



CHEA Secretary/CLMS2 Communicator

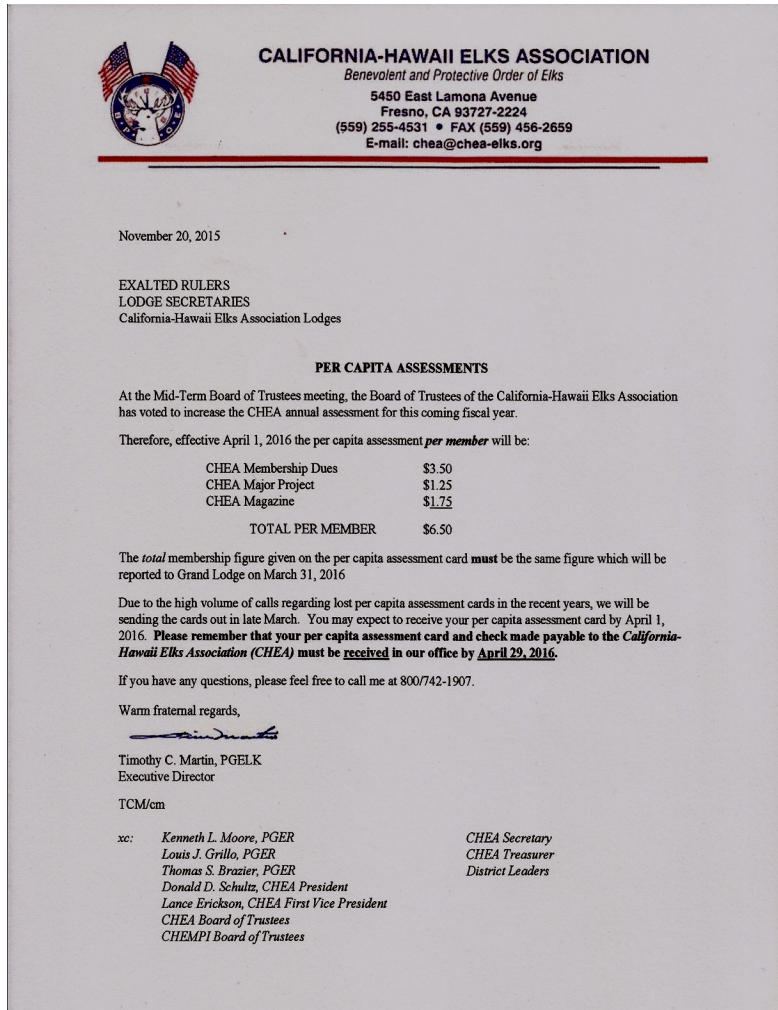
CHEA Secretary, Frank Chicago, PDDGER — CLMS2 Chair, RaeLene Pritchard, PER

January 2016 , Quarterly Newsletter

Volume 1, Issue 2

Editor, RaeLene Pritchard

CHEA DUES INCREASE 2016



Urgent!!! In December all District Chairs were notified via email to contact their Lodge Secretaries with an important update to the CLMS2 Web as follows:

As Lodge Secretaries prepare to send out statements for the new fraternal year, 2016 2017, **it is imperative that CLMS2 be updated to reflect a dues increase for CHEA as stated in the attached letter.** I would appreciate each District Chair advise and monitor their Lodges for this change in CLMS2 which should be accomplished prior to printing statements.

The process to change the new fraternal year rates for CHEA is as follows: **Access CLMS2 web and click on the Options tab, Select Enable Expert Mode and Submit; Next Click on the Accounting Tab, Choose Edit Rates and Click on Dues by the Batch Rates; Under Pre-Paid Dues ONLY, change the rate from \$6.00 under Regular & Life Prepaid State Fees 1 to \$6.50, click Update to change the rate.**

At the beginning of the new fiscal year, upon verification of the Annual Grand Lodge Membership Report being completed and before any new Dues are input, you will need to go back in Expert Mode to the Accounting Tab and Edit Rates for Delinquent and Current Dues.

I will be viewing Lodges in CHEA for completion and will be calling Lodge Secretaries who do not make changes by mid-January. Hopefully we will be able to make this transition without too many problems. Just remember that if you don't make the changes prior to sending out statements the Lodge will be short \$.50 for each member when it comes time to pay your Per Capita Dues.

Annual Grand Lodge Membership Report



2750 N. Lakeview Avenue, Chicago, IL 60614-1889 • Phone: (773) 755-4708 • Fax: (773) 755-4709

BRYAN R. KLATT
Grand Secretary

A Fraternal Organization

DATE: October 15, 2015
FROM: Bryan R. Klatt, Grand Secretary
SUBJECT: Computation of Grand Lodge Dues
TO: Local Lodge Secretaries

Dear Lodge Secretary:

Under Sections 4.231, 14.150 and 14.300, *Laws of the Order*, in addition to their annual dues, it is now mandatory for the collection of the Grand Lodge Per Capita and Assessments from each Member, including Life Members. The total Per Capita for Grand Lodge, Elks Magazine and Insurance is **\$15.50 per Member**. The breakdown of the total Grand Lodge Per Capita and Assessments for the 2016-2017 fraternal year is as follows:

For Grand Lodge expenses and operations	\$ 6.50
For subscription to Elks Magazine	\$ 5.50
For General Liability Insurance Assessment	\$ 3.50
REMIT following dues with report	\$ 15.50

The above figures, as well as what you have entered in your CLMS2 Dues and Fees program for State Association dues, will be included in the combined total on your Lodge Dues Statements. The amount owed Grand Lodge will be calculated by multiplying \$15.50 by the ending membership total as submitted on your Annual Membership Report. Your State Association fees must be paid separately and sent directly to your State Secretary.

With the passage of Resolution 16 during the 2014 New Orleans National Convention, Section 16.010 has been changed to read:

"As of April 1 of each year the membership portion of the Lodge Annual Report shall be filed electronically by the Grand Secretary. Each Lodge Secretary shall insure that all Lodge membership information is current through March 31. The charity portion...."

WHAT DOES THIS CHANGE MEAN? All your 2015-2016 membership data in CLMS2 (adds, drops, deceased, delinquents, etc.) must be completed by midnight on March 31, 2016.

The Annual Charitable Giving Report and per capita dues/assessment check continues to be due by **May 1, 2016**, as required under Section 16.010.

BRK:th

cc: Ronald L. Hicks, GER
Advisory Committee
Grand Trustees
SDGERS
DDGERS

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Elks Care – Elks Share

What does this mean and how can I prepare for the End of Year?

Prior to March 31st:

- Drop Delinquent Members
- Review and update Officer & Committee Members
- Review and Update Lodge information in CLMS2 Web
- Review and correct Top Recruiter information for your Lodge
- Review your Balance Count—Make every effort to resolve out of Balance; understanding that corrections that you made may not be resolved until the new year. *Example, A member marked deceased at the close of last year who was then found to be in error will not correct until close of this year
- Review Current Lodge Year Changes under Reports and then under Membership in CLMS2 PC, save copies as appropriate for future reference
- Clean Up your Candidates list ***You should never leave anyone in the system that you don't have clear understanding of why they are delayed for more than 4 months between Initiation steps.

- Print the following Report in CLMS2 PC: Click on Reports, Check General, Select Current Year—Year End Membership List, then print/send report. Print your list and make sure members are not there twice or misrepresented in another record thereby causing an out of balance situation.
- Also in Reports in the CLMS2 PC, Check Dues & Fees, Select Current Year—Fiscal Year End Transaction List, then print/send report. Check these records for any problems.
- ***You will be locked out of the CLMS2 system for some time starting April 1 so that Grand Lodge can accurately process all of the annual reports.***
- ***Once you regain access:*** Check your settings, validate “Elks year begins” Date, validate “Reported Elks April 1” has changed and “Life Members April 1” has changed.
- Review your Staffers
- Track 60 Day Reinstatements
- Submit Payment to Grand Lodge
- Submit Payment to CHEA
- Submit Charitable Giving Data

Lastly, if your member counts are still off please review knowledgebase Article 154, Under the Support Tab, Knowledgebase, then enter 154 in Keyword. Follow these instructions to resolve your Out of Balance issues for the new year and take care to not have any other problems down the line.



*****ATTENTION*****

**Absolute Dimits, Transfer In & Out
Dimits, Certificate of Release & Drops**

*Please remember that **Absolute Dimits** can only be granted if the member is current in dues and before they are dropped for nonpayment. All Absolute Dimit requests should be written with a signature from the member. You can 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 **ALERIS** 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.

Certificate of Release members are those who are not in good standing and have been dropped by another Lodge for non-payment of dues. The Lodge of record should check their Inactive file to see if they have a CLMS2 record of the member, if they do and after collecting the COR fee, go to the Wizarding Menu and select Grant Certificate of Release. The COR will want to know the Lodge he is dimiting to and then provide a screen to acknowledge the \$20 payment. The receiving Lodge will then go the Add a Membership Candidate screen and select: is affiliating to this Lodge via a Certificate of Release, you will then input their last name and Lodge number to retrieve their Record information and bring them in the Candidates list for process. They must be Investigated and balloted on ONLY.

Drops are 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.

I am providing this information Again, as these areas continue to be problematic throughout CHEA for the Lodge Secretaries. Please, please call your District Chair or Myself for help if you don't understand.

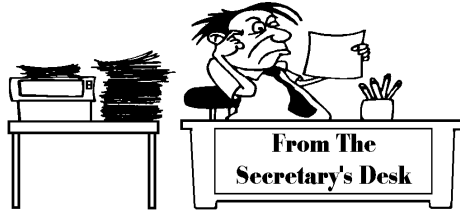
REMINDERS

On the **CLMS2 Web: Roster Page** you will find a section listed as **Alerts**. I have found many Lodges who do not on a regular basis resolve these items in a timely manner. These items are **Flagged Records**, which should only be there to remind you of actions you need to take in the future; **Pending Outgoing Transfers**, which you should monitor and ensure that they are picked up and processed by the incoming Lodge; **Pending Incoming Transfers**, which you should pick up and process immediately; **Pending Submissions**, which are change of address & membership applications and should be corrected promptly and efficiently; and lastly **Membership Inquiries** which should be responded to within 7 days and an acknowledgment sent to Grand Lodge in that time frame.

Please administer these areas as expeditiously as possible as they are key to keeping your data accurate! If you don't understand what you are being asked to do, call your District Chair or myself for assistance.

**Membership
MATTERS**





I will be conducting a Secretary, CLMS2 and Accounting Seminar this year at the Association Convention being held in Anaheim. In the past, we have designed the workshop for new secretaries, CLMS2 and accounting personnel.

If there are any specific topics you would like addressed please e-mail them to me at fjcmajor@gmail.com no later than April 1, 2016. We will attempt to address as many of your concerns as possible in the allotted time we have.

Watch for your convention packets in the mail sometime in early March. The schedule time and place for the workshop will be listed. Remember to inform your delinquent members in writing before you drop them for non-payment of dues.

Look forward to seeing everyone in Anaheim in May.

Frank Chicago, PDDGER
CHEA Secretary



Delinquents

Be sure to contact your Membership Chair and have them advise the Lapsation Committee to send out statements with a letter giving members all options to pay their dues before the end of the year. Contact them personally by phone or in person and find out why they haven't paid their dues. Every effort should be made to retain them and try to engage them in the Lodge activities. Please remember that if given a written request to drop them you can do that in the Expert Mode and access their History where in the drop down file you can select a New Drop Date.

MEMBERSHIP INQUIRIES

The Grand Lodge Web has implemented a new membership inquiry system – <http://www.Elks.Org/who/> – designed to allow members of the public to contact the Lodge to express their interest in joining the Order. Inquiries submitted in this manner will display automatically in the “Alerts” section at <http://www.Elks.Org/clms2web>. Please respond to all membership inquiries within seven days of submission.



Dues and Fees

CLMS2Web: Options

Home Roster Reports Settings Officers/Committees Accounting Options Staff Messaging Support Help

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

Options

Options updated.

Advanced Editing Options

☒ Enable expert mode. (Enables editing of readonly records and sensitive data, and the permanent deletion of records; this session only.)

☐ Enable Demo Mode. Enable demo mode to test or demo CLMS features on test data. Note that demo mode is for testing only, and your membership counts and statistics may not match your production data.

Changes submitted in demo mode will **not** be synced to CLMS2PC for Windows, CLMS2PC Online, or to Grand Lodge.

Submit

CLMS Terms of Service
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Whenever updating your Dues and Fees, don't forget to Enable Expert Mode. Also, make sure that any changes you make are authorized by your State Association or Lodge 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: TRUE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2015

Payments

NOTE: payment records will be retained for seven years.

Lodge Year Starting 4/1/ 2015 or Start Date: End Date:

☒ All Dues and Fees
☐ Application Fees Only
☐ New Member Dues Only
☐ Reinstatement Dues Only
☐ Granted Fees Only
☐ Current Dues Only
☐ Delinquent Dues Only
☐ Prepaid Dues Only
☐ Optional Dues, Fees, and Donations Only

Display Payments

Select the Accounting Tab, which gives you a selection of Payments, Edit Rates and Transactions Recap; choose to **Edit Rates** and this should take you to the Lodge Rates Page as shown below.

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: TRUE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2015

Lodge Rates

Use the form below to display the dues and fees charge

Note that Grand Lodge dues (per-capita, insurance, etc.) payments are processed.

To edit rate amounts only, select one of the "batch" opt

Batch Editing: [Fees] [Dues]

Current Dues

☐ Prorated dues/fees only

From **Batch Editing**: You can select to edit Fees or Dues (example below is Dues)

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: TRUE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2015

Edit Lodge 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

Update

From the **Edit Lodge Dues** Page you can appropriately change Prepaid Dues, Current Dues and Delinquent Dues. Please keep in mind the time frames they impact before changing the amounts.

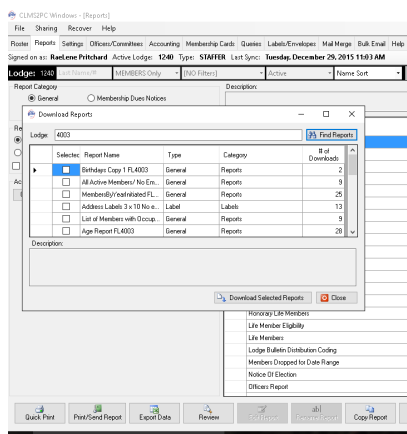
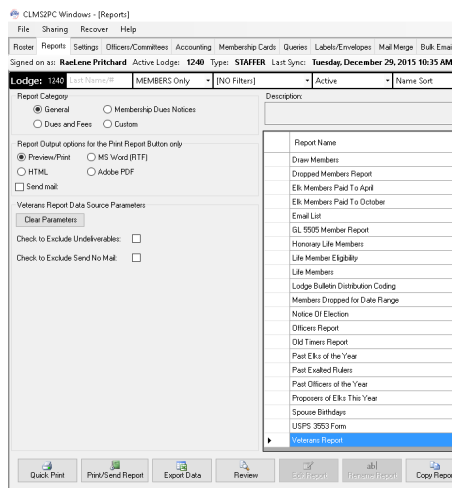


Lodge Secretaries

Please email me at raelenepritchard@att.net upon receiving, reading and complying with the Edit for the **CHEA new Per Capita Rates**. I want to make sure no one runs into a problem and that you all get the help you need to be successful. Your response is greatly appreciated.

Creating Reports

In the CLMS2 PC application you can access the Reports Tab, once in that screen just above the Reports Tab, click on the Sharing Link, select Download Reports, enter 4003 as the Lodge number then click on Find Reports. Here you will find a list of reports that you can download to your regular reports list.



Please send me an email on any reports that do not appear in the list that you would like to be able to access and I will work with Grand Lodge to create them.

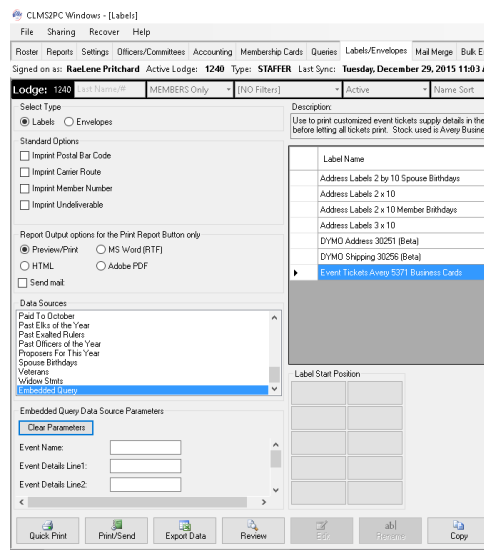
CLMS 2 PC Functions

Under the Labels/Envelopes Tab you have many different options:

To send your Lodge bulletin using a 3x10 address label sheet, first select Lodge Bulletin V2 under the Data Sources tab on the left middle section of the page; select address labels 3x10, identify the groups you wish to print (bottom, middle of page) then click on print/send for a print list.

To send you Lodge bulletin with an Imprint Postal Bar Code you can only use the address label 2x10 and then follow the same procedure as above.

To create Event Tickets, click on the Event Tickets Avery 5371 Business Cards, Under Data Sources select the Embedded Query, below that enter your event details, click the print/send to review your tickets and ensure that all the information fits in the card, if not go back and correct it, then click the print/send again and print when ready.



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

Helpdesk:

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

Promote what you Love



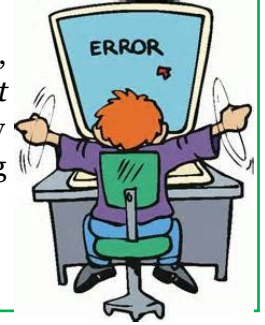


Dear Lodge Secretaries and CLMS2 Users,

It has been a great year with plenty of training both for Lodge Secretaries as well as myself! I know that the CLMS2 Web and PC system can sometimes be a mystery to us; however, with a little knowledge and a phone call to your District Chair or myself, we can make it useful in our 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.

Always here to help and just a phone call away! *Rae Lene*



THINGS TO REMEMBER all Year Round

- Keep correct minutes of all sessions.
- Keep correct accounts between the Lodge and its Members.
- Assign to each New Member a number and create a record file.
- Maintain bulletin board notices and posters.
- Keep membership records, including mailing addresses, correct in CLMS2Web.
- Receive all monies due the Lodge, from any source whatever, paying same to the Treasurer at the earliest practicable moment and obtaining receipt.
- Receive all dues from Members, paying same to the Treasurer at the earliest practicable moment, and issue Membership Cards and, if Lodge desires, identification cards.
- Assist Lodge Auditor and Committee in preparation of Annual Lodge Audit Report to Grand Lodge, as well as two Membership Reports for Lodge.
- Arrange for ordering and receiving of supplies from Grand Secretary in cooperation with Lodge Trustees.
- Attend to all correspondence subject to the approval of the Exalted Ruler.
- Promptly handle document/record transfers with other Lodges for transferred/reinstated Members.
- Apply for contests and awards available to deserving Members.

Continued....

- Notify appropriate Lodge personnel of required license renewals, government reports and property inspections.
- Supervise entry year-round of charitable/community service statistics into Charity Records Workbook or, as now required, directly into CLMS2Web upon completion by Committees involved.
- Inform persons elected to membership of that fact, and notify rejected applicants.
- Attend District and State Association meetings.
- Notify the Members of all Committees of their appointments, together with the subject given into their charge, and provide them with appropriate manuals.
- Supply Lapsation Committee with monthly Delinquent List.
- Report to the Grand Secretary each expulsion or suspension (do not include those dropped from the rolls for nonpayment of dues, or House Committee suspensions).
- Report immediately to the Grand Secretary's office any changes in Exalted Ruler's and/or Secretary's names, addresses, phone numbers or email addresses.
- Serve as a Member of the Standing Relief Committee.
- Perform all duties required in connection with Local Lodge Forums

California Statewide District Chairs

State-wide: Raelene Pritchard Merced, CA Lodge #1240 (209)380-4214
raelenepritchard@att.net

District #0640: Philip Heinemann Fremont, CA Lodge #2121 (510) 797-9154 (510)797-2121
Elks2121@sbcglobal.net

District #0680: Raelene Pritchard Merced, CA Lodge #1240 (209) 380-4214
raelenepritchard@att.net

District #0720: Earl J Conro Hanford, CA Lodge #1259 (559) 924-2466 earlconro@att.net

District #0760: Dominic Rotell Lancaster, CA Lodge #1625 (661) 722-3250 (661) 942-1625
dominicrotell@yahoo.com

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(760) 220-8229 donduztax1@verizon.net

District #0800: Earl T Bouchard Sunland-Tujunga, CA Lodge #2098 (818) 248-5985
(818) 439-6980 etbouchy@outlook.com

District #0840: Frank Gutierrez Red Bluff, CA Lodge #1250 (530) 527-8722
bowtie55pu@yahoo.com

District #0880: Diane Ward Elk Grove, CA Lodge #2577 (916) 429-1413 (916) 837-9360
scubadiver5@sbcglobal.net

District #0900: William M Chelonis PDDGER (Bill) Auburn, CA Lodge #1691
(530) 885-4062 (530) 570-8896 b.chelonis@att.net

District #0920: John N Dowden Petaluma, CA Lodge #0901 (415) 297-8394
dowdenjn@wans.com

District #0960: Michael L Mathers (Mike) Fullerton, CA Lodge #1993 (714) 330-0924
m_mathers@sbcglobal.net

District #0980: Joanna C Rentschler Duarte, CA Lodge #1427 jedsnow@hotmail.com

District #1000: James C Meyers Indio, CA Lodge #1643 (619) 698-2091 (619) 698-2091
jmeyers@dc.rr.com

District #1040: Jon S Dawson Paramount, CA Lodge #1804 (562) 634-5714 (562) 633-1804
navyjon1@earthlink.net

District #1080: Lawrence W Isham (Larry) Redondo Beach, CA Lodge #1378 (310) 374-6513 lar-
ryisham@aol.com

District #1120: Thomas Smith -PAVP Vista, CA Lodge #1968 (760) 525-4133
per.tom@1968.sdcxmail.com

District #1160: G Dennis Young (Denny) Redlands, CA Lodge #0583 (909) 307-0725
gdyngb2@aol.com

District #1200: Randal E Mc Clellan Watsonville, CA Lodge #1300 (831) 722-1867
ranper1300@sbcglobal.net

District #1240: Emmett W Darbyshire (Darby) Santa Barbara, CA Lodge #0613
(805) 968-8676 (805) 964-6858 ext. 114 darbyii@COX.net