

# **CHEA Secretary/CLMS2 Communicator**

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

July 2016, Quarterly Newsletter

Volume 2, Issue 1

Editor, RaeLene Pritchard

## **Transfer Dimit Dilemma's**

Dear Lodge Secretaries, Staff and District Chairs,

You might ask why something so simple is highlighted on the front page of this newsletter. Well, after working on the multitude of problems created by the lack of knowledge in executing, processing and completing this task with many of the Lodges in the last few months, I am compelled to stress the importance in this procedure.

If an incoming transfer has been granted a transfer dimit to your lodge, you'll be alerted by counters on the "Incoming Transfers" link of the main menu, and the "Process Incoming Transfers" link of the Control Panel. Click either one of these links to display your transfer candidate(s):

Name Current Lodge Transfer Dimit/COR Date
William E Sample Benton, JL, No. 1234 12/01/2011 (GRNTTD) Process Transfer

To process an incoming transfer, click the "Process Transfer," button, and then supply the appropriate application date. Click the "Create New Account" button and the transfer's membership data will be imported automatically from his previous lodge. *No muss, no fuss, no typing!* 

At this point in the process you'll be prompted to supply the application fee, if applicable. After you've clicked the "Submit Payment" button, you'll be taken automatically to the transfer's new roster record, where you can make any required revisions. At this point, the transfer has been converted into a candidate for membership into your lodge, and can be processed just like any other candidate by clicking the "Process Candidates" link from the Control Panel. (Note that the transfer/candidate will not be listed as an official member of your lodge until all steps of the affiliation process are complete.) \*\*\*Propose, Investigate and Ballot Only

If an incoming transfer doesn't show up in CLMS2Web Incoming Transfer queue, contact the lodge secretary and ask them to grant the member a transfer dimit. If the lodge is closed or unable to grant the dimit for some other reason, **please call your District or State CLMS2 Chair for assistance.** While you can manually add the transfer candidate to CLMS2 Web by clicking "Add New Membership Candidate" link from the Control Panel, choose the "is transferring to this lodge" option, and follow the links to add the candidate manually, it is important that a follow up is taken to ensure further training and instruction is provided.

Serious issue's that occur when procedure's are not followed include; a member is shown in both Lodges and counted as 2 members, all important data for the transferred member is lost to the new Lodge, the Outgoing Lodge will count that member in their year end report and thus pay per capita they will never receive, the Outgoing Lodge will most likely be Out of Balance when they find their member has been added to another Lodges rolls if the date was in the last year reported and finally the working relationship between the two Lodges is harmed due to the lack of communication.

Finally, Never Ever transfer a member who is Delinquent in Dues!!!

Lodge Secretaries, Please don't forget to change your Delinguent 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 select Dues, change the Regular Delinguent & Current State Fees from \$6.00 to \$6.50. This will ensure that your financial postings are correct.

#### CLMS2 Access

Lodge Secretaries may give access to Officers, Committee Members, Staffers (employee's who work for the Lodge Secretary) or any Member with a need The decision is solely with the Lodge to know. Secretary.

To provide access click | To provide access | To provide access | To provide access | To provide on the Staff Tab and select Appoint a CLMS2 Staffer, then from the drop down file, (those



listed have an established Elks.org login and password.)



Should you have a member or employee who works for the Lodge Secretary who needs access, click on the highlighted you can create one for them now in the second paragraph.



need to know only and to delete their access when their need has ended or they are no longer an employee.

#### **CLMS2 District Chairs**

have access Statewide, click on your Lodge Number at the Roster and choose the Lodge you wish Read Only Access from the drop down menu. Click on Switch Active Lodge.

CLMS2Web: Roster				
Home	Roster	Reports	Settings	Officers/Com
Control Panel <u>Add Candidate</u>			Process Candidates (5)	
CLMS: CLMS2 NamID: 200001 Type: STATE Mode: EDIT Ser Active Lodge: Merced, CA No. 1240 [44882] Last annual rep 1240 Last Name or Mem				
				Panel A
			Lodge: 12	240 Year: 2016

#### **How Do I Transfer a Member Out?**

Transferring a member out of your lodge is as simple as granting the member a transfer dimit. Simply find the member's roster record, and choose "Grant Transfer Dimit" from the Wizarding Menu. Click "GO" and you'll be taken to a form where you can you indicate the lodge to which the member will be transferring. Enter that information and click 'Submit", and you're all done.

Note that the transferring member will still be listed as a member of your lodge until he or she officially affiliates with the new lodge. Once that happens, a "transfer out" date will be written automatically to his roster record, and he'll be dropped officially from your membership roster.

### What if the transfer out date never gets written?

Contact the lodge secretary of the new lodge to ask if the member has officially affiliated. If so, you can manually add a transfer out date by putting yourself in **expert mode**, and then going to the roster record of the transferring member. Select the "History" tab, and then choose "New Transfer Out Date" from the "Add New Elk Milestone Date" drop down menu. Input the requested data and click "Submit", and the member will be dropped from your membership roster. \*Please advise your District or State Chair so that additional training can be administered in the Transfer Out Lodge.



### **Got Questions, Need Answers?**

We all have questions that we just haven't had time to ask, follow up on or send a ticket in to the Grand Lodge Help Desk. Unfortunately, although you may get an answer, there are probably 172 other Lodge Secretaries who may have wanted to know that information.

Please send your questions to your CHEA CLMS2 Chair for resolve and I will share with everyone! My email is raelenepritchard@att.net and I am usually available 7 days a week for responses. Hope to hear from you soon! RaeLene

### **Charitable Giving Report**

Available now since mid June, you can track your charitable giving data on a regular basis through CLMS2Web. To get started, click the link labeled "Update Charitable Giving Data" from the Roster Control Panel page, and then select the name of the program you'd like to submit from the drop down menu. Complete columns (A) through (J) as accurately as possible for the date on which the event occurred:

**Program Date** 

Enter the date on which the event occurred, or if the program spanned several dates, the date the program closed. Submit in mm/dd/yyyy format.

(A) Program

Enter the name of your charitable program. (From the drop down menu)

(B) Head Count of Participants

Enter the total number of program recipients. This total should **not** include Elks or helpers who worked on the program.

(C) # Elks

The number of Elks who worked on this program.

(D) # Helpers

The number of non-Elk helpers who worked on this program.

(E) and (F) Elks and Helpers Hours

The number of hours worked on behalf of this program. If accurate hours are not available, estimate as precisely as possible. Remember, if the committee consists of six Elks who worked as a group for an elapsed time of three hours, total ELKS HOURS should be "18" (6 x 3). DO NOT ENTER fraction or decimal parts of an hour - round off to whole hours!

(G) and (H) Elks and Helpers Miles

Actual or estimated mileage traveled in preparation for or in the event itself. If four people traveled a distance, the figure entered should be the product of the number of people times distance travelled BOTH WAYS - ROUND TRIP! DO NOT ENTER fraction or decimal parts of an hour - round off to whole miles!

(I) Non-Cash

Cash value or equivalent of actual items (do not include hours or miles) include telephone charges or postage used or given in a program. If in doubt about value of such items as used clothing or donated eyeglasses, contact other charitable organizations and ask what they or the IRS suggest as valuation guidelines. Door prizes, decks of playing cards for vets, etc - you don't realize how much of value is donated in most programs without being tallied. DO NOT ENTER dollar signs, cent signs, decimal points or cents - round off to whole dollars and enter numbers ONLY!

(J) Cash

Cash, check or money order given or donated; if a U.S. Savings bond, use purchase value - not value at maturity. DO NOT ENTER dollar signs, cent signs or decimal points or cents - round off to whole dollars and enter numbers ONLY!

Input data on a regular basis!

#### **CHARITY**



### **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

### NATIONAL OFFICES — CHICAGO

Grand Lodge Offices in Chicago:

**All mail:**— (name of person/agency), BPO Elks, 2750 N. Lakeview Avenue, Chicago, IL 60614-1889.

### OFFICE/AGENCY PHONE/FAX/E-MAIL

**Grand Secretary** 773-755-4708/773-755-4790 grandlodge@elks.org

**Supplies/Shipping** 773-755-4710/773-755-4711 shipping@elks.org

**Central Accounting** 773-755-4712/773-755-4713 acctg@elks.org

**Insurance** 773-755-4714/773-755-4715 insurance@elks.org

Veterans Service 773-755-4736/773-755-4737 vets@elks.org

**Internet** 773-755-4724/773-755-4725 webmaster@elks.org

Convention/Meetings 773-755-4722/ 773-755-4723 conv@elks.org

Foundation/Pledges 773-755-4730/

773-755-4733 <u>pledges@elks.org</u>

Foundation/Scholarships 773-755-4732/

**Magazine/Articles** 773-755-4740/773-755-4792 magnews@elks.org

Magazine/Circulation 773-755-4742/

773-755-4743 <u>magcirc@elks.org</u>

**Label Orders** 773-755-4744/773-755-4745 magcirc@elks.org

### AUTOMATED DIRECTORY SERVICE

773-755-4704

MEMORIAL BUILDING HOURS/TOURS **INFORMATION** — 773-755-4876



Dear Lodge Secretary's,

There seems to be some confusion on sending electronic mail to members in lieu of "paper copy". I direct your attention to Grand Lodge Statues Section 1.115 -

Notice: "EXCEPT AS OTHERWISE DIRECTED BY EXECUTIVE ORDER, ANY NOTICE REQUIRED TO BE SENT OR MAILED TO ALL MEMBERS OF A LODGE MAY BY 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 SEVED UPON A SPECIFIC MEMBER MUST BE SERVED PERSONALLY, BY UNITED STATES MAIL OR BY UNITED STATES MAIL, CERTIFIED, RETURN RECEIPT REQUESTED AS SPECIFICALLY PROVIDED".

Look forward to our sessions at mid-term. Watch the mid-term schedule when you receive your packets for place and time of the Secretary/CLSM2 and Accounting workshops that will be conducted in San Diego

Fraternally,

Frank Chicago, PDDGER CHEA Secretary

# Attention Lodge Secretaries and Staff

Prior to calling the CLMS2 Helpdesk or sending a ticket to find a resolve for your problems, please contact your District and State Chair. When you go directly to Grand Lodge for answers, not only does it further impact their call volume, the District and State misses key learning opportunities that could be shared with everyone.

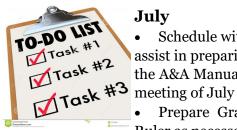
A list of your District Chairs is on the last page of this newsletter, please give us opportunity to assist you.

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

The easiest way to fix this is by going in "Expert Mode" under the Options Tab, then go to the History Tab on the Member's record, click on the right of the reinstatement/initiation/affiliation date that says [edit] and when the screen comes up click on the delete record button in the lower left hand corner. 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.

You can also (once in Expert Mode) go directly to the Member's History and in the pull down tab simply add a New Paid To Date!

### **Secretary Duties For the Months Ahead**



### July

Schedule with the Audit & Accounting Committee a review and assist in preparing a report of the Lodge Audit (Exhibit B) found in the A&A Manual to present to the General Membership at the 2nd



- Prepare Grand Lodge Convention itinerary for the Exalted Ruler as necessary
- Update and prepare the dignitary mailing list for the upcoming DDGER visitation invitations
- Duties as assigned for the DD visitation/audit

### August

- Attend the DD Clinic as required
- Prepare all records for the DD visitation and audit, see the DD manual to ensure that the Secretary's Office is prepared and has all required documents and materials needed for review of the Lodge financials, programs and reports

### September

- Verify Lodge vote on Constitutional amendments of the Grand Lodge convention (if any), submit the provided form and submit to Chicago
- Provide list of pending 1 year delinquent members (October 1st) to your Newsletter Editor/Lapsation Committee and update as necessary prior to posting.

#### October

Schedule with the Audit & Accounting Committee a review and assist in preparing a report of the Lodge Audit (Exhibit B) found in the A&A Manual to present to the General Membership at the 2nd meeting of October.



- Attend and participate in the District Jamboree as permitted (ours is in October, make a note in the month yours is conducted)
- Attend the DD Clinic as required
- Report on half years activities of the Secretary's office (Sec 12.050) \*See Exhibit N in the Secretary's Manual, page 34
- Notice 1 year delinquent members via mail/newsletter of pending drop for non-payment of dues and provide a statement of dues owed; make every effort to work with the Lapsation Committee to retain members.



### **Annual Association Mid Term Conference**

November 4-5, 2016 San Diego **Chuck Nolan** (619) 276-0564

Mark your calendars and make sure your Lodge receives a registration package in the August/September timeframe.

### **By-Laws Revisions in CLMS2**

I have received quite a few questions on the Revise Lodge By-Laws link in the CLMS2 system. The first thing you need to understand is that you are not able to amend your By-Laws until you have completed your first total revision in the CLMS2 system. After a total revision has be completed you will then be able to send all simple amendments via CLMS2. Click on the link in the upper right hand corner of the Home Page.



Begin your process by clicking on the By-Laws Worksheet which will have the following information:



Is the Lodge Incorporated? Is there a separate hall corporation? Enter your Contact information. You will then be guided through each and every article of your By-Laws and will need to input data as decided by your Lodge. You will need to indicate any auxiliary organizations, add your House Rules and any other amendments you wish to include. You will need to provide your certification dates, the Lodge Exalted Ruler and Secretary's name and at this point you will be ready to save or print the document for review.

You can then update you local lodge By-Laws by clicking on the **check out the currently approved By-Laws template** and submitting them to the Grand Lodge Judiciary Committee. For Lodge who are not yet ready to submit a complete revision but are in need of an amendment to their By-Laws you will need to obtain instructions from the **Grand Lodge Committee Member for Area 7**, **Edward C. A. Johnson of the Walnut Creek Lodge. His email address is: edwcajohnson@sbcglobal.net** 

Copies of your current By-Laws can be obtained by all Lodge Members who are registered on Elks.org and whose Lodges have made a complete revision. You can access your By-Laws on your Local Lodges website or go to elks.org, Who We Are, Local Lodges, input your Lodge number and search; this will bring you to the Local Lodge website and then click on the tab for Lodge By-Laws.

## Additional Training & Support?

Your CHEA CLMS2 Chair is available to schedule one-on-one training at your Lodge, District workshops, phone consultation, emails for process information, training for staff or Officers and any materials the Lodge may need to successfully work in our membership records.

Please consider scheduling training for your Lodge soon!



Dear Lodge Secretaries and CLMS2 Users,



I had a wonderful time at the CHEA State Convention, unfortunately, our meeting room was changed several times and the Wi-Fi I had hoped for in the vendor area did not work out. For those who did not catch the Secretaries seminar my Power Point presentation is available on the CHEA website, under Committees, CLMS2.

My objectives for this year is to get out there and work with more Secretaries, Staff and District Chairs. Please don't hesitate to call me for any training or additional support you may need. I am open to traveling to your Lodge/District DD Clinic, event, or specialized training you would

like see presented and can adjust my presentation to include your Lodge Officers who may find value in using the "Read Only" feature granted by the Secretary.

Looking forward to a great year of learning and always available to help you! RaeLene

### **Life & Honorary Life Memberships**

If your Lodge has provisions for Life Memberships, you should familiarize yourself with Section 14.260 of our Statutes that deals with Life Memberships either purchased or attained by length of membership. Also note Section 14.270 concerning Honorary Life Membership granted for Distinguished Services, in addition to the specific limitations that your Lodge is permitted in its By-Laws. Our Statutes do not require every Lodge to offer Life Memberships.

Each Member seeking Life Membership must apply in writing to the Lodge Secretary. Once received, the request should be reviewed for verification and, if found eligible, submitted to the Exalted Ruler for setting the Lodge vote (not later than the third regular meeting after the meeting in which the application is announced). Regardless of when a particular Member is elected to Life status, the special card and reduced dues do not become effective until April 1 of the succeeding Lodge year.

Our Laws also provide for a Life Member to apply to transfer his or her Life status to another Lodge, either on or after the point at which the Member applies for the Transfer Dimit. The request for the Life Membership Transfer must be submitted to the Lodge Secretary in writing as part of the application process, and each applicant must be voted on separately and receive a two-thirds majority approval.

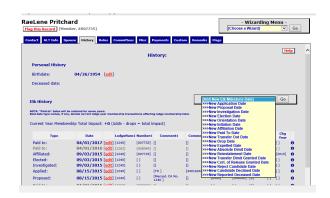
# NOTE: Honorary Life Membership CANNOT be transferred!

Don't forget to check Honorary Life or Life Membership in the Members contact screen under Roles so that their Membership card reflects their status.

### **Dropping Members**

ERROR

Requests to be dropped from the rolls of the Lodge Membership can be accomplished by going into *Expert Mode*. Thereafter you may access the members contact screen, click on their History and under "Select New Elk Milestone Date" you will be able to add a new drop date to any member who would not otherwise be allowed to drop in the system.



Care should be taken to make all efforts to retain or assist this member prior to simply dropping them. Always involve your Membership Committee so they can reach out to them and see if they can retain them!

You can also add other data as you may find necessary in your members records. Adding important information such as Application, Proposed, Elected, Orientation, Initiation, Paid To Date and more, that you have obtained via an old yellow card or record from another Lodge is valuable data you may not otherwise have in their record. Please guard this information by including it in all your records!

# **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 Res (760) 245-3174 (760) 220-8229 donduztax1@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

North Central: Robert Brotherton (Bob) Rancho Cordova, CA Lodge #2484 Res (916) 985-0939 (916) 761-0151 bobnlyd@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 Vance (Bill)** Encinitas, CA Lodge #2243 Cell (760) 791-8886 Bus (619) 261-7976 billvance.elks@gmail.com

**South Coast: Thomas Smith -PAVP** Vista, CA Lodge #1968 Res (760) 525-4133 paptomsmith@gmail.com

**Southeast: G Dennis 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 Santa Barbara, CA Lodge #0613 Res (805) 968-8676 Bus (805) 964-6858 Cell (805) 722-2347 darbyii@outlook.com

**West Central Coast: Todd M Bair** Simi Valley, CA Lodge #2492 Res (805) 522-9060 tbair5@jps.net

Hawaii: Terumitsu "Teru" Yasuda Honolulu, HI Lodge #616 Res (808) 488-2061 Cell (808) 721-1921 terumaru32@hotmail.com