

COMPLETING PER CAPITA REPORTS

Preparation:

Note: If you are not familiar with how to create a folder, rename a file, create a copy of a file, or copy and paste information in Excel, be sure to read the instructions for Computer Basics and Computer Basics and Using Excel located in the Per Capita Reporting Center on the CFRW website.

1. Obtain a copy of your membership list from the previous year.

- Your 2021 list will be emailed to you by the CFRW Data Center Manager during the first week of December. If you do not receive the list, or if it is “misplaced” or deleted, you can request a copy by completing the request form in the Per Capita Reporting Center on the CFRW website.
- Save a copy of the Membership List File in a folder marked Per Capita 2021. This will preserve the information for future reference.
- The original file will be used as you complete your Per Capita Report for Renewals.

2. Download the CFRW Per Capita Excel Spreadsheet Template

- If you have not already done so, download the CFRW Excel Spreadsheet Template from the Per Capita Reporting Center.
- In case of future changes, we recommend you download a fresh copy of the Template each month.
- Create a copy of the Per Capital Report Template. **When naming the file you will send to CFRW, please include the name of your club and region number. We recommend a file name that also includes the report number and date. EXAMPLE: Redlands-R7 PCR-01 2022-01.**
- Creating a copy will preserve your blank template.

3. Get Organized

- We recommend that you create a Per Capita Report folder on your computer.
- Create Sub-Folders for PCR 2021, PCR 2022, etc.
- Store a copy of your previous Membership List in folder PCR 2021.
- Store your Excel Spreadsheet Template in the PCR 2022 folder. You can create a copy of the Template each time you create a report or download another fresh copy.
- Please remember that no matter how your club keeps track of your total membership, you must use a clean copy of the Excel Spreadsheet Template. If you delete or add any rows or columns it may interfere with the ability to transfer the information to NFRW.

Important Note: Please DO NOT, under any circumstances close, hide, unhide, add or delete columns or rows in the Excel Per Capita Report Form. The form has been created to make information easily transfer to NFRW. If changes are made to the basic structure of the form, it will disable the transfer of information. Using the template downloaded from the Per Capita Reporting Center and copying and pasting information from a copy of the template will make this transfer possible.

Report Code Changes from last year – **Important Change**

- The previous reports used codes R, RC, N and D.
- R and N are no longer necessary because Renewals and New Members now use separate worksheets.
- **C** will only be used for Renewing Members whose information has changed since last year.
- Changes made after a member's Renewal has been reported must be made by submitting a Membership Information Change Form located on the Per Capita Report Center page on the website. These changes might include spelling of name, street address, phone number and/or email address.
- Members who are Deceased should also be reported through the Change Form on the website.

Per Capita Report of RENEWALS:

Open the Excel Spreadsheet Template that you downloaded from the website. The Per Capita Excel file template contains 2 worksheets. To begin using the worksheet for reporting renewing members, click the tab at the bottom of the workbook that reads **RENEWALS 2022**.

Club Information - At the top of your worksheet there is a box to be completed for each report.

- Enter the number of the report you are submitting.
- Enter the date of your report
- Enter the name of your club spelling out the city or location of your club followed by RWF. Please do not use initials only. Many clubs have the same initials. For instance, Redlands Republican Women Federated and Riverside Republican Women Federated both have the initials RRWF. Entering the Redlands RWF avoids confusion.
- Enter your CFRW Club number.
- Enter your CFRW Region number.
- Enter the total number of Renewing Members being reported.
- Place a check by Online Payment if you will be using a Debit Card.
- If you plan to pay by check, please enter the number of the check that you will be issuing.
Note: If you are submitting Renewals and New Members, write the same check number at the top of both worksheets. This will help the Treasurer and Data Center Manager connect your report to your payment when received.
- Enter the total amount being paid for Renewing Members. (2022 = # of Renewals x \$27)

Entering Renewing member data – *Remember: If you are not familiar with Copying and Pasting from file to file, see the Excel Instructions available under **Instructions** in the Per Capita Reporting Center on the CFRW Website.*

- Use the Copy of the file as a working copy for submitting Renewals. Save it in a different folder for the new reporting year.
- Open the working file and copy the information for each renewing member.
- In the file you are using for your report Click the RENEWALS 2022 tab to open the worksheet.
- Paste the information for each renewing member into the worksheet, beginning at Row 2

Double check all the information you have entered onto this worksheet.

Place a C in column one for any member whose information has changed since reported for last year.

Compare the number of members you copied with the number you entered at the top of the page.

When you are finished with Renewals, be sure to **save your work**. **REMEMBER: SAVE SAVE SAVE**

Per Capita Report of NEW MEMBERS:

If necessary, open the Excel Spreadsheet Template. To begin using the worksheet for reporting new members, click the tab at the bottom of the workbook that reads **NEW MEMBERS 2022**.

Please notice that Column A is colored grey and reads **Leave blank for new members report code**. This column should be left blank for use by the CFRW Database Manager.

Club Information - At the top of your worksheet there is a box to be completed for each report.

- Enter the number of the report you are submitting.
- Enter the date of your report
- Enter the name of your club spelling out the city or location of your club followed by RWF. Please do not use initials only. Many clubs have the same initials. For instance, Redlands Republican Women Federated and Riverside Republican Women Federated both have the initials RRWF. Entering the Redlands RWF avoids confusion.
- Enter your CFRW Club number.
- Enter your CFRW Region number.
- Enter the total number of New Members being reported.
- Place a check by Online Payment if you will be using a Debit Card.
- If you plan to pay by check, please enter the number of the check that you will be issuing.
Note: If you are submitting Renewals and New Members, write the same check number at the top of both worksheets. This will help the Treasurer and Data Center Manager connect your report to your payment when received.
- Enter the total amount being paid for Renewing Members. (2022 = # of New Members x \$27)

New member data - Fill in the information for each of your new members beginning on Row 2.

Notice that some fields are required and should not be left blank.

- Enter the new member's last name in column B
- Enter the new member's first name in column C
- Enter the new member's middle name if available in column D
- Enter the new member's street address or PO Box number in column G
- Enter the new member's city in column I
- Enter the new member's state in column in column J.
- Enter the new member's zip code in column K
- Enter the new member's primary phone number in column L
- Enter whether this is a home (H) or cellphone (C) in column M
- Enter the new member's email address in column N

Note: You could start this template during the reporting period and record new members ahead of time.

Double check all the information you have entered onto this worksheet.

Compare the number of New Members reported with the number you entered at the top of the page.

When you are finished with Renewals, be sure to **save your work**.

REMEMBER: SAVE SAVE SAVE

SUBMITTING PER CAPITA REPORTS AND PAYMENTS

NEW 2022: Reports and payments are due on the 1st of the month. Please allow time for checks to reach the CFRW Treasurer. Your report cannot be processed until check is received.

SUBMITTING FORMS AND PAYMENT

1. When you have completed the Report for Renewals and/or New Members for the reporting period, login to the cfrw.org Members Center, Per Capita Reporting Center
2. Click number 3, Per Capita Reporting Forms.
3. You will see two choices: Pay with a Debit Card and Pay with a Check
(See further directions below for “Paying with Debit Card” or “Paying with Check”)

PAYING WITH DEBIT CARD

For New Members or Recurring Members paying with Debit Card, complete the form as follows:

1. Select your Club Name from the dropdown menu.
2. Enter your First Name.
3. Enter your Last Name.
4. Enter the complete email address.
5. Enter the Time Period being reported using the Calendar Buttons for the Start and End Dates
6. Click the UPLOAD button. Navigate through your computer and select the completed Per Capita Report template file you want to upload. The filename will appear in the box.
7. Under Product Details, click the Plus Sign until the number equals the number of Renewing and New Members you are reporting.
8. Enter the Debit Card Number, Expiration Date and CVV number from the back of the card.
9. **When paying by Debit Card, a convenience fee of \$1.00/member will automatically be added to your total.**
10. The total amount due will appear in the Blue Box Below. Compare it to the amount you were expecting.
11. Click Pay (the Blue Box) to Submit. Your file will be upload and your payment will be processed.
12. After completing your payment, you will receive an email receipt/report. A report will also be sent directly to the CFRW Treasurer, Data Center Manager and Membership Chair.

PAYING WITH CHECK

1. Enter the full name of your Membership Chair/Per Capita Reporter
2. Enter the complete email address for your Membership Chair/Per Capita Reporter
3. Enter the Time Period being reported using the Calendar Buttons for the Start and End Dates
4. Enter the Total Number of Renewals plus New Members on the worksheets in the File you are submitting.
5. The total amount of due will appear in the Total Amount Due window. Compare it to the amount you were expecting.
6. Enter the Check Number in the box. It should match the check number you recorded at the top of your report.
7. The method of a payment will automatically appear as **via Check**
8. Click Choose File, under Upload Excel Sheet. Navigate through your computer and select the completed template report you are uploading.
9. Click Submit
10. Your file will be uploaded, and your payment information will be submitted.
11. After completing your payment, you will receive an email receipt/report. A report will also be sent directly to the CFRW Treasurer, Data Center Manager and Membership Chair.
12. **Mail your check to: CFRW 4th Vice President Tammy Galt, 961 North Armstrong Avenue, Clovis, CA 93611**