

Manage Club Members - Add a Club Member Family Member



This guide provides a step-by-step process for adding family members to a club membership, making it easy for current members to expand their participation. It highlights important details such as membership limits, the implications of discounted dues, and how these choices affect delegate counts for conventions. By following the instructions, members can efficiently manage their club's family membership options and ensure compliance with club regulations. Viewing this guide will streamline the membership addition process and clarify any potential confusion regarding dues and delegate status.



Tip! This shows how to add a new Lion as a Family Member. The sponsoring family member must be a full dues paying member of the club. Each Primary Full paying dues member may add up to 4 family members.



Alert! Family Membership is based on the member chosen to associate with an existing member as the head of the family. There is a limit of 4 members that can be added as "Family Members" for a head of the family.

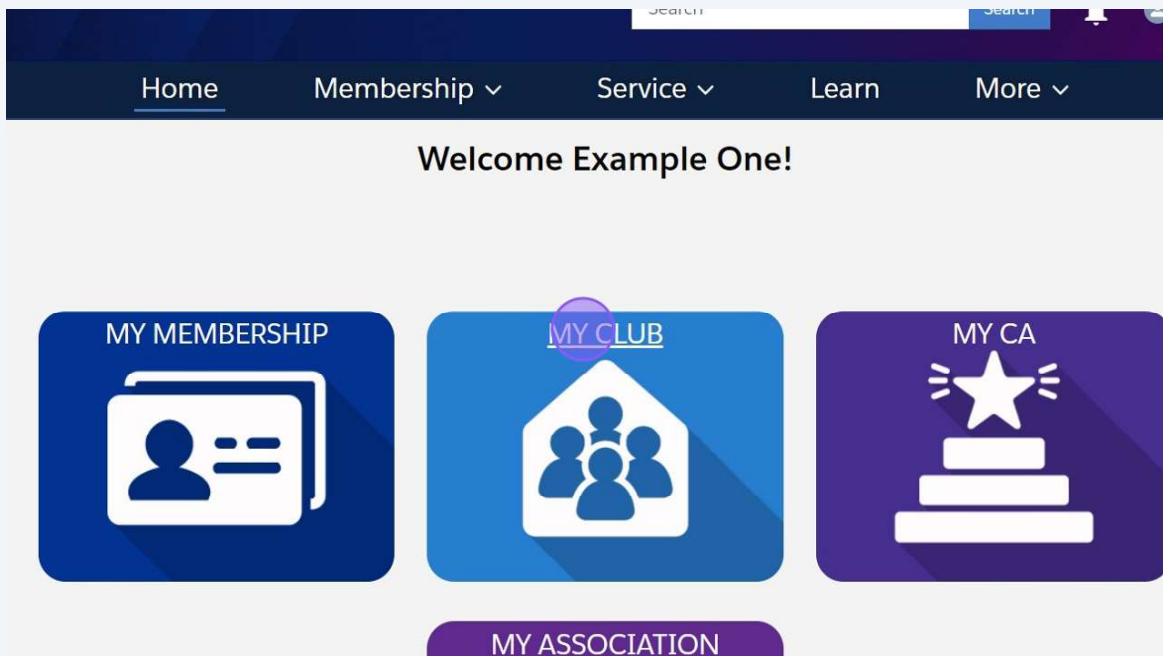
Under the Constitution and By-Laws family members with a discounted dues status no longer count toward the club delegate count for local or international conventions.

There is the option to "Waive Discount" during the add of the member. If this option is chosen, full dues will be billed for the member and the member will count toward the number of delegates, after meeting the year and a day continuous membership criteria.

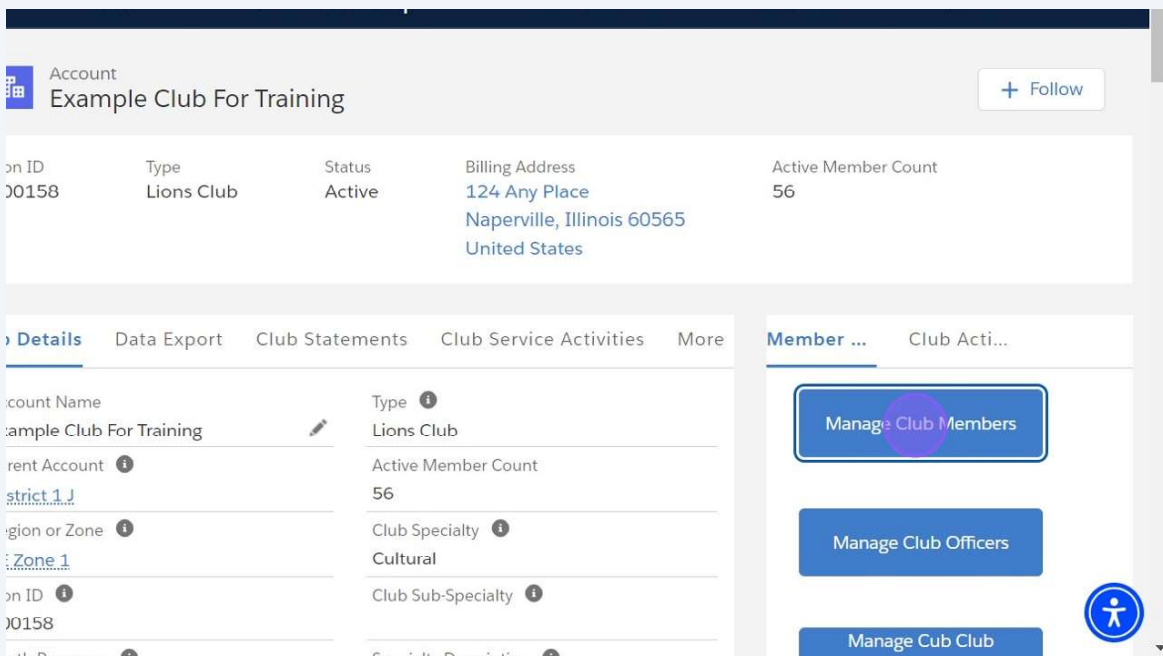
1

Sign into the Lion Portal lionportal.org

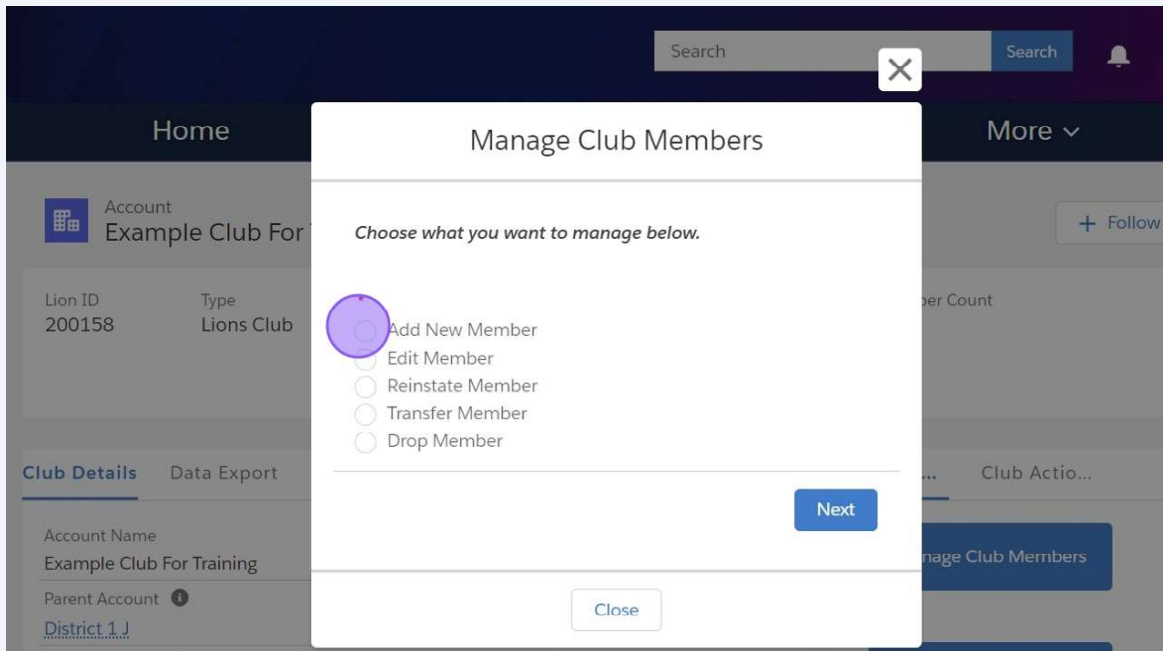
2 Click "MY CLUB"



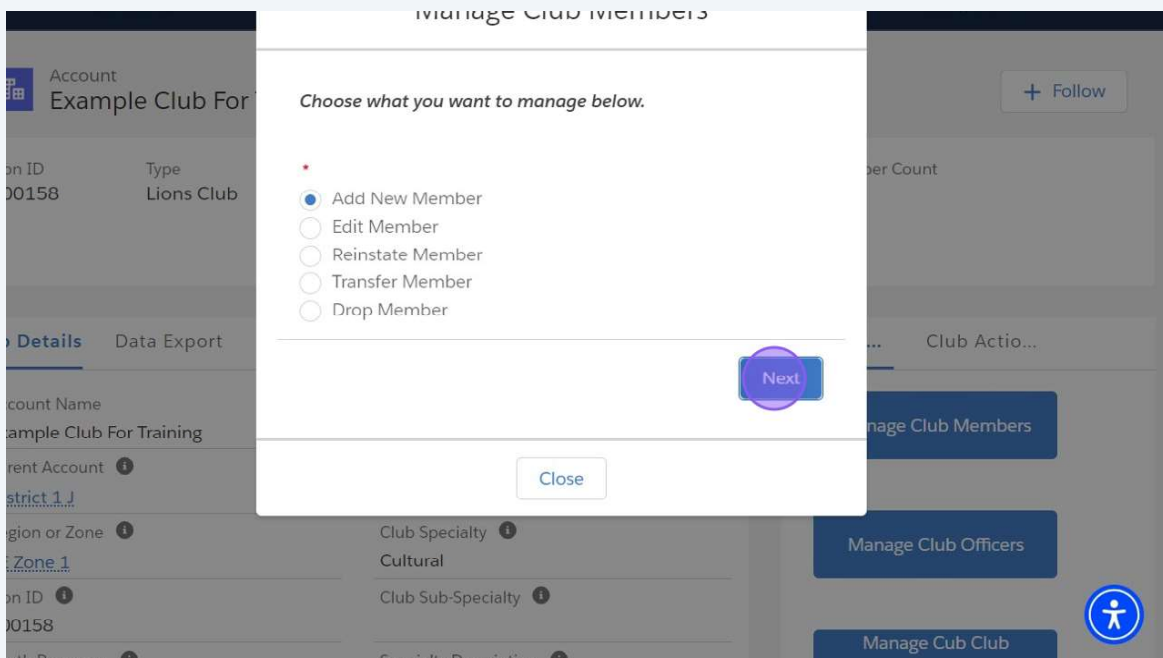
3 Click "Manage Club Members"



4 Click here.



5 Click "Next"



- 6 Enter the required data and click "Search" to identify potential duplicate members.

The dialog box is titled "Please complete fields to begin new membership process". It contains four input fields: "First Name" with the value "Example", "Last Name" with the value "Sixty-Eight", "Date of Birth" with the value "Mar 23, 1999" and a calendar icon, and "Gender" with a dropdown menu showing "Non-Binary". At the bottom, there are three buttons: "Previous", "Search" (highlighted with a purple circle), and "Close". The background shows a blurred view of the "Example Club For Training" page with various tabs and buttons.

- 7 Select the Membership Type, "Family Member".

The dialog box is titled "Manage Club Members". It contains three input fields: "Membership Start Date" with the value "Aug 1, 2024" and a calendar icon, "Membership Category" with a dropdown menu showing "Active", and "Membership Type" with a dropdown menu showing "Family Member" (highlighted with a purple circle). At the bottom, there are two buttons: "Next" and "Close". The background shows a blurred view of the "Example Club For Training" page with various tabs and buttons.

8 Click "Next"

Manage Club Members

* Membership Start Date: Aug 1, 2024

* Membership Category: Active

* Membership Type: Family Member

Next

Close

9 Select the head of the family unit from the list shown.

Manage Club Members

1 of 1 item • 0 items selected

Search: sixty

Full ...	Mai...	Birthdate	Mem...
Example Sixty	130 Any Place Naperville, Illinois 60565 United States	Sep 1, 19...	26691603

Previous Next

Close

10 Click "Next"

The screenshot shows a modal window titled "1 of 1 item • 1 item selected". Inside, there is a search bar with the text "sixty". Below the search bar, there are columns for "Full ...", "Maili...", "Birthdate", and "Mem...". A table lists the details for "Example Sixty":

Full ...	Maili...	Birthdate	Mem...
Example Sixty	130 Any Place Naperville, Illinois 60565 United States	Sep 1, 19...	26691603

At the bottom of the modal, there are "Previous", "Next", and "Close" buttons. The "Next" button is highlighted with a red circle.

11 Enter the required data for the new member. Beginning with "Relationship Type" from the drop down list.

The screenshot shows a modal window titled "Manage Club Members". It contains the following fields:

- Head of Household Name:** Example Sixty
- * Relationship Type:** A dropdown menu with "Parent" selected. This field is highlighted with a red circle.
- * Verification of Relationship:** A dropdown menu with "--None--" selected.
- * Do these members share a single address?:** Radio buttons for "Yes" and "No".
- * Household Address Verification Type:** A dropdown menu with "--None--" selected.

At the bottom of the modal, there is a "Close" button.

12 Select "Verification of Relationship"

The screenshot shows a 'Manage Club Members' dialog box overlaid on a web application. The dialog box contains the following fields:

- Head of Household Name:** Example Sixty
- * Relationship Type:** Parent
- * Verification of Relationship:** Birth Certificate (highlighted with a purple circle)
- * Do these members share a single address?:** Yes (selected with a radio button)
- * Household Address Verification Type:** --None--

A 'Close' button is located at the bottom right of the dialog box.

13 Answer the address question.

The screenshot shows the same 'Manage Club Members' dialog box. In this step, the 'Do these members share a single address?' section is highlighted with a purple circle, showing the 'Yes' radio button selected.

The fields are:

- Head of Household Name:** Example Sixty
- * Relationship Type:** Parent
- * Verification of Relationship:** Birth Certificate
- * Do these members share a single address?:** Yes (selected with a radio button)
- * Household Address Verification Type:** --None--

A 'Close' button is located at the bottom right of the dialog box.

- 14 Select the verification type from the drop down list.

The screenshot shows a web application interface for managing a club account. A modal window is open, displaying the following fields:

- * Relationship Type**: A dropdown menu with "Parent" selected.
- * Verification of Relationship**: A dropdown menu with "Birth Certificate" selected.
- * Do these members share a single address?**: Radio buttons for "Yes" (selected) and "No".
- * Household Address Verification Type**: A dropdown menu with "Bill" selected.

At the bottom of the modal, there are two buttons: "Next" (highlighted with a purple circle) and "Close".

- 15 Click "Next"

This screenshot is identical to the one above, showing the same modal window with the same fields and buttons. The "Next" button is highlighted with a purple circle, indicating the next step in the process.

16 Search for Sponsor by Lion ID or Name

The screenshot shows a web application interface with a dark blue header and a sidebar. A modal dialog titled "Manage Club Members" is open in the center. The dialog has a white background and a thin border. It contains the text "Please search for a sponsor for the new member." followed by a section titled "* Search by Name or Lion ID". Under this section, there are two radio buttons: "Name" (which is selected and highlighted with a purple circle) and "Lion ID". Below the radio buttons is a text input field. At the bottom of the dialog, there are three buttons: "Previous", "Next", and "Close". The background of the application is dimmed, showing a club profile for "Example Club For Training" with details like "Lion ID 200158", "Type Lions Club", "Account Name", "Parent Account", "Region or Zone", "Active Member Count", and "Club Specialty".

Manage Club Members

Please search for a sponsor for the new member.

* Search by Name or Lion ID

☒ Name

☐ Lion ID

Previous Next

Close

17 This example does a name search. Enter first and last name.

This screenshot shows the same "Manage Club Members" dialog box as in the previous image, but with the "Name" radio button selected. Below the radio buttons, there are two text input fields: "* First Name" and "* Last Name". The "First Name" field is highlighted with a purple circle and contains a single character "I". The "Last Name" field is empty. The "Previous", "Next", and "Close" buttons are still present at the bottom of the dialog. The background application interface is the same as in the previous image.

Manage Club Members

Please search for a sponsor for the new member.

* Search by Name or Lion ID

☒ Name

☐ Lion ID

* First Name

* Last Name

Previous Next

Close

18 Type "Example **tab** sixty"

19 Click "Next"

Account
Example Club For Training

on ID
00158

Type
Lions Club

Details Data Export

Account Name
Example Club For Training

Parent Account ⓘ

District 1 J

Region or Zone ⓘ

Zone 1

on ID ⓘ

00158

Club Specialty ⓘ

Cultural

Club Sub-Specialty ⓘ

Specialty Description ⓘ

Please search for a sponsor for the new member.

* Search by Name or Lion ID

☒ Name

☐ Lion ID

* First Name

Example

* Last Name

sixty

Previous Next

Close

+ Follow

Member Count

Club Action...

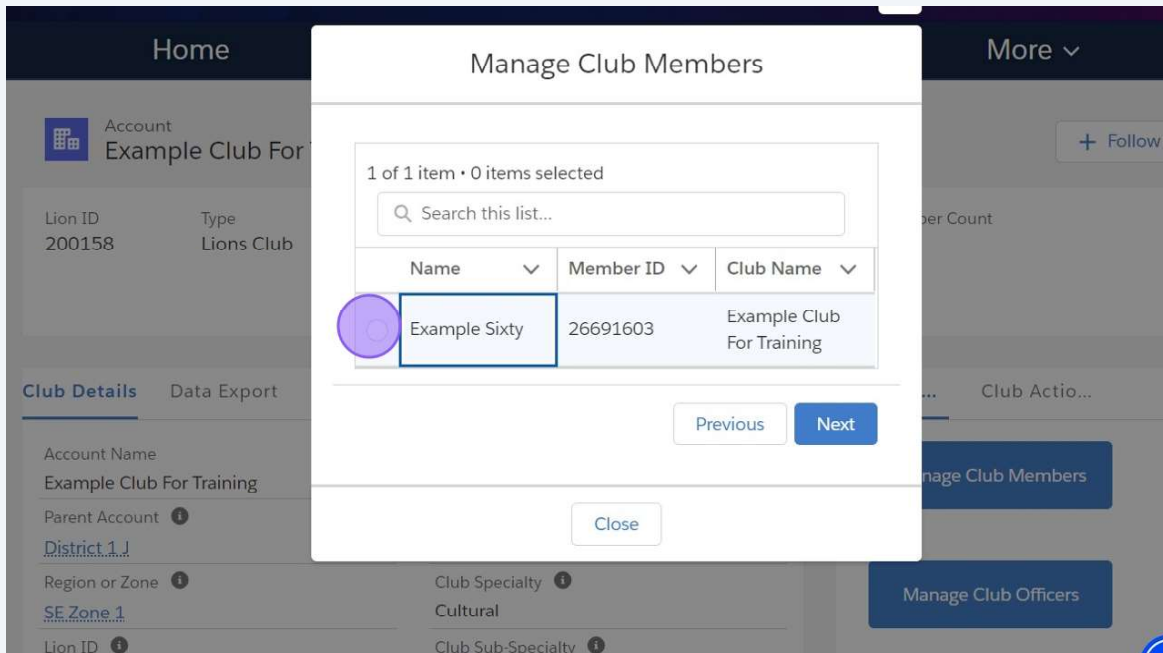
Manage Club Members

Manage Club Officers

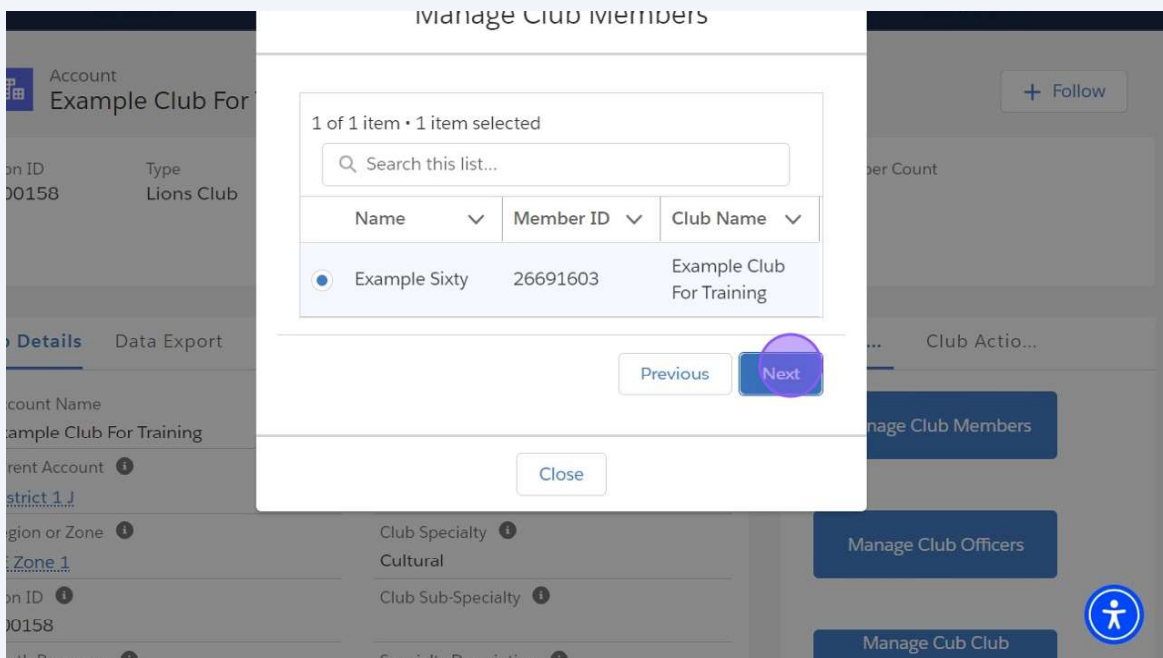
Manage Cub Club

ⓘ

- 20 Use the radio button to select the sponsor.



- 21 Click "Next"



22

Confirm the correct member sponsor and click "Next"

The screenshot shows a web application interface with a modal dialog box titled "Manage Club Members". The dialog box contains the following text:

Use this sponsor for the new membership?

Name: Example Sixty - Example Club For Training

Lion ID: 26691603

At the bottom of the dialog box, there are three buttons: "Previous", "Next" (highlighted with a purple circle), and "Close".

The background of the web application shows a sidebar with "Account" and "Example Club For Training" information, and a main content area with "Details" and "Data Export" tabs. The "Details" tab is active, showing fields like "Account Name", "Parent Account", "Region or Zone", "Club Specialty", and "Club Sub-Specialty".



Alert! This is where you are asked to confirm the discount or waive of discount.

23

Confirm this is to be added at the Family Dues discount or Waive the discount. If the discount is waived the member will be charged full dues and count toward the member delegate count after 1 year 1 day of membership.

The screenshot shows a web application interface with a modal dialog titled "Manage Club Members". The dialog contains the following text:

By waiving the discount, this member will become a full-paying member. This member will count towards their club's delegate entitlement once they have served consecutively for one year and one day at full dues-paying membership. For more information, refer to Board Policy Chapter XVII.

Below the text is a link: [Board Policy Chapter XVII](#).

At the bottom of the dialog is a checkbox labeled "Waive Discount", which is currently unchecked. To the left of the checkbox is a purple circle icon.

At the bottom right of the dialog are two buttons: "Previous" and "Next". At the bottom center is a "Close" button.

The background shows a sidebar with "Home" and "More" tabs, and a main content area with "Club Details" and "Data Export" tabs. The "Club Details" tab is active, showing fields like "Account Name", "Parent Account", "District 1 J", "Region or Zone", "Lion ID", "Club Specialty", and "Club Sub-Specialty".

24

Check the "Waive Discount" box to waive discount. Leave unchecked to have the family discount applied to the new member. Click "Next"

The screenshot shows the same "Manage Club Members" dialog box as in the previous image. The checkbox labeled "Waive Discount" is now checked. The "Next" button is highlighted with a purple circle.

The background interface remains the same, showing the "Manage Club Members" dialog box over a web application with a sidebar and main content area.




Tip! The member has been added. A green confirmation box will show. Click the "X" icon to close the message.

25

Click "Example Club For Training" to return to you "My Club" page.

[Home](#) [Membership ▾](#) [Service ▾](#) [Learn](#) [More ▾](#)


 Membership
MEMBER#0011943980

Contact
[Example Members Sixty-Eight](#)

Club
[Example Club For Training](#)

Details

Club ⓘ
[Example Club For Training](#)

Contact ⓘ
[Example Members Sixty-Eight](#) 

Club Branch ⓘ

Relationship Type ⓘ
Parent

Membership Sponsor ⓘ

Membership Status ⓘ
Active Member

Membership Type
Lion

Membership Category ⓘ
Active

Program ⓘ
Family Member

Add Type ⓘ

Phone: [\(+001\) 630-468-6900](#)

No related lists to display

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Click "Home" to return to the landing page.
This concludes the "Manage Club Members - Add a Club Member Family Member" Quick Guide.

The screenshot displays the 'Lion Portal' interface. At the top, there is a dark blue header with the 'Lion Portal' logo on the left, a search bar in the center, and notification and user icons on the right. Below the header is a navigation bar with links for 'Home' (highlighted with a purple circle), 'Membership', 'Service', 'Learn', and 'More'. The main content area shows the 'Account' section for 'Example Club For Training', with a '+ Follow' button. Below this is a table with club details:

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	57

Below the table are two tabs: 'Club Details' and 'Member ...'. The 'Club Details' tab is active, showing fields for 'Account Name' (Example Club For Training), 'Type' (Lions Club), 'Parent Account', and 'Active Member Count'. The 'Member ...' tab is also visible, showing a 'Club Acti...' link and a 'Manage Club Members' button.