

# Subsidiary Groups

1. Background: all active seculars need to belong to an active fraternity. Sometimes they need to also belong to a sub-group. In all cases the seculars *must* belong to an established fraternity. There are three types of groups:
  - a. Cells (also known as satellites). These may meet in a separate location for some deactivated fraternities. There may be an assigned leader.
  - b. Newly Forming Groups: a group of seculars who are at the first stage of becoming a fraternity. There will be an *appointed* leader.
  - c. Emerging Communities: a group of seculars which are almost ready to become a fraternity. They have an *appointed* council.

2. To Create a New Subsidiary Organization, an Admin User selects the Fraternity which will sponsor the Subsidiary Group. On the right column in the first set of tasks click on the **Create New Subsidiary** link which will cause the Create Subsidiary page.

- a. Select **Org Unit Type ID**: Newly Forming Group, Emerging Fraternity or Cell.
- b. **Org Unit Number** (optional - Assign a unit number unique to the Region).
- c. **Ord Unit Name**(the public name of the group).
- d. **Org Unit Display Name** (the name that will appear on reports).
- e. **Org Unit Description** (explanation of unit's function).
- f. **Org unit Status**: Initiated/Disbanded (latter will be set if you need to record a unit what is no longer active).
- g. **District Group Name** (optional qualifier).
- h. **Primary Language** (Language used by group)
- i. **Org Unit Abbreviation** (nomally OFS for seculars).
- j. **Notes** (any comments needed to explain the Subsidiary's purpose).

- k. The rest of the form is where you enter contact information about the subsidiary group. Most information is optional.
- l. Org Address City (use Any Town if it's undetermined).
- m. Org Country (defaults to USA, *not* US. This determines what States/Provinces are available in the next drop down).
- n. Org Address State Province (select the USA state/territory, or Canadian Province).
- o. Org Address Postal Code.
- p. Click on **SUBMIT** to create the group..
- q. Click on **Exit with no change** if you don't want to create the Subsidiary Organization.

- 3. Once the Subsidiary Organization is created you can assign persons to this *secondary organization*.
  - a. On the Fraternity Summary page, scroll down to the membership list and find the member you need to add to the Subsidiary Organization and click on the **Details** link which will open the persons detail form.

- b. Scroll down to the Secondary Membership drop down and select the correct group. Then scroll down to the bottom of the form and click on **UPDATE** to save the changes.

- c. Repeat steps a and b for all added members of the group.
- d. All members of the subsidiary group will have the group's Display Name as defined on the form used to create the group in their Secondary Membership field. By default this will be the Org Unit Name '-' City Name.

4. To view/edit a Subsidiary Group on the Fraternity Summary Page scroll down to the list of Subsidiary Groups section and find the **Subsidiary Summary** link will display the details about the group.

- a. The top of the ruling page will show a summary of the group.
- b. To view/edit (depending on the user's permissions, scroll down below the Notes field and click on the **Edit/View Subsidiary** link. This will open the full edit form.
- c. If you have edit permissions you can see the form and make changes in any field. Some fields, like **Display Name**, are generated from other fields. (in this case **Org Unit Name** and **Org City**).  
Some fields are not applicable to all group types. For example: a cell won't have a pastoral or fraternal visit, but an Emerging Community may.
- d. After you have made the changes click on **UPDATE** to save them. To abandon the changes click on **Exit with no change** at the bottom of the form or

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at the top of the form.

**Cell Remote-Claremont-CA 2502**

mekofs@gmail.com Admin

**Address:**

Claremont, CA 91711

<b>Sponsoring Fraternity</b>	Holy Spirit-Claremont-CA	<b>Date Initiated</b>
<b>Subsidiary Status</b>	Initiated	<b>Fraternity Meeting Time</b>
<b>Region Name</b>	Saint Francis-unknown-CA	
<b>Notes</b>	Members who are remote	

**General Information**

<b>Org Unit ID</b>	150030
<b>Org Unit Type</b>	Newly Forming Group <input type="button" value="v"/>
<b>Region Name</b>	Saint Francis-unknown-CA
<b>Parent Org Unit Name</b>	Holy Spirit-Claremont-CA
<b>Parent Org Unit</b>	10149
<b>Org Unit Name</b>	Remote <input type="button" value="v"/>
<b>Org Unit Number</b>	<input type="text"/>
<b>Display Name</b>	Remote-Claremont-CA
<b>Org Unit Description</b>	Member who meet remotely <input type="button" value="v"/>
<b>Status ID</b>	Initiated <input type="button" value="v"/>
<b>District/Group Name</b>	<input type="text"/>
<b>tbl org unit official seat</b>	<input type="text"/>
<b>Language</b>	English <input type="button" value="v"/>
<b>Org Unit Abbreviation</b>	OFS <input type="button" value="v"/>
<b>Notes</b>	Members who are remote
<b>Active</b>	No
<b>Last Edit User</b>	82266
<b>Last Edit Date</b>	6/13/2023

**OFS Org Unit Key Dates**

<b>Last Fraternal Visitation Date</b>	<input type="text" value=""/>
<b>Last Pastoral Visitation Date</b>	<input type="text" value=""/>

- e. If you need to change the sponsoring fraternity for this subsidiary group, on the Sponsoring Fraternity's Summary page, scroll down below the top summary and click on the **Transfer Subsidiary to new Sponsoring Fraternity** link.

Remember like all transfers you need edit permissions to both organizations. The Change Sponsoring Fraternity form will display. While several fields will display, the **Parent Org Unit Name** will display only organizations to which the user has edit permissions.

**Warning:** you can move the organization, but the members will not automatically move to the new organization.

Click on **UPDATE** to finalize the change. When the user does this it will display the *original/losing organization* page. To perform the transfer of members (remember until this is done they will be

under to original sponsoring fraternity not the new one) use the **Transfer Person to Another Organization** link in the left column of the Sponsoring Fraternity's Summary page.

- f. If the subsidiary is an Emerging Fraternity and is going to be canonically established on the Subsidiary there a series of steps that have to be followed. On the Subsidiary Summary page there is a link **Canonically Establish Emerging Fraternity**. Click on it and a new form will open. At the top of the page are a series of instructions which you need to follow.

- Change Fraternity Name if desired.
- Change Org Unit Type to Local Fraternity.
- Change Status to Established.
- Add establishment date and additional Province/Diocese information.
- Change will occur in the night cycle.
- Once the change is verified, establish permissions to the new fraternity.
- Members of the new fraternity are transferred from the sponsor to the new fraternity, and their secondary membership is deleted from their records.

### Change Sponsoring Fraternity

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#### General Information

<b>Org Unit ID</b>	150030
<b>Org Unit Type</b>	Newly Forming Group
<b>Status ID</b>	Initiated
<b>Region Name</b>	Saint Francis-unknown-CA
<b>Parent Org Unit Name</b>	Holy Spirit-Claremont-CA
<b>Parent Org Unit</b>	Holy Spirit-Claremont-CA <span style="float: right;">▼</span>
<b>Org Unit Name</b>	Blessed Luchesius & Bounadonna (K)-Los Angeles-CA <span style="float: right;">▲</span>
<b>Org Unit Number</b>	Holy Spirit-Claremont-CA
<b>Display Name</b>	Immaculata-Corona-CA
<b>Org Unit Description</b>	Immaculate Conception-San Diego-CA
<b>District/Group Name</b>	Immaculate Heart of Mary (S)-Santa Ana-CA
<b>Notes</b>	Nuestra Senora De Los Angeles (S)-San Diego-CA
<b>Active</b>	Our Lady Of Guadalupe-Hacienda Heights-CA
<b>Last Edit User</b>	Region Sponsored Groups
	Saint Anthony Of Padua (V)-San Diego-CA
	Saint Clare (K)-Rowland Heights-CA
	Saint Clare (V)-Fountain Valley-CA
	Saint Diego (K)-San Diego-CA
	Saint Francis (K)-Los Angeles-CA
	Saint Francis Fraternity at Anaheim (K)-Anaheim-CA

UPDATE

*Exit with no change*

g. Follow these instructions on the form.

- i. When you click **UPDATE** the system will move the subsidiary to the new sponsoring fraternity. This occurs in the nightly cycle.
- ii. Because this will create a new Fraternity, users must be given permission to access the new fraternity. Contact a National Admin user and have them grant you, and anyone else who will need it, permissions to Edit or Read to the new Fraternity.
- iii. Once you have verified that the subsidiary is under the new sponsoring fraternity, you will need to transfer the members from the old sponsoring fraternity to the newly established fraternity. Once transferred, remove the Second Membership from each of the members.

General Information	
Org Unit ID	150030
Fraternity Name	Remote
Display Name	Remote-Claremont-CA
Org Unit Type	Emerging Fraternity
Status ID	Initiated
Region Name	Saint Francis-unknown-CA
Parent Org Unit ID	20052
Org Unit Number	2502
Org Unit Description	Member who meet remotely
District/Group Name	
Notes	Members who are remote
Active	No
Last Edit User	82266
tbl org unit established date	
tbl org unit established by province id	
tbl org unit established by friar	
tbl org unit established by bishop	

**UPDATE**

*Exit with no changes*

5. If a subsidiary group is no longer needed:

- a. On the Subsidiary Summary page change all positions to Vacant.
- b. Edit each person currently in the subsidiary group by going to their listing under the Fraternity Summary page and click on the **Details** link. On the Person Edit form change the **Secondary Membership** drop down to Not Applicable and then click **UPDATE** to save your changes . Repeat for each person.
- c. Return to the Subsidiary Summary page and select **Edit/View Subsidiary** link. Change the **Status ID** to 'Disbanded' and click **UPDATE** to save your changes..