

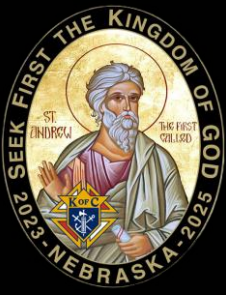
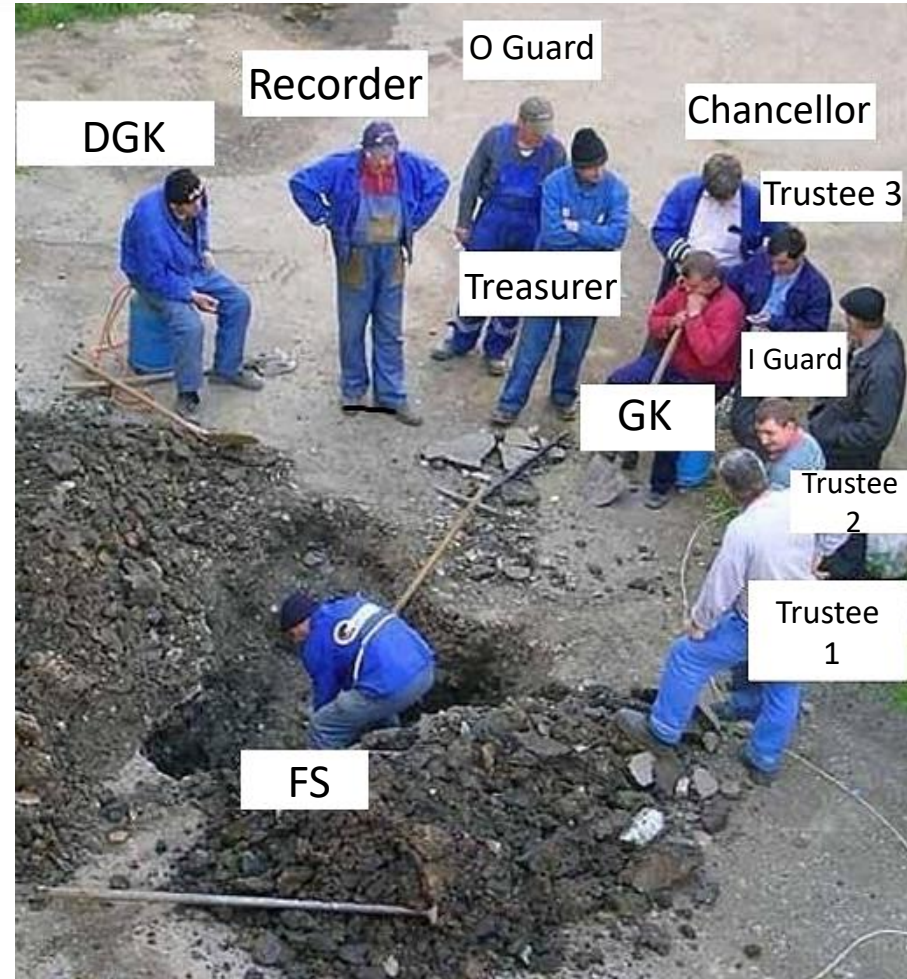
NEBRASKA KNIGHTS OF COLUMBUS

2024 Convention Financial Secretary Workshop

Mike Vaughn
Joe Kaup

Digital Copy

<https://nebraskakofc.org/resources/financial-secretary-resources.html>



Seek First the Kingdom of God

Member Management - Officer Online



Officers Online

Hi Michael Vaughn | Last Login: 10/27/2021 at 1:27 pm

Change Role: Financial Secretary

Urgent Messages

Nebraska > 40 > #1966 (Plattsmouth)

Supporting Applications

- Officers Desk Reference
- Office Of Youth Protection
- Home Corporations
- Member Management
- Member Billing
- By Laws Online
- Knights Gear
- Supplies Online
- Canadian Supplies Online

Membership | Reports | Forms | Publications | Prospect | Candidate

	Quota	Month to Date			Year to Date			%
		Gain	Loss	Net	Gain	Loss	Net	
MBR	6	0	0	0	1	0	1	17
INS	0	0	0	0	0	0	0	

Council Membership

Total Membership	129
Change in Membership	0

Only approved officers with log-in privileges have access to this page

Nice to Know: FS/FC are the only members to have full access to council/assembly information

Prospect: Someone who joined through the supreme portal and is eligible to join your Council

Candidate: Latest way to add a new member, transfer in, and reactivate members

Seek First the Kingdom of God

Adding Members

Form 100	Candidate's Tab	Join through Supreme Website
Paper Copy	Officer Online	New member Selects "Join" Button
Scan and Email	Online	Online
New Members	New Members	New Member Becomes a Prospect if Council Identified
Can Transfer and React Members	Can Transfer and React Members	Cannot Transfer or Reactivate
Retain Form 100 for Records	Produce and Retain Paper Form 100	No Paper Form 100 Required
1 st , 2 nd and 3 rd Degree Date is date CUF taken	1 st , 2 nd and 3 rd Degree Date is Date CUF Taken	1st Degree Date is date joined 2 nd and 3 rd Degree Dates CUF Taken
New Members and Reactivated Member - Credit to Council	New Members and Reactivated Member - Credit to Council	Membership Credit to Council (When Transferred) and Agent
Dues Paid to Council	Dues Pay to Council	Dues paid to Supreme Until Transfer
Can Take Several Weeks to Process	Near Instant for New. 2-3 days for Transfers and Reactivations	Near Instant



Seek First the Kingdom of God

Council Reports



Officers Online
Hi Michael Vaughn | Last Login: 4/10/22

Urgent Messages

Council Program and Supply Purchases
When purchasing items from Supplies Online, please use the unique email address entered as their 'From' field. This includes Coats for Kids, available under Financial Matters in the Council Program.

Email Addresses Mandatory for Safe Environment
In order to be counted towards a council's Safe Environment participation rate, a unique email address entered as their 'From' field is required.

Nebraska > 40 > #198

Supporting Applications

Officers Desk Reference
 Office Of Youth Protection
 Canadian Supplies Online

Membership Reports Forms Publications Prospect Candidate

Membership Reports Forms Publications Prospect Candidate

Nice to Know: Rosters are updated weekly

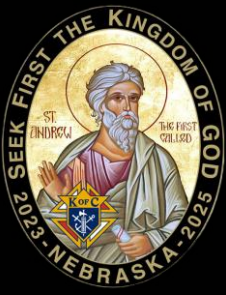
Search:

Report Name	Date	PDF	Excel
Membership Roster	4/12/2022		
Membership Roster - January	1/1/2022		
Membership Roster - July	7/1/2021		
Financial Statement	4/1/2022		
Safe Environment Member Status	4/12/2022		
Safe Environment Participation Rate Report	4/12/2022		
Council Billing Statement (Past)	3/31/2022		

Nice to Know: Hover then click on (past) to view previous 18 months of Council Statements

Seek First the Kingdom of God

Council Statement



- Ready by the first of the month
- Retained for 18 months (on Website)
- Provides membership Info →
- Provides Supreme financial Info →
- Status of required forms →
- Must be able to log into Officers Online
- Payment coupon to remit Per Capita, Catholic Advertising, and Culture of Life

KNIGHTS OF COLUMBUS COUNCIL STATEMENT-SUMMARY AND PAYMENT COUPON

DATE	ST	COUNCIL	LOCATION		QUOTA	GAIN	LOSS	NET	ATTAINED
06/01/23	NE	1966	PLATTSMOUTH	MEMBERSHIP	8	9	0	9	112.50 %
				INSURANCE	0	2	1	1	0.00 %

IF YOU HAVE ANY QUESTIONS REGARDING YOUR COUNCIL STATEMENT PLEASE CALL:
 MICHAEL G VAUGHN
 1809 HEDGEAPPLE RD
 PLATTSMOUTH NE 68048-5666
 FOR MEMBERSHIP: (203) 752-4210
 FOR BILLING: (203) 752-4392

COUNCIL STATUS: IN GOOD STANDING

SUMMARY		MEMBERSHIP BY CATEGORY				INCLUDED IN TOTAL		
MEMBER INFORMATION	DATE	ASSOC	INS	INACT	TOTAL	HON	HL	EXM
MEMBERSHIP TOTALS	06/01/23	91	45	0	136	6	31	3

SUMMARY		ACCOUNTS			
FINANCIAL INFORMATION	DATE	PER CAPITA	CATHOLIC ADV / CULTURE OF LIFE	SUPPLIES	TOTAL
AMOUNTS DUE	06/01/23	0.00	0.00	0.00	0.00

SUBMIT OFFICER REPORT FORM NO. 185 IN MEMBER MANAGEMENT BY JUNE 30
 COLUMBIAN AWARD APPLICATION FORM NO. SP-7 DUE BY JUNE 30.
 SUBMIT SERVICE PERSONNEL REPORT FORM NO. 365 IN MEMBER MANAGEMENT BY JUNE 30

PLEASE RETAIN TOP PORTION FOR COUNCIL RECORDS
 PLEASE RETURN THIS PORTION WITH PAYMENT

PAYMENT COUPON

PAYMENT DUE UPON RECEIPT PLEASE MAKE ALL CHECKS PAYABLE TO:
 KNIGHTS OF COLUMBUS SUPREME COUNCIL

ST	COUNCIL	LOCATION	REMIT DATE:	
NE	1966	PLATTSMOUTH	06/01/23	
			TOTAL AMOUNT DUE:	\$.00

MAIL THIS COUPON WITH YOUR REMITTANCE TO:
 KNIGHTS OF COLUMBUS-COUNCIL ACCOUNTS
 PO BOX 382172
 PITTSBURGH PA 15251-8172
 80000000260019660000000006012319

Seek First the Kingdom of God

Council Statement (Continue)



KNIGHTS OF COLUMBUS COUNCIL STATEMENT											DATE	ST	COUNCIL	LOCATION
											06/01/23	NE	1966	PLATTSMOUTH
NUMBER	NAME	TRANSACTION DESCRIPTION	EFFECTIVE DATE	MEMBERSHIP BY CATEGORY				INCLUDED IN TOTAL			ACCOUNT BALANCES			
				ASSOC	INS	INACT	TOTAL	HON	HL	EXM	PER CAPITA	CATHADV / CULTURE OF LIFE	SUPPLIES	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	
	BALANCE FORWARD		05-01-23	92	46	0	138	5	30	3	0.00	0.00	0.00	
2281335	BRINK EDWARD E	HONORARY MEMB	05-30-23					+1				0.00	0.00	
4423183	CURTIS TONY R	MEMBER TRANSFER	05-31-23											
4423183	CURTIS TONY R	MEMBER TRANSFER	05-31-23		-1		-1							
3478820	REINEKE RONALD E	HONORARY LIFE	05-01-23						+1					
4871684	STASKIEWICZ KENNETH R	MEMBER TRANSFER	05-31-23											
4871684	STASKIEWICZ KENNETH R	MEMBER TRANSFER	05-31-23		-1		-1							
	NEW BALANCE		06-01-23	91	45	0	136	6	31	3	0.00	0.00	0.00	
ADDRESS MAINTENANCE REGISTER														
MBR #	NAME	STREET ADDRESS		EXTRA ADDRESS LINE				CITY		ST/PROV	POST CODE			
5335441	PAUL P THOMPSON	46447 PINOAK RD						AVOCA		IA	515212539			

Page 3 contains membership updates

Nice to Know: Honorary and Honorary Life status is updated automatically and ceremonial cards are produced and sent to FS for presentation

Seek First the Kingdom of God

Navigating Supplies

Requires credit/debit card...see Officers Desk Reference!



Officers Online

Hi Michael Vaughn | Last Login: 4/10/2022 at 3:13 pm | Change Role: Financial Secretary

Urgent Messages

Council Program and Supply Purchases (e.g., Coats for Kids)
When purchasing items from Supplies Online or Knightsgear individuals can no longer select "Charge Council or Assembly" at checkout. All orders must be paid in full at checkout. This includes Coats for Kids. Councils and assemblies are now able to obtain a credit or debit card in their name for approved expenses. Information is available under Financial Matters in the Officers Desk Reference.

Email Addresses Mandatory for Safe Environment Roles
In order to be counted towards a council's Safe Environment compliance, Grand Knights, Program Directors, Family Directors, and Community Directors must have a unique email address entered as their "Primary Email" in Member Management.

Nebraska > 40 > #1966 (Plattsmouth)

Supporting Applications

- Officers Desk Reference
- Office Of Youth Protection
- Home Corporations
- Member Management
- Member Billing
- By Laws Online
- Knights Gear
- Supplies Online**
- Canadian Supplies Online

Membership | Reports | Forms | Publications | Prospect | Candidate

Knights of Columbus

Available M-F 8AM-6PM EST
Toll Free: 1-833-591-7770
Direct Phone Line: 1-443-541-8550

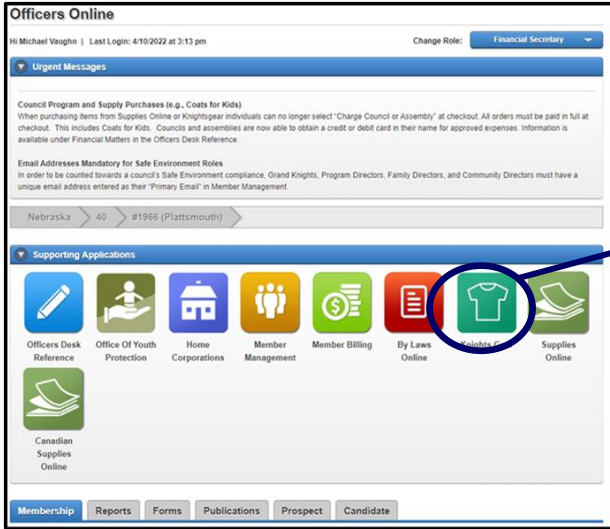
Need help navigating the site? Watch this video for helpful information.

SHOP MY ORDERS LOGOUT

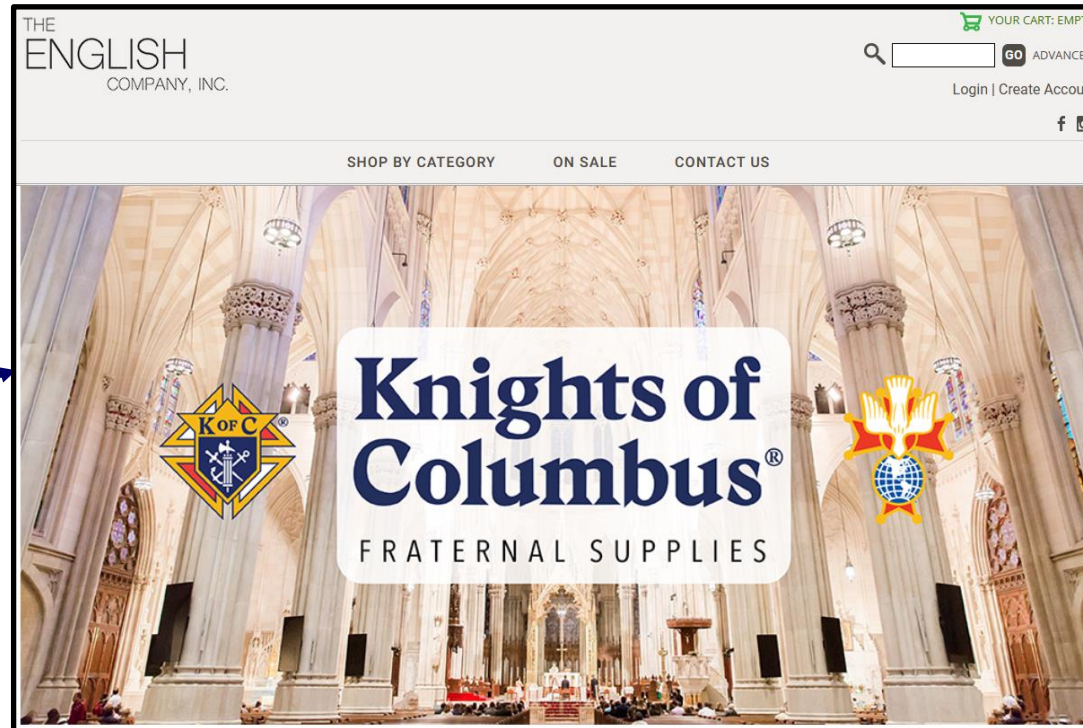
Family of the Month Award

Seek First the Kingdom of God

Navigating Supplies



Nice to Know: The English Company
<https://www.kofcsupplies.com/>
Ceremonial Supplies, Plaques
Jewels, Baldrics, etc



Seek First the Kingdom of God

MEMBER MANAGEMENT/MEMBER BILLING COUNCIL ADMINISTRATION SECTION

Notifies hierarchy who in charge

Tracks council officers and committee leads

Provides rates

Updates officers (185) and committee

Leads (365) after elections

Updates go directly to Supreme

Provide a .PDF update to State Executive Secretary

Demo

Nice to Know: Both Forms are due by June 30th

Officers Online

Hi Michael Vaughn | Last Login: 4/10/2022 at 3:13 pm

Change Role: Financial Secretary

Urgent Messages

Council Program and Supply Purchases (e.g., Coats for Kids)
When purchasing items from Supplies Online or Knightsgear individuals can no longer select "Charge Council or Assembly" at checkout. All orders must be paid in full at checkout. This includes Coats for Kids. Councils and assemblies are now able to obtain a credit or debit card in their name for approved expenses. Information is available under Financial Matters in the Officers Desk Reference.

Email Addresses Mandatory for Safe Environment Roles
In order to be counted towards a council's Safe Environment compliance, Grand Knights, Program Directors, Family Directors, and Community Directors must have a unique email address entered as their "Primary Email" in Member Management.

Nebraska > 40 > #1966 (Plattsmouth)

Supporting Applications

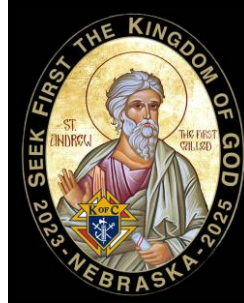
- Officers Desk Reference
- Office Of Youth Protection
- Home Corporations
- Member Management**
- Member Billing
- By Laws Online
- Knights Gear
- Supplies Online
- Canadian Supplies Online

Membership Reports Forms Publications Prospect Candidate



Seek First the Kingdom of God

Member Billing "Expert"



KNIGHTS OF COLUMBUS OFFICERS ONLINE

UPDATE YOUR PROFILE

Officers Online

Hi Michael Vaughn | Last Login: 1/30/2023 at 6:33 pm

Change Role: Financial Secretary

Urgent Messages

By Laws Update

Membership Cards

ASAP (Ad & Support After Pregnancy)

Council Program and Supply Purchases (e.g., Coats for Kids)

Email Addresses Mandatory for Safe Environment Roles

Supporting Applications

Officers Desk | Office of Youth Protection | Home Corporations | Member Management | By Laws Online | Knights Gear | Supplies Online

Nice to know:
Expert button is your Help button.
Most questions Can be answered here

Member Billing

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 kofc.org/safe

Please note that the Member Management, Member Billing and By-Laws Online Call Center's new telephone number is 202-359-4210. When calling, please select option 1.

LIVE TRAINING

UPDATES MEMBER MANAGEMENT MEMBER BILLING BY-LAWS FS / FC SUPPORT CONTACT US

Recent Updates:

Video Tutorial: Click here to view Video Tutorials

Data Extract Tool: The issues with generating an extract using the Data Extract Tool has been corrected in Member Management.

This issue continues when attempting to generate an extract using the Data Extract Tool, if your version of Excel is earlier than 2007, in Member Billing. We are working to correct these issues with Member Billing application.

Account List: The Supreme Council has added a System defined expense Account: Sub Account for Councils named Per Capita: Culture of Life.

Member Billing

Getting Started / Initial Set-Up

Adjusting on Past Dues for delinquent members

Billing Schedule/Frequency

Enter/Change Amount of Dues

Billing Notice Delivery Preference for individual members

Sub Class Information

Generating an Assessment

Entering Receipts/Payments

Entering Vouchers

Printing

Email Functionality

General Information

KNIGHTS OF COLUMBUS Find a Member by Last Name: [] Go Print this screen

Officers Online Member Management Member Billing Print Center-HB

Council Ledger

Council Billing & Accounting - Council Ledger

Council

FATHER SHINE Council 1966

Council Location: PLATTSMOUTH District: 040 Jurisdiction: NE Date of Institution: 06-08-1919

View Transactions

By Date By Transaction Type By Income Account By Expense Account By Event

Show from: [] to: [] Search

Council Transactions - Processed

Date	Transaction Type	Batch #	Account: Sub Account	Event	Amount
------	------------------	---------	----------------------	-------	--------

Council Transactions - Pending

Pending Receipts

Pending Vouchers

Pending Assessments

Pending Adjustments

Expert

Press "Expert" Button

Seek First the Kingdom of God

Audit Form



Knights of Columbus **Semiannual Council Audit Report**
For Period Ended June 30, 20__

Council No.: _____ City: _____ State: _____ DUE BY: AUGUST 15

SCHEDULE A – MEMBERSHIP

	ADDITIONS			DEDUCTIONS		
	INS.	ASSO.	TOT.	INS.	ASSO.	TOT.
Total members start of period						
Initiations						
Transfers from other councils						
Transfers — assoc. to insurance						
Transfers — ins. to associate						
Re-entries						
Total for period						
Minus total deductions						
Number members end of period						

SCHEDULE A – ALTERNATIVE

Our council uses Member Management/Member Billing. The requirement for completing Schedule A is satisfied.

SCHEDULE B – CASH TRANSACTIONS

FINANCIAL SECRETARY		TREASURER	
Cash on hand beginning of period	\$ _____	Cash on hand beginning of period	\$ _____
Cash received — dues, initiations	\$ _____	Received from financial secretary	\$ _____
Cash received from other sources:		Transfers from sav./other accts.	\$ _____
(Explain kind and amount)		Interest earned	\$ _____
\$ _____		Total receipts	\$ _____
\$ _____		Disbursements:	
\$ _____		Per capita: Supreme Council	\$ _____
Total cash received	\$ _____	State Council	\$ _____
Transferred to treasurer	\$ _____	General council expenses	\$ _____
Cash on hand at end of period	\$ _____	Transfers to sav./other accts.	\$ _____
		Miscellaneous	\$ _____
		Total disbursements	\$ _____
		Net balance on hand	\$ _____

SCHEDULE C – ASSETS AND LIABILITIES

ASSETS		LIABILITIES	
Cash:		Due Supreme Council:	
Undeposited funds	\$ _____	Per capita	\$ _____
Bank — Checking acct.	\$ _____	Supplies	\$ _____
— Savings acct.	\$ _____	Catholic advertising	\$ _____
— Money market accts.	\$ _____	Other	\$ _____
Due from _____ members	\$ _____	Due State Council	\$ _____
Total current assets	\$ _____	Advance payments by _____ members	\$ _____
Less: current liabilities	\$ _____	Misc. liabilities	\$ _____
Net current assets	\$ _____		\$ _____
Other Assets:		Total current liabilities	\$ _____
Short term CD	\$ _____	Signed this _____ day of _____, 20__	
Money Market Mutual Funds	\$ _____		
Misc. assets	\$ _____		
Total other assets	\$ _____		
Total assets	\$ _____		

Please complete all items. Insert "None" where no figures are to be shown.

SEND ONE COPY TO: Council Accounts
Email: council.accounts@kofc.org
Fax: 855-228-1396
Mail: 1 Columbus Plaza, New Haven, CT 06510
COPIES TO: State Deputy, District Deputy, Council File

For more details, see Knights of Columbus Leadership Resources (#5093) booklet.
*All U.S. Councils must file form 990 with IRS annually. For info, email tax.ein@kofc.org or refer to Officer's Desk Reference. 1295 123

Can only be a negative number

Knights of Columbus **Semiannual Council Audit Report**
For Period Ended December 31, 20__

Council No.: _____ City: _____ State: _____ DUE BY: FEBRUARY 15

SCHEDULE A – MEMBERSHIP

	ADDITIONS			DEDUCTIONS		
	INS.	ASSO.	TOT.	INS.	ASSO.	TOT.
Total members start of period						
Initiations						
Transfers from other councils						
Transfers — assoc. to insurance						
Transfers — ins. to associate						
Re-entries						
Total for period	0	0	0			
Minus total deductions	0	0	0			
Number members end of period	0	0	0			

SCHEDULE A – ALTERNATIVE

Our council uses Member Management/Member Billing. The requirement for completing Schedule A is satisfied.

SCHEDULE B – CASH TRANSACTIONS

FINANCIAL SECRETARY		TREASURER	
Cash on hand beginning of period	\$ _____	Cash on hand beginning of period	\$ _____
Cash received — dues, initiations	\$ _____	Received from financial secretary	\$ _____
Cash received from other sources:		Transfers from sav./other accts.	\$ _____
(Explain kind and amount)		Interest earned	\$ _____
\$ _____		Total receipts	\$ _____
\$ _____		Disbursements:	
\$ _____		Per capita: Supreme Council	\$ _____
Total cash received	\$ _____	State Council	\$ _____
Transferred to treasurer	\$ _____	General council expenses	\$ _____
Cash on hand at end of period	\$ _____	Transfers to sav./other accts.	\$ _____
		Miscellaneous	\$ _____
		Total disbursements	\$ _____
		Net balance on hand	\$ _____

SCHEDULE C – ASSETS AND LIABILITIES

ASSETS		LIABILITIES	
Cash:		Due Supreme Council:	
Undeposited funds	\$ _____	Per capita	\$ _____
Bank — Checking acct.	\$ _____	Supplies	\$ _____
— Savings acct.	\$ _____	Catholic advertising	\$ _____
— Money market accts.	\$ _____	Other	\$ _____
Due from _____ members	\$ _____	Due State Council	\$ _____
Total current assets	\$ _____	Advance payments by _____ members	\$ _____
Less: current liabilities	\$ _____	Misc. liabilities	\$ _____
Net current assets	\$ _____		\$ _____
Other Assets:		Total current liabilities	\$ _____
Short term CD	\$ _____	Signed this _____ day of _____, 20__	
Money Market Mutual Funds	\$ _____		
Misc. assets	\$ _____		
Total other assets	\$ _____		
Total assets	\$ _____		

Please complete all items. Insert "None" where no figures are to be shown.

SEND ONE COPY TO: Council Accounts
Email: council.accounts@kofc.org
Fax: 855-228-1396
Mail: 1 Columbus Plaza, New Haven, CT 06510
COPIES TO: State Deputy, District Deputy, Council File

For more details, see Knights of Columbus Leadership Resources (#5093) booklet.
*All U.S. Councils must file form 990 with IRS annually. For info, email tax.ein@kofc.org or refer to Officer's Desk Reference. 1295 123

Seek First the Kingdom of God

Nebraska Knights of Columbus
2023-2025

Due Dates

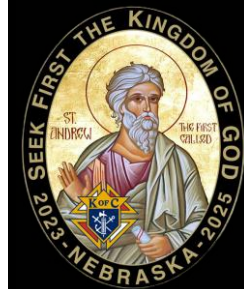
State

Due Date	Description
1-Sep	July State Per Capita Assessment
1-Sep	July Supreme Per Capita Assessment
1-Sep	First ICC Submission
31-Jan	Intellectual Disabilities (Tootsie Roll®) Program Report
1-Mar	January Supreme Per Capita Assessment
1-Mar	January State Per Capita Assessment
1-Mar	Final ICC Submission
1-Mar	Award Nominations

Supreme

FORMS AND REPORTS	
<u>Due Date</u>	<u>Form/Report</u>
June 30	Report of Chosen Officers for the Term (#185) OR the Officers Screen on Member Management
	Service Program Personnel Report (#365)* OR the Service Personnel Screen on Member Management
August 15	Semiannual Council Audit (#1295)
September 15	District Deputy Report (#944)
January 31	Annual Survey of Fraternal Activity (#1728)*
February 15	Semiannual Council Audit (#1295)
June 30	Columbian Award Application (#SP-7)*
Immediately	Membership Document (#100)
If Required	Notice of Intent to Retain (#1845)
As Required	Entries for the State Council Service Program Awards Contest (#STSP) and Family of the Year Contest to your state council
Monthly	Family of the Month (#1993)

* Indicates Star Council Award Requirement



Seek First the Kingdom of God

Supreme and State Assessments

(Due Upon Receipt)

Assessments			
	State	Supreme	Grand Total
Jan Per Capita	\$5.37	\$1.75	
Jan Catholic Advertising		\$0.50	
Jan Culture of Life		\$1.00	
Jul Per Capita	\$5.38	\$1.75	
July Catholic Advertising		\$0.50	
July Culture of Life		\$1.00	
Total	\$10.75	\$6.50	\$17.25

Honorary Life does not pay any dues

Disabled do not pay dues

Honorary Members do not pay Culture of Life so dues are \$2.00 less



Seek First the Kingdom of God

IRS Form 990

Required annually -cannot skip a year

Plenty of notice

990N Electronic Post Card

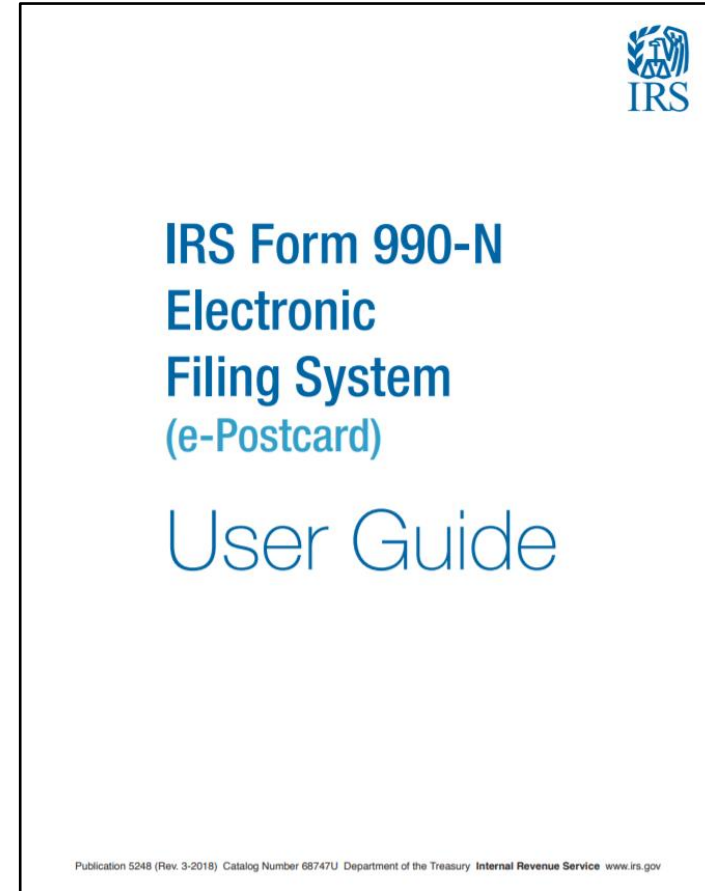
- Under \$50,000 in gross revenues

990-EZ: \$50K to \$200K

Form 990: > \$200K

Failure to comply: Loss of taxes and revoking of EIN

Nice to know:
Supreme recommends using an accountant if you are over \$50K in revenue.



<https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard>



Seek First the Kingdom of God

FRATERNAL LEADER ADVISORY

Sent from Supreme directly to council leadership (and others)

Provides breaking news, reminders resources and recommendations

Emailed directly to you...not getting...verify email and ensure it is not going to Junk mail

<https://www.kofc.org/en/news-room/fraternal-leader-advisory/index.html>

All FSs and FCs must receive

Seek First the Kingdom of God



RESOURCES

LEADERSHIP RESOURCES (#5093)

<https://www.kofc.org/en/resources/officers/officers.pdf>

FRATERNAL LEADER ADVISORY

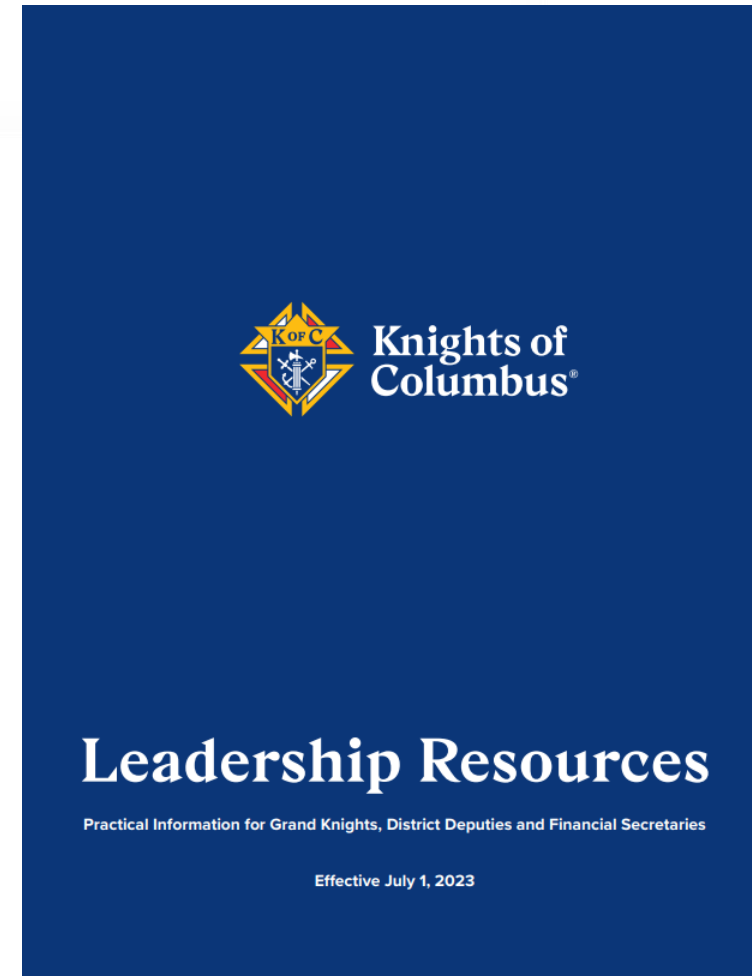
<https://www.kofc.org/en/news-room/fraternal-leader-advisory/index.html>

FRATERNAL VIDEO LIBRARY

<https://www.kofc.org/en/videos/fraternal-training-library.html>

STATE FINANCIAL SECRETARY RESOURCES

<https://nebraskakofc.org/resources/financial-secretary-resources.html>



Seek First the Kingdom of God

You Are Not Alone...

SUPREME COUNCIL OFFICE CONTACT DIRECTORY

Customer Service	203-752-4000	
Customer Service	1-800-380-9995	
KnightsGear	1-855-432-7562	knightsgear@kofc.org
Supplies Online	1-833-591-7770	customersupport@slwmco.com
Fraternal Mission		fraternalmission@kofc.org
Affiliate Membership		affiliate@kofc.org
Catholic Information Service		cis@kofc.org
Ceremonials		ceremonials@kofc.org
Chaplains Programs and Development		chaplains@kofc.org
Columbia Magazine		columbia@kofc.org
Council Accounts		council.accounts@kofc.org
Financial Secretary Appointments		financial.secretary@kofc.org
Membership Growth		councilgrowth@kofc.org
Membership Records		membership@kofc.org
Member Management/Member Billing		expertfs@kofc.org
Scholarships		scholarships@kofc.org
For general inquiries, email		info@kofc.org

Nice to know:
State FS Co-Coordinator
Chairmen
Joe Kaup
Cell: 402-340-9875
Mike Vaughn
Cell: 402-297-5434
Email:
fscordinator@nebraskakofc.org



Seek First the Kingdom of God

NEBRASKA KNIGHTS OF COLUMBUS



Questions?

Seek First the Kingdom of God

