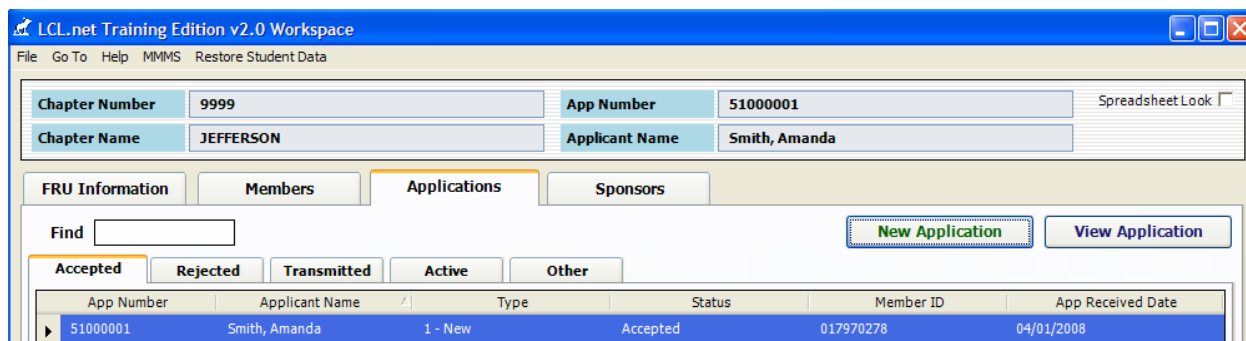


HOW TO DELETE AN APPLICANT

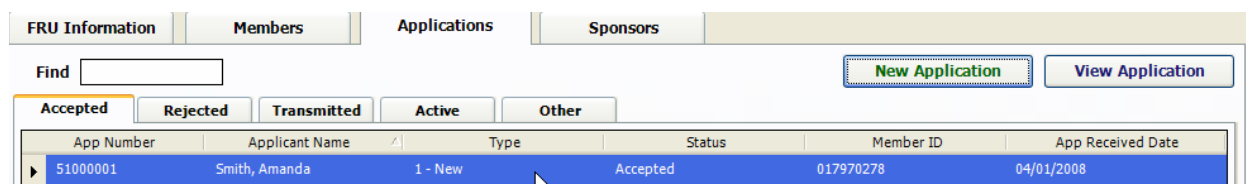
It is the responsibility of the fraternal unit to monitor applicants in their LCL database. If an applicant record is entered in error and is rejected it may need to be deleted so that it can be reentered correctly. This procedure is written to explain how to delete an applicant from LCL.

Applicants can be found under the “**Applications**” tab in LCL. Applicants are listed by status in this screen. Notice that there are five status tabs within the **Applications** area of LCL. These status’ are explained in the “**STATUS CODE DEFINITIONS**” procedure on the CNMA website.



When it is determined that an applicant will mostly likely not complete their obligation of membership (i.e., not pay the dues portion of the application requirement) their status can be changed to “**INACTIVE**” which will move them to the “**Other**” tab in the **Applications** area of LCL.

To change the status of an applicant, double click on their record in the **Applications** area of LCL.



For example I will double click on Amanda Smith who is showing in the **Applications** area of my LCL database under the **Accepted** tab.

The screenshot shows a software window titled "Application" with a blue title bar. The main area contains a form for an applicant named Amanda Smith. At the top, there are fields for FRU Number (9999), FRU Name (JEFFERSON), Member ID (017970278), and Applicant Name (Amanda Smith). Below this is a yellow header for "Applicant Information". The form is divided into several sections:

- Application:** Application Number (51000001), Application Date (09/11/2007), Application Code (1 - New), Application Status (Accepted), Date Entered (04/01/2008), Ballot Date (09/20/2007), Report Date (04/01/2008), Report Number, Fees Paid (checked), and Dues Paid (unchecked).
- Name Information:** Title, First Name (Amanda), Middle Name, Last Name (Smith), and Suffix.
- Address Information:** Address 1 (348 ELMHURST WAY), Address 2, City (JEFFERSON), State/Prov (Illinois), Zip (60539), Country, and Birth Date (09/01/1955).
- Contact Information:** Home Phone ((639) 085-9209) and eMail Address.
- Enrollment:** Enroll Date and an Enroll button.
- Family Information:** Married (checkbox), Number of Children, First Name, Middle Name, and Last Name.
- Employment Info:** Occupation, Employer, and Bus Phone (with area code, number, and extension fields).

At the bottom left, there is a "Sponsor" section with fields for Member ID (2260785), First Name (Melissa), Address (41 N MORELL RD), City (ANTIOCH), State (IL), and Zip (60002-8819). A "Notes" section is also present. At the bottom of the form are buttons for "Print Screen", "Edit", "Save", "Reset", and "Close". The status bar at the very bottom indicates "Browse Mode", "04/01/2008", and "4:54 PM".

When I double click her record it opens her individual record in **Browse Mode**. In order for me to make a change to her record I must click the **“Edit”** button to change the screen to **“Edit Mode”**.

To change her status I must click on the drop down area next to the **“Application Status”**. Notice that the only available options are her current status of **“Accepted”** or another status of **“Inactive”**.

This is a close-up view of the "Application" form, specifically the "Application Status" field. The field is a dropdown menu currently showing "Accepted". Below the dropdown, the "Inactive" option is highlighted in yellow, indicating it is the selected option for the next step.

I select the **“Inactive”** status and click the **“Save”** button to change her status to **Inactive**.

Application

FRU Number	9999	FRU Name	JEFFERSON
Member ID	017970278	Applicant Name	Amanda Smith

Applicant Information

Application		Name Information	
Application Number	51000001	Title	
Application Date	09/11/2007	First Name	Amanda
Application Code	1 - New	Middle Name	
Application Status	Inactive	Last Name	Smith
Date Entered	04/01/2008	Suffix	
		Address Information	
Ballot Date	09/20/2007	Address 1	348 ELMHURST WAY
Report Date	04/01/2008	Address 2	
Report Number		City	JEFFERSON
Fees Paid	<input checked="" type="checkbox"/>	State/Prov	Illinois
Dues Paid	<input type="checkbox"/>	Zip	
		Country	
		Birth Date	


Because I changed her status to “**Inactive**” she will now appear in the “**Other**” tab as shown below.

FRU Information	Members	Applications	Sponsors		
Find <input type="text"/>		New Application	View Application		
Accepted	Rejected	Transmitted	Active		
Other					
App Number	Applicant Name	Type	Status	Member ID	App Received Date
51000001	Smith, Amanda	1 - New	Inactive	017970278	04/01/2008

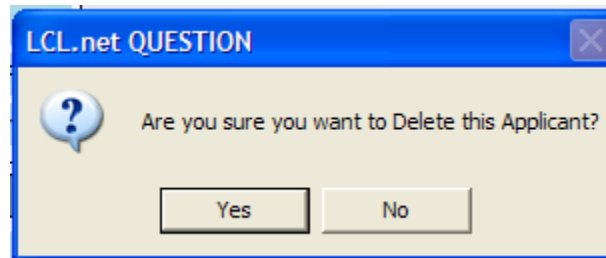
She will remain here in the “**Other**” tab unless I take action to change her status.

If I wish to delete her application from LCL, and therefore MMMS, then I will need to delete her from LCL. This is done by double clicking her record again to open her record in **Browse Mode**. Once again I must click the “**Edit**” button to open the record so I can edit it and change the “**Application Status**”. When I select the drop down next to the “**Application Status**” there is a new selection of “**Deleted**”.

Applicant Information

Application	
Application Number	51000001
Application Date	09/11/2007
Application Code	1 - New
Application Status	Inactive 
Date Entered	Active
	Deleted
	Inactive

I select “**Deleted**” and then click “**Save**” to save the changes to the applicant.



An LCL warning message will appear asking you if you are sure you wish to delete the applicant. Deleting an applicant will result in the need to reenter the applicant again since the record will be marked as “**Deleted**” and cannot be retrieved.

FRU Information	Members	Applications	Sponsors		
Find <input type="text"/>					
		New Application	View Application		
Accepted	Rejected	Transmitted	Active		
Other					
App Number	Applicant Name	Type	Status	Member ID	App Received Date
51000001	Smith, Amanda	1 - New	Deleted	017970278	04/01/2008

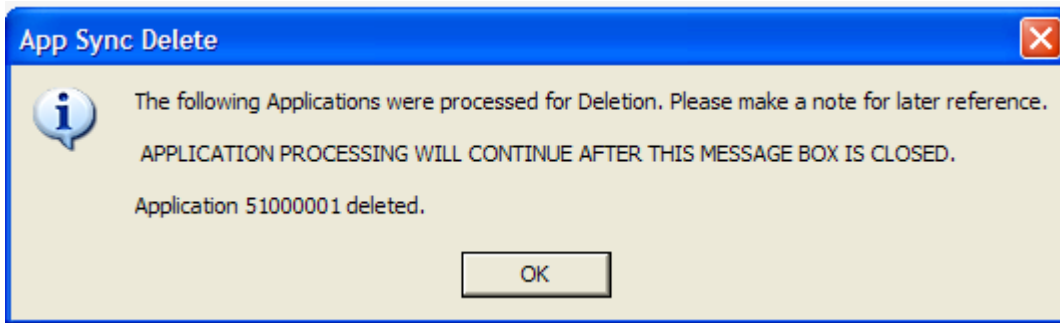
Notice that the **Applicant** now appears in the “**Other**” tab with a Status of “**Deleted**”.

There are other reasons why a fraternal unit might desire to delete an applicant, for instance the applicant has been rejected by a vote of the fraternal unit, or the applicant record was entered in error and has rejected after transmission and the error cannot be fixed on the existing record. The most important thing to remember about deleting an applicant is that you cannot “undelete” them so be careful when using this procedure to delete them.

Another thing to remember is that making an applicant “**Inactive**” will move them to the “**Other**” tab where they will remain until additional action is taken to either delete the applicant or to make them “**Active**” again by changing their status and transmitting to move them back to an “**Accepted**” status. This might happen when we send a letter

reminding the applicant that they have not paid the required dues and after a given period we feel they are not going to pay them so we make them “**Inactive**”. Later they may forward the dues required and we must reactivate them so that we can mark the dues as paid and enter an “**Enroll Date**” to enroll them into our fraternal unit.

The next time that an **Application Transmit** is performed by the fraternal unit the following message will appear telling you that LCL has processed the application for Deletion.



You must acknowledge the message by clicking “**OK**”. The record will no longer appear in the “**Other**” tab in the **Applications** area of your LCL database.