



# **CHEA Secretary/CLMS2 Communicator**

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

**April 2016 , Quarterly Newsletter**

**Volume 1, Issue 3**

**Editor, RaeLene Pritchard**

## **California-Hawaii Elks Association 2016 Convention**



**101st ANNUAL CONVENTION**

**ANAHEIM, CALIFORNIA**

**MAY 18 – 21, 2016**

***Tom Lemm, Convention Chairman***

***(714) 349-9910***

***Why YOU should come join us:***

***Meet other Elks at other Lodges—Make new friends!***

***Get ideas that work for other Lodges that just might work for you!***

***Renew your spirit at the Exalted Rulers March***

***Meet the 2016 CHEA Theme Child***

***Enjoy the Hospitality Suites of the other Lodges***

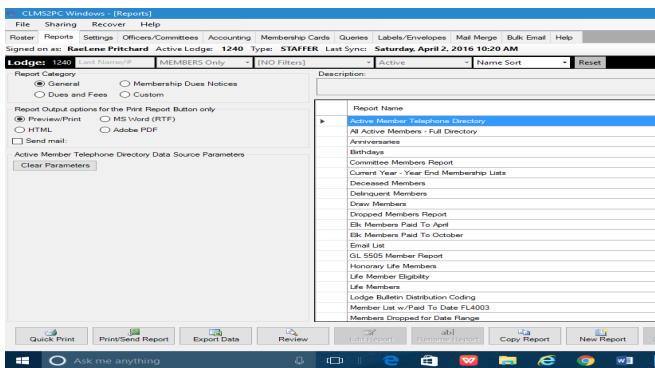
***If you haven't yet received your package for the Convention please contact Tom Lemm immediately to ensure your registration is received timely!  
Follow procedures to return payment and make your reservation at the hotel through the proper representative in your District.***

## New Reinstatement/Initiation/Affiliation Shows As Delinquent With Multiple Months Dues Owed

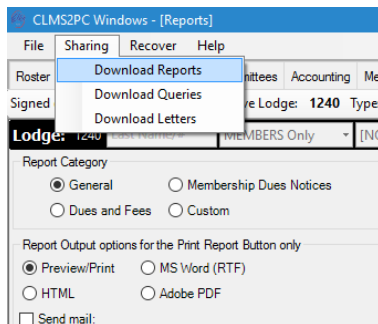
The easiest way to fix this is by going into "expert" mode (Options tab). Go to the history tab on the member's record. Click on the red edit link to the right of the reinstatement/initiation/affiliation date. Delete this record.

The member's record will now be pushed back into the Process Membership Candidates section. Here you will click on the applicable link and advance the candidate again this time clicking on the appropriate dues payment button when asked.

## Reports & Queries



In CLMS2 PC click on Reports or Queries, you will see several types of reports and queries listed and various report categories or parameters on the left that you can choose from. If you don't see a report or query that fits what you need click on Sharing above (example below).



From this list you can add additional reports and queries using the Lodge number 4003. Other Lodges may have further reports and queries in there CLMS2 PC so check the forum to see who may be able to share those. Please let me know what other reports you may want to see and I will request them from Grand Lodge.



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

BRYAN R. KLATT  
Grand Secretary

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

Benevolent and Protective Order of Elks • Grand Lodge

**Elks Care – Elks Share**

**Lodge Secretaries, Please don't forget to change your Delinquent and Current CHEA Dues to \$6.50 on or after April 1st and before you post any payments!**

**\*\*\*Go to the Accounting Tab, Choose Edit Rates and at the Batch Editing Line and select Dues, change the Regular Delinquent & Current State Fees 1 from \$6.00 to \$6.50. This will ensure that your financial postings are correct.**



## CLMS2 Web & PC Workshop



On behalf of the **San Francisco Lodge No. 3**  
you are cordially invited to attend  
a CLMS2 Workshop  
for Lodge Secretaries, Staff, Exalted Rulers,  
Trustees, Committee Chairs or anyone who has  
Read or Read/Write Access to the system.

**CHEA CLMS2 Chair, RaeLene Pritchard**  
will conduct a 4-hour  
Workshop for beginners, as well as those  
wanting to improve their expertise in  
maneuvering in the system.

**April 16, 2016**

**San Francisco Lodge No. 3**  
450 Post St - 2M, San Francisco, CA 94102-1526  
10 a.m. to 3 p.m.

Complementary Pastries & Coffee 9 a.m.  
Lunch \$15 with Reservation  
RSVP to reserve your seat to Lodge Secretary,  
Wes Rudoi  
(415)421-5230

Directions to Lodge upon request,  
recommended to take BART  
to the Powell/Post Station and walk to the Lodge

## 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](http://www.elks.org/clmsweb/support/helpdesk.cfm)

## **CLMS2PC for Windows needs your attention**

HQ had to make some changes required by Microsoft to  
keep the sync process working.

Also, Windows XP, 2000 & 2003 will no longer be sup-  
ported after June 1, 2016, so this news item is not for ma-  
chines running these older Windows versions. If you are  
running one of these older windows machines, you will  
need to replace your system prior to 6/1/2016 or stop  
using CLMS2PC for windows on that machine, this is  
unavoidable. These machines have been considered ob-  
solete for well over a year now. Incidentally Vista will no  
longer be supported by Microsoft after 4/11/2017, so  
start planning for this one to drop off also.

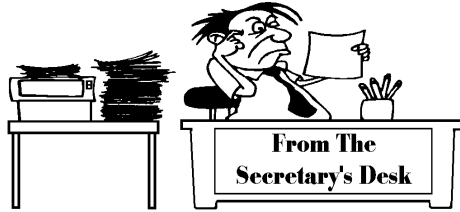
Another quick way to confirm you are running the latest  
version is by looking at the shortcut name, you should be  
ok if it reads "CLMS2PC 2016", otherwise you need to  
upgrade.

For the rest of you, check the version number after you  
log in to CLMS2PC for windows, its located in the lower  
right hand corner of the main screen. If the version num-  
ber is less than 2.0.0.10, you must re-install CLMS2PC  
for windows prior to 6/1/2016.

If you disregard this, CLMS2PC for windows will stop  
syncing after 6/1/2016. Please do not wait until the last  
minute, otherwise we suspect the Help Desk line will  
be unbearably long.

If you are running Vista, Windows7, 8.1 or 10 go to  
this link to download and install the update soon.

**[https://www.elks.org/clms2web/  
clms2PC.cfm](https://www.elks.org/clms2web/clms2PC.cfm)**



By the time you receive this newsletter Lodge year 2015-2016 will be closed and we will begin the 2016-2017 Lodge year. All secretaries were mailed a letter with an enclose CHEA per-capita payment card included requiring the Lodge to send payment into Fresno No Later Than April 20, 2016. The letter forwarding the payment card includes the 2016-2017 CHEA per-capita assessments amount for your use in calculating per capita. Your total membership figure you give

on the assessment card must be the same figure which you reported to Grand Lodge on March 31, 2016.

On Friday afternoon the CHEA Association Convention, there will be an **Accounting Consultant/CLMS2 and Secretaries seminar** in the Orange County Ballroom, Salons 1 to 4.

The seminar begins promptly at 1:00 p.m. I encourage all new secretaries to attend this seminar. You we gain valuable knowledge which will assist you in your duties as Lodge Secretary. We will have audio visual equipment and microphone for use by the presenters for power point presentations and microphone for use during the seminar.

Look forward to seeing you in Anaheim.

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



### \*\*\*Dropped Members

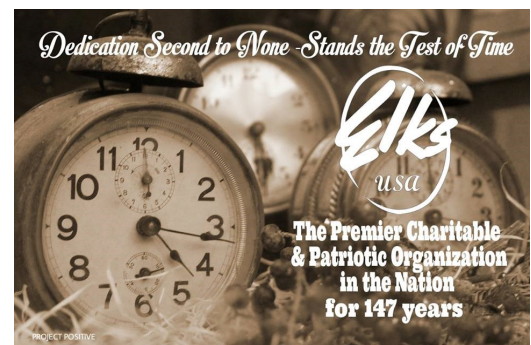


**Section 14.180.** An unaffiliated Member whose name has been stricken from the Rolls of Membership for nonpayment of dues, may on his application, if made within sixty (60) days thereafter, be reinstated as a Member in good standing in the Lodge upon majority vote thereof at the next regular meeting and payment of delinquent and current dues. The Secretary shall advise the unaffiliated Member in writing of the date of his being dropped from the rolls and of his right to re-affiliate within sixty (60) days. If the reinstatement is not reported in the annual membership

report to the Grand Secretary, the report shall be supplemented and the Grand Lodge per capita and assessments paid. The reinstatement shall not result in the loss of continuous and consecutive membership standing.

### Caution Lodge Secretaries:

For all transactions for Dues, Fees and Donations that are marked Paid By Lodge, please leave communication in the Members Comments section stating the meeting date that it was voted to on to do so. Excessive entries that are marked "Paid By Lodge" are being investigated and should be reserved for members who meet requirements under the Statutes and your By-Laws. Decision is finally granted by the members at a Lodge meeting.



## Membership Statements

CLMS2Web: Settings

Home

Roster

Reports

Settings

Officers/Committees

Accounting

Options

Staff

Messaging

Support

Help

Settings

CLMS2

Update [Elks.org Account](#)

CLMS: CLMS2

NamID: 200001

Type: STATE

Mode: EDIT

Server: wsprd3/membership1

Expert: FALSE

Active Lodge: Merced, CA No. 1240 [44882]

Last annual report submitted for year: 03/31/2015

Merced, CA Lodge Number #1240 Settings

Lodge

Dues

Mailings

Email

Other

Custom

Dates

Dues/Fees

Need to edit the amount of your lodge dues and fees? [Click here.](#)

12-months Dues:

☐ Lodge accepts 12-months dues ONLY

Default Values for Dues Statements:

Message Imprint:

Submit

CLMS Terms of Service

Copyright ©2016 BPO Elks.

If you have additional comments, information, credit card number and signature or notices you want to add to your Membership Statements, use the Settings Tab. When you get to the Settings Page click on Dues and you will see an Imprint box that can be filled with any data you wish to show.

## Adding Additional Donations or Changing Lodge Dues and Fees

Click on the Accounting Tab, select Edit Rates, use the pull down bar to select All Dues and Fees, click on Display Rates, scroll down until you find the Dues or Fees you need to change and click on the Red TranCodeID number to the left of the Description and it will display a grey Edit Payment Rates Box, enter your information in the Description and Amount Only.

[illegible]

## How To Grant A Certificate of Release Using CLMS

A Certificate of Release is granted to an unaffiliated member who wishes to become a member of another lodge instead of reinstating to previously affiliated lodge, Statutes, Section 14.180.

To accomplish this through CLMS you must go to the INACTIVE record of member. Click on the Wizarding Menu dropdown and choose the option "Grant Certificate of Release". Fill in the lodge number they want to dimitt to and click on the Submit button.

**PLEASE KEEP IN MIND THE FOLLOWING:**

**Issuing a Certificate of Release to an Active but Delinquent member conflicts with the Statutes, Section 14.180. A COR can only be given to an unaffiliated Member**



## Out of Balance

### There are 2 basic out of balance conditions:

**Membership is understated** – ending count lower than CLMS ACTIVE members If CLMS is reporting that your monthly Lapsation report or Annual Report worksheet ending count is lower than the membership, CLMS will automatically add to the reinstatement count to adjust for the difference. This adjustment will continue through the end of the year including the annual report filed with Grand Lodge. The subsequent starting membership for the next Lodge year will be adjusted by that amount so that you start the next Lodge year with the corrected membership count.

**Membership is overstated** – ending count higher than CLMS ACTIVE members If CLMS is reporting that your monthly lapsation report or Annual Report worksheet/report ending count is higher than the active membership, you will need to perform an audit of your membership to identify what the correct number should be:

- Verify that the members on your Lodge roster in CLMS contains all of your active membership but nothing else. Determine the correct active membership count from the audited Lodge membership roster and note this figure on the last page of the audited membership roster.
- Determine how many members your Lodge is overstated, noting this figure also on the last page of the audited membership roster, make sure this is the correct number.
- The Lodge Secretary should send the Active Membership Roster with the last page showing the correct total, circled and signed by you certifying it is correct. The audited reports must be sent to the Grand Secretary.
- Then you file the Annual Report, knowing that it is overstated.
- Once the Active Roster and Annual Report are received, we'll check the numbers. If the paperwork is found correct, the Grand Secretary will authorize staff to add the amount to correct the total on the dropped for non-payment line of the Annual Report. This will drop your total and you will begin the year with the correct figure.

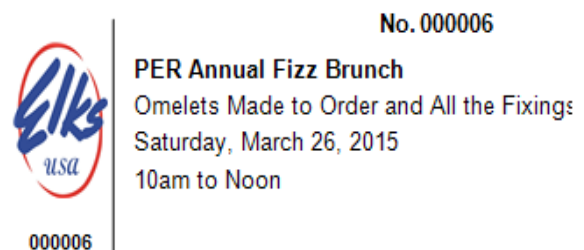
*We'll manually adjust your Year Ending count downward after you file your report via CLMS if the documentation provided is acceptable. Note that your CLMS backup reports will continue to report the overage because the starting number cannot be adjusted until the annual report is filed and finalized by Grand Lodge in May/June.*

\*\*\*Please see the October 2015 issue for more extensive instructions to find issues

### Event Tickets Avery 5371 Business Cards

- Make sure you provide as much information to the report for printing. You have available 4 boxes for text
  - a. Event Name
  - b. Event Details Lines 1 through 3
  - c. Starting Ticket Number
  - d. Ending Ticket Number
- You are not limited on how much text you can enter in these boxes however, if you exceed the amount of space on the report some of your text may not appear.
- It's a good idea to type the text you expect to see in each line using windows Note Pad or Word so you can compare what you see on the tickets.
- **IMPORTANT** It is a good idea to preview by printing one ticket or reviewing in the print preview, before printing all your tickets so as not to waste stock.
- If you wish to edit the graphic for you Event you can simply copy this report and customize your own.

#### EXAMPLE



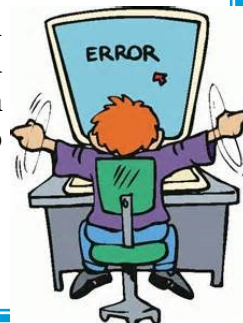


Dear Lodge Secretaries and CLMS2 Users,

Well I just got the letter letting me know that I have been retained for another year as your CHEA CLMS2 Chair for the 2016-2017 Fraternal year. I have never had such a wonderful experience in Elksdom and have made many, many more friends along the way. You all have really been great about calling and working out your CLMS2 Web and PC issues and I have gained even more knowledge by working with you!

At Convention this year in Anaheim, I will be staffing a table and will have Wi-Fi to be able to work live in your Lodge CLMS2 program and assist with any immediate problems. I can also spend a little time to train and figure out those pesky Alerts that you may not be able to figure out. I look forward to meeting everyone and hope you will stop by to say Hi!

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



## THINGS TO REMEMBER

### April

- Grand Lodge will automatically file your end of year membership report, please remember to send a copy of the dues remittance to Lodge Bookkeeper or Treasurer for check preparation and issuance to Grand Lodge (Statutes 12.050) Deadline May 1st
- Prepare and report at the first meeting in April the Secretary's Office year's activities to the Lodge (Statutes 12.050) see Form found in the Secretary's Manual as Exhibit N
- Notify Members of all Committee appointments (Statutes 12.050)
- Attend District Deputy Clinic
- Request cards for Widow/Widowers and have letter signed by a qualified sponsor, issue cards and mail out to recipients
- Update and prepare dignitary mailing list for upcoming Association VP visitation invitations

### May

- Attend State convention
- Attend VP visitations as permitted
- Duties as assigned for the AVP visitation

### June

- Receive annual audit and taxes, obtain signature and mail/deliver copies to the DDGER, Grand Lodge Audit & Accounting Area 7 Committee Member and mail taxes via certified mail
- Attend VP visitations as permitted
- Prepare Forum box with aid of Trustee's (Sec. 1.210)

## **Lodge Secretary Report for the 1st Meeting in April and October**

EXHIBIT N			
LODGE TRANSACTIONS REPORT			
[Section 12.050(m)]			
Lodge Secretaries: You may copy this page for your use.			
Lodge No. _____ Name _____			
For six month period starting April 1, 20____ to September 30, 20____			
<b>MEMBERSHIP TRANSACTIONS</b> (Based on yearly Worksheet)		<b>DELINQUENTS</b>	
Number of Elks on April 1	_____	6 months in arrears	_____
Number Initiated	_____	1 year in arrears	_____
Number Affiliated by Dimit	_____	Over 1 year in arrears	_____
Number Reinstated	_____		
Lines 2,3,& 4—Total Added	_____	<b>DUES</b>	
Number stricken for nonpayment	_____	Collected	_____
Number Expelled	_____	To be collected	_____
Transfers Granted	_____		
Absolute Dimits Granted	_____	<b>PER CAPITA FEES</b>	<b>GL</b> <b>SL</b> <b>DISTRICT</b>
Number Deceased	_____	Collected	_____
Lines 6-10 = Total Dropped	_____	To be collected	_____
Total on Sept. 30	_____	Are By-Laws current?	Yes <input type="radio"/> No <input type="radio"/>
Lines 1 & 5 minus Line 11	_____	Expiration Date	_____
For six month period starting October 1, 20____ to March 31, 20____			
<b>MEMBERSHIP TRANSACTIONS</b> (Based on yearly Worksheet)		<b>DELINQUENTS</b>	
Number of Elks on October 1	_____	6 months in arrears	_____
Number Initiated	_____	1 year in arrears	_____
Number Affiliated by Dimit	_____	Over 1 year in arrears	_____
Number Reinstated	_____		
Lines 2,3,& 4—Total Added	_____	<b>DUES</b>	
Number stricken for nonpayment	_____	Collected	_____
Number Expelled	_____	To be collected	_____
Transfers Granted	_____		
Absolute Dimits Granted	_____	<b>PER CAPITA FEES</b>	<b>GL</b> <b>SL</b> <b>DISTRICT</b>
Number Deceased	_____	Collected	_____
Lines 6-10 = Total Dropped	_____	To be collected	_____
Total on March 31	_____	Are By-Laws current?	Yes <input type="radio"/> No <input type="radio"/>
Lines 1 & 5 minus Line 11	_____	Expiration Date	_____

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**See your CLMS2 Web Under the Accounting Tab, Payments, to pull data specific to Dues Collected, Grand Lodge and CHEA Per Capita Collected. See Page 2 of this newsletter to access CLMS2 PC Reports and Queries**

## California-Hawaii Statewide District Chairs

**State-wide:** Raelene Pritchard Merced, CA Lodge #1240

Cell (209)380-4214 Lodge (209) 723-1240 raelenepritchard@att.net

**Bay:** Philip Heinemann Fremont, CA Lodge #2121 Res (510) 797-9154

Bus (510)797-2121 Cell (510) 468- 7609 Elks2121@sbcglobal.net

**Central:** Raelene Pritchard Merced, CA Lodge #1240 Cell (209) 380-4214

Lodge (209) 723-1240 raelenepritchard@att.net

**East Central:** Earl J Conro Hanford, CA Lodge #1259 Res (559) 924-2466

Cell (559) 410-0764 earlconro@att.net

**Inland:** Dominic Rotell Lancaster, CA Lodge #1625 Res (661) 722-3250

Cell (661) 609-1950 dominicrotell@yahoo.com

**Inland :** Donald D Schultz Victorville, CA Lodge #1877 (760) 245-3174 (760) 220-8229  
dondutztax1@verizon.net

**Metropolitan:** Earl T Bouchard Sunland-Tujunga, CA Lodge #2098 Res (818) 248-5985

Cell (818) 439-6980 etbouchy@outlook.com

**North:** Frank Gutierrez Red Bluff, CA Lodge #1250 Cell (530) 527-8722

Fax (530) 527-2428 bowtie55pu@yahoo.com

**North Central:** Diane Ward Elk Grove, CA Lodge #2577 Res (916) 429-1413

Cell (916) 837-9360 scubadiver5@sbcglobal.net

**Northeast:** William M Chelonis PDDGER (Bill) Auburn, CA Lodge #1691

Res (530) 885-4062 Cell (530) 570-8896 b.chelonis@att.net

**Northwest:** Gary Corda Petaluma, CA Lodge #901; Res (707) 782-0197

Cell (707) 827-0602 secretary@elks901.org

**Orange Coast:** Michael L Mathers (Mike) Fullerton, CA Lodge #1993

Cell (714) 330-0924 Res (714) 524-1105 m\_mathers@sbcglobal.net

**San Gabriel Valley:** Joanna C Rentschler Duarte, CA Lodge #1427

Res (909) 599-5630 Cell (909) 732-7718 jedsnow@hotmail.com

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

**South Central:** Jon S Dawson Paramount, CA Lodge #1804 Res (562) 634-5714

Cell(562) 822-8685 navyjon1@earthlink.net

**South Central Coast:** Lawrence W Isham (Larry) Redondo Beach, CA Lodge #1378 Res

(310) 318-7945 Cell (310) 374-6513 larryisham@aol.com

**South Coast:** William (Bill) Vance (Brenda) Encinitas, CA Lodge #2243

Cell (760) 791-8886 Bus (619) 261-7976 billvance.elks@gmail.com

**Southeast:** G Dennis (Denny) Young (Denny) Redlands, CA Lodge #0583

Res (909) 307-0725 Cell (909) 644-9518 gdyngb2@aol.com

**West Central:** Debbie Monelo San Jose, CA Lodge #522 Res (408) 515-0126

dmonelo@gmail.com

**West Central Coast:** Emmett W Darbyshire (Jackie) Santa Barbara, CA Lodge #0613

Res (805) 968-8676 Bus (805) 964-6858 Cell (805) 722-2347 darbyii@outlook.com

**Hawaii:** Terumitsu "Teru" Yasuda (Vickie) Honolulu, HI Lodge #616 Res (808) 488-2061 Cell

(808) 721-1921 terumaru32@hotmail.com