



# FORMS TRAINING

COUNCIL FORMS TRAINING



## COUNCIL FORMS FOR THE YEAR

- Report of Officers Chosen for Term – 185
- Service Program Personnel Report – 365
- State Directory Information - <https://kofc-az.org/state-forms%2Freports>
- Family of the Month – Each council should be considering this. The family of the month then gets submitted to Supreme a chance to become family of the year.

# LOG INTO OFFICERS ONLINE GO TO MEMBER MANAGEMENT



# COUNCIL OFFICERS – FORM 185

- The fun part of the Online Submission

*No where on the form does it say Form 185!*

KNIGHTS OF COLUMBUS		REPORT OF OFFICERS CHOSEN FOR THE TERM			
Council #		DATE OF ELECTION			
COUNCIL ADDRESS (Meeting Location)		THIS REPORT CAN BE COMPLETED USING MEMBER MANAGEMENT. OTHERWISE PLEASE PRINT – INDICATE MEMBERSHIP NUMBERS			
STREET		ADDITIONAL ADDRESS			
CITY		STATE/PROVINCE		ZIP/POSTAL CODE	
GRAND KNIGHT	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
CHAPLAIN	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
DEPUTY GRAND KNIGHT	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
CHANCELLOR	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
RECORDER	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
TREASURER	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
LECTURER	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
ADVOCATE	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
WARDEN	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
ADDRESS CHANGE		STREET	CITY	STATE/PROVINCE	ZIP/POSTAL CODE
INSIDE GUARD	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
OUTSIDE GUARD	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
TRUSTEE FOR ONE YEAR	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
TRUSTEE FOR TWO YEARS	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL
TRUSTEE FOR THREE YEARS	MEMBERSHIP NO.	LAST NAME	FIRST NAME	INITIAL	EMAIL

SIGNED F.S.

• THIS INFORMATION IS ESSENTIAL FOR TRANSACTION OF OFFICIAL BUSINESS AND DIRECT MAIL COMMUNICATIONS WITH OFFICERS.  
 • APPOINTMENT OF FINANCIAL SECRETARY (SECTION 12B, LAWS AND RULES).  
 THE FINANCIAL SECRETARY SHALL BE APPOINTED BY THE SUPREME KNIGHT. HE SHALL HOLD OFFICE AT THE WILL OF THE SUPREME KNIGHT.

SEND ORIGINAL TO: Membership Records (email: AddressChange@kcof.org)  
 SEND COPIES TO: State Deputy, District Deputy, Council File

185 4/18

**CLICK ON  
LIVE**



**\*\*NOTICE – COMCAST EMAILS\*\***

The Supreme Council is experiencing issues with emails going to Comcast accounts. We believe that this is how Comcast deals with receiving emails from a 'NoReply' process in general (not just from the Knights of Columbus), which is the current industry standard. We are working to determine if the Supreme Council can change our process to allow emails to go through to our members with a Comcast email address.

The Service Program Personal (also known as Form 365) will be recorded as received when the following required roles have been appointed - Program Director, Community Director, Family Director, Membership Director, and Retention Chairman.

Safe Environment Requirements can be found at [kojc.org/safe](http://kojc.org/safe)

Please note that the Member Management, Member Billing and By-Laws Online Call Center's new telephone number is 203-752-4210. When calling, please select option 1.

LIVE

TRAINING

CLICK ON COUNCIL ADMINISTRATION

	Officers Online	Member Billing	Member Management	Council Administration	Print Center-MM
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- Member Management
  - Find a Member
    - ▶ Search Results
    - ▶ General Information
    - ▶ Fraternal Information
    - ▶ Personal Information
    - ▶ Member Interests
    - ▶ Contact Notes
    - ▶ Change History

### Member Management - Find A Member

#### Search Criteria

Display records for the following:

☒ Active Members ☐ Former Members

#### Required Criteria

Last Name:  -or- Member #:

Search Tips

CHOOSE  
COUNCIL  
OFFICERS  
CURRENT &  
NEXT

- Council Administration
- Council Information
- ▶ Council Officers  
Current & Next
- ▶ Service Program  
Personnel  
Current & Next
- ▶ Additional Positions
- ▶ Member Interests
- ▶ Parish List
- ▶ Title List
- ▶ Download Tools

CHOOSE  
NEXT  
FRATERNAL  
YEAR

- Council Administration
- ▶ Council Information
- Council Officers  
Current & Next
- Current Year
- ▶ Next Fraternal Year
- ▶ Service Program  
Personnel  
Current & Next
- ▶ Additional Positions
- ▶ Member Interests
- ▶ Parish List
- ▶ Title List
- ▶ Download Tools

# ADDING IN NAMES

1. Choose the Role

2. Click on Search by Last Name

3. Click on Search

5. Put in Start date

6. Click on Assign

4. Highlight the name

The screenshot shows a web form titled 'Council Members' with two tabs: 'Council Members' and 'Members from Other Councils'. The 'Council Members' tab is active. The form contains the following fields and controls:

- Choose a Role:** A dropdown menu with 'Grand Knight' selected.
- Search by Last Name:** A text input field with a 'Search' button next to it.
- Enter Start Date:** A date input field with '07-01-2019' entered and a calendar icon to its right.
- Assign:** A button located at the bottom right of the form.
- Search Tips:** A section containing a 'Choose Member:' dropdown menu.

The 'Choose Member:' dropdown menu is open, showing a list of members. The first item is 'UNASSIGNED' and the second item is 'Kato, Thomas Y', which is highlighted. The numbered instructions point to the following elements:

1. Choose the Role: Points to the 'Choose a Role:' dropdown.
2. Click on Search by Last Name: Points to the 'Search by Last Name:' text input.
3. Click on Search: Points to the 'Search' button.
4. Highlight the name: Points to the 'Kato, Thomas Y' entry in the 'Choose Member:' dropdown.
5. Put in Start date: Points to the 'Enter Start Date:' date input.
6. Click on Assign: Points to the 'Assign' button.



THE NAME POPS UP.  
CHANGE THE ROLES FOR ALL ROLES YOU ARE FILLING.

Council Members

Members from Other Councils

Choose a Role:  
Grand Knight

Search by Last Name:  
  
Search

Enter Start Date:  
07-01-2019

Search Tips

Choose Member:  
UNASSIGNED  
Kato, Thomas Y

Assign

Next Year Officers

Officer Positions	Name	Member#	Start Date
Grand Knight	Kato, Thomas Y	4089719	07-01-2019

CLICK ON SUBMIT ONCE DONE



Submit Reset

## NOTES

- The only positions that you need filled are:
  - Grand Knight
  - Financial Secretary
- If you do not have all the positions filled, don't worry. Submit anyway.

ONCE COMPLETE, GO TO PRINT CENTER-MM

Officers Online

Member Billing

Member Management

Council Administration

Print Center-MM

Choose “2. Next Fraternal Year Officers” if doing prior to July 1  
Choose “1. Current Officers” after July 1

### Print Center - Reports

#### Council Reports


1. Current Officers
2. Next Fraternal Year Officers
3. Current Service Program Personnel
4. Next Fraternal Year Service Program Personnel

CLICK "CLICK HERE TO OPEN" TO OPEN THE REPORT

## **Reporting Service**

**Thank you for waiting, your report is ready.**

Click here to open



## REPORT

- This will open the report in a PDF. Save the file to your hard drive! Check your “Downloads” folder if you cannot find it. It is called “NextFraternalYearOfficers.pdf”
- Rename the file to append the Fraternal Year and Council Number.
  - Example: NextFraternalYearOfficers-2019-2020-10062.pdf
- Email this to:
  - Rick Garrison – [azknights@q.com](mailto:azknights@q.com)
  - Your District Deputy
- If you make changes, make sure you email the updates!

## SERVICE PROGRAM PERSONNEL CURRENT & NEXT

- The fun part of this form – No where on the form does it say Form 365!

CLICK ON COUNCIL ADMINISTRATION

	Officers Online	Member Billing	Member Management	Council Administration	Print Center-MM
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- Member Management
  - Find a Member
    - ▶ Search Results
    - ▶ General Information
    - ▶ Fraternal Information
    - ▶ Personal Information
    - ▶ Member Interests
    - ▶ Contact Notes
    - ▶ Change History

### Member Management - Find A Member

**Search Criteria**

Display records for the following:

☒ Active Members      ☐ Former Members

**Required Criteria**

Last Name:       -or-      Member #:

Search Tips



CHOOSE  
SERVICE  
PROGRAM  
PERSONNEL  
CURRENT &  
NEXT



- Council Administration
- Council Information
  - ▶ Council Officers Current & Next
  - ▶ Service Program Personnel Current & Next
  - ▶ Additional Positions
  - ▶ Member Interests
  - ▶ Parish List
  - ▶ Title List
  - ▶ Download Tools

CHOOSE  
NEXT  
FRATERNAL  
YEAR



- Council Administration
  - ▶ Council Information
  - ▶ Council Officers Current & Next
  - Service Program
  - Personnel Current & Next
    - Current Year
    - ▶ Next Fraternal Year
  - ▶ Additional Positions
  - ▶ Member Interests
  - ▶ Parish List
  - ▶ Title List
  - ▶ Download Tools

QUIRKINESS....  
YOU HAVE TO CHOOSE “COPY CURRENT YEAR” TO PROCEED.

Next Fraternal Year 2019-2020

Copy Current Year

If not, you get this  
when trying to  
assign

Assignment failed

Member cannot be assigned to the position until Copy Current Year button is selected. Click Ok to Proceed.

Ok

# SERVICE PERSONNEL

1. Choose the Role

2. Click on Search by Last Name

3. Click on Search

5. Put in Start date

6. Click on Assign

4. Highlight the name

**Supreme Defined Positions** **Council Defined Positions**

**Choose a Role:**  
Program Director

**Search by Last Name:**

**Enter Start Date:**  
07-01-2019

**Choose Member:**  
UNASSIGNED  
Kato, Thomas Y

THE NAME POPS UP.  
CHANGE THE ROLES FOR ALL ROLES YOU ARE FILLING.

#### Change Service Program Personnel

##### Supreme Defined Positions

##### Council Defined Positions

Choose a Role:

Program Director

Search by Last Name:

Search

Enter Start Date:

07-01-2019



Search Tips

Choose Member:

UNASSIGNED  
Kato, Thomas Y

Assign

#### Next Year Service Program Personnel

Program Positions	Name	Member#	Start Date
Program Director	Kato, Thomas Y	4089719	07-01-2019

CLICK ON SUBMIT ONCE DONE



Submit Reset

## NOTES

- There are only 5 roles that are Required:

- **Program Director**
- **Community Director**
- **Family Director**
- Membership Director
- Retention Chairman

**Bolded members are required to take Safe Environment training.**

ONCE COMPLETE, GO TO PRINT CENTER-MM

Officers Online

Member Billing

Member Management

Council Administration

Print Center-MM

Choose “4. Next Fraternal Year Service Program Personnel”  
if doing prior to July 1  
Choose “3. Current Service Program Personnel” after July 1

### Print Center - Reports

#### Council Reports


1. Current Officers
2. Next Fraternal Year Officers
3. Current Service Program Personnel
4. Next Fraternal Year Service Program Personnel

CLICK "CLICK HERE TO OPEN" TO OPEN THE REPORT

## **Reporting Service**

**Thank you for waiting, your report is ready.**

Click here to open





## REPORT

- This will open the report in a PDF. Save the file to your hard drive! Check your “Downloads” folder if you cannot find it. It is called “NextProgramPositions.pdf” or “CurrentProgramPositions.pdf”
- Rename the file to append the Fraternal Year and Council Number.
  - Example: NextProgramPositions-2019-2020-10062.pdf
- Email this to:
  - Rick Garrison – [azknights@q.com](mailto:azknights@q.com)
  - Your District Deputy
- If you make changes, make sure you email the updates!

FILL OUT THE STATE DIRECTORY  
FORMS  
STATE DIRECTORY INFORMATION -  
[HTTPS://KOFC-AZ.ORG/STATE-  
FORMS%2FREPORTS](https://koafc-az.org/state-forms%2FREPORTS)  
SEND TO AZKNIGHTS@Q.COM



Mail to: Knights of Columbus  
AZ State Council  
14175 W Indian School Road  
Suite B4-626  
Goodyear, AZ 85395-3363

## DIRECTORY INFORMATION

Email To: [AZKnights@Q.com](mailto:AZKnights@Q.com)  
FAX To: 1-877-899-7505  
Questions or Help, Call:  
(623) 536-4801

DUE DATE: July 1

### PLEASE TYPE OR PRINT LEGIBLY

USE TAB/SHIFT TAB TO MOVE BETWEEN SHADED FIELDS

COUNCIL NAME: COUNCIL NUMBER:

#### GRAND KNIGHT

Name:   
Wife: Home:   
Street:   
City: ZIP:   
Cellular:   
\*\*Email:

#### DEPUTY GRAND KNIGHT

Name:   
Wife: Home:   
Street:   
City: ZIP:   
Cellular:   
\*\*Email:

#### FINANCIAL SECRETARY

Name:   
Wife: Home:   
Street:   
City: ZIP:   
Cellular:   
Email:

#### CHAPLAIN

Name:   
Parish: Work:   
Street:   
City: ZIP:   
Home: Cellular:   
Email:

Council Mailing Address:

Council Meeting Address:

Meeting Day and Time:

Council Phone:

Council Email / Web Page:

#### FR. MCGIVNEY GUILD CHAIRMAN

Name:   
Wife: Home:   
Street:   
City: ZIP:   
Cellular:   
Email:

#### PARISH INFORMATION

Diocese:   
Parish Name:   
City: ZIP:   
Parish Name:   
City: ZIP:

#### CULTURE OF LIFE CHAIRMAN

Name:   
Wife: Home:   
Street:   
City: ZIP:   
Cellular:   
Email:

#### LADIES AUXILIARY PRESIDENT

Auxiliary Name:   
Name: Husband:   
Street:   
City: ZIP:   
Cellular:   
Email:

## WHY 2 SEPARATE FORMS WITH THE SAME INFORMATION????

- The first Officers Chosen for Fraternal Year is a Supreme Form. Supreme automatically gets this when you fill it out online.
- Unless councils sends a copy of the PDF to [azknights@q.com](mailto:azknights@q.com), we don't have access to it.
- The ONLY way we get it currently is through the State Directory.
- This is CRITICAL for disseminating information to Grand Knights and Officers throughout the year.

## SIDE BAR

- Use Email to send as many forms as possible to Supreme. Try not to snail mail.
- If you don't have a scanner, use your phone! There are apps out there for both Android and Apple: CamScanner, Tiny Scanner.
  - REMEMBER TO SAVE AS PDF TO EMAIL TO SUPREME!

## FAMILY OF THE MONTH – #10668

- Due 15<sup>th</sup> day of following month
- To be selected as Family of the month, each family should stand out as an exemplary model to others in the parish.
- The following factors should be considered when selecting a Family of the month:
  - • Is the family tight-knit? Does the family spend quality time together?
  - • Does the family attend weekly Mass together?
  - • Does the family pray together outside of Mass?
  - • Has the family made significant contributions to the parish and church community?
  - • Does the family serve as a model of Catholic family values?
- Talk to Pastor about presenting Family of the Month at a mass the Family attends
- You can use this as a soft "recruiting" event.
- SEND TO SUPREME AND [azknights@q.com](mailto:azknights@q.com)

## FAMILY OF THE MONTH ENTRY FORM

DUE BY 15<sup>th</sup> DAY OF THE FOLLOWING MONTH

Fully complete this report form by listing the family's information and qualifications. This will also ensure that the family is entered in the Supreme Council Family of the Month Contest.

The family of \_\_\_\_\_ has been selected as the \_\_\_\_\_

(Nominee's Name)

(Month)

Family of the Month for Council \_\_\_\_\_ in \_\_\_\_\_

(Number)

(State or Province)

Husband: \_\_\_\_\_ Member: ☐ Yes ☐ No Membership Number (if applicable): \_\_\_\_\_

Wife: \_\_\_\_\_ Children: ☐ Yes ☐ No If yes, how many children? \_\_\_\_\_

Age of nominee: \_\_\_\_\_ Years of Service: \_\_\_\_\_

(If Applicable)

Husband/nominee's email address: \_\_\_\_\_

Home Address: \_\_\_\_\_

(Street)

(City)

(State/Province)

(Postal Code)

Our council's Family of the Month was selected for the following reasons:

The following factors should be considered when selecting a Family of the Month:

- Is the family tight-knit? Does the family spend quality time together?
- Does the family attend weekly Mass together? Does the family pray together outside of Mass?
- Has the family made significant contributions to the parish and church community?
- Does the family serve as a model of Catholic family values?

Signed: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

(Grand Knight)

Grand Knight's email: \_\_\_\_\_



FAITH IN ACTION

Email a copy of this document to: [fraternalmission@kofc.org](mailto:fraternalmission@kofc.org)  
(Councils should also retain a copy of this completed form for their files)

(See other side for instructions)

FAMILY



QUESTIONS???