The Catholic Women's League Of Canada

Toronto Diocesan Council

CWL Fall Training Day

October 29th , 2011 (original presentation)

(Presentation - updated on Oct. 28, 2026)

We will be covering:

- **Benefits of the On-line System**
- **Responsibilities**
- **Getting Started**
- **Member Information – Remittance**
- **Payments**
- **Pre-Authorized Debit Plan**

We will not be covering

- How to run a membership drive
- How to obtain and keep track of membership and renewals at your Council
- How to process your deposits into your bank accounts of membership fees

ON-LINE MEMBERSHIP ENROLMENT SYSTEM - BENEFITS:

- **NEW & RENEWED MEMBERSHIPS CAN BE COLLECTED IN OCT., NOV., DEC. NOTE: FEBRUARY 28TH IS THE DEADLINE, HOWEVER, YOU CAN STILL CONTINUE TO IMPUT PAYMENTS THROUGH OUT THE YEAR.**

- **REMITTANCE CAN BE PROCESSED AS SOON AS ADVISED BY NATIONAL**

- **NEW MEMBERS CAN BE ENTERED AS SOON AS CONFIRMATION OF RECORD IS RECEIVED FROM NATIONAL**

- **THIS PROCEDURE FACILITATES CHANGES TO MEMBERSHIP INFORMATION IN A TIMELY MANNER**

- **INFORMATION YOU SEE ON-LINE IS A REPLICA OF WHAT NATIONAL HAS ON THEIR DATABASE.**

Benefits – (Continued)

- **MISSING/WRONG INFORMATION CAN BE DISCOVERED AS SOON AS THE INFORMATION HAS BEEN CONFIRMED BY NATIONAL AND APPEARS ON YOUR SCREEN**
- **NOTICES OF DEATHS WILL BE FORWARDED TO NATIONAL, PROVINCIAL AND THE DIOCESE IN A TIMELY MANNER**
- **NATIONAL WILL NOT BE OVERWHELMED WITH PAPER ALL AT ONCE**
- **THE SYSTEM IS EFFICIENT, EASY SAVES TIME, MONEY AND IF HANDLED PROPERLY – SAVES TREES!**

ON-LINE MEMBERSHIP ADMINSTRATION SYSTEM

- **WHO IS RESPONSIBLE: VICE PRESIDENT OR MEMBERSHIP SUB-COMMITTEE**
- **APPROVAL FORM, DUELY SIGNED TO BE SENT TO NATIONAL**
- **PASSWORD WILL BE E-MAILED TO "ADMINISTRATOR"**
- **ONLY ONE PERSON SHOULD HAVE ACCESS TO PASSWORD AND FILES**

ON-LINE MEMBERSHIP ADMINSTRATION SYSTEM

- **INSTRUCTIONS WILL BE SENT FROM NATIONAL WITH PASSWORD**
- **NO PAPER REPORT WILL BE SENT FROM NATIONAL AFTER SIGN-UP**
- **INPUT FOR 2012 CAN PROCEED AFTER E-MAIL NOTIFICATION HAS BEEN RECEIVED BY THE ADMINISTRATOR**
- **ENSURE THAT MEMBERSHIP FEES ARE RECEIVED BEFORE YOU ENTER INTO THE SYSTEM**
- **ENSURE THAT MEMBERSHIP PAYMENTS HAVE BEEN DEPOSITED BY THE TREASURER.**

ENTERING THE SYSTEM

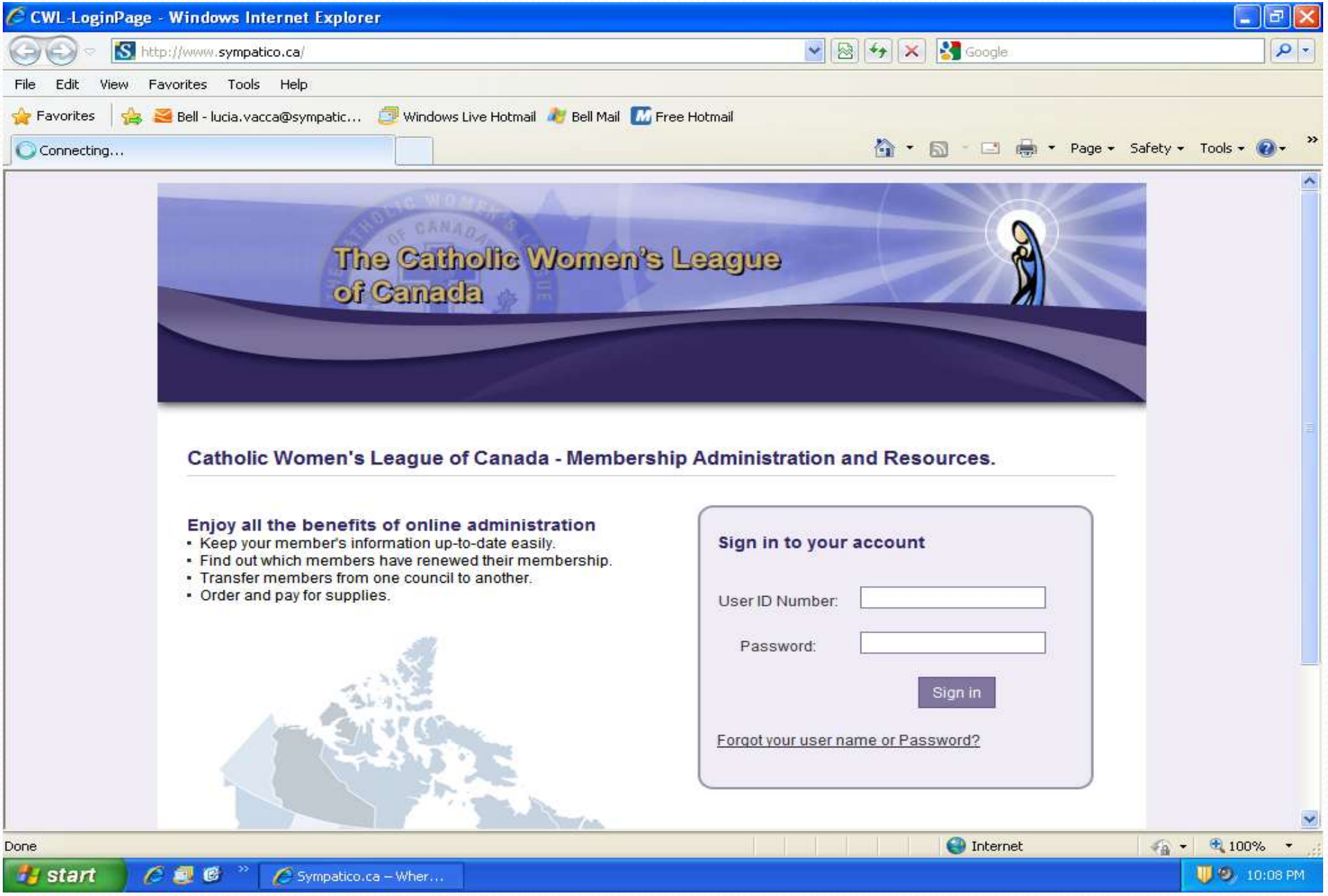
- **GO TO YOUR WEB BROWSER AND ENTER**
  secure.cwl.ca/cwladmin
  INTO THE ADDRESS LINE.

- **BOOKMARK THIS PAGE AS ONE OF YOUR FAVOURITES.**
  MARK "CWL-LOGIN PAGE"

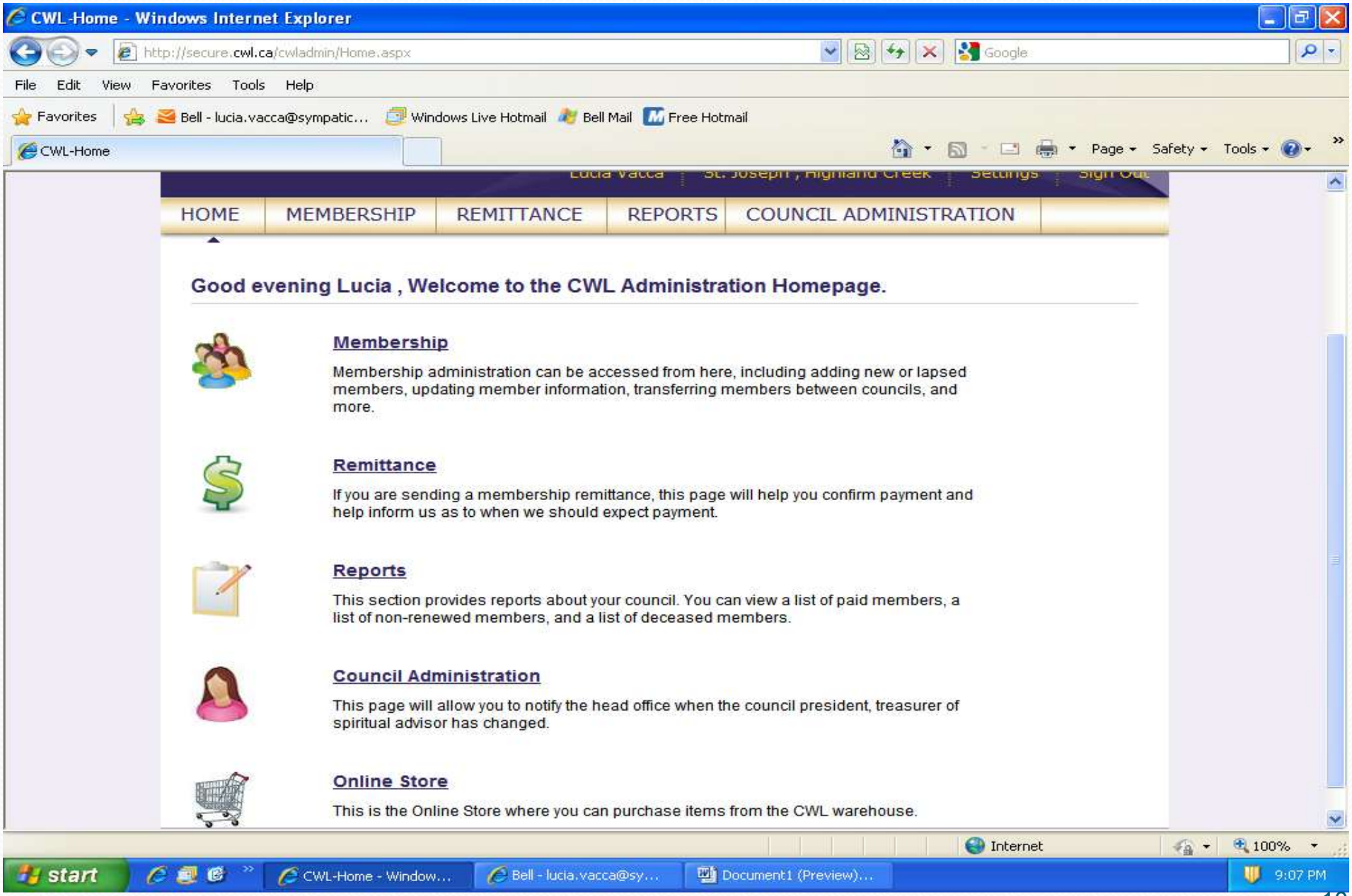
- **LOG IN WITH YOUR ID AND PASSWORD AND FOLLOW INSTRUCTIONS AS PER THE**
  "PROCEDURES FOR ADMINISTERING MEMBERSHIP ON-LINE"
  (as per your handout – this will be forwarded to you from National)

- ***DO NOT SHARE YOUR PASSWORD WITH ANYONE !!***

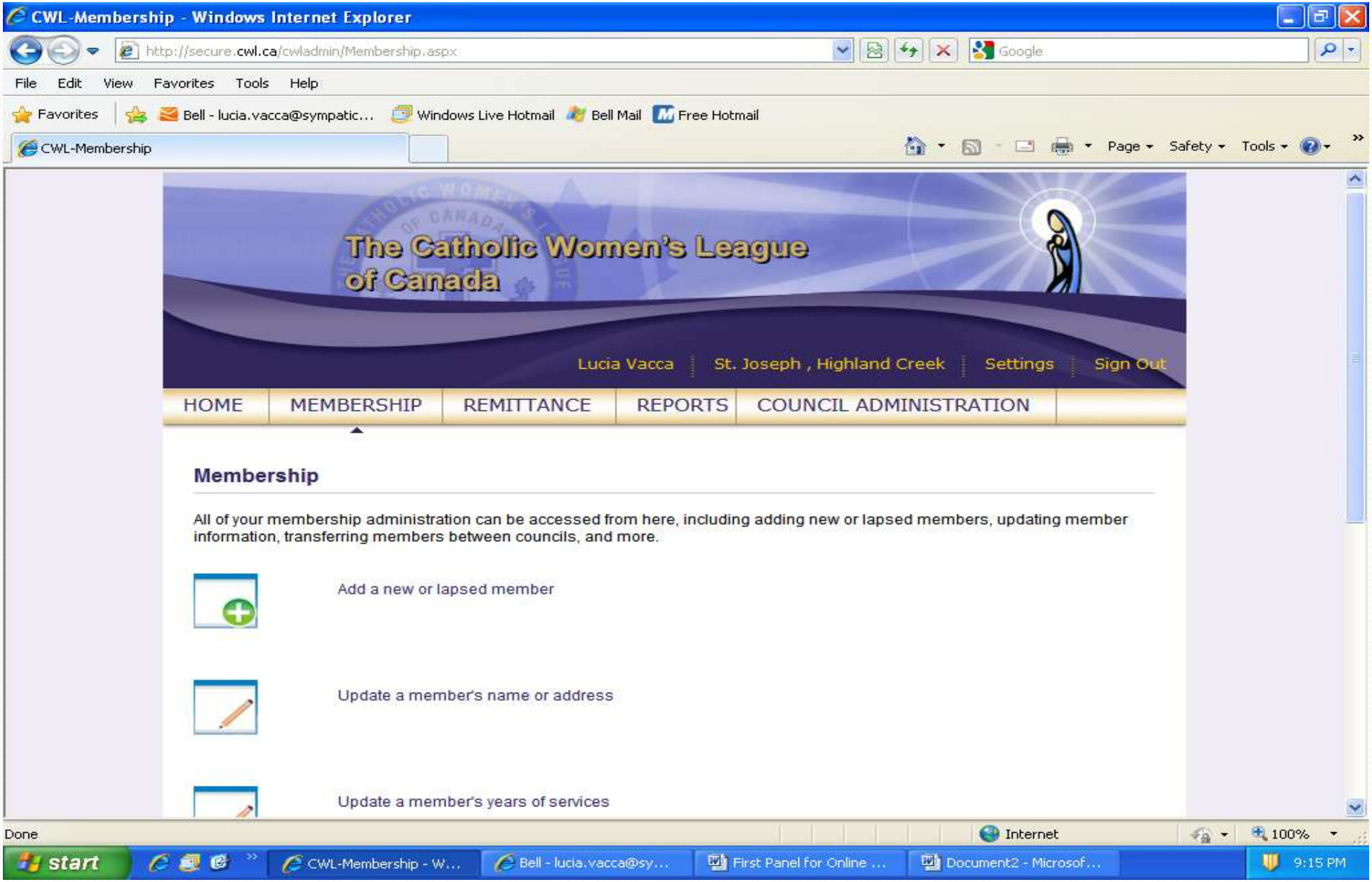
ON-LINE ADMINSTRATION FOR MEMBERSHIP – NATIONAL MAIN ENTRY PANEL - NEED USER ID AND PASSWORD



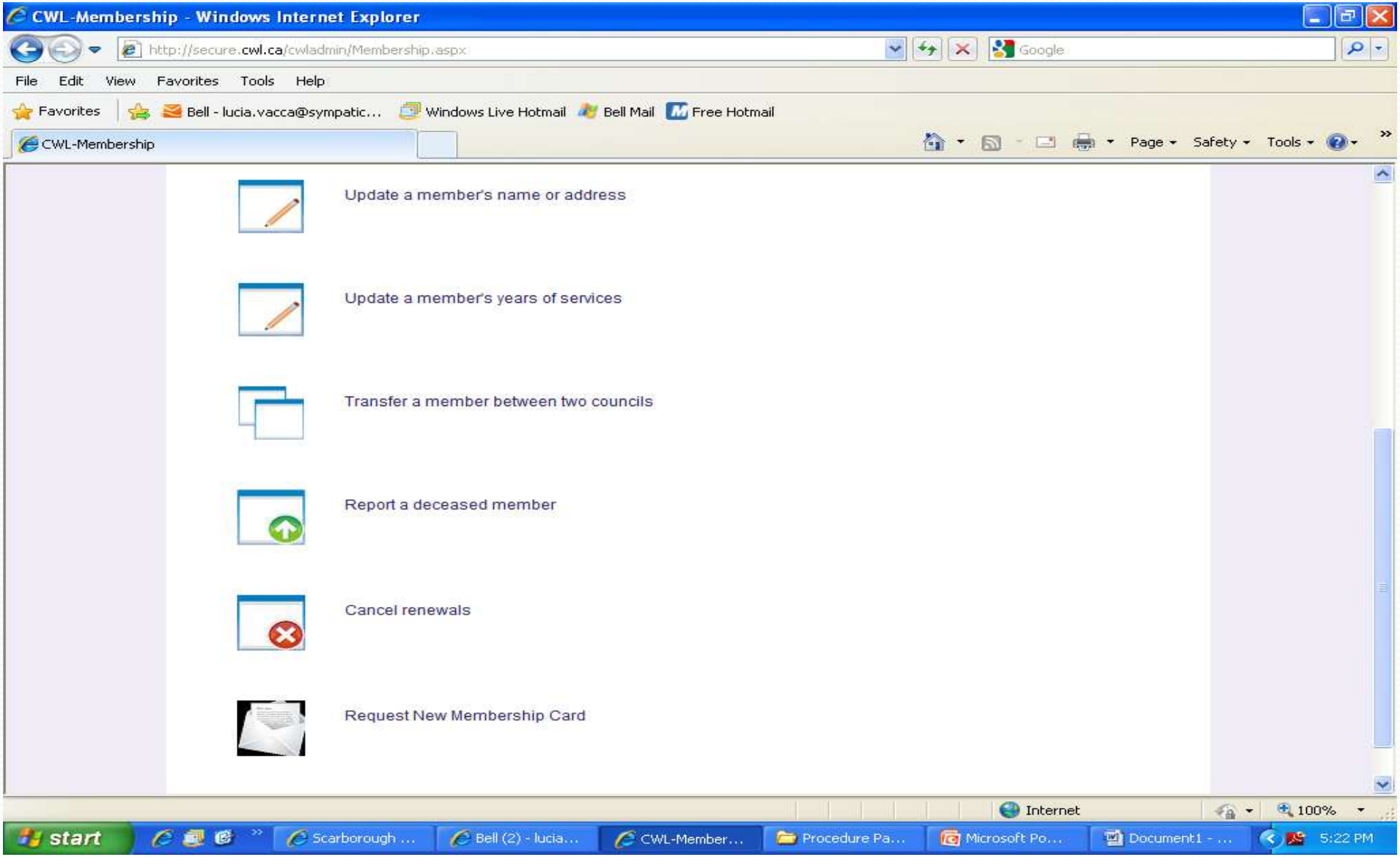
ON-LINE ADMINSTRATION MEMBERSHIP HOME PAGE



ON-LINE ADMINSTRATION MEMBERSHIP



On-line Administration -- Membership panel - (continued)



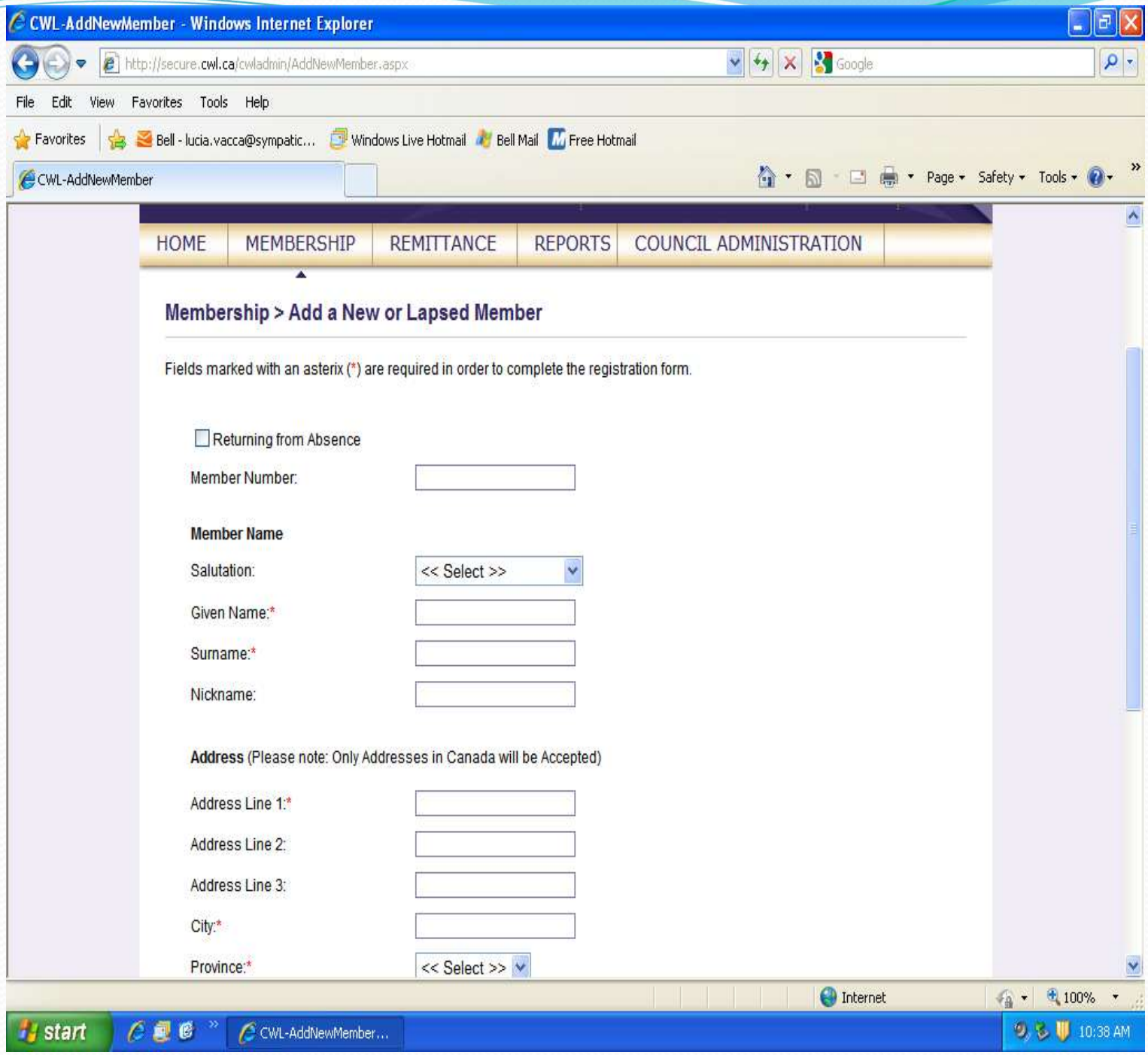
MEMBERSHIP – Add New or Lapsed Member

This is the main panel when adding a new member or returning member and changing a member's name

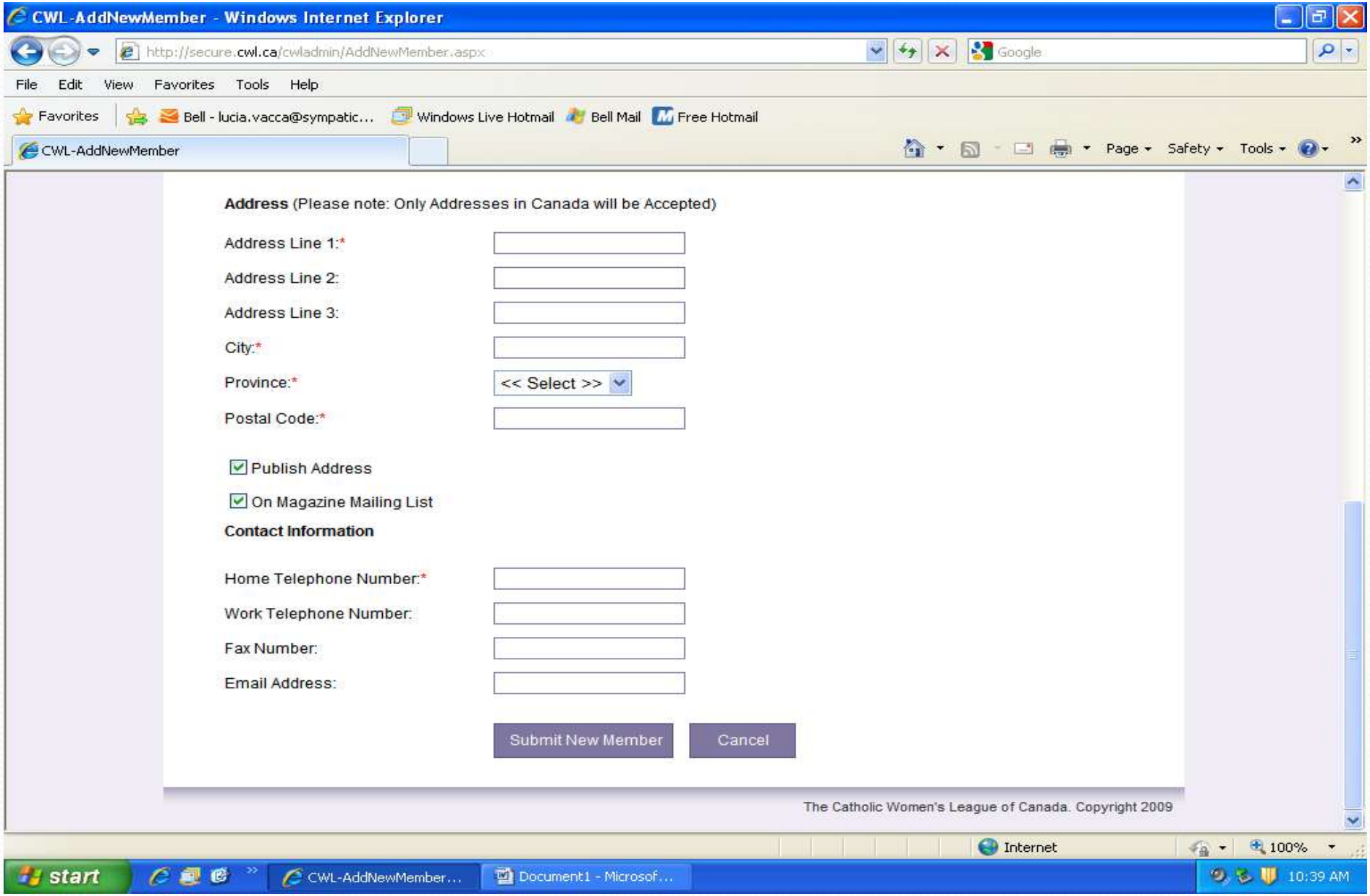
Note: When a member is added into the system

1) You will be notified by a confirmation email that this records has been added.

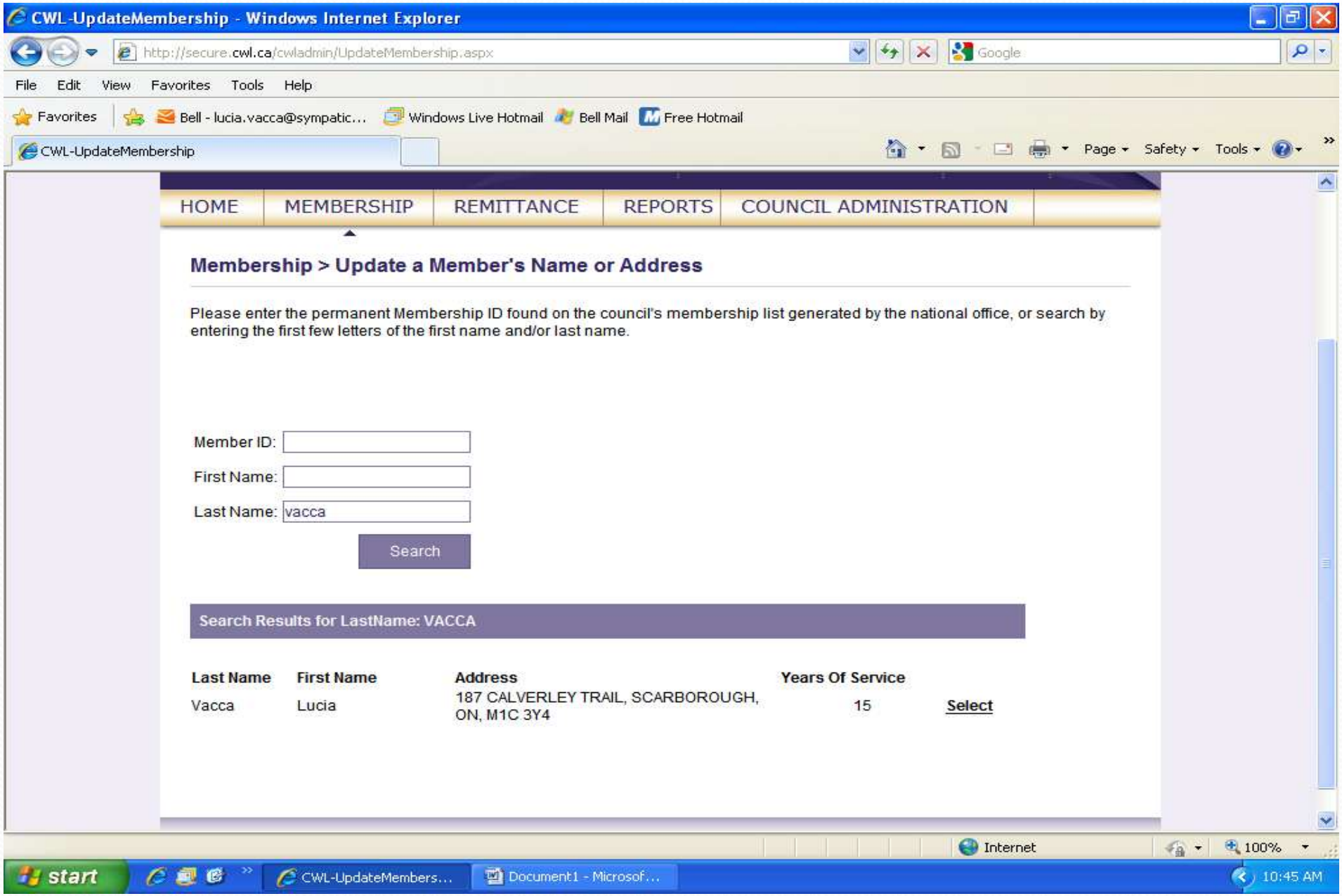
2) Need to allow 5 working days before this member will appear on the remittance



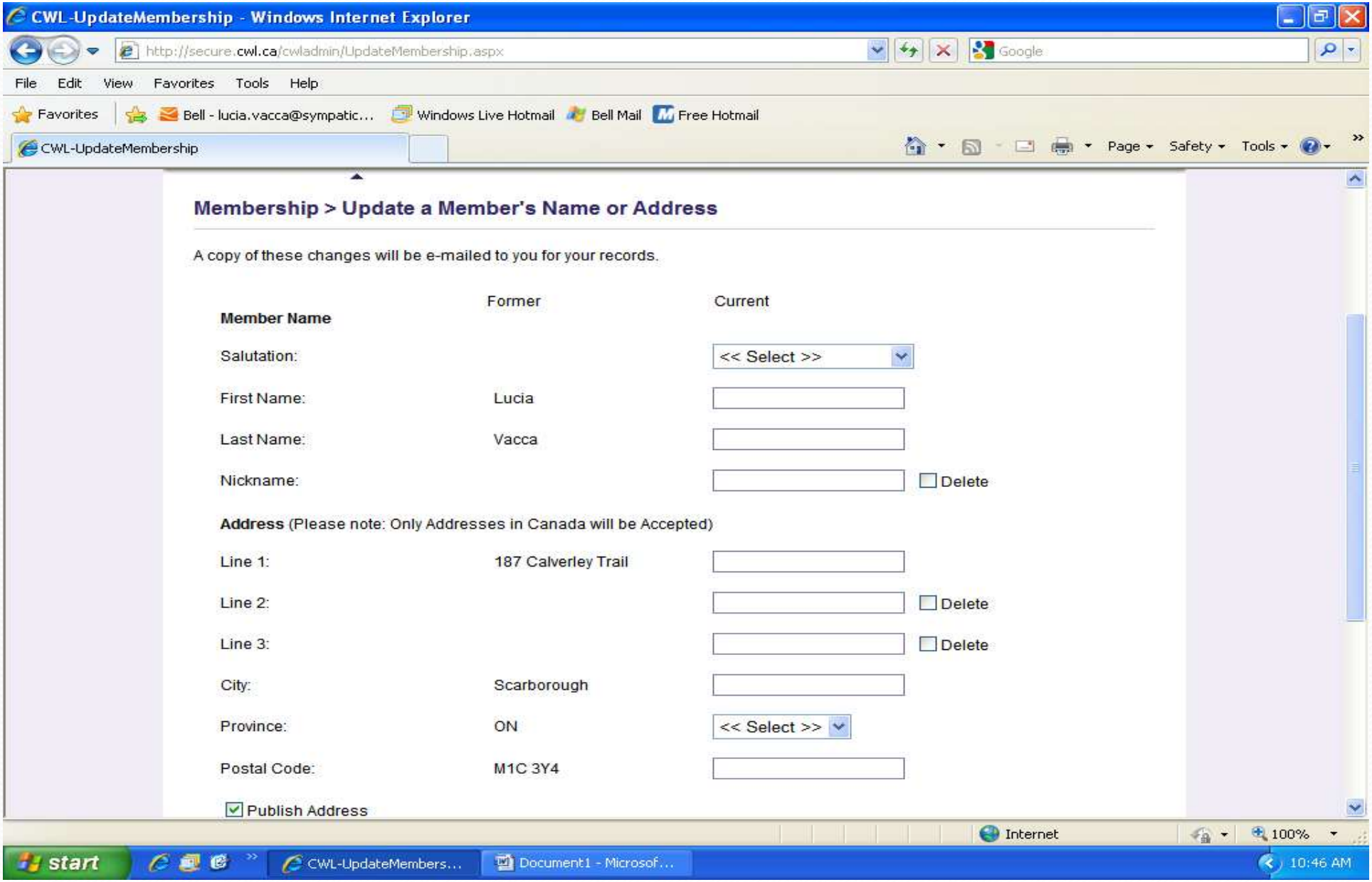
Add New or Lapsed Member (continued)



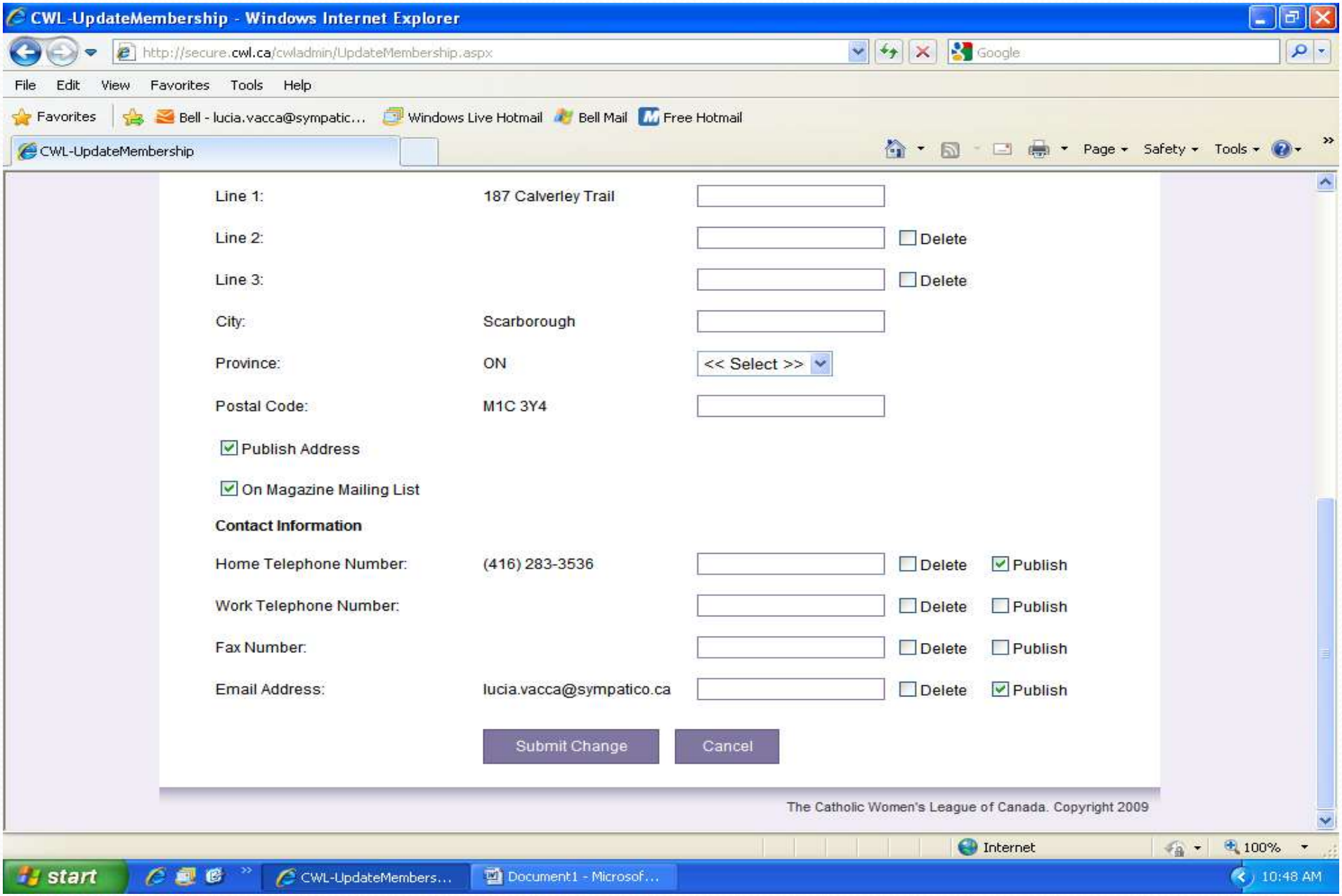
Membership – Update a Member's Name or Address



Membership – Update a Member's Name or Address



Membership – Update a Member's Name or Address



Membership – Transfer a Member Between Councils

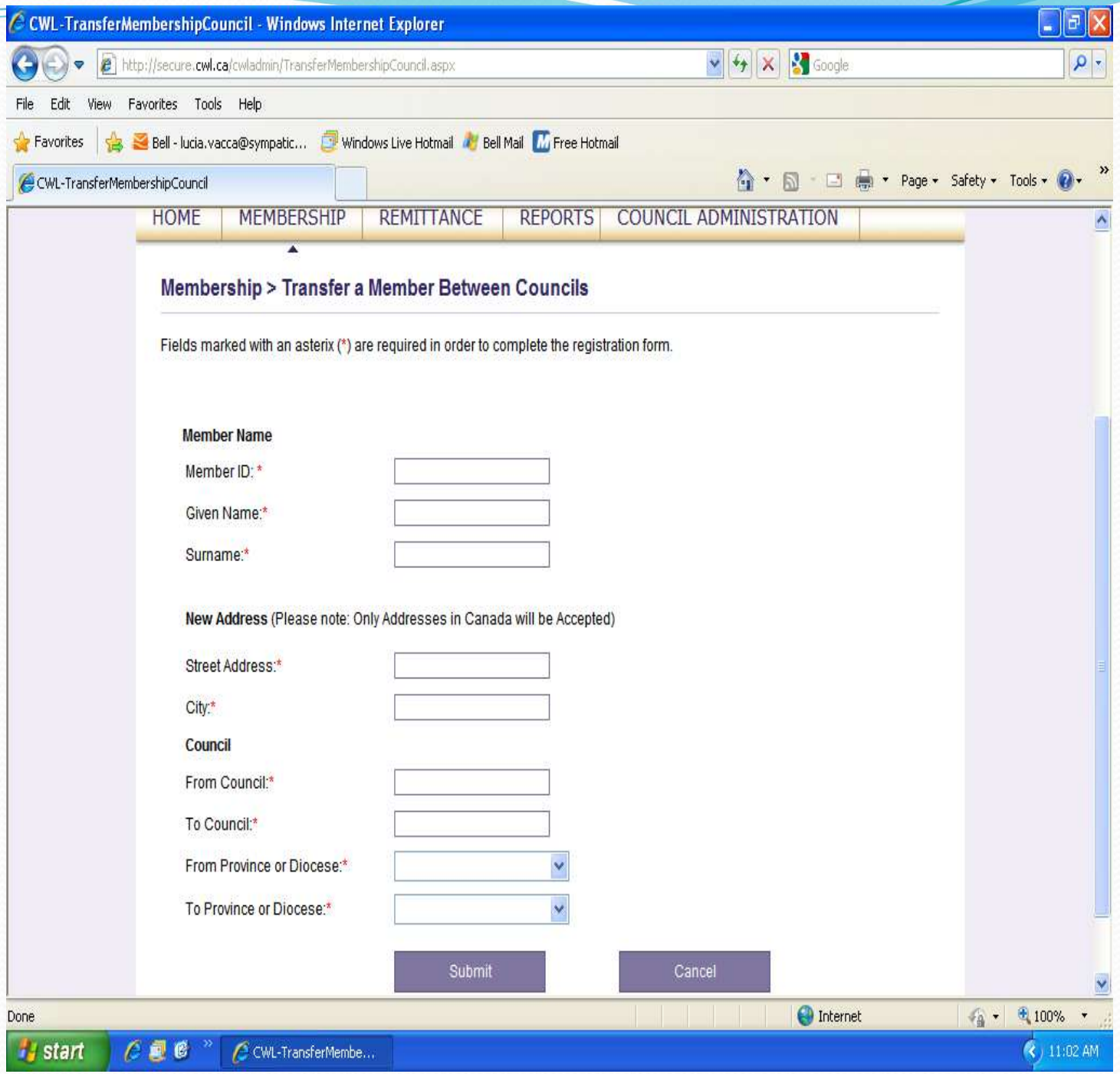
In this panel you have the option of transferring a member from your Council to another Parish Council.

<u>Note:</u> all the areas with an asterisk (*) must be filled in.

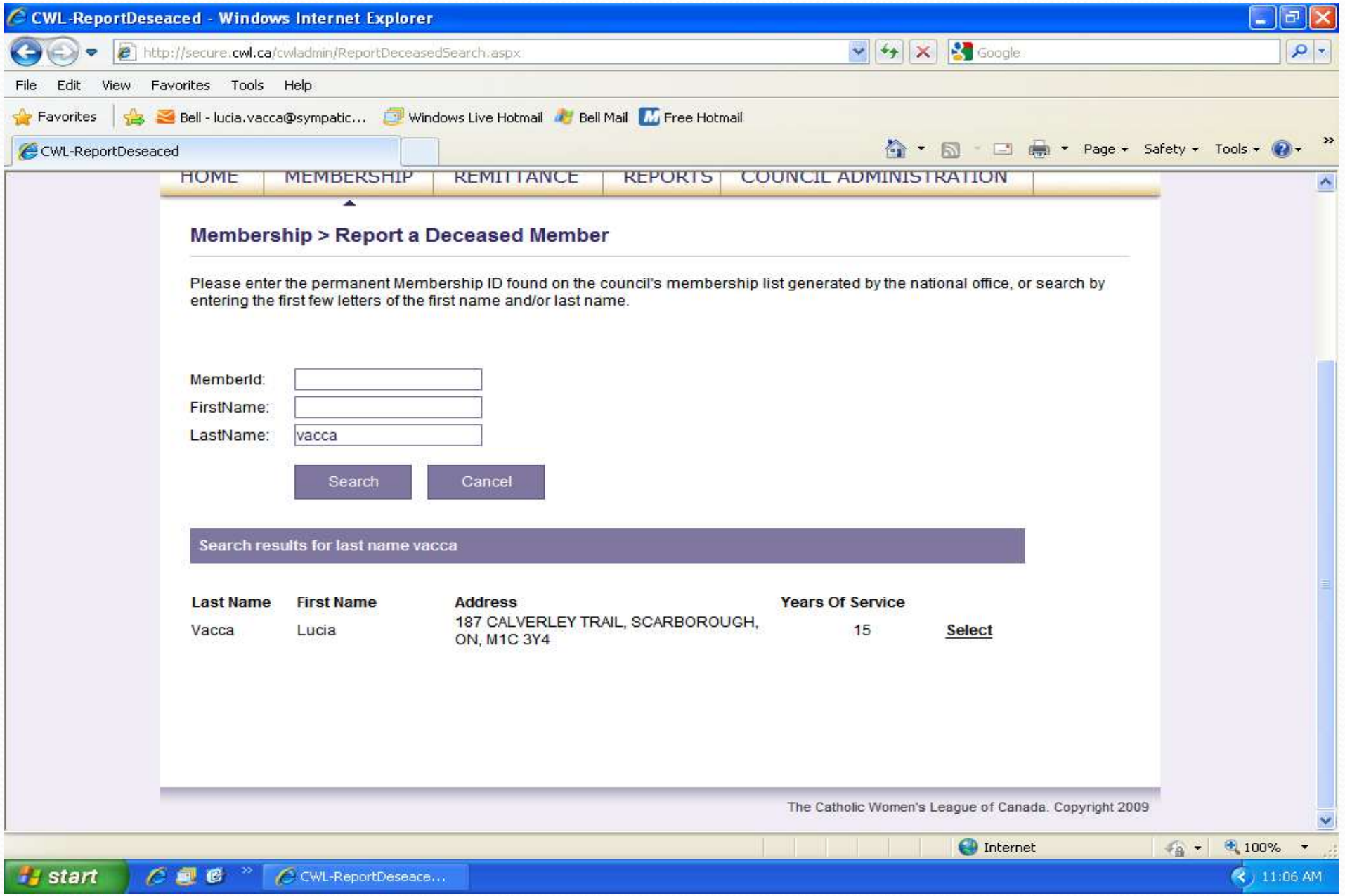
What you need to know is the Council designation -- Diocese or Province.

The member will need a letter from the previous council to confirm her membership in that council.

By doing a transfer the member will not loose her years of service.



Membership – Report a Deceased Member



Membership – Report a Deceased Member

In this panel you will see the member's information.

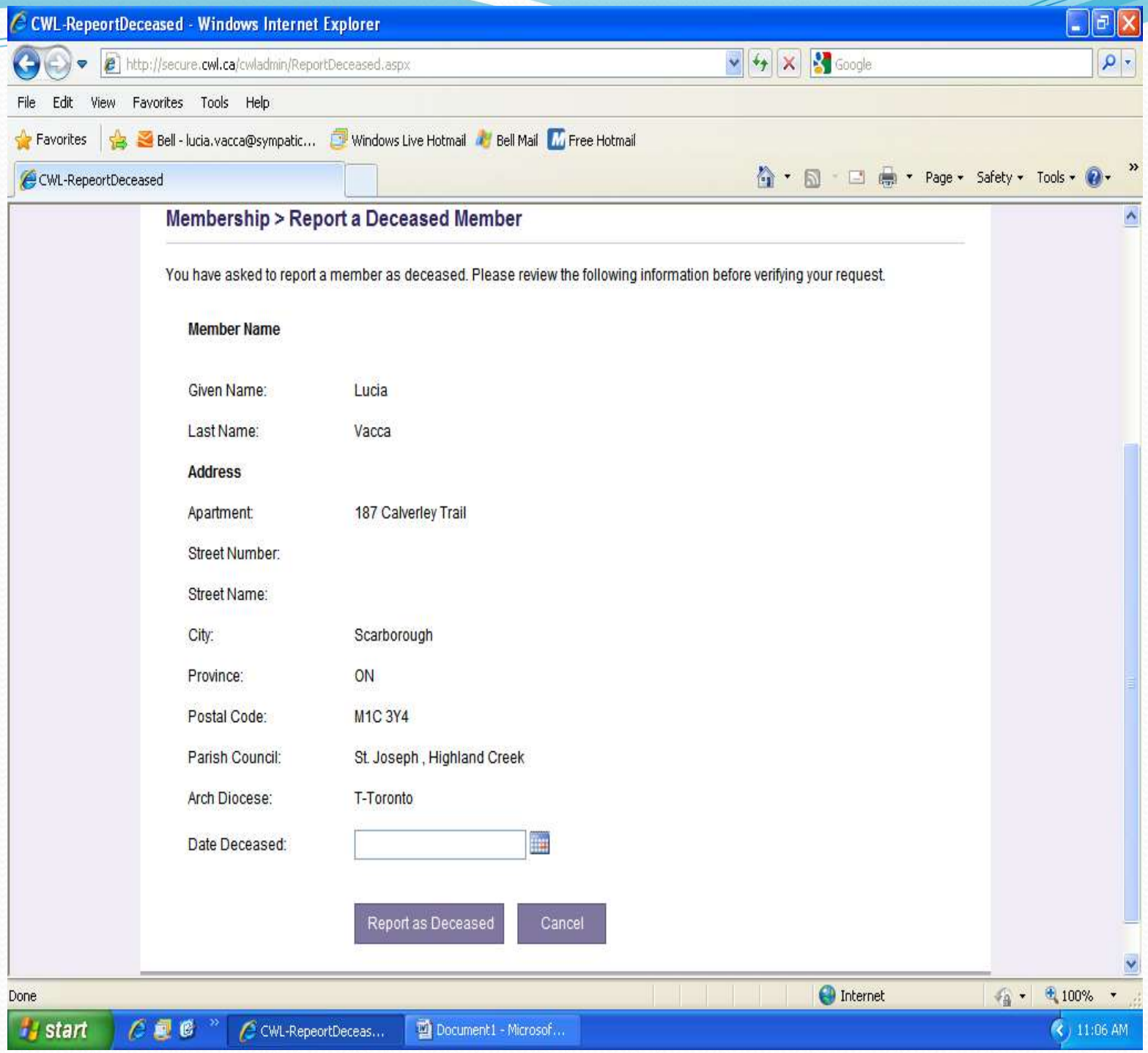
Make sure that this is the member who has deceased.

Select the date from the calendar and the "Date Deceased" will automatically fill in and then hit

"Report as Deceased"

The Administrator will receive a confirmation notice by email.

The record will show the date of notification and the date of death.



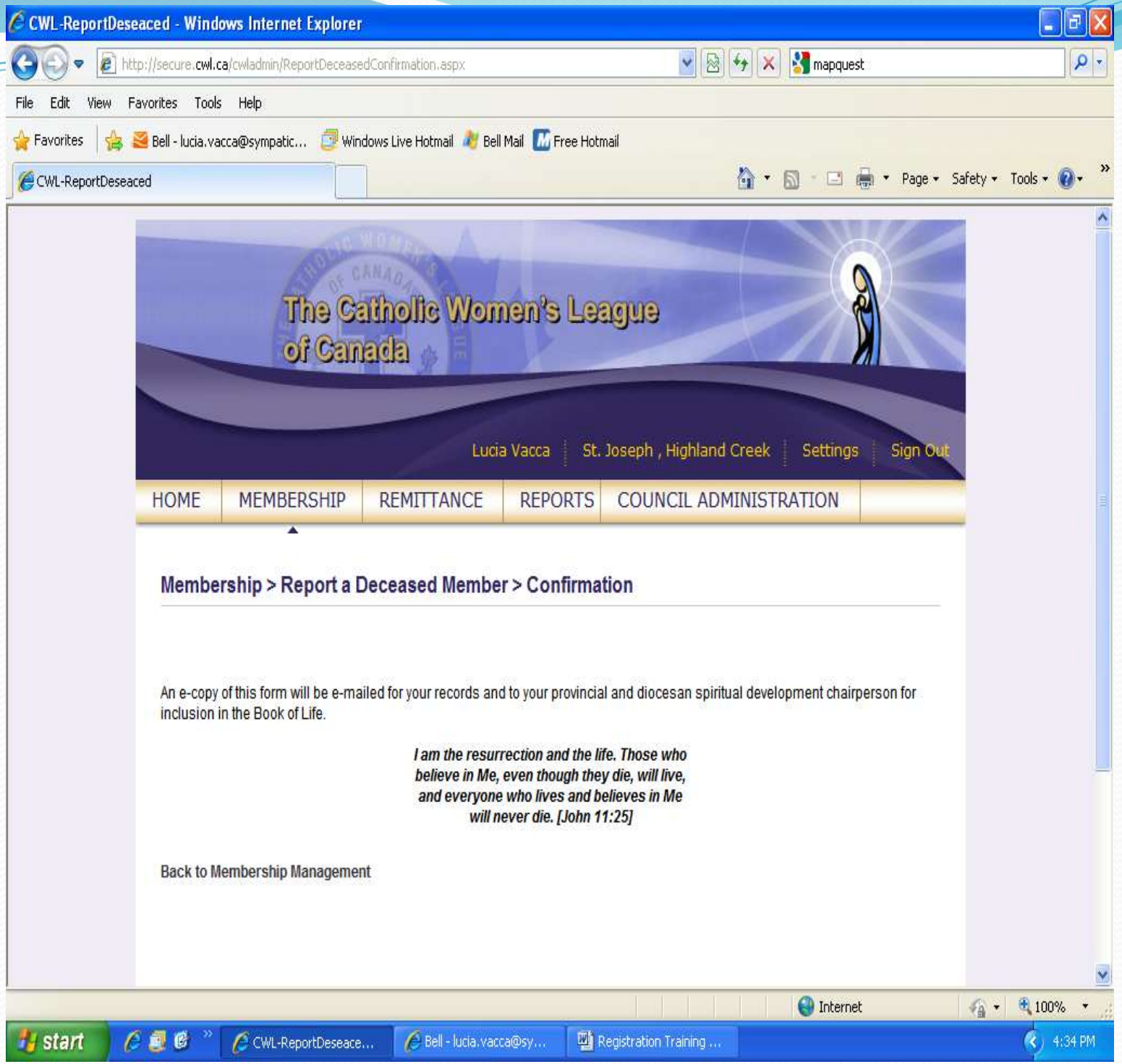
Membership – Report a Deceased Member - Confirmation

You will receive a confirmation of this transaction

<u>NOTE:</u>

By inputting the deceased information on the online system a copy of this notice will go to Provincial and Diocesan Spiritual Development Chairs for the Book of Life.

For those using the Online System: There is no need to fill out the paper *"Form for Reporting Deceased Members"* and <u>no more</u> mailing or faxing required.



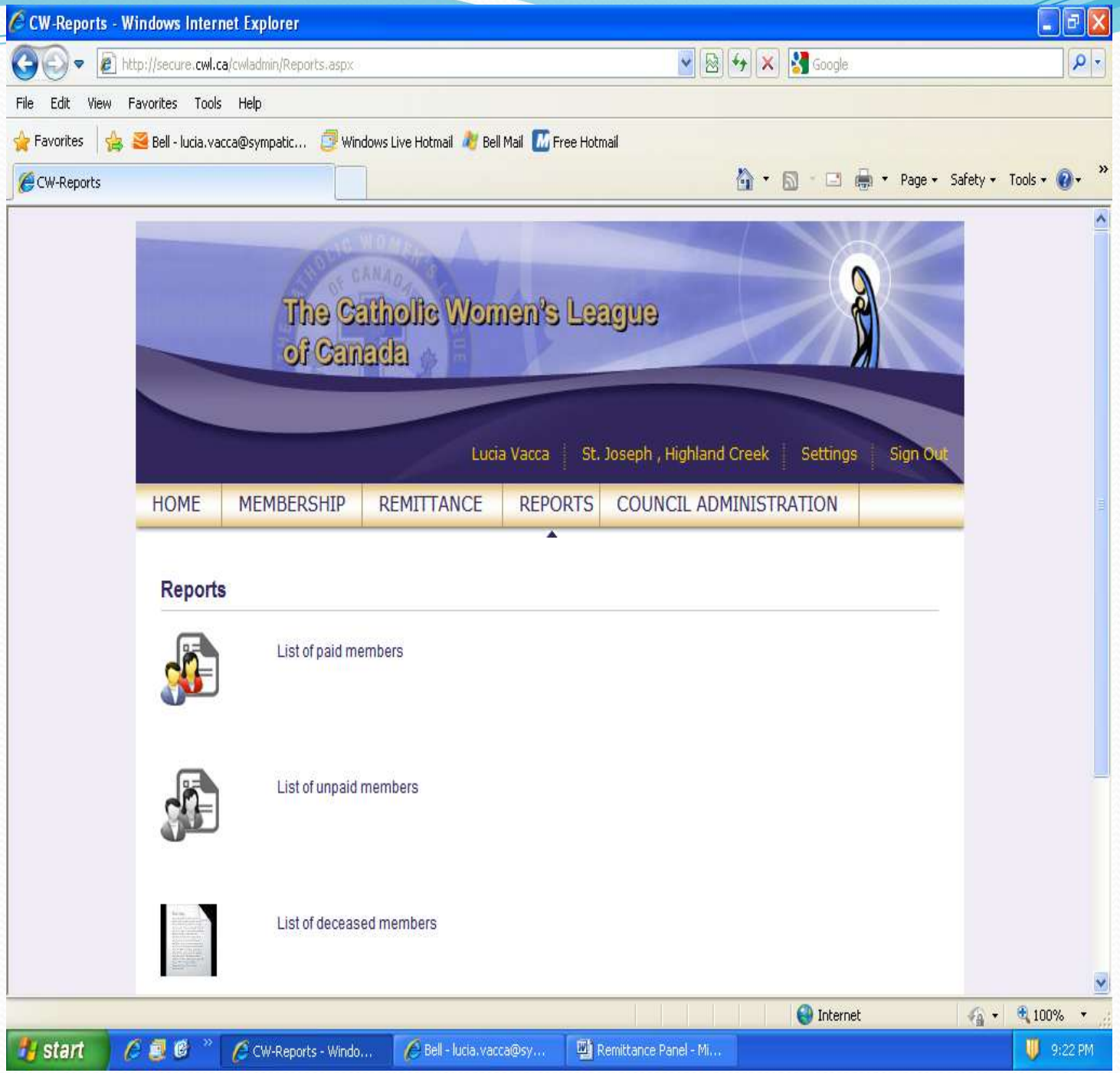
REPORTS

From this entry Panel you have a choice of 3 types of reports

1) **List of paid members to date, this will give you a count of processed members and the data stored. In this panel you have the option of sorting by years of service. As well options of output e.g. to excel or labels**

2) **List of unpaid members to date**

3) **Report of Deceased Members for the year or previous year**



Reports

HOME MEMBERSHIP REMITTANCE REPORTS COUNCIL ADMINISTRATION

Member Administration Module == Member Roster

○ Current Year ○ Previous Year
☐ Sort by Years of Service

Total Members: 90

Membership Year 2011

St. Patrick
T000
Stratford, ON

President: Name

Treasurer: Name

Member ID	Full Name		Mag		
123445	Jane Doe	340 – 300 Penthouse Scarborough, ON M1B ET4	Y	Home: (416) 234-2222 Email:	Year Joined: 2009 Years Of Service: 3 Comments:
345622	Francine Port	23 East Dale, ON Scarborough, ON M1B ET4	Y	Home: (416) 234-2555 Email:	Year Joined: 2007 Years Of Service: 5 Comments:
343332	Lucy Fun	345 Nowhere Scarborough, ON M1B ET4	N	Home: Email:	Year Joined: 1986 Years Of Service: 26 Comments:

Make a PDF | Export to Excel | Mailing Labels | Back

Remittance

HOME MEMBERSHIP REPORTS COUNCIL ADMINISTRATION ◯1 SELECT ◯2 SUBMIT ◯3 PRINT

REMITTANCE == Step 1 – Select Members

Please check each box for which payment has been received.
If no box is available, the member has been recorded as having paid her per capita fees in a previous year.

Parish Name
T00
Toronto, ON

President: Name

Treasurer: Name

List of members that have not paid.

Member ID	Full Name	Address	Payment for 2010	Payment for 2011
123445	Jane Doe	340 – 300 Penthouse	Paid (Batch 270)	☐
345622	Francine Port	23 East Dale, ON	☐	No Renewal
223344	Lucy Fun	345 Nowhere St	Paid (Batch 345)	Pending (Batch 940)
342312	Paoline Tan	34 Fanfair St.	Paid (Batch 315)	☐
345222	Greta Shim	2356 State Ave.	☐	Paid (Batch 2118)
234455	Ann Thomas		☐	No Renewal

Next Cancel Save Progress and Exit

PRE-AUTHORIZED DEBIT PLAN (PAD)

- **NO LONGER WILL YOUR COUNCIL NEED TO ARRANGE FOR THE PREPARATION AND MAILING OF A CHEQUE TO NATIONAL OFFICE.**
- **NO LONGER WILL YOU HAVE TO WAIT WHILE IT SITS IN THE REMITTANCE QUEUE.**
- **BY CHOOSING THE PAD OPTION, NATIONAL OFFICE WILL DEDUCT FROM YOUR COUNCIL'S ACCOUNT THE AMOUNT DUE AS INDICATED ON THE E-MAIL CONFIRMATION OF YOUR MEMBERSHIP REMITTANCES.**

PRE-AUTHORIZED DEBIT PLAN (PAD)

- **AMOUNT WITHDRAWN WILL BE EQUAL TO THE AMOUNT REFLECTED ON THE CONFIRMATION YOU RECEIVE FIVE BUSINESS DAYS AFTER YOU HAVE REMITTED YOUR BATCH.**

- **FIVE DAY DELAY WILL PROVIDE ENOUGH NOTICE FOR YOUR TREASURER TO DEPOSIT ANY MEMBERSHIP CHEQUES SHE HAS ON HAND PRIOR TO THE WITHDRAWAL OF FUNDS.**

- **WHEN YOU COMPLETE A BATCH – FORWARD THE E-MAIL CONFIRMATION YOU RECEIVED TO YOUR TREASURER FOR HER AWARENESS.**

Additional information in your booklets include:

- **On-line Membership System Enrollment Form**
- **Procedures for Administering Membership On-Line**
- **Membership – Deceased Members Roster**
- **Membership – Request New Membership Card**
- **Council Administration Screen**
- **Remittance Details – email confirmation (Note: Membership increase not reflected in this sample)**
- **List of members and fees – total payment to National Treasury**
- **Pre-Authorized Debit Plan**

CONTACTS

National Office

Membership Coordinator
Membership Renewals:

membership@cwl.ca

Phone: (204)927-2310
Fax: (204)927-2321

Toronto Diocesan Executive

On-Line Membership Support:

Lucia Vacca 416-283-3536
lucia.vacca@sympatico.ca