

SUPPORTER SCHEME STANDARDISATION OVERVIEW

The Supporter Scheme is moving to a standardised national model on 1st February 2019. The new process will be more streamlined for both our customers and for you.

Regular updates from the Supporter Scheme team have been distributed via the ACRM regional newsletters since November. **Scroll down to see all the updates.**

Overview of the changes

- All Area managed schemes will be migrated to the national scheme
- All letters including onboarding and renewals will be sent from a national mail house – you will not be able to generate local scheme letters
- All letters will have one signatory
- Local contact details will be on the receipt

You will still be able to:

- Sign up and manage a Supporter Scheme but it will default to the national scheme
- Take payments for a local walk in
- Manage your supporter details in the Vault or through the Area Portal including viewing supporter's information, scheme status, renewals and lapsed customers
- Provide complementary schemes for community initiatives or high value supporters
- Print a donation or scheme payment receipt or interim acknowledgment letter
- The process to request a new card also remains the same

Scroll to the end of this document to see a flowchart explaining how donations attached to Supporter Scheme payments will be handled.

SUPPORTER SCHEME UPDATE #1

Published week beginning 29 October

Streamlining Supporter Scheme across St John

Standardising the Supporter Scheme is part of Fit for Future and will make our systems simpler, consistent and more customer friendly.

This will mean a change in the way some of us process Supporter Scheme subscriptions. Full training and comprehensive information will be available in late November/early December, and we will be in touch with each Area Committee to confirm dates and times closer to the time.

The main benefits of these changes are:

- Streamlined back end operations leading to:
 - ✓ Better flow of internal funds
 - ✓ Fewer internal transactions
 - ✓ Better visibility and accountability to the public
 - ✓ Greater data accuracy, efficiency and consistency
 - ✓ Reduced duplication of effort
- Centrally managed customer communications for more consistent messaging and service experience for our customers and communities
- Smarter use of technology to achieve innovation and efficiency in the future

Workshops

Nominees for each Area will be participating in workshops in mid-November to help us understand the current processes and to help map-out any new processes required. Your input to helping us deliver a great service for our customers is invaluable, so please share your thoughts with your nominees (see list attached). Keep an eye out for more information and outputs from the workshops next month.

If you have any questions about the Supporter Scheme, please contact your ACRM.

SUPPORTER SCHEME UPDATE #2

Published week beginning 12 November 2018

Supporter Scheme update

Streamlining the Supporter Scheme is now underway and will go 'live' in late January 2019. Training for back-end support will be available and we will be in touch with dates and time soon.

Future enabled

Centralising and streamlining our Supporter Scheme administration processes is the first step and will pave the way for us to review the end to end customer journey. It will ensure we are designing the best experience for every one of our Supporter Scheme customers at every touchpoint. As part of St Johns' digital transformation, this will drive the evolution of our online/digital channels, self-service and payment options available to our customers, reducing postage and administration costs.

If you have any further questions, please contact your ACRM.

SUPPORTER SCHEME UPDATE #3

Published week beginning 23 November

WHAT DO THE SUPPORTER SCHEME CHANGES MEAN FOR ME?

Changes to the Supporter Scheme are essentially to make our systems and processes more streamlined for both our customers and for you. It will be implemented on 1st February to avoid changes during the holiday period when many people are away.

What does this mean for you?

- All Area managed schemes will be migrated to the national scheme
- All letters including onboarding and renewals will be sent from a national mail house – you will not be able to generate local scheme letters
- All letters will have one signatory
- Local contact details will be on the receipt
- There will be a change to the commission structure and Supporter Scheme reporting and we will provide more details on this soon

You will still be able to:

- Sign up and manage a Supporter Scheme but it will default to the national scheme
- Take payments for a local walk in
- Manage your supporter details in the Vault or through the Area Portal including viewing supporter's information, scheme status, renewals and lapsed customers
- Provide complementary schemes for community initiatives or high value supporters
- Print a donation or scheme payment receipt or interim acknowledgment letter
- The process to request a new card also remains the same

Over the next week the Supporter Scheme team will be testing the changes to the system to make sure everything is working properly, and that it is as user friendly as possible. We have identified people within each region to help us with this testing and provide feedback on further improvements. These are our 'nominated champions'.

The Supporter Scheme team will be sending weekly updates and aims to have examples of the new National Scheme letters available for you to see next week. Please keep your eyes peeled for these updates.

If you have any questions in the meantime, please contact:

Standardisation project – Deb Hill	Finance/reports/flow of funds - Gary Thomass
Vault/Portal– Deb Trow	Supporter Scheme customer communications – Pip Waters

Update: Supporter Scheme Standardisation

3/12/18 | Update #4

Hi everybody, wow the countdown to Christmas is really on now! It's such a busy time for everyone so here's hoping we all get some decent rest – and glorious weather over the break. Here's an update on our main focus for this week, and for the weeks ahead.

Letter samples

We are currently mocking up the new National and local letters and hope to show these to you next week. Essentially, the National letters will be signed by the National Supporter Scheme Manager and all official tax receipts will come from the Chief Financial Officer. The locally printed letters will retain your Area Committee name and address. Each letter will also include standard information about contacting St John via the 0800 number and our website

The key benefit to standardising the letters is a more streamlined process which will:

- Speed up product development
- Reduce effort, legacy demand, operational challenges and costs

Where do Donations and Supporter Scheme funds go?

A straight donation will continue to be treated and processed as it is currently, including a donation made by a Supporter Scheme member. However, donations attached to Supporter Scheme payments will be treated slightly differently. High value donations generally go to National Office and the region.

- If the Supporter Scheme receipt and donation is banked into the Area Committee bank account, the donation stays with the Area Committee
- If the Supporter Scheme receipt and donation is deposited into the National Bank account, the donation will remain in that account but recognition of the donation revenue will flow through to the local region

This week

We continue to focus on solution design, letter content, reports and processes.

Next week

We'll be finalising the new letters and starting the process of deploying all the necessary changes, as well as testing. We will also firm up what additional support is required for next year.

Progress update

The following page shows how we are progressing overall by the percentage indicator.

Feedback and questions

Standardisation project Deb Hill	Finance/reports/flow of funds Gary Thomass
Vault/Portal Deb Trow	Supporter Scheme customer communications Pip Waters

Timeline

SUPPORTER SCHEME STANDARDISATION UPDATE

30/11/18 | Update #4

Scope

October 2018

Analysis

We've been working with Deborah Trow, Pip, Finance, ICT and ACRM representatives to understand current state and impacts of standardisation at a high level.

We've developed an understanding of change impact, what's NOT changing, what IS changing for ACs to manage supporters under a national scheme.

100%

Hello

Mid November 2018

Engagement & comms

Communication via ACRMs to advise ACs what standardisation really means to them and the role they do daily, weekly, monthly. We'll be seeking feedback on our findings.

100%

Ready

Early December 2018

Review

In early December, we will roll out a view of new reports and screen changes for you to view, and plan training (if requested) from mid-late January 2019.

Test

Early December 2018

Makes changes & test

Deborah Trow will commence first round of Area Portal testing of reports and screen changes

Prepare

Mid December 2018

Makes changes & test

We'll deploy all change processes and confirm support required (if any), plus timelines of what's ahead in January 2019.

Support

January 2019

Prepare for change

We'll be providing support around the Area Portal changes, new reporting processes and access to new reports.

Live

1 February 2019

Make change

All schemes will be switched to the 'Nationally-Managed Scheme' flag. All Supporter Scheme customers will now show as 'Nationally Managed Scheme'.

End Feb 2019

1st Scheme Commission Run

Update: Supporter Scheme Standardisation

10/12/18 | Update #5

All on track...

With only two working weeks before the end of the year, the team is working hard to ensure everything is ready to go live on 1st February. To minimise any impact on our customers, please see the Action list on page 2. We thank you for your co-operation during this transition period and please don't hesitate to contact the team with any questions (details below).

New look letter samples

We are pleased to share the new standardised letters that customers will start to receive from 1 March onwards. These will be sent from the Nationally Managed Scheme and can be [viewed here under Supporter Scheme Sample Letters](#).

Key dates and managing expiries

From 1 February 2019, expiry letters will be issued centrally for customers expiring in March, and the local 'print renewal letter' button will no longer be available.

December	January	February	March
1 - 30 Dec	1 - 31 Jan	1 - 28 Feb	1 - 31 Mar
		1 Feb - All schemes switched to become Nationally Managed Schemes	
Area Committees continue to send renewal/expiry letters to customers whose schemes expire up to 28 Feb			
		National will pull renewals for customers whose schemes expire from 1 March onwards, to allow 1 months' notice	
			1 March - Customers start to receive Supporter Scheme comms/letters from National

Update: Supporter Scheme Standardisation

Actions required please

1. LETTER LODGEMENT

For a smooth transition and to ensure all customers get a minimum of one months' notice before renewal - **all January and February renewal/expiry letters are to be rolled into your December lodgements and sent before Christmas.** Please ensure our local administrators are aware of this expectation. It's important we minimise any impacts on our customers throughout the transition and ensure the timing of our reports is right in the New Year. Please get in touch if you have any issues.

2. LOCAL DETAILS FOR LOCAL LETTERS

A spreadsheet will be sent out shortly with the postcodes in each of your regions. Please complete the local store name and address for each postcode. This information will then be pulled into your locally printed letters/acknowledgements when customers pay locally.

This week and next week

- We are finalising the wording and layout for the locally printed letters and acknowledgements and will be gathering key local details including local store names and addresses where customers can visit and make payments
- We will start to gather support requirements and schedules for next year
- We are continuing to align the testing environment and test the changes being made

Progress update

The following page shows how we are progressing overall by the percentage indicator.

Feedback and questions

Standardisation project	Deb Hill	Finance/reports/flow of funds	Gary Thomass
Vault/Portal	Deb Trow	Supporter Scheme customer communications	Pip Waters

Timeline

SUPPORTER SCHEME STANDARDISATION UPDATE

10/12/18 | Update #5

Scope

October 2018

Analysis

We've been working with Deborah Trow, Pip, Finance, ICT and ACRM representatives to understand current state and impacts of standardisation at a high level.

We've developed an understanding of change impact, what's NOT changing, what IS changing for ACs to manage supporters under a national scheme.

100%

Hello

Mid November 2018

Engagement & comms

Communication via ACRMs to advise ACs what standardisation really means to them and the role they do daily, weekly, monthly. We'll be seeking feedback on our findings.

100%

Ready

Mid December 2018

Review

In mid-December, we will roll out a view of new reports and screen changes for you to view, and plan training (if requested) from mid-late January 2019.

Test

Early December 2018

Makes changes & test

First round of Area Portal testing of reports and screen changes

30%

Support

January 2019

Prepare for change

We'll be providing support around the Area Portal changes, new reporting processes and access to new reports.

Prepare

Mid December 2018

Makes changes & test

We'll deploy all change processes and confirm support required (if any), plus timelines of what's ahead in January 2019.

Live

1 February 2019

Make change

All schemes will be switched to the 'Nationally-Managed Scheme' flag. All Supporter Scheme customers will now show as 'Nationally Managed Scheme'.

End Feb 2019

1st Scheme Commission Run

Update: Supporter Scheme Standardisation

17/12/18 | Update #6

Getting ready for change

When we return from the holiday break it won't be long before the new Supporter Scheme Standardisation goes live on 1st February. These are exciting times and we look forward to a smooth transition and a process that is simpler and more efficient for everyone. Thanks for your co-operation during the transition and we hope you have a relaxing break. See you in January!

New Year expiries

Last week we requested that, where possible, you roll all January and February renewal/expiry letters into your December lodgements. Ideally, we'd like to have all the letters out before Christmas as it would ease the transition process, however, it is still acceptable to process February renewals in early January.

Early January

Once we are all back at work we'll be providing training support to show you the portal changes. We'll also confirm what support processes are in place and how to access new reports.

Local details

Shortly, a spreadsheet with the post codes in each of your Regions will be circulated. Please ensure you complete the local store name and address for each postcode in your region. We need this information by mid January to ensure it can be added to the letters you will be printing locally.

Feedback and questions

How would you like to receive information about Supporter Scheme Standardisation? Is there another channel other than the ACRM weekly newsletter? Please get in touch with Pip Waters and let her know the best way to keep you informed!

Standardisation project Deb Hill	Finance/reports/flow of funds Gary Thomass
Vault/Portal Deb Trow	Supporter Scheme customer communications Pip Waters

Update: Supporter Scheme Standardisation

14/01/19 Update #7

Welcome to 2019!

We hope you have all had a relaxing and enjoyable break.

This week we continue to build and test our new Vault templates, reports and portal functionality. Test data is being created ready to send to the mailhouse to test the letter generation. Finance are reviewing the Bureau processes are also building and testing their new reports.

Next week we will be running end to end portal testing to ensure all data and functionality is correct. We will then be able to share some screen shots and walk you through the new functionality.

February Renewals/Expiries

Before Christmas we requested that, where possible, you roll all January and February renewal/expiry letters into your December lodgements. If you were unable to do this, please ensure you process all your February renewals before the end of January. Payments from the 1st February will fall under new processes and reporting.

Local details for locally printed acknowledgement letters/receipts

A spreadsheet for each of your Regions has been circulated. Please ensure you complete these lists as best you can. Details sent back to us by 18 January can be included in the new locally printed letters available from 1 February. There will be other opportunities to update these details post launch.

Feedback and questions

Pip Waters	Supporter Scheme customer communications
Gary Thomass	Finance/reports/flow of funds
Deb Hill	Standardisation project
Orly Jacobson	Programme communications
Deb Trow	Vault/Portal

Timeline

SUPPORTER SCHEME STANDARDISATION UPDATE

10/12/18 | Update #5

Scope

October 2018

Analysis

We've been working with Deborah Trow, Pip, Finance, ICT and ACRM representatives to understand current state and impacts of standardisation at a high level.

We've developed an understanding of change impact, what's NOT changing, what IS changing for AOs to manage supporters under a national scheme.

100%

Hello

Mid November 2018

Engagement & comms

Communication via ACRMs to advise AOs what standardisation really means to them and the role they do daily, weekly, monthly. We'll be seeking feedback on our findings.

100%

Ready

Mid December 2018

Review

We are now looking to be able to share what the new screens look like mid January

Test

Early December 2018

Makes changes & test

First round of Area Portal testing of reports and screen changes

60%

Support

January 2019

Prepare for change

We'll be providing support around the Area Portal changes, new reporting processes and access to new reports.

Prepare

Mid December 2018

Makes changes & test

We'll deploy all change processes and confirm support required (if any), plus timelines of what's ahead in January 2019.

40%

Live

1 February 2019

Make change

All schemes will be switched to the 'Nationally-Managed Scheme' flag. All Supporter Scheme customers will now show as 'Nationally Managed Scheme'.

End Feb 2019
1st Scheme Commission Run

Update: Supporter Scheme Standardisation

21/1/19 | Update #8

Not long now...

Less than two weeks now until we switch to standardisation for the Supporter Scheme. Thanks very much to everyone for their co-operation to date. Please bear with us over the next 14 days whilst we finalise everything before we go live.

Key changes after 1st February

Following the launch you will be able to:

- Run a Supporter Scheme member report
- Print local interim Supporter Scheme payment acknowledgement letters and donation receipts
- Reprint updated customer renewal and expiry letters locally
- Request a full donation receipt to be sent by the mailhouse, directly to the customer
- You will no longer need to manage the paperwork for ambulance invoices

Progress update

All the letter templates have now been updated and are currently being tested. The functionality and screen changes are also being finalised and tested this week.

February renewals/expiries

Please ensure you process all your February renewals before the end of January. Payments from the 1st February will fall under new processes and reporting.

Updating your local details

If you have an Area Committee managed scheme you should have received a request to confirm branch/store name and addresses. If we receive this information before 31 January, we can update your details. After this date, we will update details upon request.

BAU for your banking schedules

Good news from the finance bureau. All current processes and impacts have been reviewed and we confirm that there will be no major changes. This means you should keep sending in your banking schedules as usual.

The bureau will continue to process any letters they receive during the February transition period to minimise any customer impact/delays in processing. Once letters start to come out from the national mailhouse, all Supporter Scheme and direct mail will start being handled by the mail clearing centre in Auckland.

Update: Supporter Scheme Standardisation

ICT testing and support

Unfortunately, we had some issues with the ICT test system rebuild which means there won't be any training sessions before we go live. However, please remember that the changes are minimal, so it should be quick and easy for you to understand the new process. We will send you a user-friendly support manual as part of the launch and your ACRM can also help with any questions you may have. Deb Trow will be available for support from 11 February onwards.

New reports available soon

A New Fees report is currently in development and New Member status reporting is also being updated to include some additional fields. Both reports will be shared once complete.

This week

Testing, testing and more testing!

Next week

Even more testing and writing the simple manual to help you understand the new process (it's easy, don't worry).

I need help – who can I contact?

If you need any assistance after the launch on February 1st please contact your ACRM who will be able to help you, or they will pass your query on to the right person. Deb Trow will be providing additional support from 11th February onwards.

Feedback and questions

Standardisation project	Deb Hill	Finance/reports/flow of funds	Gary Thomass
Vault/Portal	Deb Trow	Supporter Scheme customer communications	Pip Waters

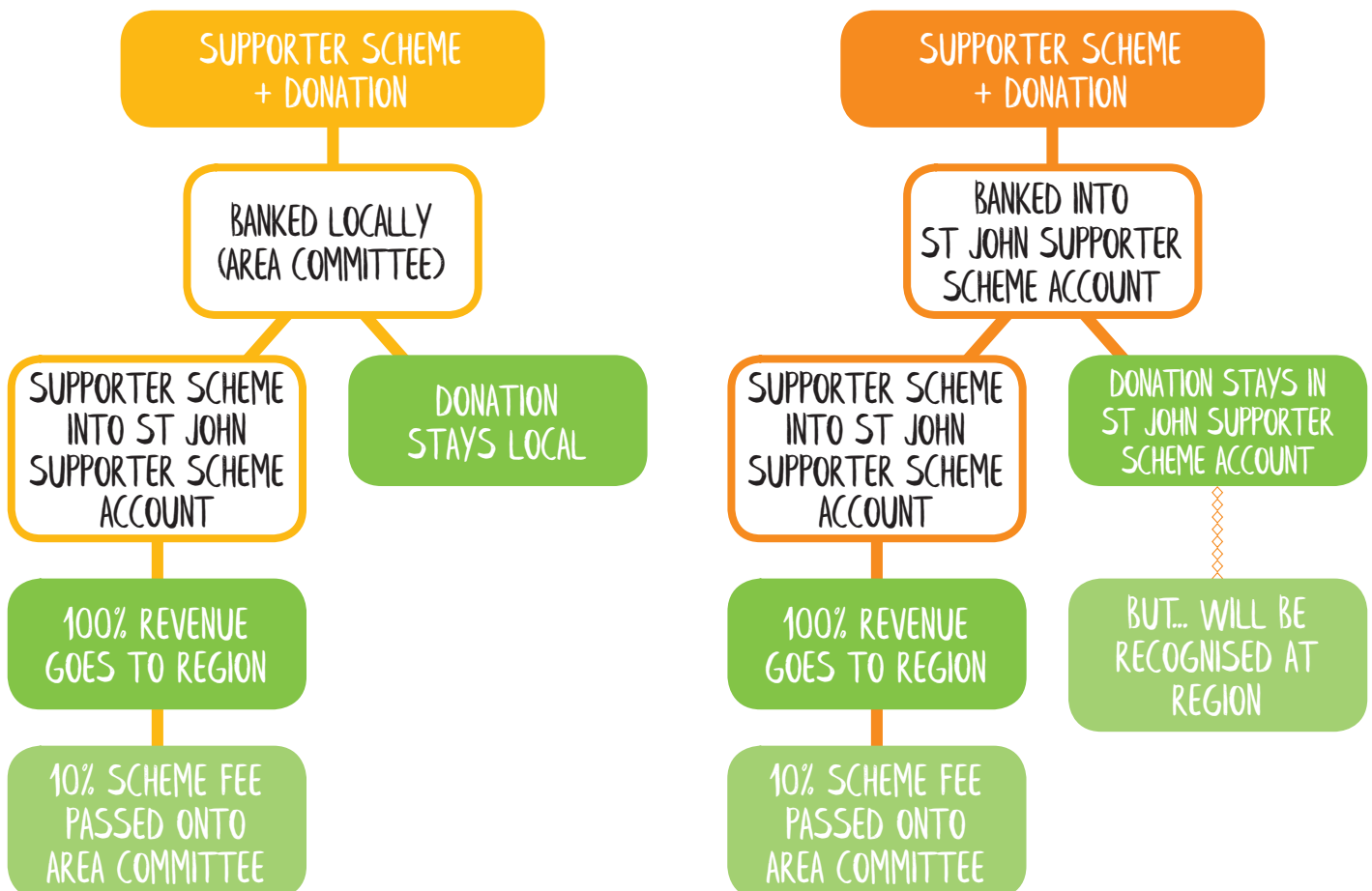
SUPPORTER SCHEME

FLOW OF FUNDS

Straight donations stay where they are banked



Supporter Scheme *plus* donations are treated differently



Update: Supporter Scheme Standardisation

31/1/19 | Update #9

Ready, Steady, Go...!

Supporter Scheme Standardisation will be live from tomorrow morning. Thank you everyone for your patience and co-operation during the development, set up and test phase.

Key changes for Area Committees

- Area managed schemes in the Vault will now be flagged as Nationally managed
- All customer Supporter Scheme communications including renewals and lapsed letters will be managed nationally and be sent from the national Mailhouse
- You will still be able to:
 - Generate member reports/views
 - Continue to process and update member schemes
 - Generate a copy of a letter sent
 - Generate local interim acknowledgement letters for Supporter Scheme payments
 - Generate donations receipts
- You will no longer need to generate renewal and lapsed letters. The print letter functionality will be disabled.
- Locally processed funds from the Supporter Scheme will remain in the local account
- Ambulance invoices will not be re-charged as of 1st Feb. Any back logged invoices, due to processing from the ambulance strike, will not be re-invoiced if unprocessed at the time of the switch.

Bureau processing

Volumes for February are expected to be the same as usual, with reductions starting in March and April

'How to' documents

Attached is a document showing the changes to the Supporter Scheme Report -these changes are for all regions.

Also attached is information about the changes to the Receipt Required Tick Box – donation receipt only.

Key contacts

Standardisation queries – Contact your ACRM

Scheme queries:

- 1-14 Feb - Pip Waters 09 526 0528 x 8921
- 14 Feb onwards - Deb Trow 0800 785 646 x 8300

Timeline

SUPPORTER SCHEME STANDARDISATION UPDATE

31/1/19 | Update #9

Scope

October 2018

Analysis

We've been working with Deborah Trow, Pip, Finance, ICT and ACRM representatives to understand current state and impacts of standardisation at a high level.

We've developed an understanding of change impact, what's NOT changing, what IS changing for ACs to manage supporters under a national scheme.

100%

Hello

Mid November 2018

Engagement & comms

Communication via ACRMs to advise ACs what standardisation really means to them and the role they do daily, weekly, monthly. We'll be seeking feedback on our findings.

100%

Ready

Early December 2018

Review

In early December we'll rollout a view of new reports and screen changes, and plan training (if requested) from mid-late January 2019. Update: Changes were so minimal, training was not required.

Test

November – December 2018

Make changes & test

Test area portal page updates and new reports, setups and processes.

100%

Prepare

January 2019

Prepare for change

We'll be providing support around the portal changes and new reporting processes

100%

Train

January – February 2019

Makes changes & test

Deploy all change processes and confirm support required, timelines of what will occur in January 2019.

100%

Live

1 February 2019

Make change

All schemes will be switched to the nationally-managed flag. Area Portal page for scheme management will now show 'National'.

99%


End Feb 2019

1st Scheme Commission Run

Receipt Required Tick Box – donation receipt letters only

An enhancement has been made to the Area Committee Payment Detail screen.

When the **Receipt Required** check box is ticked the receipt letter will be sent by the mailhouse directly to the customer.



Area Committee Payment Details


Customer: 3766241 Name: Jane Test Mercury Bay Area Committee

Invoice	Description	Invoice Date	Due Date	Invoice Amount	Amount Owning	Payment Amount	Select
▶	Donation/PET--Pet Therapy					\$10.00	<input checked="" type="checkbox"/>

Payment Method: Cash
Payment Reference:
Drawer: Jane Test

Total Payment Received: \$ 10.00
☒ Receipt Required
Cancel Proceed Print Receipt

When the **Receipt Required** check box is unticked, the receipt letter will go into the batch Print Receipts on the Area Committee Home screen to be printed and posted later. When your selection has been made click on the **[Proceed]** button.



Area Committee Payment Details

Customer: 3766241 Name: Jane Test Mercury Bay Area Committee

Invoice	Description	Invoice Date	Due Date	Invoice Amount	Amount Owning	Payment Amount	Select
▶	Donation/PET--Pet Therapy					\$10.00	<input type="checkbox"/>

Payment Method: Cash
Payment Reference:
Drawer: Jane Test

Total Payment Received: \$ 10.00
☐ Receipt Required
Cancel Proceed Print Receipt

Note: the receipt letter can also be printed at the time of payment processing, click on the **[Print Receipt]** button on the Area Committee Payment Detail screen.

Supporter Scheme Report

On the Area Committee Home screen, the [Print Supporter Scheme Letters] button has been replaced with the new [Supporter Scheme Report] button.

A Supporter Scheme Report can be run to view your Area Committee Supporter Scheme members details. The report can be download as a CSV file.

Note: if you administer more than one Area Committee, ensure that you select the appropriate Area Committee from your provided drop-down list.

Actions:

- Click on the **[Supporter Scheme Report]** button.



Area Committee Record

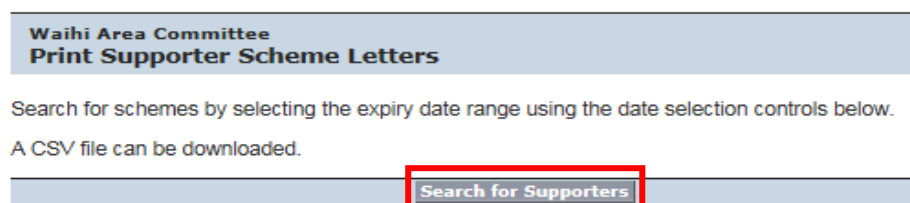
You are currently working with Area Committee Waihi

Organisation Customer Detail Edit Enter Payments **Supporter Scheme Report** Banking Schedule Reprint Bank Schedule
Print Receipts Reprint Receipts Membership report Edit / Verify Address

Internal Customer
Active

Customer ID 405611 Customer Record Type St John Internal Customer [\[Change\]](#)
Customer Name St John - Waihi [\[View Hierarchy\]](#) Partner Account ☒
Parent Customer

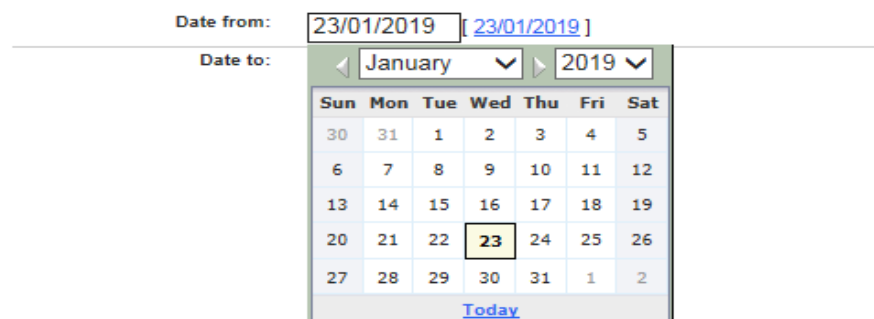
- The below screen will display with a pop-up date calendar for 'Date from'. Select the appropriate from and to dates, then click on the **[Search for Supporters]** button.



Waihi Area Committee
Print Supporter Scheme Letters

Search for schemes by selecting the expiry date range using the date selection controls below.
A CSV file can be downloaded.

Search for Supporters



Date from: 23/01/2019 [\[23/01/2019 \]](#)

Date to: January 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

[Today](#)


- The screen will refresh and return a list of Supporter Schemes that fall within the selected date range.

Waihi Area Committee
Print Supporter Scheme Letters

Search for schemes by selecting the expiry date range using the date selection controls below.

A CSV file can be downloaded.

[Search for Supporters](#) [Download CSV file](#)

 Your search returned 12 schemes, displaying records 1 to 12.

Date from: [[23/01/2019](#)]

Date to: [[23/01/2019](#)]

<input checked="" type="checkbox"/>	Principal	Stage	Customer #	Street Address	Expiry Date
<input checked="" type="checkbox"/>	Gwen Beasley	Active	2625913	20 Dobson Street	25/02/2019
<input checked="" type="checkbox"/>	Peter Bratton	Active	3037427	91 Mataura Road	25/02/2019
<input checked="" type="checkbox"/>	Carole Corner	Active	3210348	2A Seddon Avenue	27/02/2019
<input checked="" type="checkbox"/>	Johannes Langeveld	Active	3067608	560 Waitawheta Road	27/02/2019
<input checked="" type="checkbox"/>	D Martin	Active	3211298	18 Princes Street	24/02/2019

- If the return search data contains records greater than 200 Schemes, the process will create 'pages' of 200 records in alphabetical order. On the screen you will see a message informing:

- The total count of records returned for the date range selected.
- The record count range displayed on screen
e.g. **Your search returned 215 schemes, displaying records**

1 to 200

- A **Next** page button to advance forward if more than one page.
- Then on the following pages a **Previous** button to move backwards through the records.

- Key notes for these pages:

- **Search for Supporters** button – select if you change the search dates to return a new data list.
- **Returned data records** will display the **Principal, Stage, Customer #, Street Address** and **Expiry Date** of the Scheme.
- **Download CSV file** button – exports the selected members details in an Excel worksheet. The Excel worksheet will list all Individual, Joint and Household Supporter Schemes and where applicable all family members linked to a family principal.

- The following Supporter Scheme information fields will display on the worksheet:
 - Customer Number
 - Mailing Name
 - Informal Mailing Name
 - Address1
 - Address2
 - Address3
 - Phone
 - Email
 - Expiry Date
 - Member1Title
 - Member1FirstName
 - Member1MiddleName
 - Member1LastName
 - Member1Birthdate

Note: Member First Name, Middle Name, Last Name and Birthdate are repeated for each attached Member record for up to 9 members. When multiple pages exist, you need to action each individual page and select the **Download CSV file** button to produce the Excel workbook.

Update: Supporter Scheme Standardisation

11/3/19 | Update #10

Up and running!

The end of March will mark a full two months of Supporter Scheme Standardisation. We are continuing to monitor the system closely to make sure the new process is working for you. Once again thank you everyone for your patience and co-operation to help us implement this significant project.

Shiny new Fees Report

A newly designed and easy to read fees report will be sent out monthly, following financial month end. The new report outlines:

- All new, renewed, lapsed and complementary members
- Which members have made a payment in the past month

Attached is a mock-up of the new monthly fees report which initially, will be delivered as a PDF attachment to nominated Area Committee treasurer/AEO/Secretary.

Bureau teams will receive a spreadsheet each month that outlines the automated General Ledger transactions related to this process. Payments outlined in the report will occur on the 20th of the month.

If you have any queries about the report, please contact your Area Bureau or [Gary Thomass](#).

Supporter Letters – including local payment options

Communications sent via the national Mailhouse now include some alternative local locations where customers can pay. Check out a couple of examples on the [Fit for Future website](#)

Have your Say!

You have all been amazingly co-operative with the switch to standardisation and we thank you for your continued support. But we also want to hear your feedback, so later this month we will be sending out a simple survey to hear about your experience of the launch, how standardisation is working in your Area, what we could improve etc.

Key contacts

Standardisation project	Deb Hill	Finance/reports/flow of funds	Gary Thomass
Vault/Portal	Deb Trow	Supporter Scheme customer communications	Pip Waters