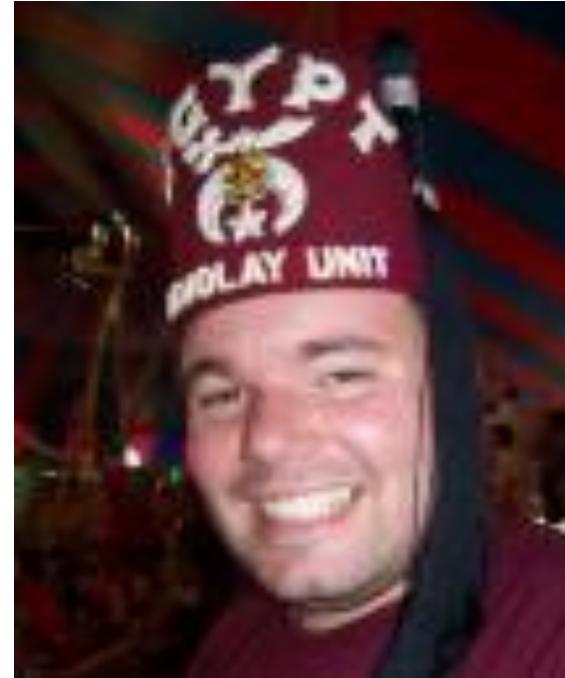


INTRODUCTIONS – FRATERNAL INFORMATION SERVICES



Alicia Lindsay

FIS Technical / Operations Manager



Jody Meguiar

FIS Applications & Tech Support Manager

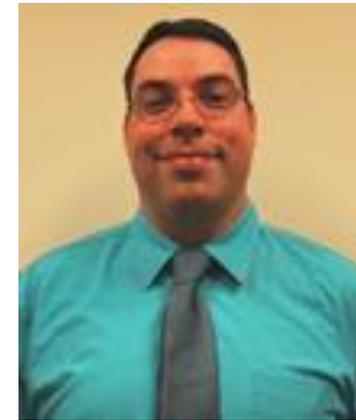
INTRODUCTIONS – FRATERNAL INFORMATION SERVICES



Steve Gainey
Chief Fraternal IS Officer



Randy Baron
Sr. Director, Fraternal IS



JP Jackson
HQ Web Developer Analyst



Anil Atav



Denny Jacob
Web Developers / Programmers



Brian Robson

WHAT IS WEBFEZ?

WebFez is Shriners International's web-based management system which provides access and administration of the Shrine's centralized membership database, SI and Temple operations from virtually any device with internet access.

WEBFEZ SECURITY & USER CLAIMS

User claims can be granted or removed by the Temple Recorder (or anyone with TempleAdmin user claims)

- ***Based on Role/Function***

- TempleAdmin* - Automatically assigned to the Temple Recorder
 - *Highest level of access; can assign and remove user claims as needed*
- TempleStaff
 - *Same as TempleAdmin, without access to assign or remove user claims*
- TempleDivan*
 - *View-only access to Noble records, dues charges/payments, awards, WebFez reports*
- TempleGuest
 - *Same as TempleDivan, without access to reports or membership activity*
- TempleMembership*
 - *Can edit basic Noble contact information, and view charges/payments*
- Unit/ClubAdmin*
 - *View/edit rights to administer membership, officers and roles for specific Units/Clubs*

WEBFEZ SECURITY & USER CLAIMS

User claims can be granted or removed by the Temple Recorder (or anyone with TempleAdmin user claims)

- ***Based on Administrative Function***
 - MDS & MDS_Temple*
 - *Membership Development System (MDS) prospect management*
 - QR_Full or QR_Basic
 - *Scanning for WebFez events (full includes snapshot view of amount due)*
 - TempleEmail
 - *Send messages through the “Communications” tab*
 - CharityActivities
 - *Charitable activities & approval process (requires training module & validation)*

User claims may be granted to ANY WebFez user, once they have registered and activated their WebFez account

** Certain specific roles will have auto-generated user claims*

** Certain specific administrative claims also require Temple claims*

WEBFEZ SECURITY & USER CLAIMS

User claims can be granted or removed by the Temple Recorder (or anyone with TempleAdmin user claims)

Test Test

Shriners International Headquarters

ShrineID: 1216360 Dues Total: \$0.00 No payments received.

Member Number: [3113316](#) Arrears Total: \$0.00

Status: [Creation](#) Dues Class: Regular

Navigation tabs: Quick View, General Info, Temple Info, Dues Info, Make Payment, Awards, Fundraising, Library, Audit Trail, **User Claims**

Sub-tabs: Claims, Color Theme, Password

Noble Claims Administration

+ Add New Claim

Claim Type	Claim Target
------------	--------------

Add Claim dialog box

Claim Type: **Select a Claim Type**

Buttons: [Checkmark], Cancel

Add Claim dialog box

Claim Type: Select a Claim Type

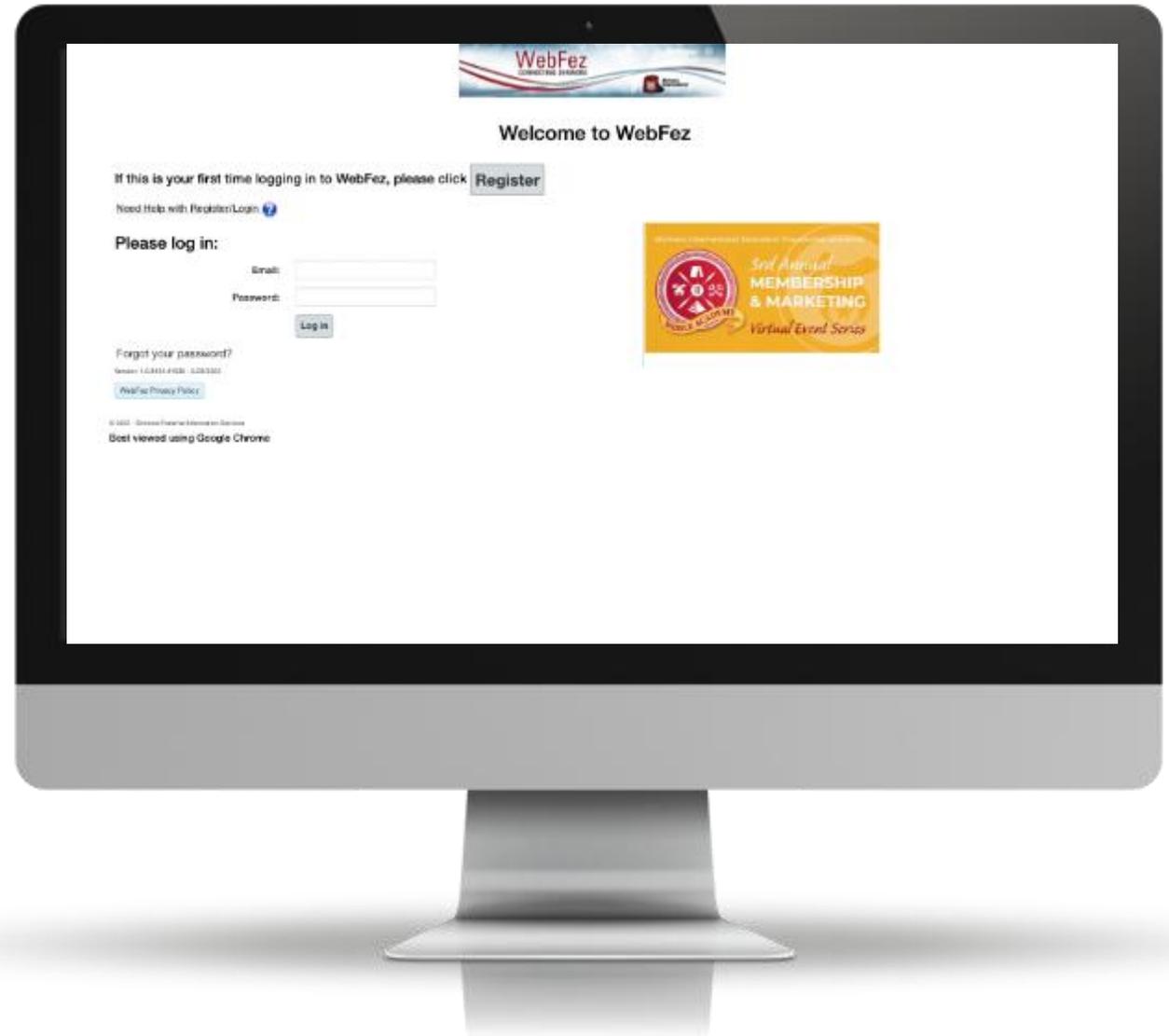
Buttons: **Update**, Cancel



WHERE DO I REGISTER OR LOGIN TO WEBFEZ

DESKTOP/LAPTOP LAYOUT

- To register or login, navigate your browser to: **ShrinersInternational.org** or **webfez.shrinenet.org**
- As members of the Temple Divan, elevated access has already been enabled for you – but **YOU MUST REGISTER** to log in.



WHAT CAN **TEMPLE DIVAN** MEMBERS ACCESS IN WEBFEZ?

Based on TempleDivan user claims, available once they have registered their account and logged in

- **View-Only** access
 - Member demographic information
 - *i.e.: addresses, phone numbers, email addresses, etc.*
 - Member dues charges and payments
 - Membership status
 - Temple information & history record
 - Temple-specific member awards
 - Various and comprehensive reports
 - *i.e.: Noble contacts, birthdays, dues analysis, member balances, Legacy members, necrology report, years of service, etc.*
 - Documents in the WebFez Library

WHO CAN HAVE ACCESS TO WEBFEZ?

Solely at the discretion of the Recorder & Temple Board of Directors

- **Anyone** may be granted access to WebFez
 - Courtesy profiles may be added for non-Nobles for a variety of reasons
 - Controlled by user claims
 - May be administrative support or simply to receive communications
 - Should have a unique email address to use as a login username
- *What are my options for removing someone's access to WebFez?*
 - 1) *Removing their user claims (they can no longer fulfill duties)*
 - 2) *Disabling their WebFez record (they can no longer log in)*

WEBFEZ SECURITY & USER CLAIMS

User claims be granted or removed by the Temple Recorder (or anyone with TempleAdmin user claims)

- **TO DO** (Action Item):
Regularly review who has advanced user claims at your temple
 - 1) “Security” tab on WebFez admin screen
 - 2) *User Claims* report

BeAShrinerNow.com & PETITION PROCESS

ePetitions (electronic source)



Paper Petitions (manual source)



Prospect Temple:
 *

Prospect Status:
 *

Prospect First Name:
 *

Prospect Middle Name:

Prospect Last Name:
 *

Prospect Suffix:

DOB:

Prospect Email Address:
 *

Confirm Email Address:
 *

At least one phone number is required.*

Prospect Home Phone:

Prospect Cell Phone:

Spouse Name:

Spouse Email:

Address 1:
 *

Address 2:

City:
 *

Postal Code:

Country:
 ▾ *

State:
 ▾

Top Line Signer:
 🔍

Second Line Signer:
 🔍

Lodge Name:
 *

Lodge State/Province:
 *

Occupation Category:
 ▾

Personal Interests:
 Leisure Activities & Recreation

Musical, Performing & Parading

Occupational Interests & Professional Development

Occupation:
 ▾

Social Gatherings

Sports & Adventure

Volunteer Service

Submit

WEBFEZ MDS DASHBOARD



Definitions:

Prospects = BASN Inquiries that identified as “Not a Mason” or an EA/FC

Master Masons = BASN Inquiries that identified as a Master Mason, but did not complete the ePetition

ePetitions = BASN inquiries that identified as a Master Mason, and completed the ePetition

White search bar allows you to search for a prospect (or a current Noble) by name, email, prospect ID, etc.

The screenshot shows the 'PROSPECT NAME' form in the WebFez MDS system. The form includes fields for personal information (First Name, Middle Name, Last Name, Last Name2, Suffix, DOB, Age, Occupation), contact information (Masonic Lodge, Lodge Location, Phone Number, Email Address, City, State, Postal Code), and status information (Temple, Referral, Mentor, Status). There are also checkboxes for 'Freemason' and 'Legacy Freemason', and fields for 'Petition Top Line Signer' and 'Petition Second Line Signer'. At the bottom, there are buttons for 'Print Petition...', 'Send Email...', 'Add New Note...', and 'Save Changes'. Red annotations with arrows point to the search bar, the Temple dropdown, the Referral field, the Mentor dropdown, the Status dropdown, the Signer fields, the 'Send the Prospect an Email' button, the 'Add a note to the record' button, and the 'Save Changes' button. A large red arrow points to the 'Save Changes' button with the text 'Finalize changes'.

Much of the information on this screen is editable. Finalize all changes by clicking the red button below. ↓



- Statuses include "Shrine Petition Received" | "Validation in Process" | "Petition Complete – Ready for Ballot" | "Candidate"
- Once set as "Candidate" a WebFez candidate record will generate



PETITION FOR INITIATION AND MEMBERSHIP

Egypt Shriners

TO THE POTENTATE, OFFICERS AND NOBLES OF EGYPT SHRINERS, SITUATED IN THE CITY OF TAMPA, FLORIDA:

I, the undersigned, hereby declare that I am a Master Mason in good standing in Hillsborough Lodge 25 USA, located at , which meets the recognition standards of the Conference of Grand Masters in North America, Interamerican Masonic Confederation or the World Conference of Grand Lodges, or have otherwise met the prerequisites for membership under the bylaws of Shriners International. I hereby make application to become a Noble of the Order and a member of your temple. If granted membership, I promise to conform to the Articles of Incorporation and Bylaws of Shriners International and the Bylaws and Ceremonies of your temple.

Have you previously applied for admission to any temple of the Order? No If yes, what temple? When?

PRINT FULL NAME: Doctor Teeth Date of Birth 01/01/1975 Profession/Occupation Retired?

Residence: 1234 Main Street Tampa, FL 33616 UNITED STATES Mail Address (if different): Home Phone: 9876543210 Cell Phone: Business Phone: Email: drteeth@electricmayhem.com

Spouse's Name: Email:

Petitioner's Signature: Dr Teeth Date: 2/27/2024 12:00:00 AM

RECOMMENDED BY:

NOBLE: _____ SHRINE ID: _____

NOBLE: _____ SHRINE ID: _____

Official Use Only: Petition Fee \$ _____ Method of Payment _____ Fez Size: _____



ePetitions are *LEGAL* petitions

No additional paper petition is needed for a legitimate recruitment process

Data may be edited/updated by way of the MDS prospect profile

Click "Save Changes" to finalize

Once status is changed to "Candidate," MDS profile locks and further changes are to be made through WebFez

Click "Print Petition" to access petition form (can be printed for documentation)

All included elements as required by Bylaws

WHAT'S THE PROCESS FOR CREATING NEW NOBLES?

One-off, by clicking his status

Joseph Walker

ShrineID: 1270511 Dues Total: \$0.00 No payments received.
Member Number: 32258 Arrears Total: \$0.00
Status: Candidate Dues Class: Regular Member

Add a New Status for Joseph Walker
Dues Class: Regular Member
Current Status: Candidate
Current Balance: \$0.00

Effective Date

3/27/2024 10:10 AM

New Status

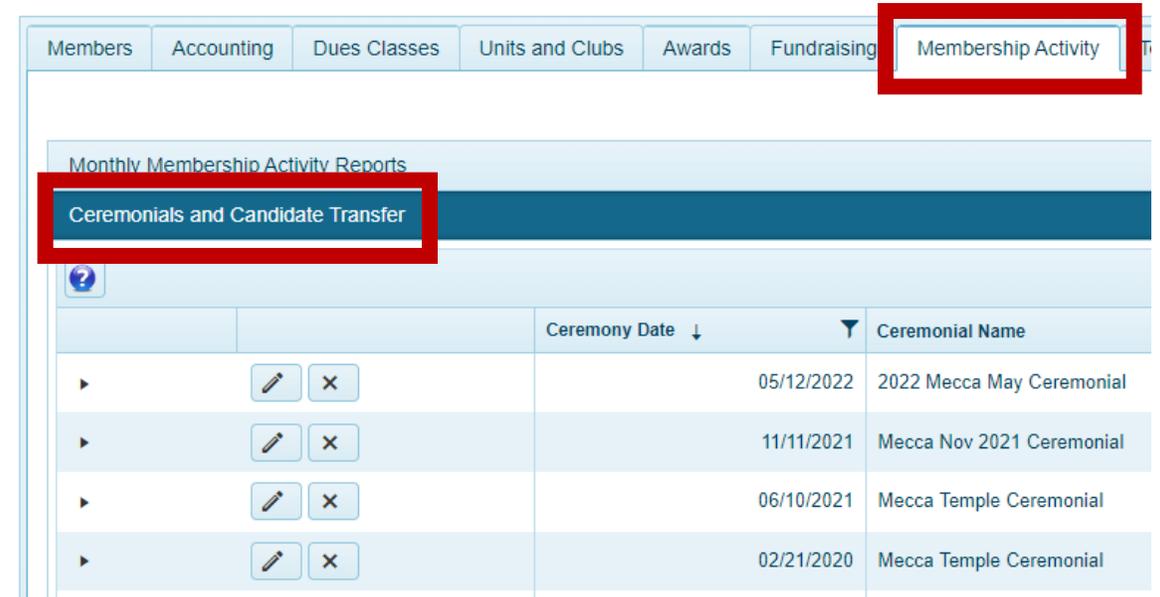
Select a Status

DuesClassID

Regular Member

Cancel

Via the Candidate Transfer Process



		Ceremony Date ↓	Ceremonial Name
▶	 	05/12/2022	2022 Mecca May Ceremonial
▶	 	11/11/2021	Mecca Nov 2021 Ceremonial
▶	 	06/10/2021	Mecca Temple Ceremonial
▶	 	02/21/2020	Mecca Temple Ceremonial

*Bulk update multiple candidates at once
from "Candidate" to "Creation"*

HOW DO I ADD A NEW RECORD IN WEBFEZ?

WebFez CONNECTING SHRINERS Training Environment

Hello Alicia 0

Home Contact SI Member Center MDS MarCom Videos Training WebFezHQ My Record Temple Financials

IMPORTANT INFORMATION Support

This is the TRAINING Environment. Please click [Here](#) for the PRODUCTION Environment.

Egypt Shriners

[WebFez Best Practices Guide](#)

Temple Number:	142	Current Regulars:	1,332
Temple Sequence:	71	Current Associates:	100
Pronunciation:	(e'jipt)	Total Members:	1,432

Members Accounting Dues Classes Units and Clubs Awards

Reports QR Scan Event

Temple Members Advanced Search

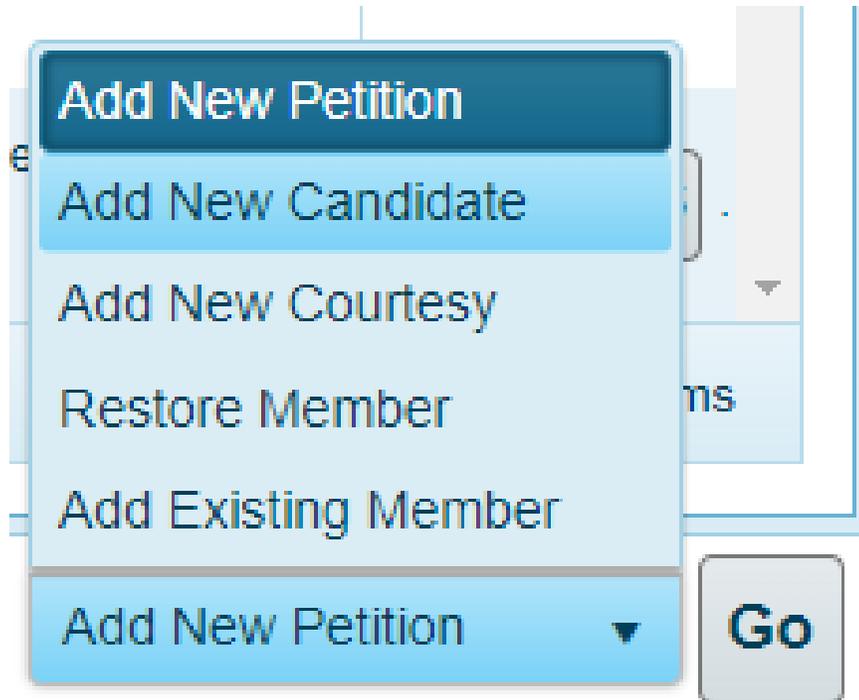
1 - 13 of 13 items

Back to List of Temples

Add New Petition Go Create New Member Add Existing Member



HOW DO I ADD A NEW RECORD IN WEBFEZ?



Add New Petition:

For adding new PAPER Petitions that are currently being investigated for membership

Add New Candidate:

For adding new PAPER Petitions which have cleared the ballot and are no longer a “prospect”

Add New Courtesy:

For adding a new Courtesy record (can be a temple staff member, a Divan lady, widow or anyone else)

Restore Member:

For adding a member who DOES NOT HAVE a current profile in WebFez

Add Existing Member:

For adding a member who currently exists in WebFez

BeAShrinerNow.com & PETITION PROCESS

ePetitions (electronic source)



Paper Petitions (manual source)



WHAT IS THE MY FEZCARD VIEWER APP?

My FezCard Viewer

- A smartphone-compatible app that presents a digital membership card and QR code
- Available as a free download from the Google Play Store / Apple iStore
- Displays the current, paid dues year for the Noble
- One-time registration, using Last Name, Shrine ID and Temple
 - Refreshes every time the app is accessed
- Compatible with scanning functionality for temple events, etc.

Using *My FezCard Viewer* on iPhones (iOS 18.1.1+)

In August 2024, an update was pushed to iPhone users to install the new iOS 18.0, which updated the operating system and apps installed on the iPhone. Many Nobles experienced issues where the *My FezCard Viewer* app would not load properly; the phone often displayed a “blank” or “white” screen instead of the usual digital membership card.

With the release of iOS 18.0.1, the issue was resolved – with a specific caveat. Nobles were instructed to rotate their phones to “landscape orientation” for the digital membership card to load. ***And, with the release of iOS 18.1.1 and 18.2, an additional point was made, that the users should rotate their phones such that the line on the “blank” screen is at the TOP of the screen.*** Doing so will force-load the digital card.



If you are an iPhone user, are using the latest iOS version and are still experiencing issues, please follow the instructions below.

1) If you encounter a white, or “blank” screen, rotate the phone to position the line at the top of the screen.

If this does not display the digital card”

- 1) Uninstall *My FezCard Viewer* from your phone and reinstall it through the Apple Store (to ensure that you have the latest/most up-to-date version available).
- 2) Register, using your Shrine ID (not your Member Number), your Last Name and your Temple of *primary* membership (not Associate).
- 3) Click “Register.”
- 4) Rotate your phone, per above.

HOW CAN MY MEMBERS PROVE GOOD STANDING?

Hard Card

ROBERT J. MEGUIAR
EGYPT SHRINERS
MEMBER #: 29061
SHRINE ID #: 954929

Shriners International **2025**

Your membership in Shriners International helps support Shriners Hospitals for Children®, a health care system providing specialized medical care to children, regardless of the families' ability to pay.

To refer a patient, please call:
800-237-5055 in the U.S. or
800-361-7256 in Canada
shrinershospitalsforchildren.org

Jim Cain
Imperial Recorder
beashrinernow.com | shrinersvillage.com | webfez.shrinenet.org

Signature

Temporary Card or Screenshot

ROBERT J. MEGUIAR
3952 W ELROD AVENUE
TAMPA FL 33616

ROBERT J. MEGUIAR
EGYPT SHRINERS
MEMBER #: 29061
SHRINE ID #: 954929

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Jim Cain
Imperial Recorder
beashrinernow.com | shrinersvillage.com | webfez.shrinenet.org

Signature

Dear Noble MEGUIAR

Above, please find a temporary copy of your Egypt Shriners membership card. Your permanent card has been requested, and should arrive in the next few weeks. As you should be prepared to show your membership card each time you attend a Shrine function, please cut out the temporary card, sign it and carry it with you until the physical card arrives.

Another option available to you is to visit the Google Play Store or the Apple App Store on your phone or tablet. You may also use the QR code to verify your good standing.

EGYPT SHRINERS
ROBERT J. MEGUIAR
2025

SHRINE ID: 954929

To refer a patient, please call:
US: 800-237-5055
Canada: 800-361-7256
shrinershospitalsforchildren.org

SHRINERS INTERNATIONAL | shrinersinternational.org | beashrinernow.com

Digital Card (My FezCard Viewer)

*Pings WebFez record every time

CARD QR CODE

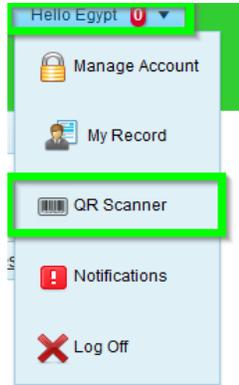
EGYPT SHRINERS
ROBERT J. MEGUIAR
2025

Robert J. Meguiar
Shrine ID: 954929
Home Temple: Egypt Shriners
Current Dues Year: 2025

Associate Temple: Al Rai'e Saleh Shriners

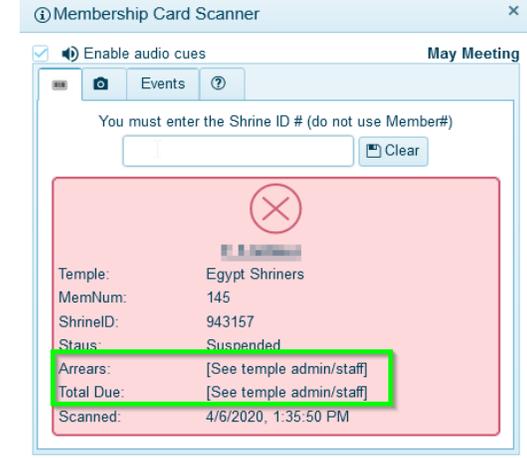
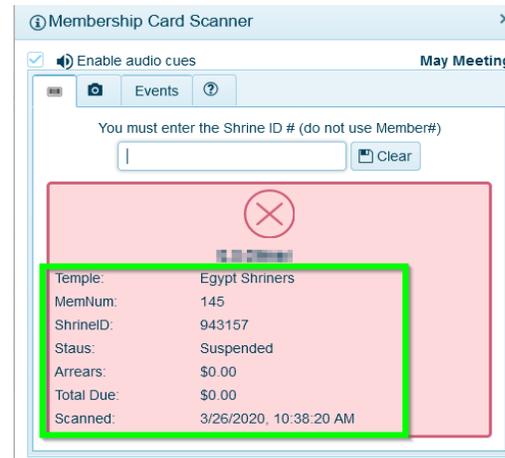
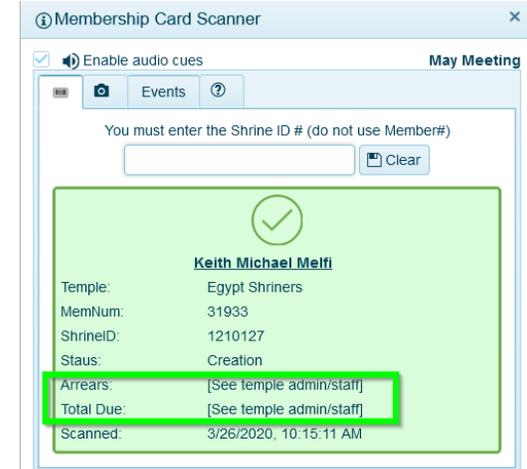
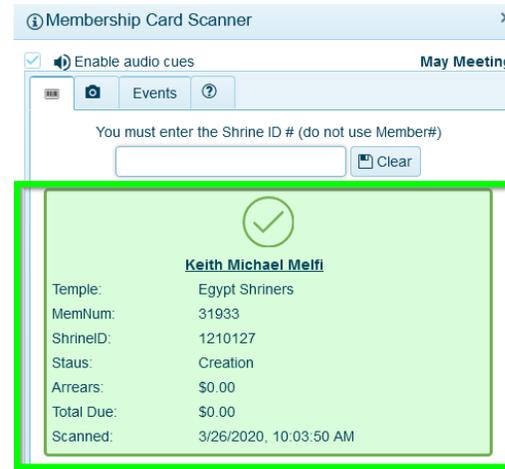
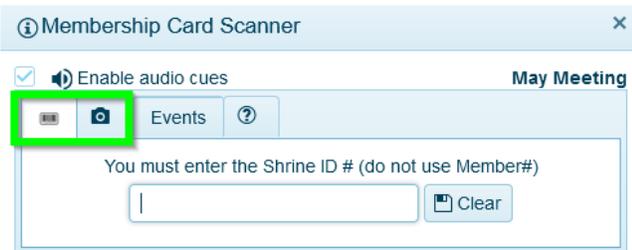
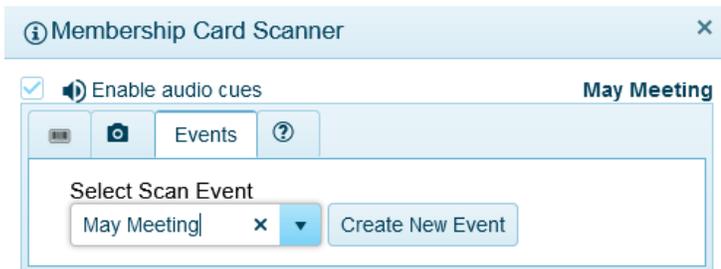
To refer a patient, please call:
US: 800-237-5055
Canada: 800-361-7256

HOW DO I USE THE WEBFEZ QR SCANNING FEATURE?



QR_Full Security Claim (view)

QR_Basic Security Claim (view)



HOW DO I USE THE WEBFEZ QR SCANNING FEATURE?

The screenshot displays the WebFez QR Scanning interface. The top navigation bar includes various menu items, with 'QR Scan Events' highlighted in red. Below this, a table lists events, with '2023 May Business Meeting' highlighted in red. The 'Attendees' section shows a table with columns for Last Name, First Name, Temple, Shrin..., Mem..., Current (At Scan), and FezCard App Scan. The 'Current (At Scan)' and 'FezCard App Scan' columns are highlighted in red.

Event Name	Event Start Date	Event End Date	Closed
2023 May Business Meeting	05/18/2023	05/18/2023	<input checked="" type="checkbox"/>

Draw Index	ShrineID	Last Name	First Name	Temple	Discarded	FezCard App Scan	Prize
No items to display							

Last Name	First Name	Temple	Shrin...	Mem...	Current (At Scan)	FezCard App Scan
Adams	Ryan	Mecca Shriners	1310771	292390	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Benefits of utilizing the QR Scanning feature are many, and include:

- Documenting attendance, participation*
- Assigning points to individual Nobles for temple-based awards*
- Conducting raffles*
- Confirming “good standing” at events*
- Promoting timely dues payments for participation*
- Establishing a quorum for stated, special meetings*

WHAT IS THE WEBFEZ LIBRARY?

- Online file repository and management system, supported by WebFez
- Communications and notifications may be sent directly from WebFez, notifying users of newly posted documents and resources
- Documents/resources are separated by fraternal Department sponsor
- Available to all Nobles, with files and folders individually assigned by specific claims for accessibility and action
 - *(i.e. Specific officers, all Divan Members, Nobles, etc. may read, download, print, as assigned)*

WHAT IS THE WEBFEZ LIBRARY?

My Library EVP Ofc - Shriners Intl. Temple Accounting FIS Membership

Important Documents

Favorite	Preview	Folder Name	File Name	Size	Uploaded	File
No results found.						

◀ ◁ 0 ▷ ▶

Search Whats New Favorites Recently Viewed All Files

Max Results:

Favorite	Preview	Folder Name	File Name	Size	Uploaded	File Actions
☆	 pdf	<u>Written Resources</u>	SI-HQ-PDF-2022-Membership-Report-05-2023.PDF	683 KB	12/20/2023 3:24 PM Annette Montanez	File Actions... ▼
★	 pdf	<u>Publications</u>	2023 Directory.pdf	8 MB	4/6/2023 2:37 PM Jessica Cureton	File Actions... ▼
☆	 pdf	<u>Publications</u>	2010 ShrineRitual.pdf	180 KB	3/16/2022 12:47 PM Anita Coant	File Actions... ▼

◀ ◁ 1 ▷ ▶

UNIT & CLUB ADMINISTRATION

Shriners International Headquarters

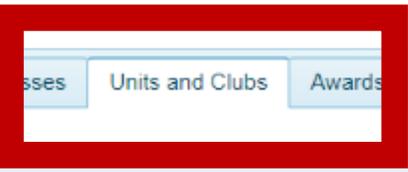
[WebFez Best Practices Guide](#)

Temple Number: 999 Current Regulars: 0
Temple Sequence: 999 Current Associates: 0
Pronunciation: Total Members: 0

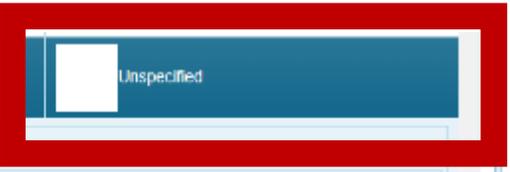
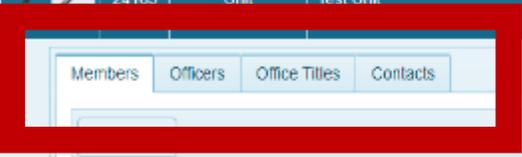
Regarding Unit & Club Administration:

- *Member lists and officers should be regularly maintained*
- *Inactive Units or Clubs should be reported to FIS for deactivation*
- *Categories of purpose/interest should be identified*

Members	Accounting	Dues Classes	Units and Clubs	Awards	Fundraising	Membership Activity	Temple	Reports	Security	Notification	Communications	Library	Support	CharityActivities
													Display Inactives	Add New
	Type	Name	All Mbrs	Active Mbrs	Inac...	Unit Club Legal Name	Category Name							
	24165	Unit	Test Unit	0	0	<input type="checkbox"/>	Unspecified							



	24165	Unit	Test Unit	0	0	<input type="checkbox"/>	Unspecified								
															Display Inactives
Inactive	Member Number	First Name	Last Name	Temple	Status Title	Arrears	Total Due								
<input type="checkbox"/>	0														
															No items to display



The image displays three overlapping screenshots of the 'Unit and Clubs Editor' form, illustrating the steps to create a unit:

- Step 1:** The 'Category' dropdown menu is highlighted with a red box. The form fields include: Type (Unit), Title (Test Unit), Category (Unspecified), Activity (Unspecified), Description (WebFez Add Unit test), Inactive (checkbox), and Include Temple Members Only (checkbox).
- Step 2:** The 'Category' dropdown menu is open, showing options: Unspecified, Geographic Area, and Leisure Activities & Recreation. A hand cursor points to 'Geographic Area'. The form fields are the same as in Step 1.
- Step 3:** The 'Activity' dropdown menu is highlighted with a red box, showing options: Unspecified, Unspecified, Clowns, Dancing, Foot Patrol, Go-Carts, and Instrumentalists. The 'Update' button at the bottom right is also highlighted with a red box. The form fields are the same as in Step 1.

**If a specific organization is geography-based, select "Geographic Area" as its Category.
No "activity" is required.*

MEMBERSHIP EXPERIENCE = RETENTION

Member Experience

Member Interests

Prospect Interests

Purpose of Club & Unit Groups



Sports & Adventure



Volunteer Services



Musical Performing & Parading



Professional Development



Leisure Activities & Recreation



Social Gatherings

MEMBERSHIP EXPERIENCE = RETENTION

Log-in to Shriners International

If you are trying to access member-restricted content and/or files, you will be required to login.

Please **Login** now using your **WebFez** username and password. Click on **Account Help** below, for login instruction and assistance.

USERNAME

PASSWORD

[SIGN IN >](#)



[Who We Are](#)

[Join](#)

[Chapters](#)

[News & Events](#)

[Member Center](#)

[Education](#)



[PROFILE](#)



[EN](#)

[US](#)

HELLO
Robert

[REFER A MAN >](#)

[CONTACT MY CHAPTER >](#)

[Update My Profile >](#)

[Change My Password >](#)

[View Member Card >](#)

[Log Out >](#)

YOUR INFORMATION

YOUR SHRINE CENTER

[Egypt Shriners >](#)

5017 E. Washington Street
Tampa, FL 33619

1813-884-8381

DUE

\$0.00

YOUR SHRINE CENTER

[Al Rai'e Saleh Shriners >](#)

1707 Ave. Ponce de Leon
San Juan, PR 00910

310-200-2268

DUE

\$0.00

YOUR TOOLS

WebFez >

Full membership information, additional settings, and chapter administration access.

Legacy Tool >

Register yourself and your family member into our Legacy Tool and receive a certificate.



MEMBERSHIP EXPERIENCE = RETENTION

MEMBER TOPICS OF INTEREST
Member Topics of Interest Select all that apply

<input checked="" type="checkbox"/> Has Interest Recreation	<input checked="" type="checkbox"/> Has Interest Social
<input type="checkbox"/> Has Interest Performing	<input type="checkbox"/> Has Interest Sports
<input checked="" type="checkbox"/> Has Interest Prof Dev	<input checked="" type="checkbox"/> Has Interest Volunteer

[UPDATE MY PROFILE >](#)

Education  PROFILE  EN  SEARCH

[Update My Profile >](#)

[Change My Password >](#)

[View Member Card >](#)

[Log Out >](#)

In This Section

MEMBER CENTER

- Accounting and Governance > +
- Education > +
- Marketing & Communications > +
- Member News and Memos >
- Membership > +
- Refer a Man >
- Sporting Events > +

MEMBERSHIP EXPERIENCE = RETENTION

Robert J. "Jody" Meguiar

Egypt Shriners

ShrineID: 954929 Dues Total: \$0.00 Last Payment of \$5.00 Posted on 12/29/2023
Member Number: [29061](#) Arrears Total: \$0.00 Unapplied Amount: \$0.00
Status: [Creation](#) Dues Class: Total Life PCM/PCLM/LM



Quick View | General Info | Temple Info | Dues Info | Make Payment | Awards | Fundraising | Library | Audit Trail | User Claims

Contact Temple

Date of Birth: 7/30/1978 (Age: 46) Spouse: Kimberly
Birthplace: TAMPA, FL Spouse's Prefix:
Occupation: Computer Support Specialists Is Legal Spouse
 Retired Is a Permanent Contributing Member (PCM)
 Non-Solicitation Is a Per Capita Life Member (PCLM)
 Suppress Dues Notice

[View Shrine Card](#)

Interests

- Recreation
- Performing
- Professional Dev
- Social
- Sports
- Volunteer

Notes:

Top Line Signer for 2015, note per the Recorder waive his Temple dues for 2017. akp 12/22/2016 - paid dues to 2020.../sdf 9/19/18 belongs to Scottish and York Rite, Executive Officer for Florida DeMolay, State Chairman - Masonic Youth Activities...lcg Completed 5 for 5 and granted Temple life membership per Potentate TC

[Recommendations](#)

[Edit General Info](#) [Dues Notice](#) [Print](#) [Back to Temple](#) [Back to List of Temples](#) Go to Shrine ID: Go to Member Number:

Has Recreation Interest

Has Performing Interest

Has Professional Development Interest

Has Social Interest

Has Sports Interest

Has Volunteer Interest



MEMBERSHIP EXPERIENCE = RETENTION

U/C Interest Recommendations

Include All Temples *

* to help generate ideas for starting new units and clubs at this temple

Unit/Club Title ↑	Interest Title	Activity Title	Temple	President Name
C-Cabiri	Volunteer Service	Cabiri	Egypt Shriners	Ronald Hoedebeck
C-Humidor Club	Social Gatherings	Cigars	Egypt Shriners	Mark Bose
C-Y.E.S. Shrine Club	Social Gatherings	Age-based Groups	Egypt Shriners	Jeffrey Zelesnikar
M-Membership	Volunteer Service	Membership / SMART Team	Egypt Shriners	
U-DeMolay Unit	Volunteer Service	DeMolay	Egypt Shriners	John Bast
U-Director's Staff	Volunteer Service	Directors & Ritual Cast	Egypt Shriners	Darrell Colestock
U-Fez-A-Que	Leisure Activities & Recreation	Cooking & Culinary	Egypt Shriners	
U-Legion Of Honor	Occupational Interests & Professional Development	Military	Egypt Shriners	Thomas Griffiths
U-Past Masters Unit	Volunteer Service	Masonic Past Masters	Egypt Shriners	James Welch
U-Ritual Team Unit	Volunteer Service	Directors & Ritual Cast	Egypt Shriners	R. James Rocha

1 - 10 of 11 items

Close

The image displays three sequential screenshots of the 'Unit and Clubs Editor' form, illustrating the steps to create a unit:

- Step 1:** The 'Category' dropdown menu is set to 'Unspecified'.
- Step 2:** The 'Category' dropdown menu is open, showing options like 'Unspecified', 'Geographic Area', and 'Leisure Activities & Recreation'. 'Geographic Area' is selected.
- Step 3:** The 'Activity' dropdown menu is open, showing options like 'Unspecified', 'Clowns', 'Dancing', 'Foot Patrol', 'Go-Carts', and 'Instrumentalists'. 'Unspecified' is selected. The 'Update' button is highlighted.

**If a specific organization is geography-based, select "Geographic Area" as its Category.
No "activity" is required.*

MEMBERSHIP EXPERIENCE = RETENTION

Member Experience

Member Interests

Prospect Interests

Purpose of Club & Unit Groups



Sports & Adventure



Volunteer Services



Musical Performing & Parading



Professional Development



Leisure Activities & Recreation



Social Gatherings

MEMBERSHIP PAYMENTS – CUTTING DOWN ON FINANCIAL LOSSES

Membership dues receivables are posted in WebFez to function in tandem with the temple's accounting system.

Dues Classes define the individual member's billing charges and it is critical to review the dues classes annually before July 1st to ensure:

- Correct charges are assessed for each dues class
- Changes to temple dues amounts have approved through the appropriate process
- Each member is in the correct dues class
- Members with life memberships (either LM, PCM or PCLM) are appropriately exempt from annual assessment (*Dues Class Review report*)

An incorrect Dues Class assigned to a member could result in a financial hardship to the temple or an inappropriate charge to a member!

All updates and changes should be made in WebFez no later than July 15th. The dues assessment (a.k.a. the “rollover”) will take place on August 1st.

MEMBERSHIP PAYMENTS – CUTTING DOWN ON FINANCIAL LOSSES

The *Payment Distribution* report is key for balancing Membership dues payments with the bank deposit!

- Every payment entry appear on the payment distribution report which should match the temple's deposit
- If funds posted in WebFez (Payment Distribution report) do not match the deposit, this is a clear indication you are out of balance

The *Undistributed Payments* report is a key report that should be reviewed **multiple times during each month!**

- Undistributed payments are payments posted to an account that have not been applied towards any charges (known as credits)
 - It's acceptable to have credits on account as long as the payment shows a payment comment (for example: 2025 Dues)

MEMBERSHIP PAYMENTS – CUTTING DOWN ON FINANCIAL LOSSES

WebFez common data entry errors:

- Payments posted several times in error (as duplicates)
 - These incorrectly posted funds will automatically be applied towards the next year's dues charges, which yields a financial loss to the temple
- Payments posted with additional “donations” several times in error (duplicates)
 - This not only creates a duplicate in the system, but also shows on the Payment Distribution report as duplicate donations to the Hospital (which creates an additional financial loss or false loss)
- Payments posted to the wrong member's account
 - The member who paid will not receive credit for his dues payment
- Payment posted for the wrong amount
 - Example: payment amount was for \$150.00, posted for \$550.00

WEBFEZ PAYMENTS – BEST PRACTICES

- When posting payments, use the appropriate payment types
 - Payments are not categorized until they are applied to charges
 - Payments may be deleted within 14 days of the posting date
- Payment activity in WebFez is audited
- WebFez Reports of most interest to Recorders:
 - Payments: History, Journal and Distribution
 - Undistributed Payments
 - Charge History
 - Dues Analysis Summary – Current and Year-End
 - Dues Assessment Details
 - Electronic Payments: One-off and Recurring
 - Member Balance Reports
 - **Dues Class Review Report**

**WebFez saves daily balance summaries and monthly individual balances!*

A DAY IN THE LIFE OF
a Shrine Recorder



SHRINERS
INTERNATIONAL

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

March – July

- **Review & Confirm Unit & Club administration**
 - Add Units & Clubs to WebFez
 - *Adding or deactivating a domestic Shrine Club requires review by Temple Accounting*
 - Review Unit/Club membership roster is correct, and that the correct officers are in place
 - Provide user claims to any updated Unit/Club officers
- **Plan and Prepare for Dues Assessment**
 - *****INPUT ANY CHANGES TO DUES IN WEBFEZ FOLLOWING APPROPRIATE PROCESS PER SHRINERS INTERNATIONAL AND TEMPLE BY-LAWS*****
 - *Reference Imperial Bylaws §332.2(f)*
 - **Clean up and Consolidate Dues Classes wherever possible**
 - Ensure that Nobles are in the proper Dues Class
 - Verify mailing addresses and contact information as needed
 - **Opportunity:** *Instruct Nobles how to update their own info in the Member Center*

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

March – July

- **ALL** Temple preparations in WebFez should be completed **by July 15th**:
 - Dues Assessment (August 1st); and
 - Dues Notice Distribution (early September)
- **Pay particular attention to the following:**
 - Any dues amount changes entered in WebFez;
 - Confirm payment link;
 - Life membership options purchased or granted to members of your Nobility; and
 - Dues Notice suppression flag set in WebFez for members who **should not** receive a dues notice

Notify Nobles to be on the lookout for an emailed dues notice via temple publications, meetings and other methods of communication!

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

Dues Notice Details

- **OSG Billing Services produces and distributes the dues notices:**
 - Emails cost about \$0.04/per email
 - Hardcopy delivery in U.S.A. – 4-15 Days
 - *Pre-sorted Non-Profit Marketing Mail - \$0.22/piece of postage.*
 - Hard copy delivery in Canada – 1-4 Days
 - *Pre-sorted Letter Mail – billed in US\$, calculated when invoiced by the Canadian Postal Service; Most recently charged at \$0.78(US)/piece of postage*
 - **US Mail can be tracked to Nobles' streets in most cases (this is not available in Canada)**

Instructions for downloading and registering for My FezCard Viewer will be included on the back of each dues notice

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

August

- **Dues Assessment (August 1st)**
 - Dues are assessed in WebFez (a.k.a. the “rollover”)
 - *International temples should print notices from WebFez & distribute them to their Nobility*

*****IMPORTANT:**

1. *Post payments in WebFez ASAP to avoid unnecessary duplicate dues notices, multiple billings for dues notices, member dissatisfaction, etc*
2. *Posting and applying payment is required for membership renewal process to be completed!*

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

September

- **First Dues Notice is emailed to all US and Canadian members who:**
 - *Have a balance due;*
 - *Have an email address; and*
 - *Are not flagged for “Dues Notice Suppression”*
- *Email dues notices contain a link to the online bill pay service (for temples which have a bill pay link populated in WebFez)*
 - *This is not limited only to EMS temples*
- *Begin to contact by phone any delinquent members who may be at risk of suspension (bulk emails are not enough, and should not be utilized for this process)*

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

October – November

- **First hardcopy dues notice is mailed to all US and Canadian members who:**
 - *Have a balance due;*
 - *Have a valid mailing address (not flagged as a “bad address”); and*
 - *Are not flagged for “Dues Notice Suppression”*
- *If a Noble does not receive a dues notice, he may log into WebFez and print one for himself.*
 - *Likewise, the temple can print or email one from his Noble record upon request/necessity*
- **Per General Order No. 1, Units/Clubs complete annual elections by October 31st**
- **Late November, NPD Postcards will be mailed to members at risk of suspension**
 - *This postcard does NOT meet the requirement for First Class notification*

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

December

- **December 1st**
 - **Election returns are opened in WebFez for temples to certify/validate their elections**
 - **Ensure that the appropriate contact information is used, as it is published in the annual Directory*
- **End of Year Suspensions – Preparation and Processing**
 - Review NPD status for delinquent members
 - Finalize calling in preparation for the vote to suspend
 - Vote to approve NPD suspensions (effective 12/31)
 - *Vote MUST occur prior to 12/31*
 - Process all NPD suspensions, according to the bylaws
- **Per General Order No. 1, Unit/Club officers must be entered into WebFez by December 31st**

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

January

- **The December report closes the 1st week of January (final date TBD)**
 - ***All December status changes, including all suspensions, must be entered by this time!***
 - *Rectified suspensions may be reversed during this time period; after the reports close, the process for restoration must be employed*
 - *Once finalized, the December report:*
 - *Yields the annual membership and PCM/PCLM numbers which are used to calculate the temple's annual assessment;*
 - *Report the membership numbers which dictate the current year's Representatives*
- **Processing & finalizing the Annual Report (by January 15th):**
 - *Add any Hardship Remits as appropriate (and approved by the Nobility/Divan);*
 - *Verify officers and close the annual report. All open reports will automatically be closed on January 15th!*
- **Past due, soft copy dues notices will be emailed to US & Canadian members in mid-January**

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

February

- Past-due, hardcopy notice is mailed to US & Canadian Nobles in February
- An exit survey will be emailed to all Nobles suspended on 12/31 to gain feedback; a restoration petition is linked for reference and use as appropriate

SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

Overview / Recap

- August 1st – Dues Assessment / “Rollover”
- September – First dues notice (by email)
- October – Hardcopy dues notice (by mail) to US and Canadian Nobles
- November – NPD Postcard to all members at risk of suspension
- December – 2nd emailed dues notice
- January – Retention postcard to newly suspended Nobles (“Please come back...”)
- January – 3rd emailed dues notice
- February – FINAL hardcopy dues notice (by mail) to US and Canadian Nobles



MOST EXCITING NEW FEATURES OF 2024

PENDING NPD SUSPENSIONS

Launched in May 2024, with training sessions & resources. Successfully transitioned the year-end 2024 NPD suspensions!

Criteria for flagging members as Pending NPD-Suspension

- Pending the temple's suspension after 1 year or 2 years arrears
- Member must owe either 1 or 2 years arrears, consistent with the temple bylaws
- Member cannot have any "unapplied" funds
- Temple must follow the bylaws before final suspension, effective December 31st

Refer to the Bylaws for Suspension of Non-Payment of Dues

§ 323.11 Suspension for Nonpayment of Dues:

(a) Suspension or Remission. A temple may not carry a member on the books who is more than 2 years in arrears. The temple must either suspend him or remit his dues.

(b) Procedure for Suspension. A Noble may be suspended for nonpayment of dues in the following manner:

- (1) He must be notified by first-class mail that he is in arrears;
- (2) He must be given an opportunity to be heard;
- (3) He must be admitted to the temple for this purpose even though he is in arrears; and
- (4) A majority of members present at a stated meeting must vote to suspend him.

(c) Effective Date. Whenever adopted, any order of suspension shall be effective as of December 31 of the last year of the delinquency.



PENDING NPD SUSPENSIONS

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This is the TEST Environment. Please click [Here](#) for the PRODUCTION Environment.

Thomas M Griffiths

Egypt Shriners

ShrineID: 957079 Dues Total: \$200.00 Last Payment of \$200.00 Posted on 11/29/2021 [Pay My Bill](#)
Member Number: [31770](#) Arrears Total: \$0.00 Unapplied Amount: \$0.00
Status: [Creation](#) Dues Class: Regular Member



Pending NPD Suspension:

Hello Noble Thomas. Your record indicates a balance due for 2024 dues which may lead to a lapse in your membership at the end of 2024. We would appreciate your payment or, if there is a discrepancy, please contact our office. Our contact information is available by clicking the Contact Temple button below. We value your membership and want you to remain an active member.

Quick View | General Info | Temple Info | Dues Info | Make Payment | Awards | Fundraising | Library | Audit Trail | User Claims

Contact Temple

Date of Birth: 9/17/1945 (Age: 78) Spouse: Yuanlin
Birthplace: DETROIT, MI Spouse's Prefix:
Occupation: Retired Is Legal Spouse
 Retired Is a Permanent Contributing Member (PCM)
 Non-Solicitation Is a Per Capita Life Member (PCLM)
 Suppress Dues Notice

Interests
 Recreation
 Performing
 Professional Dev
 Social
 Sports
 Volunteer

Notes:

[View Shrine Card](#) ?

! Pending Suspending Confirmation

By typing **YES** in the box below and clicking OK, your temple agrees that this action is in compliance with the Imperial ByLaws suspension process as defined in §323.11 for the year in which the noble is to be suspended.

Nobles whose Pending Suspension flag is set and who still remain delinquent when the year is closed will be automatically Suspended for non-payment of dues. It is strongly encouraged that temple leaders personally speak with the noble (not merely email him) unless, after diligent search and effort, they have exhausted all reasonable efforts to speak with him personally.

OK Cancel

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[Quick View](#) [General Info](#) [Temple Info](#) [Dues Info](#) [Make Payment](#) [Awards](#) [Fundraising](#) [Library](#) [Audit Trail](#) [User Claims](#)

[Contact Temple](#)

Date of Birth: 9/17/1945 (Age: 78) Spouse: Yuanlin **Interests**
Birthplace: DETROIT, MI Spouse's Prefix: Recreation
Occupation: Retired Is Legal Spouse Performing
 Retired Is a Permanent Contributing Member (PCM) Professional Dev

Notes:

**To remove the checkbox, either click it again and certify that it should be "unchecked", or post a payment or an adjustment to the record to clear the outstanding charge.*



TRAINING & NOTIFICATIONS

- **TO DO** (Action Item):

Login to WebFez and review **IMPORTANT INFORMATION & the WebFez Banner frequently!** Time-sensitive information is posted there regularly!

- **TO DO** (Action Item):

Recorders should register for the upcoming Training Sessions
FIS covers all of WebFez in four one-hour sessions (I, II, III, IV), annually

- FIS conducts periodic Online Training Sessions – posted to the WebFez banner notification and registration information!
- *Introduction to WebFez's Best Practices* is available on the WebFez site
- Interactive training videos are posted online at the WebFez "Training" tab
- Personalized training for individuals or small groups is available by request

HOW DO I GET HELP?

- **BEST/QUICKEST:**

- Direct entry using the WebFez Support Ticket interface, using the “Support” tab

- E-mail: **WEBFEZFEEDBACK@SHRINENET.ORG**

- Toll-Free Support Line: 844.674.6266

