

# CHEA Secretary/CLMS2 Communicator

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

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Editor, RaeLene Pritchard

# Year End Procedure for 2016/17 Lodge Year

Make sure member records are in order **BEFORE** the close of business on March 31. Updates to member records should be completed, payments posted, delinquents dropped and membership status changes completed. Make sure any active member count issues are resolved prior to the end of March 31. Remember that calls to Grand Lodge CLMS Coordinators and the CLMS helpdesk will be difficult due to call volume the last days of March, so get your questions answered and resolved early in the month.

Also make sure that the CLMS2 records reflect the **correct Lodge Secretary** in office on April 1, otherwise you will not be able to login after April 1 when the official change of the guard occurs. <u>It is necessary to submit this information even if the same Secretary continues to serve in that capacity.</u>

Starting at 3AM on April 1 CST, Grand Lodge will accept the records on file and auto file the Annual Reports for all lodges.

Prior to April 1 Lodges will be able to preview their annual report submission. Starting at 3AM on April 1 CST, Grand Lodge will accept the records on file as submitted by the Lodge Secretary & auto file the Annual Reports for all lodges. Notifications will be emailed to the Lodge Secretary in office indicating that the records are locked until the annual report submission and all processing has been completed. Another notification will be sent following the submission on April 1 along with a link to the Annual Report that was filed. An invoice for the appropriate per-capita will be emailed on April 1 to the lodge Secretary from the Grand Lodge Accounting Department and a paper copy of the invoice will be mailed to the Lodge. Finally, notification will be sent letting the Lodge Secretary know that the data-entry preparation for the new year has been completed and to proceed with April work. Because of the large number of submissions it may take a few days to complete all of the processing, please visit the CLMS website periodically to read about the progress and watch for the email sent to the address of Lodge Secretary as filed in your elks.org profile.

At the close of business on March 31, membership records, payments and member status should reflect your membership as of that day at the close of all business. **Delinquent members should be dropped** after the last Lodge meeting in March and before the end of business on March 31. Entering records retroactively once in the new Lodge year will not be possible, get it done before the close of March 31. Dues and member status changes received April 1 or after should be held until the email notification is received indicating that the Lodge is clear to proceed with April transactions. This should occur by April 5 at the latest, watch for the email and visit the CLMS2 website for progress updates.

If your member counts are off please review **Knowledgebase article 154 and 386** before moving on to the next part of this document. **(Call Your District or State Coordinator \*list on last page of this newsletter, so they can help you!)** The documents describe what needs to be done to reconcile the member counts so you can begin the new year in balance with the Grand Lodge. Requests to adjust the official ending member count for 3/31 must be in the hands of the Grand Secretary along with the required explanation and proof **before June 1**, otherwise the ending count in CLMS2 will stand until the following year.

It is advisable to capture the status of Lodge records at the close of business for the year ending 3/31/2017 for your permanent records and for troubleshooting either on paper or PDF format.

# Checklist of things to do before the end of business on March 31st

#### • Drop Delinquent Members

One year and over delinquent members <u>must be dropped</u> after the 2nd meeting in March, prior to March 31.

#### • Lodge Officers and Committee maintenance

Review and update Officers and Committee persons for the new 2017/18 lodge year and confirm the list to be accurate if not done yet. Reconfirm if you have made any changes to the list since the last confirmation. Unless this is completed prior to March 31, the elected Lodge Secretary will not be able to log into the CLMS2 website on April 1.

#### Lodge Info for the Grand Lodge Subordinate Lodge Directory

Review and update the Lodge Info for your Lodge to be included in the Grand Lodge Subordinate Lodge Directory for the 2017/18 lodge year and confirm the list to be accurate if not done yet. Reconfirm if you have made any changes to the list since the last confirmation. Note that this year you will also be including the Lodge Net Worth figures as part of the Lodge Info that were formerly submitted on the Annual Report in Section D.

#### Top Recruiter

<u>Review and correct Top Recruiter info for your Lodge</u> for the 2016/17 lodge year. Note that the info displayed will be used this year as Section C when the Annual Report is filed.

## REPORTS - There are reports that should be printed for verifying the counts reported to Grand Lodge

Review the "Balance Count" report available under "REPORTS" then under "CLMS Status" on CLMS2WEB — this report may provide clues that reveal member records causing the year ending counts to be out-of-balance. If potential discrepancies are found, the report includes suggestions about each individual case.

Next, also review the "<u>Current Lodge Year Changes</u>" report listed under "REPORTS" then under "Membership" on CLMS2WEB. This report may reveal where a member is counted as a + or – affecting your ending member count and shows instances where someone may have been counted more than once as a + or -. This may occur when the same transaction is entered multiple times. The report also can be used as an audit check to insure all of your new members are accounted for, drops, etc. From time to time Candidates may appear on the list because potentially incorrect transactions were used to process them. Investigate candidates that appear on this report that customarily only shows member transactions. **Save a copy of this report for reference.** 

This may also be a good time to <u>cleanup your candidates</u> that never made it to membership status, either use the **DECLINED** or **REJECTED** option to indicate how they exited the process. **Do Not mark them as Suspended or Expelled** 

By printing the following report you should be able to validate the counts that you are submitting to the Grand lodge. You will need to be in **CLMS2PC** and you will need to be on the Roster tab.

- Click on REPORTS
- 2. Check GENERAL
- 3. Select "Current Year Year End Membership Lists".
- 4. Click REPORT near bottom of the screen ("No records match that logical expression" will display if there are no names to report skip to next report)
- 5. Press Printer Icon to print report.

#### Optional:

Run the GL 5505 Member Report once with ACTIVE only checked and then unchecked. Print the file to PDF. This may be an invaluable tool down the road since it gives you snapshot of member records on the date you run the report. You would run this from the Reports tab, General Category, the name of the report is GL "5505" Member Report.

#### **SUMMARY:**

- Verify that each list is complete and accurate.
- Make corrections as needed to insure these lists are accurate and reprint.
- Make sure a member is not counted on multiple add or drop unless you can prove this to be legitimate.

Also, DECEASED should include all members deceased this year and any that were overlooked in past years.

## **Transfer In & Out Urgent Notice**

For all Transfer In & Out's received or granted in this first quarter of 2017 (our last quarter of the fraternal year) Please, please track these appropriately. Communicate well between the Lodges so that all transfers are either completed by March 31st or that the outgoing Lodge is in receipt of the next years dues and you process them after Grand Lodge closes.

The key learning here is that both Lodges involved in the Transfer must know when it will be processed and if it's after the year closes, dues MUST be paid to the Outgoing Lodge. Whoever has that member on their roster on March 31st will pay the per capita dues to Grand Lodge, CHEA and any other District fee's set up in CLMS.

As I have dealt with many Out of Balance issues caused by the Lodge Secretary inputting in the current year that the member transferred out in the prior year, please take the time to do this right! Call your District or State Chair for some help if you aren't getting an answer from the Incoming or Outgoing Lodge. We actually may know someone who can get the Lodge to respond to you and thus resolve your Transfer issue.

Birthdate: Deceased date:
Deceased date:
iold date type names, if a
Current Year Memb
Current Year Memb
Current Year Memb Type Paid to:
Current Year Memb Type Paid to: Transferred:

\*\*\*This record shows the member transferred on 3/2/16 but was put in the system on 6/24/16 causing an Out of Balance condition which will need to be explained to the Grand Secretary so that they can adjust vour Lodges membership number.



## **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/

773-755-4733 scholarship@elks.org

**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 Secretaries,**



A reminder to the Lodges that prior to dropping any members for non-payment a final letter is required by GLS to each delinquent member. A copy of a suggested letter can be found in your CLSM2 PC, under Mail Merge, Final Notice Letter.

Its not to early to forward any topics you want addressed at the State Convention in Palm Springs. You can send your e-mails to me at fjcmajor@gmail.com. We will attempt to address as many as time permits during our Secretary Workshop.

Hope everyone had a Great Holiday Season!

Fraternally,

Frank Chicago, PDDGER CHEA Secretary

#### REMINDERS

On the **CLMS2 Web: Roster/Control Panel Page** you will find a section listed as **ALERTS**. I have found many Lodges, <u>who do not</u> 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.



## **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 info, 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!

## **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 or State Chair. When you go directly to Grand Lodge for answers, not only does it further impact their call volume, we miss key learning opportunities that could be shared with everyone.

District Chairs are listed on the last page of this newsletter, please give us the opportunity to assist you by calling or emailing us when you have questions~

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

#### **January**

- Attend the DD Clinic and PER Association meeting
- Remind the Audit & Accounting Committee to arrange for the annual audit by interviewing and recommending a CPA/Accountant to prepare the financial audit/taxes and obtain a letter of engagement
- Schedule with the Audit & Accounting Committee a review and report of the Lodge Audit (Exhibit B) to present to the General Membership at the 2<sup>nd</sup> meeting of January
- Review and amend Lodge Membership Statements for mail out in February, order and secure envelopes, paper and postage with Trustee's concurrence
- Order New membership and identification cards, plastic holders and stickers for the next fiscal year
- Prepare and send notification to recipients of Pin Night to attend the 1st General Membership meeting in February to receive their award , order necessary pins
- Work with the PER's for Step Up Night on the 1st General Membership meeting in February
- Provide list of Elk of the Year, Officer of the Year and Citizen of Year to Grand Lodge with request for certificate or plaques
- Prepare necessary budget to actual statements for the Lodge Trustee's to assist in preparing the new fiscal year budget and provide budgetary information that should be considered for the Lodge Secretary's office.

## February

- Prepare Directory Information Packets for the Grand Lodge
- Prepare and provide ballots for election (if needed)
- Send copy of all elected officers and appointed committee chairs to the current DD and submit same to Grand Lodge via CLMS2 web
- Prepare the Membership Statements for mail out no later than February 15<sup>th</sup>
- Order and update any Grand Lodge publications that should be on file in the Secretary's Office
- Update PER list and submit to Grand Lodge via CLMS2 web
- Consider and provide Read Only Access for CLMS2 for the Lodge Editor and Officers as assigned
- Update and prepare dignitary mailing list for upcoming Installation of Officers
- Prepare Agenda for PER Step Up Membership Meeting
- Attend Incoming and Current Committee Chair Clinic

#### March

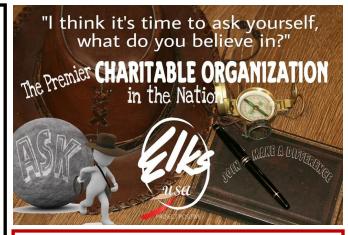
- Prepare for end of year membership report to Grand Lodge as outlined in process
- Obtain and process Grand Lodge Convention travel, reservations and accommodations for the Exalted Ruler
- Obtain and process Ritual competition reservations, meals and accommodations
- Obtain and process CHEA State Convention travel, reservations and accommodations for ER, Secretary, Leading Knight and Head Trustee
- Prepare District Directory information for all incoming new Officers as requested
- Update CLMS2 with new ER and Secretary, Committee Chairs, update PER list and review and update Lodge Information for new fiscal year,
- Duties as assigned by the ER for the Installation of Officers

## April

- File end of year membership report and send copy of dues remittance to Lodge Bookkeeper 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)
- Notify Members of all Committee appointments via newsletter (actually forwarded in March) (Statutes 12.050)
- Attend District Deputy Clinic
- Request cards for Widow/Widowers and have letter signed by sponsor, issue cards and mail out to recipients
- Update and prepare dignitary mailing list for upcoming Association VP visitation invitations

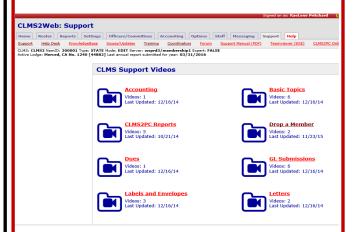
#### CLMS2 Do's and Don'ts

- Do check your CLMS2 Home page, Lodge Secretary News, for important messages from the Grand Lodge Secretary.
- **Do** clear all Alerts on the CLMS2 Web Control
- **Don't** forget to respond to all Membership Inquiries and notice Grand Lodge as required.
- **Don't** forget to update your Charitable Giving Data monthly.
- Do take the time each day to process at least one corrected record in the CLMS2 system.
- Do make sure that your Delinquent, Current and Prepaid State Fee's are all set to \$6.50.
- **Don't** ever post a record in current year with a date from the past year \*sometimes this is what you Must do when you have received bad information; however, try very hard to not ever back track if you don't have to.
- **Do** be very, very careful when operating in Expert Mode and call me should you accidently do something you didn't mean to and need to retrieve information.
- Do stay on top of Flagged Records and clear them as soon as you are able.
- Do check under Records, CLMS Status, Balance Count for any Out of Balance issues.
- Don't delete Deceased Members Records.
- Don't mark dropped Members as Suspended or Expelled
- Do input old paper records in the CLMS2 system as time permits.
- Do drop members who have requested in writing that they do not wish to be members.
- **Do** make every effort to retain members.
- **Do** Read and retain a copy of the CHEA Secretary/CLMS2 Communicator.
- Don't be a stranger, give input, tell us what you want to know, hold a training seminar for your District and be a mentor to new Secretaries.
- **Do** call your District Chair or myself anytime you have a question.



## CLMS2 Web Support Tab, click on Training and then Upcoming **Live Webinars**

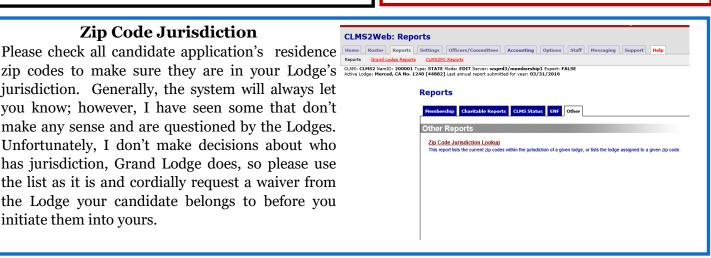
**CLMS2 Support Videos** 



Grand Lodge has provided many areas of interest in video fashion so that Lodge Secretaries can gain knowledge and expertise in CLMS2 Web and PC. Please check under the Support Tab for this and much, much more. Please advise me should you need to place a Help Desk Ticket, raelenepritchard@att.net.

## **Zip Code Jurisdiction**

zip codes to make sure they are in your Lodge's Active Lodge: Herred, CA No. 1240 [44882] Last annual report submitted for year 03/31/2016 jurisdiction. Generally, the system will always let vou know; however, I have seen some that don't make any sense and are questioned by the Lodges. Unfortunately, I don't make decisions about who has jurisdiction, Grand Lodge does, so please use the list as it is and cordially request a waiver from the Lodge your candidate belongs to before you initiate them into yours.





Dear Lodge Secretaries and CLMS2 Users,

Happy New Year! We are moving into the last quarter of the fraternal year 2016-2017 and I have had the pleasure of working with many of the Lodge Secretaries in CHEA. I was so pleased at Mid-Term Conference in San Diego to have been able to work with and resolve many of your issue's by providing a hands on training in the Committee presenters area.

I am hoping, we will be able to improve and expand this hands on training at the State Convention and will try to have District Chairs assist so everyone gets to know each other and feel comfortable about

calling and asking for assistance.

Keep those calls coming and I look forward to serving CHEA and the Lodge Secretaries for the remainder of the year!



## RaeLene

## \*\*\*Delinquents\*\*\*

to contact 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 by accessing their History file and in the drop down file you can select a New Drop Date.

All delinquents not Dropped by March 31st will be counted in your end of year numbers and Grand Lodge and CHEA will expect you to pay per capita dues. I had many Lodges who failed to accomplish this last year with various excuses why they were unable to dropped their delinquent members. Whatever your reason is, one should not be your inability to call your District or State Chair who can assist you in almost ever case!

CALL or EMAIL NOW

## Having trouble finding old records???

Remember, when you are looking for a record and not sure of how it was entered, change filters to All Records, (see example below), this will produce any record in the system. This is also a good time to clean up duplicate or erroneous records that should not be in the system.



## **Clean Up Those Records**

In your spare time, (Yes, I know we all got a lot of that) take a moment to correct at least one record daily. These are records that if you check your Roster under inactive have no date in the Paid To category or are highlighted in Red. Some errors I have found in particular are candidates and members who were marked Suspended or Expelled because the Lodge Secretary didn't know how to drop them, See example below.



Use your Expert Mode to change their History from Expelled to Dropped. Delete records that were input in error and correct any data that you have on hand to ensure member and name & candidate records are

# **California-Hawaii Statewide District Chairs**

**State-wide & Central: 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

East Central: Earl J Conro Hanford, CA Lodge #1259 Res (559) 924-2466 Cell (559) 410-0764 earlconro@att.net

**East Central: Johny Arlon Albrecht** Coalinga, CA Lodge #1613 Res (559) 935-3724 (559) 433-7350 bgrjohn@sbcglobal.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: Randal E McClellan** Watsonville, CA Lodge #1300 Res (831) 722-1867 ranper1300@sbcglobal.net

**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 (808) 721-1921 terumaru32@hotmail.com