

Fraternity Summary Page

- 1) Like all summary pages the left side of the page shows common functions: **Select a Different Organization, Log Out, Password Reset, Global Search, View/Edit TAU Distribution, Transfer Person to Another Organization, Reports, User Documentation.** These functions are all covered in separate Help Documentation. On the upper right is the [Contact Us](#) link. Use this to put in a help request, report problems or request enhancements.
- 2) The Right side of the organization summary page is divided into sections which will be covered separately below: Top name and summary, history/key dates, and notes, common tasks, roster, positions, Subsidiary Groups, Membership.
- 3) Above certain tables you will find [Download Data](#) Clicking on it will cause a spreadsheet (e.g., Excel) compatible file, and in some cases, a PDF, to be downloaded.

4) Top name and summary:

- a) The top line (in green lettering) is what kind of organization, followed by the name, city and state.
- b) The number at the end is the formal official number of the organization. Note:
at the bottom of this section is the internal unique number assigned by the system. Use this number when reporting any issues.
- c) Below that is your username as well as your status (Admin/User)
- d) On the left is the address the system has for the organization.
- e) On the right is the summary of membership in this organization by status.

Local Fraternity Holy Spirit-Claremont-CA 11701

[mekofs@gmail.com](#) Admin

Address:
Our Lady of Assumption Parish
435 Berkeley Ave
Bldg. C5, 1st floor
Claremont, CA 91711

Active Professed 20
Active Candidates 0
Active Aspirants (Inquirers) 0
Active Aspirants (Orientees) 1
Inactive Members 7
Deceased Members 36

Fraternity ID:
10149

- 5) **History/Key Dates:** the items in this section are self-explanatory. The **Notes** section provides added information which has been added about the organization.

Org Unit Status	Established	Established by Province	Saint Joseph of Cupertino
Date Established	10/4/1981	Bonded to Province	Saint Joseph of Cupertino
Date of Last Election	04/02/2023	Established in Diocese	
Next Election	04/2026	Current Diocese	Los Angeles
Date of Last Fraternal Visit	3/13/2022	Fraternity Meeting Time	2nd Sunday @ 1:00 PM
Date of Last Pastoral Visit	3/13/2022		
Region Name	Saint Francis-unknown-CA		
Notes			
Was 31102 Prof. count corrected from 22 to 20 1/1/08			

- 6) Next are some of the common tasks. Some are available only to certain users. See documentation for Region

- Click on **Edit/View Fraternity** to open the page that allows you to view or edit basic information about this Fraternity. If the user has Read Privilege, the information is displayed but not editable. Users with Edit permissions can change any information.
- If the user has edit permissions for this organization the **Create New Member** link will be displayed. Clicking on this link will open a window to Create a new person associated with this Fraternity.
- Admin users with Edit permission can click on **Create New Subsidiary** to create a Newly Forming Group, Emerging Fraternity or Cell (aka Satellite) under this Fraternity. Our documents require these groups to be sponsored by a Fraternity. In the past some of these were sponsored by a Region. Until they can be moved to a sponsoring fraternity, we have placed them under a temporary Fraternity labeled **Region Sponsored Groups**, but the people in these groups should be moved under an actual fraternity and the subsidiary group moved there. We will go into that below.
- The link **Transfer Fraternity to New Region** requires the user have Admin role with edit permissions to both the Region where the Fraternity is and the Region where the Fraternity is going to. **Warning:** this is a change from the old system. Typically, this function will need to be performed by a national admin.
- Warning** When an election has just occurred the steps in 'f' below need to be performed by the **Admin** user. Changes to the positions by other users with permissions should not be made during this process. It is up to the Admin user to coordinate with any other users (normally Fraternity level Editors). This can be handled by adding a temporary note using the **Edit/View Fraternity** function and entering a new 1st line ""**ELECTION

Edit/View Fraternity

Create New Member

Create New Subsidiary

Transfer Fraternity to New Region

Register Election

Edit Election Details

Fraternity Roster

National Directory (with contact detail)

Data Quality Report

User Permissions for Organization

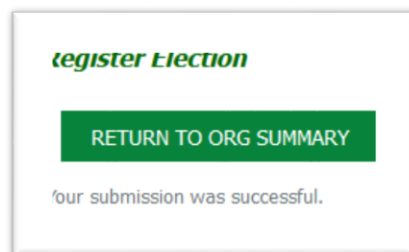
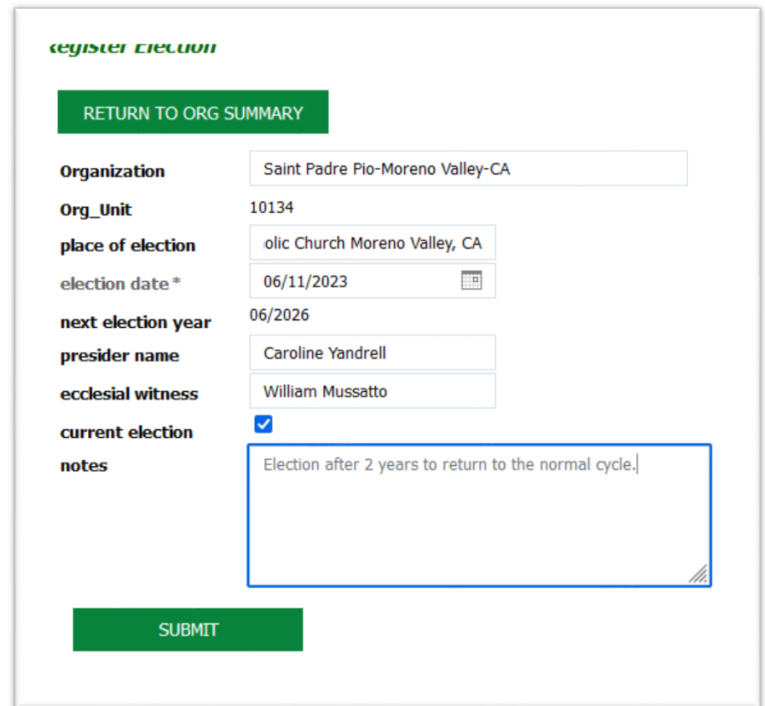
RESULTS BEING ENTERED ** “. The Admin user should remove it after the snapshot has been taken. See ‘f’ below for how to do this.

- f) When an **election** occurs the Regional Admin User needs to record the election. The 1st step is to note that the election happened by clicking on the **Register Election** link.

- i) Fill out the form that opens. Normally this is the Current election (see another help file on how to record past elections). The next election date will be calculated to be three years from the date of this election. Include any notes. In this case the election occurred 2 years after the prior election in order to get the fraternity back on the normal schedule.

Click **RETURN TO ORG SUMMARY** onto abandon the entry.

Click on **SUBMIT** to record the result.



Will be displayed to confirm the success.

- ii) The Regional Admin User needs to **Immediately** go to the positions and click on the **Details** link on each position. If there is a new person in the position select them from the **Select New Name** drop down menu. Only Active Professed should appear in this list. If the same person was reelected to the same position confirm that the **Elected/Appointed** is set to *Elected* and then Click on the **UPDATE** button. If the position becomes vacant (say 2nd councilor) use the **Vacant Position Flag** drop down to signal this and then click on the **UPDATE** button. In both cases you will be returned to the Fraternity Summary Page.
- iii) Scroll down to the positions list and you will see that the Last Election and Next Election dates for that position have been updated. Repeat for all the *elected* positions. If a position is vacant it will remain in the list but Vacant will show up in the position list. If the position is no longer needed (for instance, an appointed committee chair) **The Position Active for this Org** flag should be clicked off. If the position is a required position, the editor will not be able to change this field.
- iv) If you need to add a new position that is optional, below the positions table there is a **Create New Position** link. Click on it and the Create New Fraternity Position page will open. This form is similar to the form above. Note if you select Elected, the current election date and estimated next election date will be populated. Since this is a new position, you can't mark it as vacant. Again, only the active professed are available for assignment. Click on **SUBMIT** when you have completed the form. The new position will appear in the positions table.

Edit Fraternity Position

RETURN TO ORG SUMMARY

Position Name	Formation Director
Position Description	
Current Person	Bradley, Jaqui
Select a New Name	Select a new name ▼
Vacant Position Flag	Use the name above ▼
Position Required	Yes
Multiple Allowed	No
Last Election	4/2/2023
Estimated Next Election	4/2/2026
Elected/Appointed	<input checked="" type="radio"/> Elected <input type="radio"/> Appointed
Notes	
Position Active for this Org	<input checked="" type="checkbox"/>
Selected Person ID	56507
display name	Jaqui Bradley

UPDATE

Create New Fraternity Position

RETURN TO ORG SUMMARY

Fraternity	Holy Spirit-Claremont-CA ▼
position id	Select Position
position description	
Select Member	Select Person ▼
Last Election Date	
Next Election	<input type="radio"/> Elected <input checked="" type="radio"/> Appointed
elected appointed	
appointed date	
Position Active Flag	<input checked="" type="checkbox"/>
Notes	

SUBMIT

- v) When you have updated/added all the positions, scroll down to the **Create Council Snapshot** link to record the election. And then Click **SUBMIT** to record the Snapshot.
- vi) If you scroll down on the summary page and click on the **View Council History** link you will see a record of this election at the top as well as any prior elections the system has recorded.

Create Election Snapshot

RETURN TO ORG SUMMARY

org unit id10134

election id1555

SUBMIT

- g) If you need to change information about an election, click on **Edit Election Details**. This function requires an admin. This will open a list of all of the elections the system knows about.

RETURN TO ORG SUMMARY

Note - You need to have one "Current" election when you finish making your changes.

Personality Name	Org Unit ID	Elections ID	Election Date	next election year	Current	tbl elections last edit date	
July Spirit-Claremont-CA	10149	1528	4/2/2023	04/2026	Yes	5/23/2023 12:44:10 AM	View Details Delete
July Spirit-Claremont-CA	10149	823	8/14/2022	08/2025	No	5/23/2023 3:26:13 AM	View Details Delete

One of the elections should always be marked current. To edit details about the election click on the **View Details** link. You can change Events about an election. You can also change which election is current, when the election was held, and by whom. **Note:** changing the date of the current election will not automatically change the next election dates or when a person was elected. You will need to update each of the positions for this to happen. If you do this, retake the snapshot. You can also delete an election by clicking on the X **Delete** link, but under normal situations *don't do that*. Click on **RETURN TO ORG SUMMARY** when you are done with editing elections.

- h. The Positions table shows the list of required positions and *all* the required positions. By default, it shows active positions are displayed. Inactive positions can be viewed by changing the filter in the search. Clicking on the **Download Data** link will download a CSV version of the table which you can import into a spreadsheet program.

Org Unit Positions

Position Active
☐ Yes
☐ No
☒ All

SEARCH

Download Data

Position Title	Position Description	Person Name	Last Election	Estimated Next Election	Elected/ Appointed	Date Appointed	View/Edit
Minister		Bill Mussatto	4/2/2023	4/2026	Elected		Details

Each row shows the Position Title, the optional Position Description, the display name of the holder of the position, the Last Election date, Estimated Next Election date, whether the position is filled by election or appoints (remember if members of a council change position by council vote, the new assignment is *appointed* even if the original person was elected to it), if appointed, the date appointed, and finally the Details link where you can view or change who holds the position.

- i) Click on **Fraternity Roster** link and the Fraternity Roster page will open. Note: the information on this page contains personally identifiable information so it needs to be handled appropriately. Using filtering it's a very powerful tool (see below).

(1) At the top is the panel which controls what is displayed along with the name of the Fraternity.

Fraternity Roster for Holy Spirit-Claremont-CA as of 3/28/2025

By default, all the active members of the fraternity will be displayed, but you can, by selecting 03-Deceased and Active Flag 'Any' get a list of the deceased members. Or using different filters get just the candidates or by while holding down the 'Ctrl' key select Aspirant (Orienteer), Aspirant (Inquirer), and Candidate. After you have made your selection, click on **SEARCH** and the results will be displayed in the lower section.

Last Name	First Name	Suffix	Display Name	Profession Date	Profession Status	Phone Number	Cell Phone	Email Address	Address Line 1	Address Line 2	City	State	Zip Code	Deceased Date
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(2) If you click on any of the headings, the system will sort on that heading. For example: Clicking on **Deceased Date** will give you a list of the deceased in order of the date of their passing.

- (3) If you want to get a copy of the roster you have created click on the **Download Data** above the roster title bar. You will be given the choice of either CSV (spreadsheet compatible file) or PDF which can be either saved or printed directly. Note: the PDF may take a bit of time to generate, and it will be watermarked because it contains

personally identifiable information. Close the Tab or separate window when you are done. **Note/Warning:** If after the looping circle goes away and you don't see a new popup or tab then you have popup's blocked for <https://c7cre397.caspio.com/>. Go to Settings and Security and search for popups and add it to the site to your list.

Click onto **RETURN TO ORG SUMMARY** leave the roster page.

- ii) Click on **National Directory (with contact detail)** (admin users only) shows a link to a PDF version of the national directory top level persons (e.g., ministers, Regional Spiritual Assistants) and can be printed. Since it contains personally identifiable information read access at the national level is required. Click on the back button to return to the summary page.

- iii) Click on [Data Quality Report](#) (admin users only) generates a report with the members of any region to which the user has edit privilege. The report shows and lists the persons who have an error/issue with data. It will open a selection box (see screen shot on the right). You can select any region (or all) to which you have edit permission. Select whether to look at a Fraternity that is active or not and whether the person is active (the defaults are Person Active = Yes, and Fraternity Active = Any). If you want to see only those persons with a specific error, check the box (e.g., Invalid Email) which corresponds to that error. *Note* if more than one box is checked then all checked errors must be present.

The report will be displayed with the Region and then the Local Fraternity. At the right end of the line is a "View Details" link, which will take you to a reduced Edit screen for that person (only the fields which could contain errors) so you can correct it. Click on

UPDATE

to save the change and return to the list of errors.

The you **BACK** button will take back without making any **changes**. Click on

RETURN TO ORG SUMMARY

to return to the search screen. There you can select new criteria. Click on **Search Again** to return to the summary.

Click on [User Permissions for Organization](#) (admin users only) to see a list of all the users who have access to the organization. To see a list of the users that have access to organization, click on the Users Permissions for Organization link below the History/Key Dates section of the summary page. The report will list all users by permission category, User Role and whether they have edit or read-only privilege. The default sort order for the report is Permission Category (using sequence number), Edit privilege and user last name.

RETURN TO ORG SUMMARY

User Permissions for Our Lady of Guadalupe - Empress of the Americas-Albuquerque-NM Regional Fraternity - 9/7/2024

 Download Data ▼

User Last Name	User Name	Read Only	Edit	User Role	Permission Category ▼
Franco	Yvonne (Bonnie) I. Franco, OFS	No	Yes	Admin	Regional Admin.
Gregory	Virginia (Gigi) Gregory, OFS	Yes	No	User	REC Member
Wolbert	Jerome Wolbert, OFM	Yes	No	User	Provincial SA
Charsky	Mary Frances Charsky, OFS	Yes	No	User	NEC Member
DeRose-Bamman	Jane DeRose-Bamman, OFS	Yes	No	User	NEC Member

Data Quality Report - Active OFS Members Search Criteria

RETURN TO ORG SUMMARY

Region

All ▼

Change Fraternity Active to "no" to check for active members in inactive fraternities.

Change Person Active to "no" to check for Unspecified Membership Status.

Person Active ☒ Yes ☐ No ☐ Any

Fraternity Active ☐ Yes ☐ No ☒ Any

Check only one criteria at a time to prevent incomplete results.

- Profession Status Missing ☐
- Profession Date Missing ☐ for Professed Members
- Profession Date 1/1/1900 ☐
- Admission Date Missing ☐ for Candidates
- Admission Date 1/1/1900 ☐
- Welcoming Date Missing ☐ for Aspirants/Inquirers
- Birth Year Missing ☐
- Birth Year 1900 ☐
- Phone 1 Missing ☐
- Phone 1 is all 9s ☐
- Invalid Address ☐
- Invalid Email ☐
- Membership Status Missing ☐

SEARCH

- iv) Click on [Fraternity Demographics Summary](#) (admin users only). This report is at the region level, and can be expanded to show all fraternities in the region. Demographics include counts by profession status, whether they are ordained (and what level) along with data for membership status changes YTD.

- 7) If this fraternity has Subsidiary Group they will be displayed below the **View Council History**, or **Create Council Snapshot** (Admin only) depending on the user's permissions.

Subsidiary Groups						
Subsidiary	Subsidiary Name ▲	Org Unit Type	Active	Sub ID	org_unit_id	Edit/View
10002	My God My All EC-Fullerton-CA	Emerging Fraternity	Yes	11421	11421	Subsidiary Summary

See the document on Subsidiary Groups for more information about creating, moving and populating subsidiary groups.

- 8) The last selection is the **Member Search/Edit** (again need to change print screen with new wording for Aspirants)

Member Search/Edit

Profession Status ?

All
 Visitor
 Aspirant
 Inquirer
 Candidate

Membership Status ?

All
 01-Active
 02-Lapsed
 03-Deceased
 04-Active-Excused

Last Name

Subsidiary Members

Select Subsidiary ▼

Active ?

☐ Yes
 ☐ No
 ☒ Any

SEARCH

- b) Below this is the results of the Search:

Last/First/Middle, Active, Professed Status, Suffix (e.g., OFS), Membership Status (e.g., 07-Definitive Withdrawal), ID (i.e., system number), 2nd Membership (blank unless they are in a subsidiary), Profession Date, Deceased Date, Edit/View, TAU-USA Active Flag. In the Edit/View column is the **Details** link, clicking on this will provide a view of the complete record of the person (see separate documentation or this page). Clicking on any on any of the columns will allow you to sort on that column. Default is last name.