



# CHEA Secretary/CLMS2 Communicator

CHEA Secretary, Frank Chicago, PDDGER—CLMS2 Chair, RaeLene Pritchard, PER

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Editor, RaeLene Pritchard

## Lodge Secretary News

Dear Lodge Secretary,

As Grand Exalted Ruler, I am personally asking every "at risk" Member on our Lapsation rolls to pay their dues and remain a Member of the Benevolent and Protective Order of Elks.

In an effort to expedite this process, we have already generated the letters and demonstrate how to produce mailing labels in CLMS2PC for your Lodge. We have also created an easy-to-follow tutorial video and written instructions and have posted links at the bottom of this page.

I am personally counting on you, the Lodge Secretary, to get these letters in the mail by **October 5th**. Please remember to include the Members' dues invoice in your mailing.

Your District Deputy Grand Exalted Ruler will be following up with your Lodge to verify participation. Canceling Memberships for non-payment is not the solution. Throwing in the towel this early in the fraternal year is unacceptable; we all must stay patient and fight harder to collect from our delinquent Members.

### **Great goals require great effort.**

The future of your Lodge and our Order depends on our success.

Sincerely and Fraternally,

**Ronald L. Hicks**

Grand Exalted Ruler

\*\*\*Secretaries please refer to your CLMS2 Home Page under Lodge Secretary News for the following:

### **WRITTEN INSTRUCTIONS (with Video Links):**

#### **Labels/Envelopes:**

How to Print Labels for Delinquent Mailing  
How to Print Envelopes for Delinquent Mailing

#### **Letters**

How to Print GER Letter for Delinquent Mailing  
How to Send GER Letter for Delinquent Mailing via Email Mail Merge



## Words of Wisdom

As the CHEA CLMS2 Chair I field a great deal of calls that begin with how candidates are entered into the system. Please take care in the status of your candidate as follows:

[< Previous Page](#) [Refresh](#) [Print](#) [Close Window](#)

### Add a Membership Candidate

Execute this wizard to add a membership candidate to your database, including candidates who are transferring, reinstating, or affiliating from another lodge. If this is not what you want to do, [click here to cancel](#).

**This Candidate ...**

☐ has **never** been a member of the Elks.

☐ is **transferring** to this lodge.

☐ is **affiliating** to this lodge via an **absolute dimitt** from another lodge.

☐ is **affiliating** to this lodge via a **certificate of release** from another lodge.

☐ is **affiliating** to this lodge via a **certificate of status**.

☐ is a former member of this lodge who is **reinstating** his or her membership.

CLMS Terms of Service  
Copyright ©2015 BPO Elks.

- **Never been a member:** A candidate that has never been affiliated with any Elks Lodge at any time
- **Transferring to this lodge,:** A candidate who is transferring their membership from another Lodge who is in good standing (their dues are paid, they have not been suspended and you have received a transfer in via CLMS2
- **Affiliating via an Absolute dimitt:** A former member who has dimitted in good standing and is reinstating back to his/her previous lodge or to the lodge of their choosing (See article on how to process a member who is not in the CLMS2 system if they are not listed)
- **Certificate of Release:** A candidate who was dropped from their Lodge roles for non-payment of dues and has obtained a COR from their former Lodge of membership
- **Certificate of Status:** A candidate who has obtained a COS from Grand Lodge to verify his former membership
- **Former Member Reinstating:** A candidate who is a former member of your Lodge

## NOVEMBER MEMBERSHIP REPORTS

The Grand Secretary has announced that GL will be accepting the November Membership Reports on October 15, 2015. Remember the deadline to GL for submitting your November Membership reports using CLMS 2 Web is:



**NO LATER THAN NOVEMBER 5, 2015**

### Process to Add a Member

- \* Go to the CLMS2 Roster and select Options
- \* Check Enable Expert Mode and Select
- \* Go back to Roster and select Add Candidate Select; has never been a member of the Elks and submit
- \* Enter members current data, select proposer, unknown if information is not available, you can always go back and correct any information so simply fill in the blanks and work the details out as you can; Submit
- \* Enter all dates as you have on the Application Milestone; Applied, Proposed, Proposer, Investigated, Elected, Orientation **\*Dates must be in succession so make sure your dates reflect to correct order required by Grand Lodge, if they don't change them to make it work.** *Example: Applied 01/01/1930; Proposed 01/02/1930; Investigated 01/03/1930; Elected 01/04/1930; Orientation 01/05/1930;* you could also use the same date for all such as the initiation date; Submit  
Enter a transaction date that reflects the same date as they applied, check number and fee is not important; however, if you have it change it to the information you have; Submit Payment
- \* On Members Contact screen enter their old Membership number; NEVER use a new one, Submit change
- \* Go back to the CLMS2 Web Roster and select Process Candidates; Select applications ready for Initiation, find your member and click on Initiate

### Process to Add a Member (Continued)

- \* On Initiate Candidate Screen enter the initiation date, change their membership number to the one they initially were assigned as you did in the Member contact screen and Submit
- \* Process Pro-Rated Dues should reflect the date they may have paid, select One Year Dues Payment then enter transaction date, the rest can either remain the same or you may change the information if you have it. It really doesn't matter as the information is out dated and your task is to just bring them into the system.
- \* This will take you to the Members Contact Information where you will need to go into their history and change their Paid to Date; Enter new Paid to Date that reflects the year they were first brought in and Submit
- \* This will take you back to the History and in the pull down menu in that box (Not the wizarding menu) select a New Paid to Date for the last year they paid \*remember it should always start 04/01/\*\*\*\*, add their membership number and Submit.
- \* You are now back on the History Page again and continue to enter any other information from the pull down menu such as New Transfer Out Date, New Drop Date, New Absolute Dimit Date, etc.. (see list for others)
- \* If your member is deceased go to the Wizarding Menu and select Mark Record Deceased and hit Go; Enter the correct information on the next screen and submit, this will place your member in the inactive file and will not affect your count for CLMS
- \* For members who have transferred out to another lodge enter that information as screens appear of just go back into History and enter the information from the pull down menu. If they have transferred and dropped from that Lodge and are presenting you with a Certificate of Release, just bring them in as a reinstatement and enter the COR information manually from the History pull down menu.

## **Absolute Dimits, Transfer In & Out Dimits & Drops**

\*Please remember that **Absolute Dimits** can only be granted if the member is current in dues. Go to the Wizarding Menu and select Drop Member (Any Type) and then choose Absolute Dimit.

**Transfer In members** will appear on the Roster screen below ALERTS as Pending Incoming Transfers. Always receive any new transfers in this manner and never input the transfer as a new record. If the outgoing Lodge has failed to send the record please call them and ask them to initiate a Outgoing Transfer via the CLMS2 system. If they have already deleted their record, please call me so I can help them rebuild it and process it in the correct manner.

**Transfer Out members** should be processed through the CLMS2 system by going to their contact screen and accessing the Wizarding Menu, select Grant Transfer Dimit and input the information requested. Please contact the receiving Lodge should you not see the member leave your roster in about 30 days. Again, if they did not handle this correctly please contact me so that I can help them process it correctly.

Members who have provided a written request to drop their membership and who still owe money for their current dues can be dropped; however, every effort should be made to keep them as a member. Dropping members who don't show 1 year delinquent in the system can be achieved by accessing and enabling the Expert Mode. Go to the Roster and select the member, at their contact screen select History, you will see a new drop down menu under the Wizarding Menu. Select new drop date, enter the information and you will now see that the member has been dropped.



**South District  
Leadership  
and Officers**

A huge thanks to **District Deputy Grand Exalted Ruler, Vern Monroe** and **South District CLMS2 Chair, Jim Meyers** for allowing me the pleasure of conducting training at their DD Clinic at the Yucca Valley Lodge on Sunday, August 22nd. Please extend my heartfelt thanks to the **Yucca Valley Lodge** for their hospitality and welcoming feeling I received upon my arrival on Saturday and their continued friendliness at the Jeweling Ceremony for DDGER Monroe that evening.

It is my hope that other Districts in CHEA will take opportunity of my offer to continue training the Lodge Secretaries in CLMS2 and further their education in Web and PC operation. Please feel free to contact me to schedule a training session at your next DD Clinic or any other Seminar or Workshop you wish to create. My contact information is:

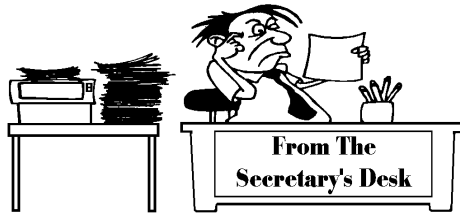
**RaeLene Pritchard, PER**  
**CHEA CLMS2 Chair**  
Merced Lodge #1240  
raelenepritchard@att.net  
209-380-4214

**\*\*\*Please remember to send a request to waive jurisdiction to the Lodge in which any candidate resides when applying to your Lodge. They will become a Grand Lodge Stray Elk and it is only common courtesy to contact the Lodge of jurisdiction so they can be aware of the affiliation to your Lodge. This can be easily handled through CLMS2 and the Messaging tab.**



**During the Mid-Term convention on Saturday November 7, 2015 at 1 p.m. in the Marriott, Grand Ballroom, there will be an Accounting Consultants and Lodge Secretary workshop. This will be an excellent time for you to get your questions answered on the new requirements outlined in the new GL Auditing and Accounting Manual concerning the new chart of accounts**





### **On Line Membership Applications:**

Has your Lodge promoted the online Membership application for signing up new Members? A current paid-up Member of the Order, using the Elks.Org website, can forward a membership invitation to family members and friends. Invitees can complete the application, and then submit their membership application online.

Lodge Secretaries will be notified of these applications via the “Alerts” screen of CLMS2, then process the electronic version the same as a paper application. All data provided by the applicant will be imported into the Lodge’s CLMS2 database with the simple click of a button.

### **Retaining Membership Applications:**

Each year, many of our Local Lodges install new and inexperienced Secretaries. With this new office, there is a learning curve which each new Secretary must navigate in managing the office as well as our CLMS2Web and PC programs. A word to the wise, never destroy or discard paper membership applications and records. Those are the only records available.

Sure, there is our computerized membership program, CLMS2, which started in the fall of 2008 but many records prior to 2008 were not entered into the program; hence the need to maintain those records.

### **Lodge Bulletins: Mail vs e-mail**

Section 1.115 Notice: *"Except as otherwise directed by Executive Order, any notice required to be sent or mailed to all Members of the Lodge may be included in the Lodge Bulletin or sent electronically to any Member who has given written authorization to receive notices electronically. Notice which is required to be served upon a specific Member must be served personally, by United States Mail or by United States Mail, Certified, Return Receipt Requested as specifically provided."*

The Grand Secretary’s Office has seen an increase in inquiries about e-mailing the Lodge Bulletin to save the Lodge money. Yes, a Lodge can e-mail the Lodge Bulletin to a Member “who has given written authorization to receive notices electronically” as stated in the Statute above. Consequently, a Lodge cannot mandate all Members will receive the bulletin via e-mail without the individual Members’ authorization.

**Frank Chicago, PDDGER**  
**CHEA Secretary**



## Dues and Fees

Enter the Lodge Dues as defined in your Bylaws without an added assessment. **Exclude** any additional State, District or Grand Lodge per-capita or assessments. Only include the Lodge Dues per your Bylaws. It's always a good idea to check your Bylaws and go through the listed Dues and Fees under the CLMS2 Accounting Tab, by selecting Edit Rates and viewing the amounts as they are listed. Go to Expert Mode and then you can adjust any that are incorrect. This seems to be an ongoing problem with Grand Lodge and Local Lodges are not charging per their Bylaws.

### CLMS2Web: Accounting

Home Roster Reports Settings Officers/Committees Accounting Options Staff Messaging Support Help  
Payments Edit Rates Transactions Recap

CLMS: CLMS2 NamID: 200001 Type: STATE Mode: EDIT Server: wsprd2/membership1 Expert: FALSE  
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2015

#### Edit Lodge Dues

NOTE: You must be in **expert mode** to edit dues.

Note that Grand Lodge dues (per-capita, insurance, etc.) are maintained by CLMS2, and do not need to be edited. They will display automatically when dues payments are processed.

Delinquent Dues		Current Dues		Prepaid Dues	
Description	Amount	Description	Amount	Description	Amount
Regular - Delinquent Dues 12 Mos	124.00	Regular - Current Dues 12 Mos	124.00	Regular - Prepaid Dues 12 Mos	124.00
Regular - Delinquent State Fees 1	6.00	Regular - Current State Fees 1	6.00	Regular - Prepaid State Fees 1	6.00
Regular - Delinquent State Fees 2	0.00	Regular - Current State Fees 2	0.00	Regular - Prepaid State Fees 2	0.00
Regular - Delinquent Other 1 Annual Fees	1.00	Regular - Current Other 1 Annual Fees	1.00	Regular - Prepaid Other 1 Annual Fees	1.00
Regular - Delinquent Other 2 Annual Fees	0.00	Regular - Current Other 2 Annual Fees	0.00	Regular - Prepaid Other 2 Annual Fees	0.00
Regular - Delinquent Other 3 Annual Fees	0.00	Regular - Current Other 3 Annual Fees	0.00	Regular - Prepaid Other 3 Annual Fees	0.00
Life - Delinquent Dues	0.00	Life - Current Dues	0.00	Life - Prepaid Dues	0.00
Life - Delinquent State Fees 1	6.00	Life - Current State Fees 1	6.00	Life - Prepaid State Fees 1	6.00
Life - Delinquent State Fees 2	0.00	Life - Current State Fees 2	0.00	Life - Prepaid State Fees 2	0.00
Life - Delinquent Other 1 Annual Fees	1.00	Life - Current Other 1 Annual Fees	1.00	Life - Prepaid Other 1 Annual Fees	1.00
Life - Delinquent Other 2 Annual Fees	0.00	Life - Current Other 2 Annual Fees	0.00	Life - Prepaid Other 2 Annual Fees	0.00
Life - Delinquent Other 3 Annual Fees	0.00	Life - Current Other 3 Annual Fees	0.00	Life - Prepaid Other 3 Annual Fees	0.00

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Home Roster Reports Settings Officers/Committees Accounting Options Staff  
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CLMS: CLMS2 NamID: 200001 Type: STATE Mode: EDIT Server: wsprd2/membership1 Expert: FALSE  
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2015

#### Edit Lodge Fees

NOTE: You must be in **expert mode** to edit fees.

Note that Grand Lodge dues (per-capita, insurance, etc.) are maintained by CLMS2, and do not need to be edited. They will display automatically when dues payments are processed.

Type	Description	Amount
GCR [1A]	Granted Fee - Cert of Release	20.00
GTD [1C]	Granted Fee - Transfer Dinit	25.00
GAD [1D]	Granted Fee - Absolute Dinit	25.00
ARN [05]	Application Fee - Reinstatement	25.00
ATD [06]	Application Fee - Transfer Dinit	25.00
AAD [07]	Application Fee - Absolute Dinit	25.00
ACR [08]	Application Fee - Cert of Release	15.00
ACS [1F]	Application Fee - Cert of Status	0.00
ANM [3A]	Application Fee - Initiation - under 26	25.00
ANM [3R]	Application Fee - Initiation 26 plus	75.00

## Out of Balance

How do you track down records that cause the active and ending count to go out of sync?

- Many Lodges that continued to modify data in CLMS2 past the April 1 cut-off date and some well into June, are now having problems balancing their member count reported to Grand Lodge against the active count for the Lodge. This can well be expected since drops in April had already been reflected in last year's report and now they are being counted again for the current year. Think about it. The same holds for additions, etc. **Do NOT** make any member changes in CLMS2 until you file your end of year membership report, as tempting as that might be!
- Lodges are DELETING (in EXPERT mode) CLMS2 records instead of marking them as dropped, transferred, etc. This is a dangerous practice and should be avoided unless you have good cause to delete a member record. Let's say an old inactive record was duplicated and you need to get rid of it. If the record was active or if there were any dates entered for the current year, deleting the record will very likely cause your numbers to be out of balance. It is not advisable to perform day-to-day tasks in EXPERT MODE because it is all too easy to delete data.
- One other practice that we have observed involves reuse of member records, where the name, address, etc. are typed over an existing record. There are many reasons this is a bad practice. **Always add a new record when adding to the database!**



Join in the conversation.

Register online  
[www.elks.org/register](http://www.elks.org/register)

### Out of Balance (Contd.)

- If you see a message like “**Error: ACTIVE count** 950 does not agree with Ending Member count 952” when you click the ROSTER tab, this is a good indication that you have a problem with the member count. What it is saying in this case is, you list 950 active members but your 4/1 count plus the additions and minus the subtractions equals 952. You are overstated by 2 members. Lets see if we can find where the problem is. If you see a message like “**Error: ACTIVE count** 135 does not agree with Ending Member count 133.” Here you are understated by 2 because the ending count is short 2 when compared to the active count.
- First check under the **REPORTS tab**, CLMS Status. Balance Tab, this link will show you the issues detected that may have affected your count. Review this report and make any changes necessary.
- Under **REPORTS tab**, Membership, Current Lodge Year Changes, you will see all additions and subtractions listed in the system for the current Lodge year. You will want to read the report line by line and verify that all of the transactions are reflected and that there are no duplicates. Run by Membership Number and then name. Look for duplicated dates, you will have to edit the member’s HISTORY tab and determine which date to DELETE in expert mode. Look for missing names on the report and figure out why it is not listed. You may have missed entering a date on the HISTORY tab. Look for names that should not be on the list and figure out what dates on the HISTORY tab need to be DELETED in **Expert mode**.
- **Drop for Non-Payment link**, this link found on the ROSTER tab shows the delinquent members and the number of years delinquent. Look for members that are listed with the wrong number of months delinquent. It is possible that your record may have the wrong paid-to date entered. Look for members that should not be listed, maybe a transfer date was missed or is listed out of order on the HISTORY tab. Look for members that should be listed, maybe the wrong paid-to date is in the record or the dates on the HISTORY tab are not listed correctly.
- **CANDIDATES only filter**, Click ROSTER TAB, select CANDIDATES only, [No Filters], [All] and press Filter button You should see a list of the candidates currently in the system and their relative status. It is possible that an inactive member being reinstated could be involved in the imbalance if dropped during the current year and the dropped dates are not reflected correctly.
- **Search the following filtered Records:** Click ROSTER TAB, select [All records], **isAbsolute(-)**, [All] and press Filter button. Review the HISTORY tab to make sure the dimit was handled correctly. The record should be inactive unless a subsequent change made it active again
- Select [All records], **isAffiliated(+)**, [All] and press Filter button. Review the HISTORY tab to make sure the affiliation was handled correctly. The record should be active unless a subsequent change made it inactive again
- Select [All records], **isDeceased(-)**, [All] and press Filter button. Review the HISTORY tab to make sure the transaction was handled correctly. The record should be inactive. Note that the DECREP date should not have been entered if the member had been previously dropped, transferred, etc. In such case, only enter the actual deceased date. DECREP dates apply only to MEMBERS, not associate members or candidates either. If you do not observe these rules, your count will deviate from what it should be.
- Select [All records], **isDrop(-)**, [All] and press Filter button. Review the HISTORY tab to make sure the transaction was handled correctly. The record should be active unless a subsequent change made it inactive again.
- Select [All records], **isExpelled(-)**, [All] and press Filter button. Review the HISTORY tab to make sure the transaction was handled correctly. The record should be active unless a subsequent change made it inactive again.

### Out of Balance (Contd.)

- Select [All records], **isReinstated(+)**, [All] and press Filter button. Review the HISTORY tab to make sure the affiliation was handled correctly. The record should be active unless a subsequent change made it inactive again.
- Select [All records], **isTranOut(-)**, [All] and press Filter button. Review the HISTORY tab to make sure the transaction was handled correctly. The record should be active unless a subsequent change made it inactive again.
- **NOTE:** Watch for a DECREP date followed by DROP or vice versa. Either drop them or mark them as Deceased for the current Lodge year or they will be subtracted twice. Even if they were dropped last year and you find out that the member died, do not enter the DECREP date or they will be subtracted again for the current year.
- Lastly, always address **OUT OF BALANCE ISSUES** when you first see them. As time goes by they only become harder to find. Call your District or State Chair for help before you call Grand Lodge.



Dear Lodge Secretaries and CLMS2 Users,

I will be the first to say that the CLMS2 Web and PC system are not always easy to use. Over time I have learned that it is easier to just ask someone for help than to struggle with the learning curve we all go through. I am hoping to provide you that little bit of help and will do my very best to answer your questions and work with you on any issues you may come across in your daily activities.



You may also find that more seasoned Secretaries are available to help, along with your District Chairs. I don't profess to know everything, *that would be Ken at Grand Lodge*, but I do promise an answer for every question. Let's work together to make CHEA the best operating Membership records Lodges in the country.

You've got a friend!

**RaeLene**



### Grand Lodge Help Desk Hours of Operation:

Monday thru Friday, 9am to 3:30pm - Central Standard Time

Closed all major holidays (President's Day, Good Friday, Memorial Day, Independence Day, Labor Day, Thanksgiving & Friday after, Christmas, New Year's).

Telephone: 773-755-4756

Toll Free: 888-604-CLMS (888-604-2567)

Fax: 773-755-4757

Email: [CLMS@elks.org](mailto:CLMS@elks.org)

Helpdesk: <http://www.elks.org/clmsweb/support/helpdesk.cfm>

**Please don't forget to send me your questions, concerns, requests for process and general operations of the CLMS2 Web and PC. I will be available at Mid-Term to field your questions and can set up training sessions in the coming months or next year. Please help me, help you by asking about what you don't understand, together we will both be well informed!**

**RaeLene Pritchard, PER**

**209-380-4214**

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