



FraternalistsGIVE.org
Chapter Activity Data Collection System

USER GUIDE

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Directions for Society Administrators (Society Admin)

Follow these steps to set up your society and chapters to report fraternal activities.

Your Login

The Alliance will send you your Login based on the data provided on the Registration Form your society sent with the User Agreement. You should change your password from what was provided to something more secure. After logging in, click on Edit Profile in the Login box to change your password or to change other information. You cannot change your login name.

Create Chapters

You need to add the names of the chapters that will be utilizing FraternalsGIVE.org. To add chapter names, login and click on Manage Chapters in the Login box. Click on the “add” button. On the next screen, type in the name of the chapter. *(TIP: Try and be consistent with how you name your chapters so that they are easy to find in a drop down. For instance, they should all start with letters or all start with numbers, if possible. If the chapter names start with a mix of letters and numbers, scrolling through the final list and finding a specific chapter will be that much more difficult.)*

Creating Chapter Administrator (Admin) Logins

Each of your chapters needs at least one person designated as the Chapter Admin.

You can decide if: a) you want to create each of your chapters’ logins,

or b) you want to direct them to the link and have them create their own login.

Before a chapter can start reporting activities, a registration for that chapter must be created. If you create it, it’s automatically activated; if they create their own registration, you must approve it and activate it.

a) Creating a Chapter Login for a Chapter Leader

Login and click on Manage Users in the Login box. Click the yellow Add New User box. Under Sign Up, fill out all the fields. (If you do not know their home phone number, use your society home office phone number). Select the chapter name from the drop down list. Click on Register My Account.

Tip: for simplicity and to make the logins uniform Create a protocol for all your chapters for the Login such as their first initial and their last name (example: dsmith). You can also create a protocol for the password such as their lodge number, the word “password” or similar. They should be instructed to change their password at some point to ensure security. Creating a protocol will help minimize both phone calls from chapter leaders and it will minimize your time since you will not need to look up lost logins. Both Chapter Admins and Society Admins can change their password by logging in and clicking on Edit Profile in the Login box.

OR

b) Instruct a Chapter Leader to Create Their Own Login

Send your chapter leader a link to FraternalGIVE.org. Instruct them to click on Create Account from the Login box. They should be instructed to fill out all fields even if they are not required, if possible. They should select the society and then select their chapter from the drop down list. (You are responsible for creating the chapters that populate this dropdown. If a chapter leader gets this far and does not see their chapter name on the drop down list, you have not created it).

Tip: Ask your chapters to follow a protocol for all your chapters for the Login such as their first initial and their last name (example: dsmith). They do not need to follow a protocol when deciding on their password, although you might give them suggestions. Creating a protocol will help minimize both phone calls from chapter leaders and it will minimize your time since you will not need to look up lost logins. Both Chapter Admins and Society Admins can change their password by logging in and clicking on Edit Profile in the Login box.

Creating a “Home Office” Chapter

If your society’s home office conducts fraternal activities and sometimes acts as a chapter by making donations to outside organizations, holds fraternal events etc., the home office should record its activities so that a true picture of the all the society’s contributions to the community are recorded. The Society Admin would follow the same steps as setting up any other chapter. The Society Admin could designate themselves as the primary contact or work with someone in the home office who will be responsible for entering Home Office Chapter data.

Activating a Chapter Admin

Society Admins must activate any Chapters Admins who created their own logins. To activate a Chapter Admin, log in and click on Manage Users. Find that Chapter Admin on the list and click on Activate. Society Admins who create usernames and passwords for Chapter Admins do not need to activate them – they are automatically activated.

Directions for Chapter Administrators (Chapter Admin)

Your Login

You will receive either complete login information or instructions to register and create your login information yourself from your Society Home office. If you have been preregistered by the home office you should login and change your password from what was provided to something more secure. After logging in, click on Edit Profile in the Login box to change your password or to change other information. You cannot change your login name. If the home office only provided the direction for you to follow the provided link to the FraternalsGIVE site and register yourself then follow the provided link to the site and click on Create Account from the Login box. Fill out all fields even if they are not required, if possible. Select the society and then select your specific chapter from the drop down list. If you get this far and do not see your chapter name on the drop down list, the society home office has not created it.

Tip: Chapters should try to follow a protocol (provided by the home office?) for all for the Login such as first initial and last name (example: dsmith). You do not need to follow a protocol when deciding on a password, although you might have been given suggestions from the home office.

Changing Logins and Passwords

Chapter Admins can change their password by logging in and clicking on Edit Profile in the Login box. Chapter Admins cannot edit their own login names. Chapter Admins can reset their own password. If you provided an email address the new password will be sent to you via email. If you did not provide an email address please contact your society administrator to reset your password.

Adding or editing an activity

After logging in select the "Manage Activities" tab from the tabs at the top of the Manage Activities screen. To add a new activity click the "Add Activity" button to edit a previously created activity locate the activity in the list and click the edit button to the right of the activity description. If you selected adding an activity the "Edit Activity" screen will open and all of the fields will be blank. As a first step be sure to confirm that your society and chapter appear in the Society: and Chapter: boxes at the very bottom right of the screen before you begin entering your data. Fill in all of the data that you can and make sure to complete all of the "Required" fields. If you are missing pieces of information or need to adjust something later you can always return to the form later through the edit activity button. If you need help on some of the specific data fields a FAQ sheet has many of the most often asked questions and answers that may help you. Once you have all of your data entered click on the submit button at the very bottom of the screen. If you selected "Edit" from the Manage Activities screen you will see the "Edit Activity" screen open with all of the data previously entered. From here just simply make your changes and then go to the very bottom of the screen and click the submit button to save your changes.

Troubleshooting/FAQs

Definitions

Society Admin – the person at the society home office who works with the chapter leaders and is their primary contact for FraternalGIVE.org. The Society Admin receives login information from the Alliance.

Chapter Admin – the person(s) at a chapter who will be actively entering chapter data into FraternalGIVE.org.

Login Box – the grey box on the right side of the homepage on FraternalGIVE.org. It asks for User Name and a password to access the system.

User Name – the first field in the Login Box. Each Chapter Admin and Society Admin has their own unique User Name. Often times it will be first initial, last name with no spaces.

Is my society an official user of FraternalGIVE.org?

To determine if your society is an official user of FraternalGIVE.org, first click on Create Account in the Login box of FraternalGIVE.org. Click on the society dropdown box (the last field) to select your society. Then, click on the chapter dropdown box that may appear to select your chapter. If your chapter does not appear in a dropdown, either your society is not a participant, or your society is a participant and has not yet created your chapter registration.

What is my User Name (for a Society Admin)?

Your account was set up with your User Name as your first initial, last name with no spaces. For assistance, contact:

Terry Whipple
Manager, Information Technology
American Fraternal Alliance
630-522-6322 ext. 125
twhipple@fraternalalliance.org

What is my User Name (for a Chapter Admin)?

Your society either created a User Name for you, and they sent you the information, or they sent you the directions on how to create your User Name yourself. You can try to create your User Name by clicking Create Account in the login box on the homepage. After registering, your Society Admin needs to approve your newly created account. If you do not know who your Society Admin is contact:

Terry Whipple
Manager, Information Technology
American Fraternal Alliance

630-522-6322 ext. 125

twhipple@fraternalalliance.org

What is my password (Society Admin)?

If you forgot your password, either contact the Alliance or reset your password by clicking on “Forgot Password?” in the Login box on the Home Page of FraternalGIVE.org. Enter your User Name and you will be emailed a temporary password.

What is my password (Chapter Admin)?

Your Society Admin may have sent you your password if they created your account and User Name. If you forgot your password, contact your Society Admin or reset your password by clicking on “Forgot Password?” in the Login box on the home page of FraternalGIVE.org. Enter your User Name and you will be emailed a temporary password which you can change later.

Can I edit or add to the information once I report on an activity? What if I forgot some details?

You can log back in and edit the event under Manage Activities. Society Admins may also edit any of their chapters’ activities.

Under Activity Type, what is the difference between a Donation by Chapter – No Event, a Member Activity, and a Service Project/Community Outreach activity?

- **Donation by Chapter – No Event** is the act of writing a check from the chapter checking account. Please add a description in the DESCRIPTION field and enter the amount of the check in the field called Monetary Donation If Any. You could enter 1 person under Number of Volunteers and 1 hour for Volunteer Time to capture the check writer’s time. You could also add 1 person under Number of Member Activities. *Examples: check from chapter to food pantry; check from chapter to parish; check from chapter to cover medical bills of needy family.*
- A **Member Activity** is an activity that is attended primarily by members, conducted by members, or that is conducted primarily for the benefit of members (not for non members). *Examples: a member social event, a board meeting, volunteer time at home working on a chapter project, typing minutes etc.*
- **Service Project/Community Outreach** is an activity that is conducted primarily for the benefit of the community or for a group outside the membership and is not focused on members. *Examples: visit to senior center; garden clean up; Habitat build; food drive for shelter; Bingo Night for town, etc.*

What is the difference between Monetary Donation, If Any and Funds Raised in the Edit Activity area?

Monetary Donation, If Any is the amount written out of the chapter's checking account. **Funds Raised** are funds collected by members and others to be dispersed to the other organization/cause directly. In some cases, the check writing is the activity; in other cases the chapter may write a check to contribute to a cause as part of a bigger activity.

Be careful not to double count donations. If your check is written because you collected funds at an event in the form of cash and personal checks, and then you deposited those donations in your chapter checking account and then wrote a check to the entity - you must pick between Monetary Donation, If Any and Funds Raised for that check amount. Otherwise, you, or your Society Admin, may accidentally add those two columns together in reports and double the amount raised.

Here are different scenarios that require different reporting:

An activity raised \$500 in donations of cash and checks and the chapter kicked in \$200 out of its checking account. The chapter gave the charity/entity an envelope of cash/checks totaling \$500 and a chapter check for \$200.

Reporting: \$500 is entered into Other Funds Raised; \$200 is entered into Monetary Donation, If Any field.

An activity raised \$500 for donations of cash and checks and the chapter kicked in \$200 out of its checking account. The chapter deposits cash/checks totaling \$500 into its checking account and writes a check for \$700 to the charity/entity.

Reporting: \$500 is entered into the Other Funds Raised; \$200 is entered in Monetary Donation, and a note is made in the DESCRIPTION field that the check written was for \$700 since it was collecting and passing through donations.

OR

Reporting: \$700 is entered in Monetary Donation, \$0 is entered into Other Funds Raised, and a note is made in the DESCRIPTION field that \$500 of the \$700 was collected, deposited and added to the \$200 chapter donation.

OR

Reporting: \$700 is entered in Monetary Donation, \$500 is entered into Other Funds Raised and note is made in the DESCRIPTION field to not add these two numbers together when trying to determine how much in donations the activity raised.

Can I categorize an activity using more than one descriptive category (religious, health and wellness, cultural etc.)?

Yes.

How do I record an activity that I do at home like typing minutes of a meeting?

Under Activity Type, first select this as a Member Activity; under Categorize Activity, check the Planning/Leadership Meeting since it directly relates to the meeting. If you are performing a task like updating a web site or making a craft, select this as a Member Activity but do not check any of the Categorize Activity boxes since none of them fit. Write in the Description field what task you performed.

How do I record the business component of a primarily social activity? For example: voting on new members or discussing proposed new bylaws after a scholarship fundraising dinner.

There are two ways to record the business component of an activity that might be primarily social.

The first way is to try and capture both the business activity and the social activity in one Activity record. Calculate the time spent on the business component and multiply by the number of people participating in the business component. For example, a three hour scholarship fundraising event attended by 100 people, with 30 minutes spent on voting and discussing bylaws would be counted as 3000 minutes (100 x 30) or 50 volunteer hours. You would add these 50 hours to the hours spent by the volunteers who worked to make the dinner happen - perhaps 5 of those 100 people were officers and spent 20 hours total setting up tables, serving food, cleaning up etc. Therefore, the total number of Volunteer Hours would be 70 (50+20). The number of Member attendees would be 100 and the Number of Volunteers would also be 100.

The other way to record the issue is to break the activity into two separate activity entries – one activity entry for the business component and another activity entry for the rest of the dinner event. In this example, you could enter one activity entry as a Member Activity - Board Meeting/Planning Meeting for the 50 hours of voting and discussing bylaws, and another activity entry entered as a Member Activity – Fundraiser for Society Scholarships to reflect the 20 hours of volunteer time by the 5 officers.

Who counts as a volunteer?

Anyone who works to plan and execute an activity and does not get paid is a volunteer. Someone who simply attends a member event for mostly social reasons is not a volunteer, but you can count them above in the Member Attendee field. Spending just a few minutes voting on an issue at a social event is not enough to consider all the attendees true volunteers. If there is a more even mix of business and social, do your best to measure the number of true volunteers.

What counts as volunteer hours?

Add up the time spent by all the volunteers counted in the Number of Volunteers field. Do not count the time spent by members simply attending an event that is primarily social. If there is a more even mix of business and social at an event, do your best to measure the number of true volunteer hours.

Should travel time be included in volunteer hours (the time it take to travel to and from activities)?

Yes.

How do I run reports on my chapter's/my society's activities?

Login, select your society and your chapter name (if applicable), and click on Manage Activities in the yellow bar and click on Download CSV for a complete list, or make a more refined search by clicking on the parameters at the right and then click Download CSV. (A CSV file opens in Excel).

How to Report an Activity

- Log in, click on Manage Activities in the yellow bar, and click on Add Activity.
- Enter the activity data for all fields; have all the required information handy (although you can go back in and edit the information).

Tell me more about Activity Info!

Many fields are required – do I have to fill them out?

Yes. The system will not let you proceed.

What kind of name should I give this event?

Be as short and accurate as possible (St. John Food Drive; Annual Scholarship Dinner, etc.).

How should I describe this activity?

Describe the activity in 250 characters or less and include all the important information.

Example: We collected 100 cans of non perishable food for the local food pantry which serves the local homeless population.

What city do I identify?

Identify in what city and state the event or activity took place. If the event took place in Canada, identify the city and check the Canada box. If the activity is a check donation, identify the city and state or country of the organization receiving the funds. If the organization is not in the United States or Canada, put the location in the description box.

What date do I use?

Enter the activity's date or choose a date range if the activity spanned more than one day. If you worked on a minor project here and there over the course of a month, select the date you completed the task.

What if I do not yet know if my society will match the funds raised?

Leave it blank; you or the society Admin can go back later and add the matching funds.

What are In Kind Donations?

In-kind donations are goods and services – not dollars – that are donated to make the activity happen and these can come from members, non members and other outside sources. Use your best estimate to place a value on these items. The fees collected from people who might purchase these items are counted in your Other Funds Raised field which places a value on the items or services. You can count the people who contributed In Kind Donations in Member and Non Member Attendees or Volunteers fields, if you wish.

Who Can Run Reports?

Chapters can run reports only on their own activities; society home offices can run reports on any of their chapters; the Alliance can run reports on any society or any chapter. Reports are downloaded into a CSV file that can be sorted by chapter, city, state, date range, type etc. Go to Manage Activities and click on Download CSV.

Why is my chapter not listed in the dropdown box when I attempt to create an account?

Either your Society Admin has not set up your chapter yet, or your society is not an official user of FraternalsGIVE.org. Please contact the Alliance with questions at twhipple@fraternalalliance.org.

How do I print a copy of a specific event or an event I just entered?

When you are in Edit Activity you will see a printer icon right below the banner at the top right of the page. If you click it a new window will open with a printable copy of the event. Scroll down to the bottom of the page and click on the word Print where you see the “Print :: Close” to get a printed copy of the entered data for the event.

How do I upload a photo with my activity data?

Under Upload Photos on the Edit Activity page, click Add. A new screen will pop up; click Upload on the new screen. Click the plus sign next to Activity Images on the left. Choose your Chapter’s folder from the list to upload your photo. Click Add Files. Find your photo on your computer, and click Open. The pop-up box will close automatically. Click Upload Now. After the photo has uploaded successfully, a box will pop up – click OK. Click on your photo in the list and enter a name for the photo in the Linked Text box. Click OK. You will now see your photo listed in the box beneath Upload Photos on the Edit Activity page.

As a Society Admin, how do I add the names of my chapters to the system?

When logged in, go to the Manage Chapters link. Select Add to add a new chapter. You can also click Edit to modify an existing chapter, or click Delete to remove a chapter. To create users and to activate them, refer to your user guide or look at other FAQs.

As a Society Admin, how do I add a Chapter Admin user so that a chapter can use this system?

You can either add the person who is the Chapter Admin yourself, or you can have them go to the website and add themselves. If you choose to add them yourself, log in and click on Manage Users. Select the chapter from the Select a Chapter dropdown box and click on submit. A new Manage Users screen will open; click the Add New User button. A Register screen will open

with all of the required information fields to be filled out. After the information is entered, click on Register My Account. You need to inform the Chapter Admin of their User Name and password. TIP: Prior to creating Chapter Admins, you should create a consistent protocol for creating User Names and passwords.

As a Society Admin, I have a Chapter Admin who says they registered but they can't add activity data. What is the problem?

Society Admins need to activate all Chapter Admins who created their own User Names. To activate a Chapter Admin, log in and click on Manage Users. Find that Chapter Admin on the list and click on Activate. Society Admins who create usernames and passwords for Chapter Admins do not need to activate them – they are automatically activated.

As a Society Admin, how do I edit or change a Chapter Admin's information?

When logged in, go to the Manage Users link. Click the edit link on the far right side of the screen directly to the right of the Chapter Admin you wish to modify.

I created an account and entered all of my information, but when I try to log in it says my User Name or password is invalid?

Your Society Admin must activate you in order for the system to allow you to add event data. Contact the Society Admin to activate you.

How much time do I have to enter an Activity?

In the Edit Activity screen, the software will automatically timeout after 20 minutes. To save your work, hit the Submit button. You can then go back and edit your activity. To add another activity in the same session, go back to Add Activity and you will have another 20 minutes to enter your data. If your screen freezes, you have likely been logged out. Click on the Home link, and login again.

My screen seems frozen. What is the problem?

If your screen is inactive for more than 20 minutes, the system automatically logs you out. You may have to go back to the home screen, re-login and re-enter your event data.

Logins and Passwords

Changing Logins and Passwords

Chapter Admins and Society Admins can change their password by logging in and clicking on Edit Profile in the Login box. Society Admins and Chapter Admins cannot edit their own login names. Society Admins can reset a Chapter Admin's password. It is the responsibility of the Society Admin to tell the Chapter what the new password is. Society Admins cannot see the password they type (it displays onscreen as *****) and so following a protocol is a good idea. Or, Society Admins should keep track of passwords they create in another spot for future reference.

Forgot Your Password?

If a Society Admin or a Chapter Admin forgets their password: click on "Forgot Password?" in the Login Box on the home page. Follow the steps to reset it, and your login is needed to do this. If a Society Admin can't remember their login, it is likely the Society Admin's first initial and last name. If that does not work, contact the Alliance. If a Society Admin fields a call from Chapter Admin who cannot remember their Login, a Society Admin will know it if a protocol was created, or a Society Admin can look it up in the system. To look up a Chapter Admin login, the Society Admin should login and click on Manage Users in the Login box. The screen shows all Chapter Admin login names.