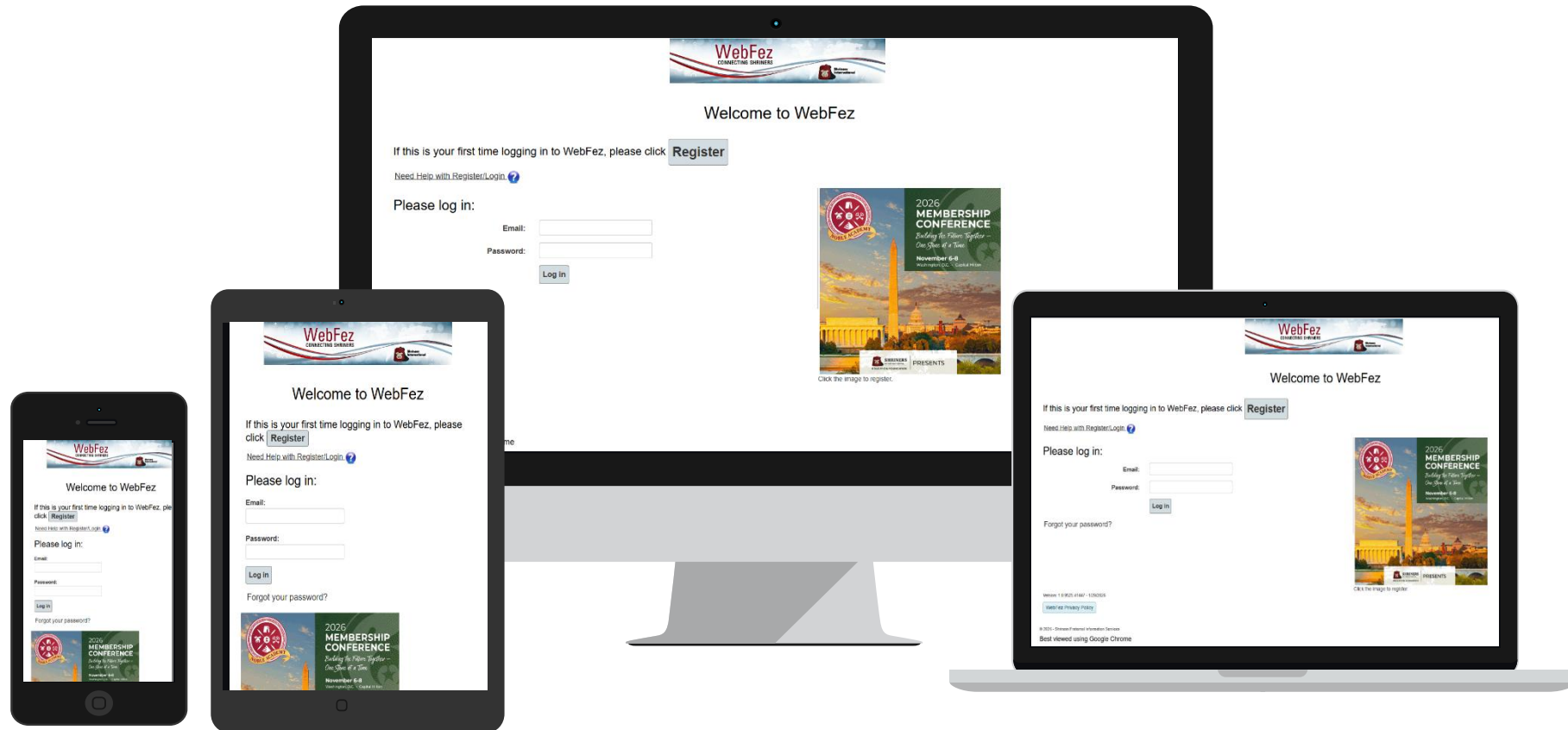


FRATERNAL INFORMATION SERVICES

Shriners International Headquarters



INTRODUCTIONS – FRATERNAL INFORMATION SERVICES



Alicia Lindsay

FIS Technical / Operations Manager



Noble “Jody” Meguiar

FIS Applications & Tech Support Manager



SHRINERS
INTERNATIONAL



INTRODUCTIONS – FRATERNAL INFORMATION SERVICES



Steve Gainey
Chief Fraternal IS Officer



JP Jackson
Sr. Director, Fraternal IS



Nick Kulikowsky
HQ Web Developer Analyst



Anil Atav



Denny Jacob
Web Developers / Programmers



Brian Robson

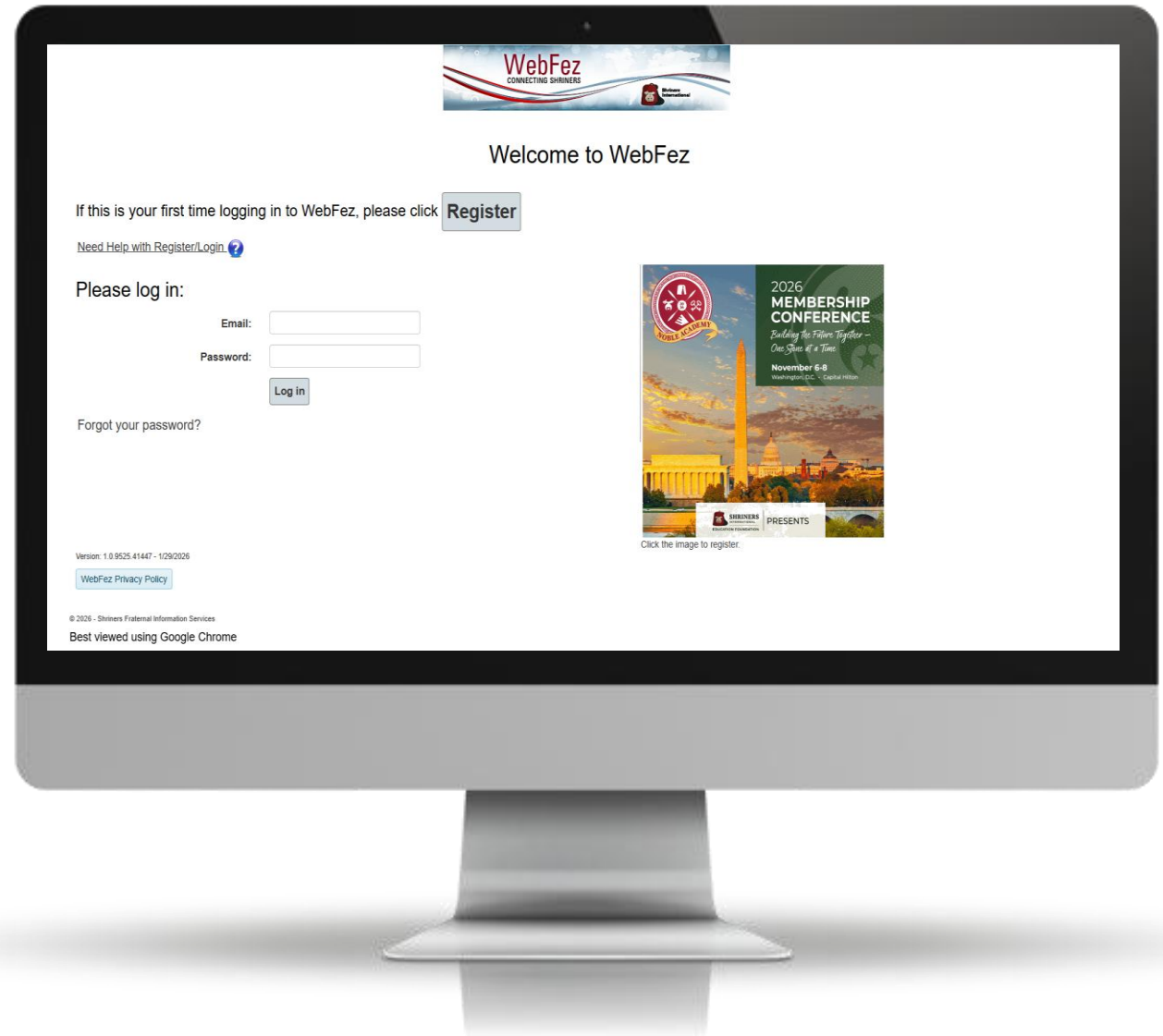
WHAT IS WEBFEZ?

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

WHERE DO I REGISTER OR LOGIN TO WEBFEZ

DESKTOP/LAPTOP LAYOUT

- To register or login, navigate your browser to:
webfez.shrinenet.org or
ShrinersInternational.org
- Members of Temple leadership with elevated access **MUST REGISTER** to receive these user claims



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**
 - *View-only access to Noble records; but no 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* BOTH should be granted!**
 - *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 may have auto-generated user claims*

** Certain specific administrative claims also require Temple claims (i.e. TempleGuest)*



WEBFEZ SECURITY & USER CLAIMS

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

- ***The MOST RESPONSIBLE thing you can do as Recorder:***
 - **Regularly review user claims for all WebFez users**
 - *Utilizing the “Security” tab in WebFez, where all claims and users are outlined*
 - **Update user claims as needed, as roles and responsibilities change**
 - *Be knowledgeable of the various user claims, and what capabilities they serve*
 - **Disable inactive WebFez accounts**
 - *Understand the difference between removing user claims and disabling the WebFez account*
 - **Ensure that all users have their own, private logins**
 - *Shared logins are an IT security “no-no”*



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

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

Claims	Color Theme	Password
--------	-------------	----------

Noble Claims Administration

+ Add New Claim

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

Add Claim

Claim Type:

Select a Claim Type

☒ ☐ Cancel

Add Claim

Claim Type:

Select a Claim Type

☒ Update ☐ Cancel



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

WHAT CAN **NOBLES** ACCESS IN WEBFEZ?

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

- **Updateable** access
 - Contact information
 - *Addresses, phone numbers, email addresses, etc.*
 - Interests (Membership initiative)
 - Legacy family members
 - Prerequisite Body information (Masonic Body)
- **View-Only** access
 - Demographic information
 - *Age, Spouse, etc. (**information reported from the petition)*
 - Membership information
 - *Current membership status, history record, member awards, payment history*
 - 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
 - Access to sensitive information is controlled by user claims
 - May be for 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) Access the “Security” tab on WebFez admin screen
- 2) Utilize the *User Claims* report

BeAShrinerNow.com & PETITION PROCESS

ePetitions (electronic source)



Paper Petitions (manual source)



Prospect Temple:

Select Temple ▼ *

Prospect Status:

Shrine Petition Sub... ▼ *

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:

SELECT ONE... ▼ ✱

State:

SELECT ONE... ▼

Top Line Signer:

Must assign Temple fir... 🔍

Second Line Signer:

Must assign Temple fir... 🔍

Lodge Name:

✱

Lodge State/Province:

✱

Occupation Category:

All Categories ▼

Occupation:

Select Occupation ▼

Personal Interests:

☐ Leisure Activities & Recreation

☐ Social Gatherings

☐ Musical, Performing & Parading

☐ Sports & Adventure

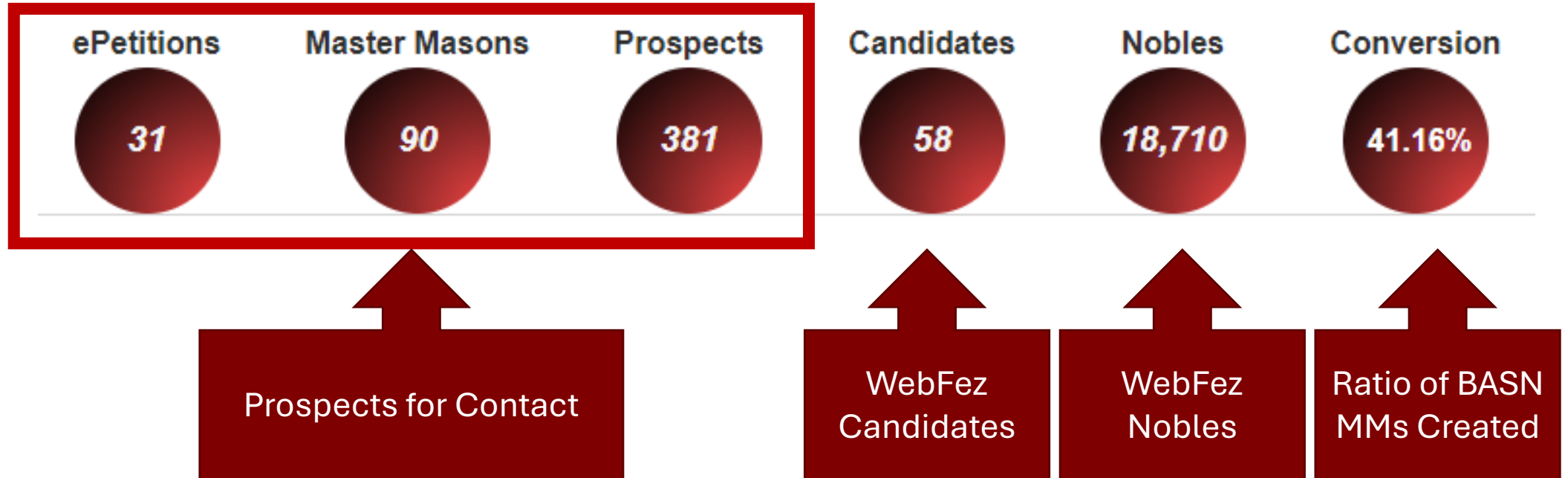
☐ Occupational Interests & Professional Development

☐ Volunteer Service

Submit



WEBFEZ MDS DASHBOARD



Definitions:

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

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

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

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, Address Line 1, Address Line 2, City, State, Postal Code), and status information (Status: Freemasons - Mast..., 49 day(s) in this status). There are also checkboxes for 'Freemason' and 'Legacy Freemason', and fields for 'Petition Top Line Signer', 'Petition Second Line Signer', and 'Petition Third Line Signer'. A 'Prospect's Additional Comments' text area is at the bottom. Red annotations with arrows point to various parts of the form: 'Reassign to Another Temple' points to the 'Temple' dropdown; 'Prospect Referrer will show here' points to the 'Referral' field; 'Assign a Virtual Mentor' points to the 'Mentor' field; 'Update Prospect Status' points to the 'Status' dropdown; 'Assign the Signers' points to the 'Petition Top Line Signer' field; 'Access the ePetition' points to the 'Print Petition...' button; 'Send the Prospect an Email' points to the 'Send Email...' button; 'Add a note to the record' points to the 'Add New Note...' button; and 'Finalize changes' points to the 'Save Changes' button. A red search bar is at the top right, and a red button is at the bottom right.

WebFez MDS
Membership & Marketing System

Search for Active Nobles or MDS Prospects...

DASHBOARD I AM R U REGIONS PROSPECTS REPORTS COMMUNICATIONS WEBFEZ

PROSPECT NAME
Shrine ID: 0
Signup Date: 3/24/2021 (1,064 days)
Last Updated: 11/8/2022 (470 days) by

First Name: [Text Field]
Middle Name: [Text Field]
Last Name: [Text Field]
Last Name2: [Text Field]
Suffix: [Text Field]
DOB: [Date Picker]
Age: [Text Field]
Occupation: [Dropdown: Accountant]
Hobbies or Interests: Volunteer Service, Social Gatherings

Temple: [Dropdown]
Referral: [Text Field]
Mentor: [Text Field]
Status: Freemasons - Mast... 49 day(s) in this status

Masonic Lodge: [Text Field]
Lodge Location: [Text Field]
Phone Number: [Text Field]
Email Address: [Text Field]
Address Line 1: [Text Field]
Address Line 2: [Text Field]
City: [Text Field]
State: [Dropdown]
Postal Code: [Text Field]

Freemason: [Radio: Yes, Radio: No]
Legacy Freemason: [Radio: Yes, Radio: No]

Petition Top Line Signer: [Text Field]
Petition Second Line Signer: [Text Field]
Petition Third Line Signer: [Text Field]

Prospect's Additional Comments: [Text Area]

Print Petition... Send Email... Add New Note... Save Changes

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



SHRINERS
INTERNATIONAL

- 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, the WebFez profile is generated and further changes are to be made through WebFez

Click "Print Petition" to access petition form (can be printed for documentation)
does not show for Paper Petitions

All elements required by Bylaws are included



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

Members	Accounting	Dues Classes	Units and Clubs	Awards	Fundraising	Membership Activity
Monthly Membership Activity Reports						
Ceremonials and Candidate Transfer						
?						
			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

Shriners International

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

Add New Petition

Add New Candidate

Add New Courtesy

Restore Member

Add Existing Member

Add New Petition

Go

Members

Accounting

Dues Classes

Units and Clubs

Awards

Reports

QR Scan Event

Temple Members

Advanced Search

1

1 - 13 of 13 items

SHRINERS INTERNATIONAL

Back to List of Temples

Add New Petition

Go

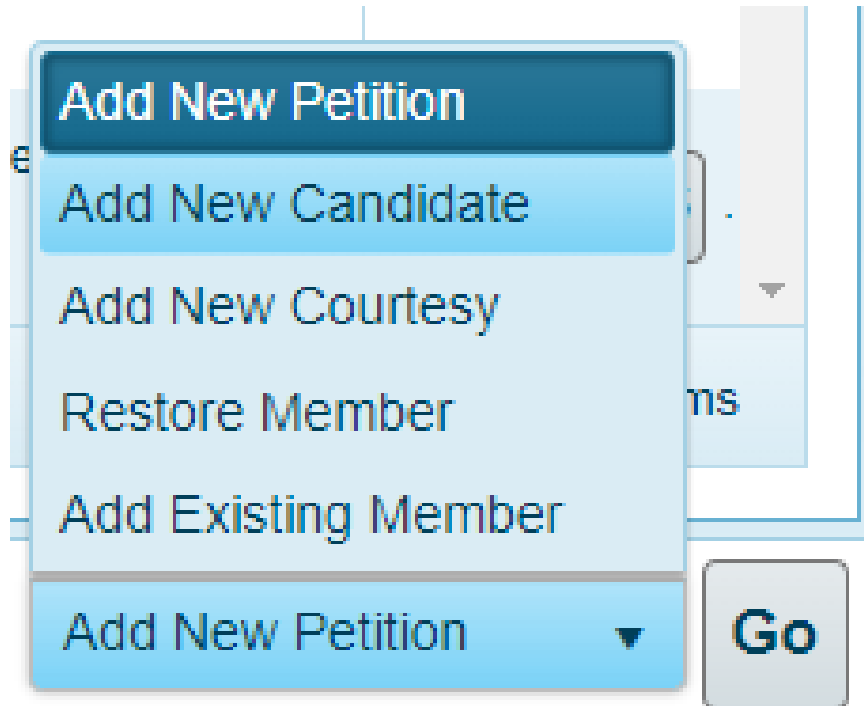
Create New Member

Add Existing Member

© 2023 - Shriners International Fraternal Information Services

WebFez Privacy Policy

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)

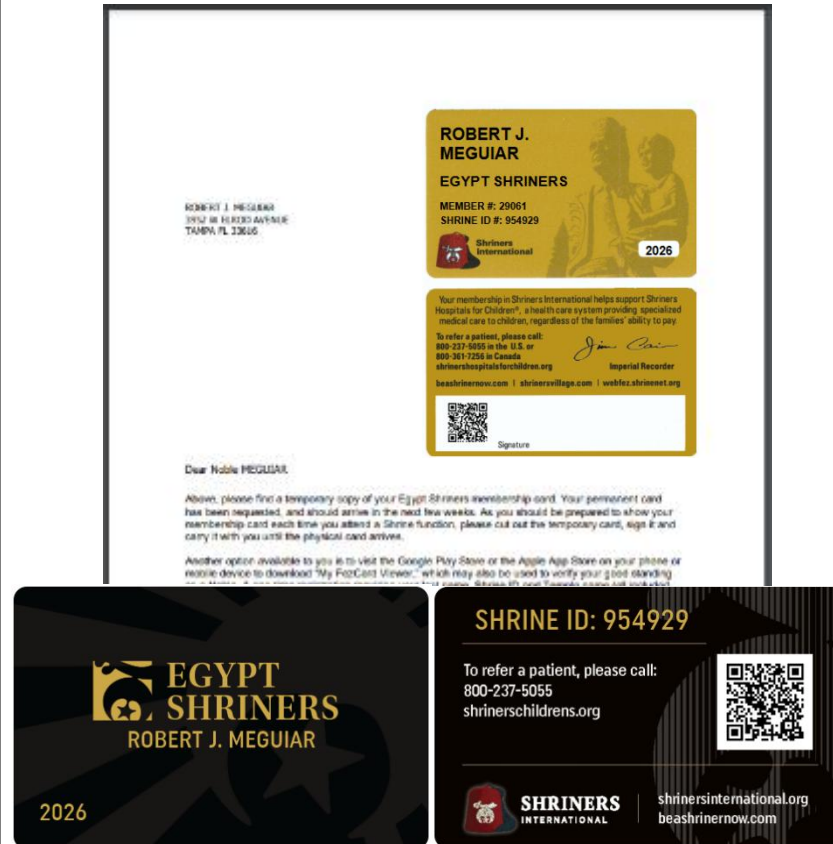


HOW CAN MY MEMBERS PROVE GOOD STANDING?

Hard Card

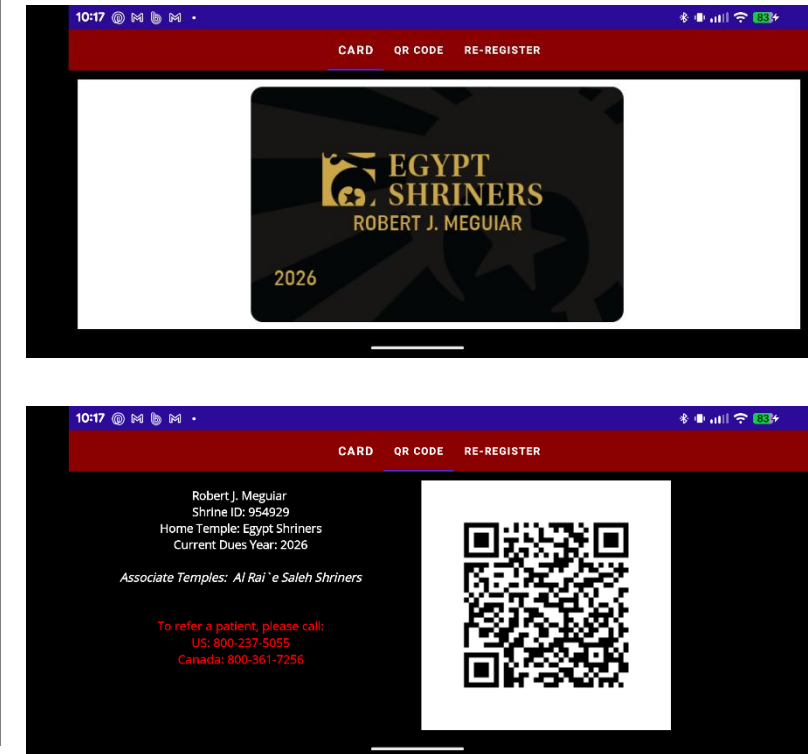


Temporary Card or Screenshot



Digital Card (My FezCard Viewer)

**Pings WebFez record every time*



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+)

From August 2024 until November 2025, updates pushed by Apple to iPhone users (starting with iOS 18.0) caused Nobles to experience issues with the *My FezCard Viewer* app not loading properly; the phone often displayed a “blank” or “white” screen instead of the usual digital membership card. Subsequent patches (i.e. iOS 18.0.1, 18.1.1 and 18.1.2) patched the issue with a specific caveat: Nobles were instructed to rotate their phones sideways to “landscape orientation” such that the “line” on the otherwise “blank” screen would be positioned across the top for the digital membership card to load.



If you are an iPhone user 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.

In November 2025, iOS 26.1 was released, which is believed to have resolved these issues.

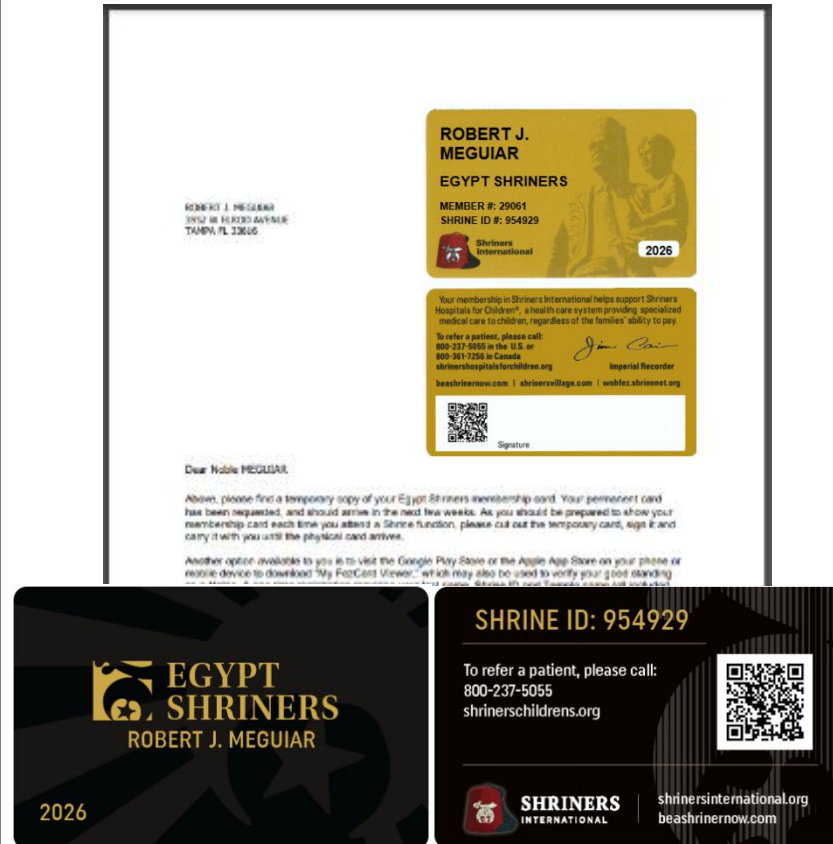
If you are an iPhone user and are still experiencing these issues, you may need to update your operating system to iOS 26.1 or above for the digital card to load without issues.

HOW CAN MY MEMBERS PROVE GOOD STANDING?

Hard Card

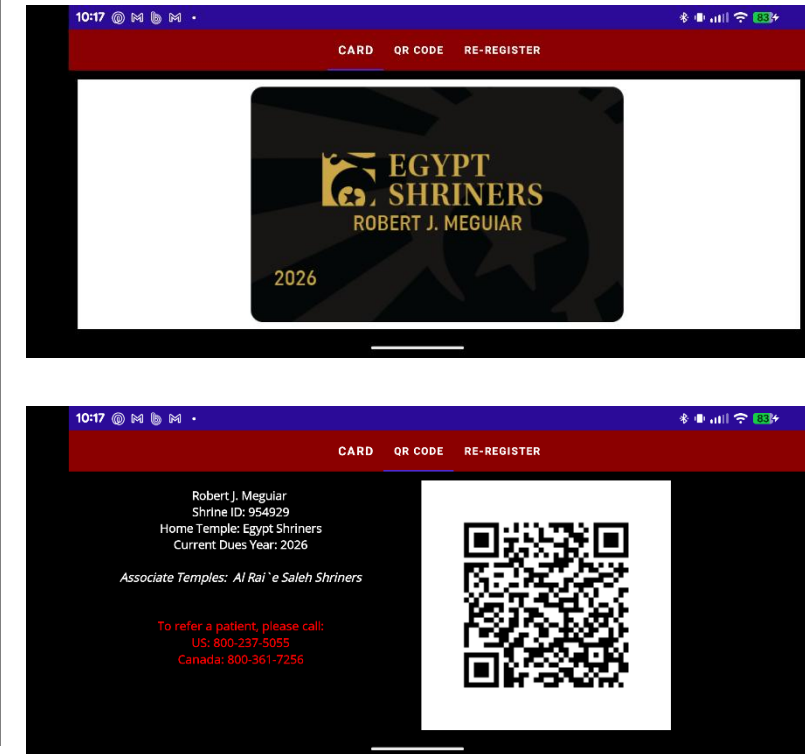


Temporary Card or Screenshot

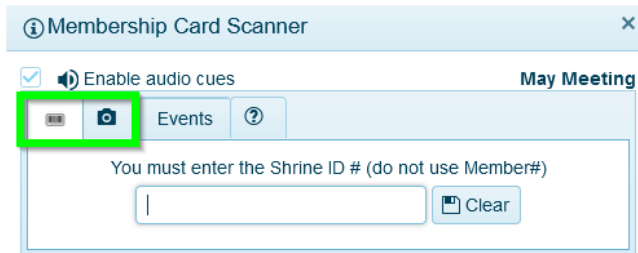
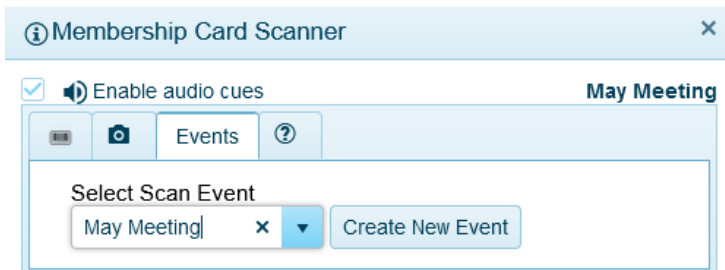
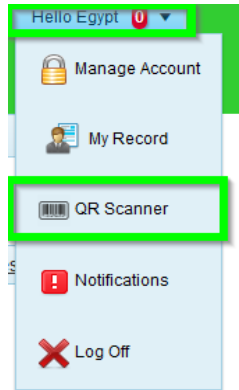


Digital Card (My FezCard Viewer)

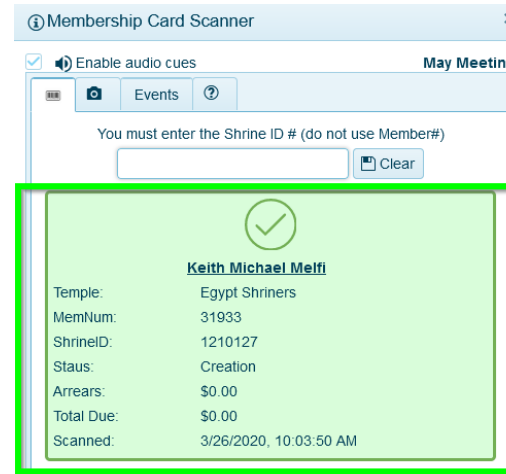
**Pings WebFez record every time*



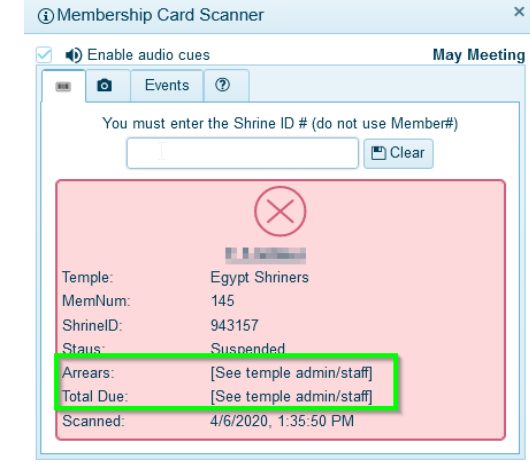
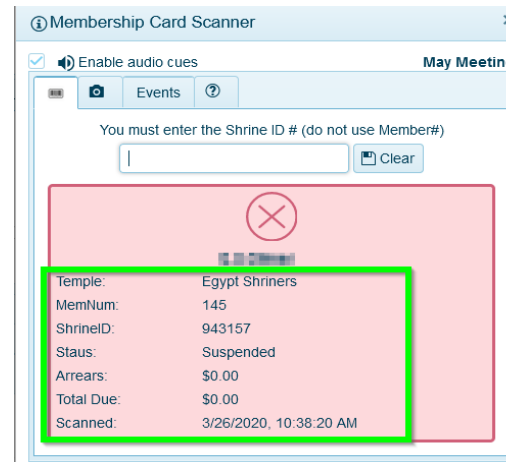
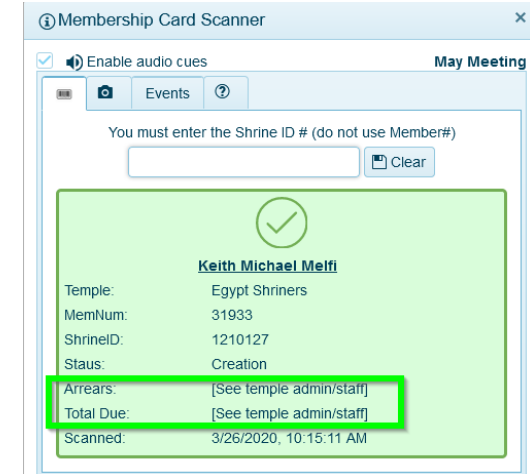
HOW DO I USE THE WEBFEZ QR SCANNING FEATURE?



QR_Full Security Claim (view)



QR_Basic Security Claim (view)



HOW DO I USE THE WEBFEZ QR SCANNING FEATURE?

The screenshot shows the 'QR Scan Events' tab selected in the top navigation bar. Below the navigation bar, there is a 'Hide Closed Events' button and a table of events. The first event, '2023 May Business Meeting', is highlighted with a red box. Below the event table, there are tabs for 'Drawings' and 'Award Points'. The 'Drawings' tab is active, showing a 'Draw Noble' button, a 'Draw Only From FezCard Scans' checkbox, and a 'Refresh Grids' button. Below these are columns for 'Draw Index', 'ShrineID', 'Last Name', 'First Name', 'Temple', 'Discarded', 'FezCard App Scan', and 'Prize'. The 'Attendees' section below shows a table with columns for 'Last Name', 'First Name', 'Temple', 'Shrin...', 'Mem...', 'Current (At Scan)', and 'FezCard App Scan'. The first row shows 'Adams, Ryan' from 'Mecca Shriners' with '1310771' and '292390' in the respective columns. The 'Current (At Scan)' and 'FezCard App Scan' columns are highlighted with a red box.

Event Name	Event Start Date	Event End Date	Closed
2023 May Business Meeting	05/18/2023	05/18/2023	☒

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	☐	☒

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*

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
 - *Accessible via the “My Record”*
 - *(i.e. Specific officers, all Divan Members, Nobles, etc. may read, download, print, as assigned)*

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

1

THE WEBFEZ COMMUNICATIONS TAB

Contacts

Message Editor

History

Help

Attachment ▼

No attachments found... ▼

Template: Select Template... ▼

 ▼

Test Mode Enabled

From:

NO USER EMAIL ADDRESS ON FILE - ▼

CC:

☐ Copy Me

☐ Copy Template

To BCC:

⊕ Add Recipients

Subject:

(0 characters)

Minimum of 16 characters is required for the Subject.

 Format ▼

B

I

U











































































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
	Unit	Test Unit	0	0	☐		Unspecified

Members | **Officers** | Office Titles | Contacts

Display Inactives

Inactive	Member Number	First Name	Last Name	Temple	Status Title	Arrears	Total Due
No items to display							



Unit and Clubs Editor

1

Type: Unit

Title: Test Unit

Category: Unspecified

Activity: Unspecified

Description: WebFez Add Unit test

Inactive: ☐

Include TempleMembersOnly: ☐

[If you would like to add a new Club or make a Club inactive, click here to enter a WebFez Support Ticket](#)

2

Type: Unit

Title: Test Unit

Category: Unspecified

Activity: Unspecified

Description: Geographic Area

Inactive: ☐

Include TempleMembersOnly: ☐

[If you would like to add a new Club or make a Club inactive, click here to enter a WebFez Support Ticket](#)

3

Type: Unit

Title: Test Unit

Category: Musical Performers

Activity: Unspecified

Description: Unspecified

Inactive: ☐

Include TempleMembersOnly: ☐

[If you would like to add a new Club or make a Club inactive, click here to enter a WebFez Support Ticket](#)

Update Cancel

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

POSITIVE 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

POSITIVE 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

64

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

1813-864-8381

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.

POSITIVE MEMBERSHIP EXPERIENCE = RETENTION

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

☒ Has Interest Recreation

☒ Has Interest Social

☐ Has Interest Performing

☐ Has Interest Sports

☒ Has Interest Prof Dev

☒ Has Interest Volunteer

[UPDATE MY PROFILE >](#)

Education


PROFILE

EN

SEARCH

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**SHRINERS**
INTERNATIONAL

In This Section

MEMBER CENTER

Accounting and Governance > +

Education > +

Marketing & Communications > +

Member News and Memos >

Membership > +

Refer a Man >

Sporting Events > +

POSITIVE 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)
Birthplace: TAMPA, FL
Occupation: Computer Support Specialists

☐ Retired
☐ Non-Solicitation
☐ Suppress Dues Notice

[View Shrine Card](#)

Spouse: Kimberly
Spouse's Prefix:

☒ Is Legal Spouse
☒ Is a Permanent Contributing Member (PCM)
☒ Is a Per Capita Life Member (PCLM)

Interests

☒ Recreation
☐ Performing
☒ Professional Dev
☒ Social
☐ Sports
☒ Volunteer

[Recommendations](#)

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...lcy Completed 5 for 5 and granted Temple life membership per Potentate TC

[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 ☒

POSITIVE 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
2
⏵
⏩

1 - 10 of 11 items

Close

Unit and Clubs Editor

1

Type: Unit

Title: Test Unit

Category: Unspecified

Activity: Unspecified

Description: WebFez Add Unit test

Inactive: ☐

Include TempleMembersOnly: ☐

[If you would like to add a new Club or make a Club inactive, click here to enter a WebFez Support ticket](#)

2

Type: Unit

Title: Test Unit

Category: Unspecified

Activity: Unspecified

Description: Geographic Area

Inactive: ☐

Include TempleMembersOnly: ☐

[If you would like to add a new Club or make a Club inactive, click here to enter a WebFez Support ticket](#)

3

Type: Unit

Title: Test Unit

Category: Musical Performers

Activity: Unspecified

Description: Unspecified

Inactive: ☐

Include TempleMembersOnly: ☐

[If you would like to add a new Club or make a Club inactive, click here to enter a WebFez Support ticket](#)

Update Cancel

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

POSITIVE MEMBERSHIP EXPERIENCE = **RETENTION**

Member Experience

Member
Interests

Prospect
Interests

Purpose of Club
& Unit Groups



Sports
& Adventure



Volunteer
Services



Musical Performing
& Parading



Professional
Development



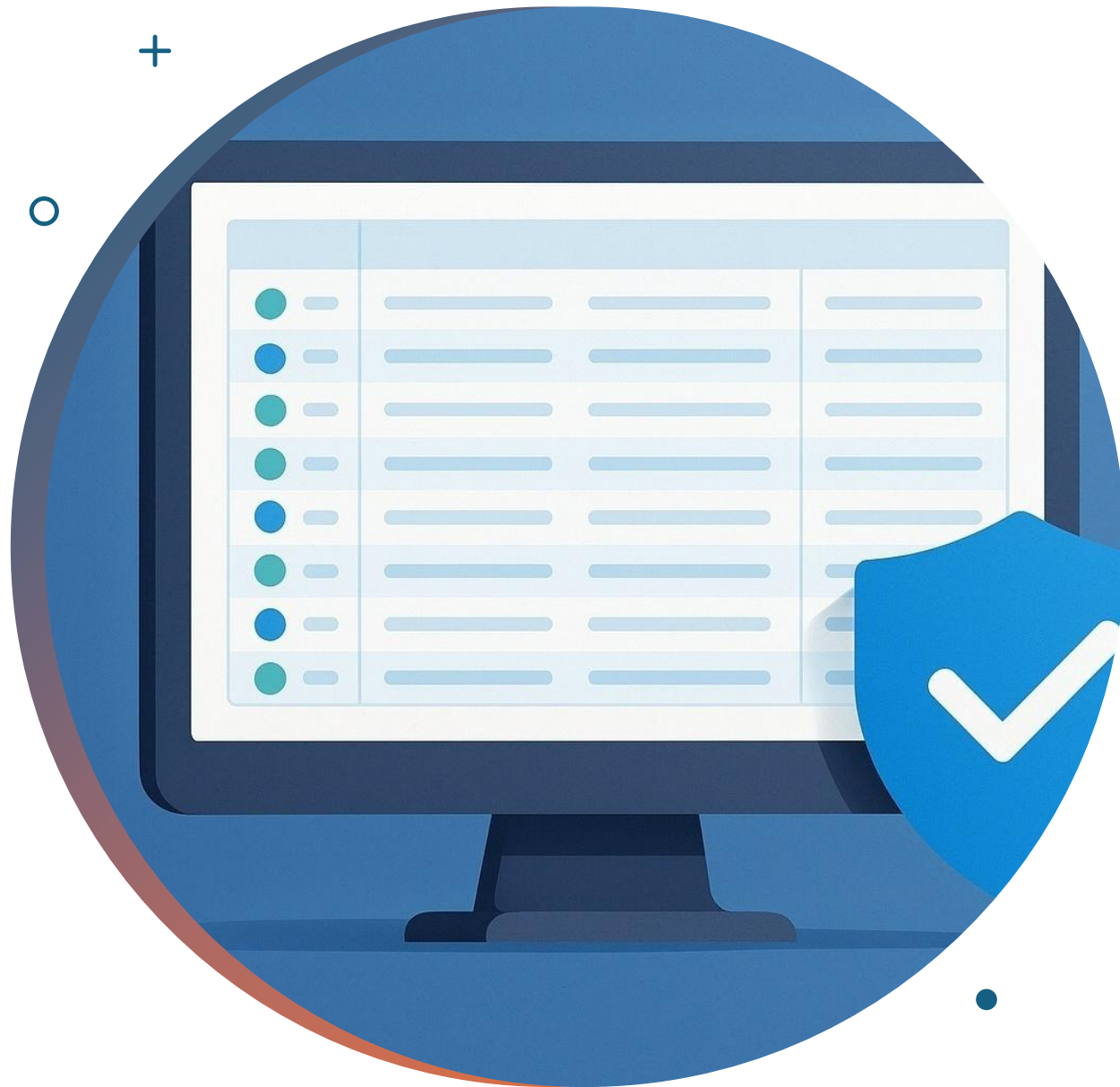
Leisure Activities
& Recreation



Social
Gatherings

WebFez Best Practices for Membership Payment Records Keeping





Importance of Clean Data

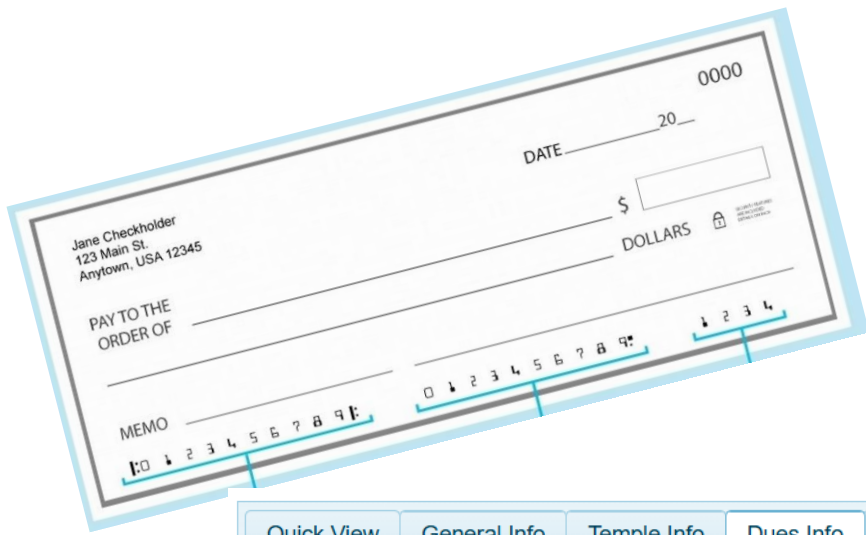
- Clean data is the foundation of accurate membership data and receivables payment processing and a successful financial reconciliation. Errors at the point of entry can quickly multiply, creating discrepancies that are time-consuming to resolve and difficult to track.

Importance of Clean Data

- **Accurate financial records:** correct payment amounts, dates, and references (**check numbers**, batch IDs) ensure deposits align with bank statements.
- **Faster reconciliation:** clean data reduces the need for manual investigation and shortens reconciliation cycles.
- **Error detection:** consistent, accurate entries make discrepancies easier to spot when something does go wrong.
- **Member trust:** accurate posting prevents member frustration caused by incorrect balances, duplicate charges, or missing payments.



Data Cleaning



Please record check numbers in WebFez when processing dues payments.

Quick View

General Info

Temple Info

Dues Info

Make Payment

Awards

Fundraising

Library

Audit Trail

User Claims

Expand All Panels

Charge History

Payment History

Drag a column header and drop it here to group by that column

		PaymentID	Temple	Amount	Balance	Payment Type	Batch	Check #	Posting Date	Entry Date	Comment		
▶			11302414		Shriners	\$220.00	\$220.00	Check	0	12/12/2025	02/13/2026		
▶			11274912		Shriners	\$220.00	\$0.00	Check	0	12/12/2025	02/13/2026		
▶			11125975		Shriners	\$220.00	\$0.00	Check	0	12/13/2024	02/13/2026		
▶			10986141		Shriners	\$220.00	\$0.00	Check	0	1106	01/03/2024	01/03/2024	
▶			10752657		Shriners	\$200.00	\$0.00	Check	0		12/02/2022	02/13/2026	
▶			10622157		Shriners	\$200.00	\$0.00	Check	0		12/17/2021	02/13/2026	
▶			10500928		Shriners	\$275.00	\$0.00	Check	0	1098	08/05/2021	02/13/2026	

Two checks posted on the same date for the same amount.



Encourage the use of batch numbering when processing membership payments in WebFez

What is a batch number system and the benefits:

- **Batch Creation** - Is a payment system that bundles these into a single batch file, assigning it a unique Batch ID for tracking.
- **Reconciliation** - Reports show batch details (count, total, fees, net amount), helping businesses track and reconcile accounts easily.

Key Benefits:

- **Efficiency** - Processes many payments at once, reducing manual effort and time.
- **Streamlined Reconciliation** - Centralized batch reports simplify bookkeeping.



Keep copies of all payment receipts with the deposits for a minimum of two years

- Credit card receipts
- PayPal receipts
- Cash payment receipts
- Checks



Reports

- Running a full payment distribution report after each batch will greatly reduce payment errors and reconcile deposits to the bank statements {*Payment Distribution Report Main*}
- Running the undistributed payment report after each batch will also help identify any payment errors {*Undistributed Payment Report*}
- Payments posted to the wrong member's account
- Payments posted for the incorrect amounts
- Payments posted numerous times (duplicates)



MISTAKES HAPPEN

What matters most is correcting the issue quickly and putting good processes in place, so the same error(s) do not occur in the future.



Here are three most common payments errors that occur with processing membership payments through WebFez

Payments posted for the wrong amount \$\$\$

Quick View General Info Temple Info Dues Info Make Payment Awards Fundraising Library Audit Trail User Claims											
Expand All Panels											
Charge History											
Payment History											
Drag a column header and drop it here to group by that column											
		PaymentID	Temple	Amount	Balance	Payment Type	Batch	Check #	Posting Date	Entry Date	Comment
▶	 	11302413	 Shriners	\$1,409,000.00	\$1,408,780.00	Cash	1000		02/13/2026	02/13/2026	2026 Dues
▶	 	11179229	 Shriners	\$220.00	\$0.00	American Express	0	EPID121...	06/16/2025	06/16/2025	Electronic Payment
▶	 	11011868	 Shriners	\$220.00	\$0.00	American Express	0	EPID89443	03/11/2024	03/11/2024	Electronic Payment
▶	 	10802566	 Shriners	\$200.00	\$0.00	American Express	0	EPID57364	12/30/2022	12/30/2022	Electronic Payment

Duplicate payment errors \$\$\$

PAYMENT DUPLICATE

Quick View General Info Temple Info Dues Info Make Payment Awards Fundraising Library Audit Trail User Claims											
Expand All Panels											
Charge History											
Payment History											
Drag a column header and drop it here to group by that column											
		PaymentID	Temple	Amount	Balance	Payment Type	Batch	Check #	Posting Date	Entry Date	Comment
▶	 	11302412	 Shriners	\$220.00	\$220.00	Check	1000	5600	02/13/2026	02/13/2026	2026 Dues
▶	 	11302411	 Shriners	\$220.00	\$0.00	Check	1000	5600	02/13/2026	02/13/2026	2026 Dues
▶	 	11064752	 Shriners	\$220.00	\$0.00	Check	0	2203	10/29/2024	10/29/2024	
▶	 	10929488	 Shriners	\$220.00	\$0.00	Check	0	2224	11/08/2023	11/08/2023	



Payments posted to the wrong member's account.

Quick View

General Info

Temple Info

Dues Info

Make Payment

Awards

Fundraising

Library

Audit Trail

User Claims

Expand All Panels

Charge History

Payment History

Two payments posted on the same date, different amounts and different check numbers

Drag a column header and drop it here to group by that column

		PaymentID	Temple	Amount	Balance	Payment Type	Batch	Check #	Posting Date	Entry Date	Comment	
▶			11247146	Shriners	\$220.00	\$0.00	Check	0	6249	11/17/2025	11/17/2025	
▶			11302415	Shriners	\$125.00	\$125.00	Check	0	321	11/17/2025	02/13/2026	
▶			11120963	Shriners	\$220.00	\$0.00	Check	0	6232	12/09/2024	12/09/2024	
▶			10945453	Shriners	\$220.00	\$0.00	Check	0	6216	11/20/2023	11/20/2023	
▶			10805015	Shriners	\$200.00	\$0.00	Check	721	6198	01/03/2023	01/03/2023	

Three quick key clean data tips:

- **Verify before you post** – always double-check the member account, payment amount, date, and reference details (check number or transaction ID) before saving the payment. Catching errors early prevents time-consuming corrections later.
- **Use batch numbers consistently** – process payments in batches and assign a batch number every time. Batch numbers create a clear audit trail and make it easier to reconcile deposits to bank statements and reports.
- **Review reports after each batch** – run the payment distribution main report and the undistributed payment report after every batch. Reviewing report immediately helps identify misapplied payments, incorrect amounts, or missing transactions while issues are still easy to fix.



**Verify before
you post**



**Use batch
numbers
consistently**



**Review reports
after each batch**

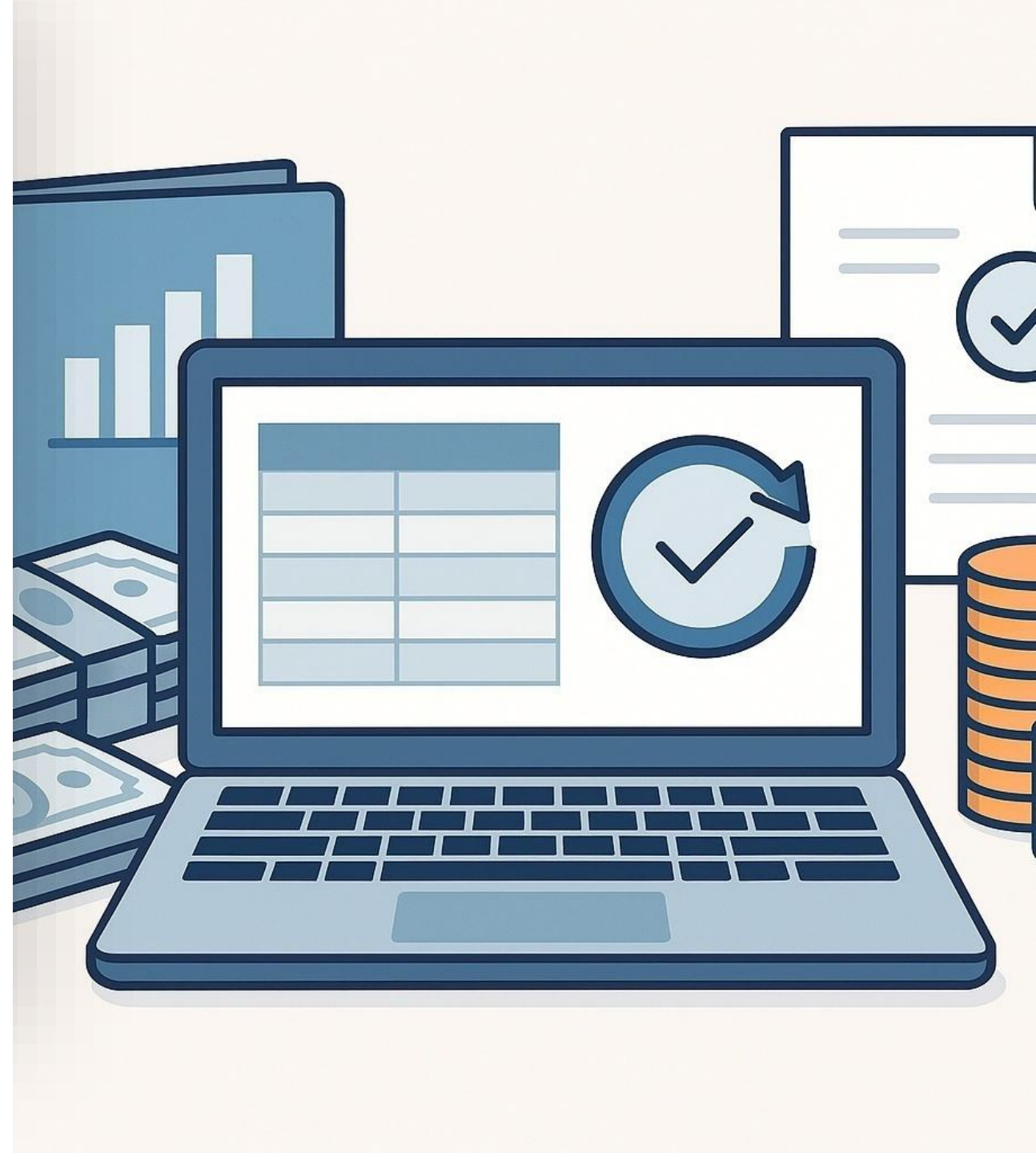
Key Take Aways

Best Practices for Accurate Membership Payment Processing

- Importance of clean data entry in WebFez
- Recording check numbers correctly
- Reducing reconciliation issues before they happen

Avoiding Common Payment Posting Errors

- Duplicate payments
- Payments posted to the wrong account
- Incorrect amounts





Key Take Aways

Improving Financial Reconciliation with WebFez Tools

- Deposits vs. bank statements
- Batch numbers and audit trails
- Leveraging reports for accuracy

Why Batch Processing Matters

- What batch numbers are
- Benefits to accounting and operations
- Impact on reconciliation speed and accuracy

Creating a Payment Process

- Documentation standards
- Receipt retention (checks, credit cards, PayPal, cash)
- Two-year retention best practices

The Financial Impact of Payment Errors

- Time spent correcting mistakes
- Reputational risks
- Member trust and satisfaction



A DAY IN THE LIFE OF A SHRINE RECORDER

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 U.S. Shrine Club requires review by SI's Temple Accounting Department at HQ*
 - 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

TO REITERATE: JULY 15TH

- **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



SHRINE PROCESS TIMELINE & REVIEW

A Recommended Schedule of Administrative Processes & Key Deadlines/Benchmarks

Dues Notice Details – 2026 Year

- **OSG Billing Services produces and distributes the dues notices:**
 - Emails cost about \$0.005/per email (1/2 a penny)
 - Hardcopy delivery in U.S.A. – 4-15 Days
 - *Pre-sorted Non-Profit Marketing Mail - \$0.27/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 \$1.02(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 NPD 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 Pending NPD Suspensions, according to the bylaws
- **Per General Order No. 1, Unit/Club officers must be entered into WebFez by December 31st**

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

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

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

 Photo

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)

Birthplace: DETROIT, MI

Occupation: Retired

☐ Retired

☐ Non-Solicitation

☐ Suppress Dues Notice

[View Shrine Card](#)



Spouse: Yuanlin

Spouse's Prefix:

☒ Is Legal Spouse

☐ Is a Permanent Contributing Member (PCM)

☐ Is a Per Capita Life Member (PCLM)

Interests

☐ Recreation

☐ Performing

☐ Professional Dev

☐ Social

☐ Sports

☐ Volunteer

Notes:

! 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.

YES

[OK](#)

[Cancel](#)

! 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](#)



PENDING NPD SUSPENSIONS

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

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)

Birthplace: DETROIT, MI

Occupation: Retired

☐ Retired

Spouse: Yuanlin

Spouse's Prefix:

☒ Is Legal Spouse

☐ Is a Permanent Contributing Member (PCM)

Interests

☐ Recreation

☐ Performing

☐ 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.*

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 (only); 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

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 a “deep-dive” training session, annually

- FIS conducts monthly and periodic (on-demand) 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



Thank you!