

CLMS2 Web 101



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Merced Elks Lodge #1240

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Elks Care - Elks Share

CLMS2 Web: Home Page/News

CLMS2Web: Home READ ONLY MODE

[Home](#) [Roster](#) [Reports](#) [Settings](#) [Officers/Committees/Auxiliaries](#) [Accounting](#) [Options](#) [Staff](#) [Messaging](#) [Support](#)

News [Supplies & Forms](#) [Download CLMS2PC for Windows](#) [CLMS2PC Online](#) [Online Help: Home](#)
CLMS: CLMS2 NamID: 3939658 Type: STATE Mode: READONLY Server: wsprd1/membership1 Expert: FALSE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2019

Lodge Secretary News

- [Audit Form Revised 5/10/2019](#)
The Microsoft Excel file used by the Grand Lodge Auditing Committee has been revised as of 5/10/2019. If you downloaded the file prior to that date, please download and file the new version instead. Thank you! (Posted 05/09/2019)
- [OUT OF BALANCE](#)
If you have an out of balance that carried over from the previous lodge year please follow instructions below. (Posted 03/20/2019)
- [CLMS2PC Update 2.1.0.4 Now Available](#)
Click through for details. (Posted 03/05/2019)
- [Memos from the Office of the Grand Secretary](#)
The 2018-19 Annual Membership Report will be automatically filed by the Office of the Grand Secretary on April 1, 2019. The Lodge Secretary shall electronically file the local lodge Charitable Report on or before May 1, 2019.

Manuals

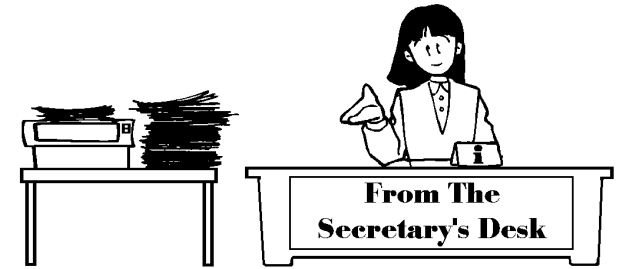
- [Manual for the Secretary of an Elks Lodge](#)
PDF Format (Posted 04/28/2014)
- [Charity Workbook](#)
PDF Format (Posted 04/20/2018)
- [Elks.org Users Manual](#)
PDF Format (Posted 06/06/2012)
- [Virtual Home Page Owners Manual](#)
PDF Format (Posted 05/04/2016)
- [Grand Lodge Manuals](#)
All online Grand Lodge Manuals

6 new manuals posted within in the last 120 days!

ENF Hotline Lodge 1240

- [Grants Dashboard](#)
Access your Lodge's [CIP Grants Dashboard](#).
- [CIP Info](#)
Visit the ENF website for more information about the [Elks Community Investments Program](#).
- [ENF Remittance Sheets](#)
Learn how to [submit an ENF Remittance Sheet through CLMS](#).

Lodge Secretary News



Important notices from the GER and Grand Secretary that all Lodge Secretaries should read and check regularly

Lodge Secretary News

- [Audit Form Revised 5/10/2019](#)
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ENF Hotline Lodge (Your Lodge #)

Beacon, Gratitude, Promise, Impact, Spotlight and Freedom Grant Applications and Status with a link to applications; Community Investment Program (CIP); ENF Remittance Sheets you can submit through CLMS.

ENF Hotline Lodge 1240

- **Grants Dashboard**
Access your Lodge's [CIP Grants Dashboard](#).
- **CIP Info**
Visit the ENF website for more information about the [Elks Community Investments Program](#).
- **ENF Remittance Sheets**
Learn how to [submit an ENF Remittance Sheet through CLMS](#).



Elks
National
Foundation

Manuals & More

Links to the Secretary's manual, Charity workbook, Elks.org user manual, Virtual Home Page Owners manual and Grand Lodge manuals



Manuals

- [Manual for the Secretary of an Elks Lodge](#)
PDF Format (Posted 04/28/2014)
- [Charity Workbook](#)
PDF Format (Posted 04/20/2018)
- [Elks.org Users Manual](#)
PDF Format (Posted 06/06/2012)
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6 new manuals posted within in the last 120 days!



MANUAL FOR THE SECRETARY OF AN ELKS LODGE



BENEVOLENT AND PROTECTIVE ORDER OF ELKS
UNITED STATES OF AMERICA



Elks.org User Manual

Grand Lodge Website
Frequently Asked Questions

www.elks.org

Revised: June 6, 2012



2018 2019 CHARITY RECORDS WORKBOOK

To assist with online submission of Local Lodge Volunteer,
Youth, Charitable and Community Service Programs
at <http://www.elks.org/clms2web>

Lodge Name: _____ No. _____ District _____

City (if different from above): _____ State _____

*Benevolent and Protective Order of Elks
of the United States of America*

... IMPORTANT ...
**RETAIN IN FILES FOR
TAX-EXEMPTION PURPOSES**

Prepared by the Office of the Grand Secretary

Code 511100



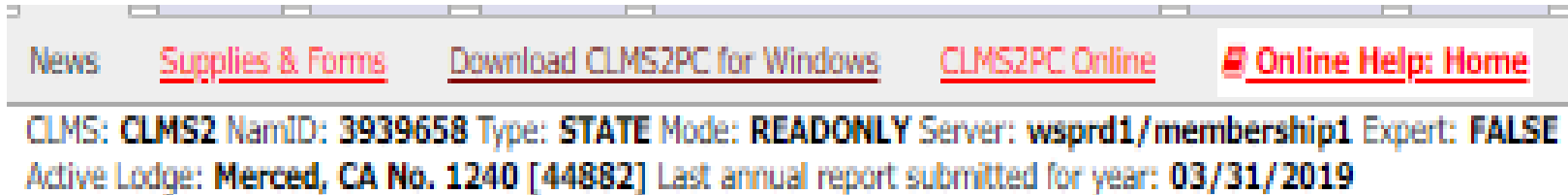
Virtual Home Page Owners Manual

Revised 1/30/2014



Who We Are	Manuals
What We Do	Virtual Manuals:
How To Join	Membership guide Marketing guide
Grand Lodge	
Convention	
Charitable Giving	
Grand Lodge Resources	
Reports	
Manuals	
Directories	
Newsletters	
Safety & Insurance Info	
Licensed Vendors	
Membership Toolkit	
Leadership	
Committees	
Elks Magazine	
Member Resources	
Extended Access	
PDF Manuals:	
Accident Prevention	
Accident/Claim Prevention Manual	513100 Download 08/03/2018
Out-of-Pocket Expense Accident Manual Form	513100 Download 05/18/2015
Local Lodge Insurance Program Guide	513000 Download 03/28/2019
Insurance Policy Information Guide	513100 Download 03/28/2019
Insurance Policy Information Guide	513100 Download 03/28/2019
Self Inspection Form	513100 Download 08/03/2015
Activities Committee	
Planning a Special Event	513600 Download 04/19/2008
Event Manual	513600 Download 03/21/2017
Health Activities Programs Manual	512100 Download 03/13/2019
Health Activities Programs Manual	512200 Download 07/31/2008
Auditing and Accounting	
Auditing and Accounting Manual	510100 Download 08/01/2019 NEW
Uniform Chart of Accounts	510100 Download 08/15/2019 NEW
District Deputies	
District Deputy Manual	510100 Download 03/20/2019
Drug Awareness	
Elks Drug Awareness Manual	04P12b Download 08/01/2017
Elks and Scouting	
Elks and Scouting Managers Guidelines	EW51 Download 04/02/2014
Elks National Veterans Service Commission	
ENVSC Manual	510100 Download 08/09/2019 NEW
Fraternal Committee	
Elks Club Rules	512200 Download 07/19/2019 NEW
Associations Manual	512000 Download 03/31/2013
Lodge Activities Manual	510300 Download 03/31/2013
Government Relations Committee	
Government Relations Manual	510300 Download 08/24/2015
Grand Lodge	
Dissemination and Management Guidelines for Local Lodges	510300 Download 12/09/2014
Uniform Lodge Guidelines	510300 Download 10/19/2003
Elks Magazine 2013/2014	510300 Download 01/09/2015 NEW
Grand Lodge & State Association Directory	513000 Download 02/28/2016
National Directory	510800 Download 02/28/2016
Hoop Shoot	
How to Have a Successful Hoopshoot	510300 Download 04/20/2008
Internet	
Elks.org Users Manual	elksorguser Download 08/06/2012
How to Register for Elks.org	elksorgregister Download 08/06/2012
Virtual Home Page Owners Manual	elksorgvhp Download 03/04/2016
Judiciary Committee	
Amalgamated Statutes	520100 Download 12/01/2018
Statute for Board of Directors	JCS03 Download 02/21/2015
Statute for Lodge	Statute Download 04/22/2015
Local Lodge	
Elks Officers & Committee Members Manual	510300 Download 10/26/2015
Public Relations and Marketing Manual	510300 Download 02/21/2016
Investigation Interview Committee Manual	510300 Download 11/04/2014
Public Relations and Marketing Committee	
Marketing New Elks Lodges	510425 Download 08/31/2010
Marketing New Elks Lodges	510450 Download 05/31/2008
Public Relations and Marketing Manual	510300 Download 09/01/2010
Ritualistic Committee	
Ritualistic Manual	510300 Download 10/26/2015 NEW
Manual of Ritual Services	510300 Download 04/10/2016
Manual of the Local Lodges	510300 Download 10/11/2017

You will also see tabs for the following:



Supplies & Forms:

When you select Supplies & forms you will be able to order your lodge supplies and cards and forms from the GL.

Download CLMS2PC for Windows:

You will be presented with information and links to both the CLMS2PC documentation and the installation package.

CLMS2PC Online: Quick access to PC when you need it in a hurry, just don't use it for long term access

Online Help: Home: Can answer questions you may have on any functions in CLMS2 Web system.

CLMS2Web Roster: Control Panel

[Control Panel](#) [Add Candidate](#) [Process Candidates \(26\)](#) [Incoming Transfers \(0\)](#) [Delinquents \(0\)](#) [Online Submissions \(0\)](#) [Sync Log \(0\)](#) [# Online Help: Roster](#)

CLMS: CLMS2 NamID: 3939658 Type: STATE Mode: READONLY Server: wsprd1/membership1 Expert: FALSE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2019

1240 Last Name or Memb. No. MEMBERS Only [NO Filters] Active Name Sort Filter Reset

Control Panel A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Lodge: 1240 Year: 2019 Letters: [*] RecordType: [M] Filter: [*] Status: [A] Name or Number: [] Sort: Name Sort Data: [membership1]

CLMS2Web Control Panel

Membership Candidates:

- [Add a Membership Candidate](#)
- [Process Membership Candidates \(26\)](#)
- [Process Incoming Transfers \(0\)](#)

Alerts:

- [Display All Alerts \(2\)](#)
- [Flagged Records \(0\)](#)
- [Pending Outgoing Transfers \(0\)](#)
- [Pending Incoming Transfers \(0\)](#)
- [Pending Submissions \(0\)](#)
- [Membership Inquiries \(0\)](#)

Grand Lodge Submissions:

- Click the button below to preview your November Grand Lodge Semi-Annual Membership Report, which will be submitted AUTOMATICALLY on November 5th.

Preview November Membership Report

(Unable to submit report in readonly mode.)
- Annual Membership report submitted.

[View](#)
- [Confirm Officers and Committee Assignments](#)
- [Submit New, Renewal or Replacement ER/Secretary](#)
- [Confirm/Update Lodge Info](#)
- [Confirm/Update PER List](#)
- Charitable Report submitted

[View](#)

(Current year data entry will begin mid-June.)

Update Charitable Giving Data (New!)

Other Record Types:

- [Add a new Associate Member](#)
- [Add a new Stray Elk](#)
- [Add a new Widow\(er\)](#)
- [Add a new Protocol Member](#)
- [Add a new Vendor](#)
- [Add a new Auxiliary Member](#)
- [Add a new Lodge](#)
- [Add under-age Child of Active Member](#)

Delinquent Members:

- [Drop for Non-Payment \(0\)](#)
- [All Delinquents \(79\)](#)

Membership Dues:

- [Process Dues Payments](#)

Lodge Stats:

Active Members:	1137
Candidates:	26
Pending Transfers:	0
Delinquents:	79
Flagged Records:	0
Full Membership Stats	

Quick Dues Payment
Membership Number:

Last Changed Data: 10/30/2019 03:47 PM Important! Remember to periodically [review your staffer appointments](#).

Add a Membership Candidate

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

Add a Membership Candidate

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

This Candidate ...

- ☐ has **never** been a member of the Elks.
- ☐ is **transferring** to this lodge.
- ☐ is **affiliating** to this lodge via an **absolute dimit** from another lodge.
- ☐ is **affiliating** to this lodge via a **certificate of release** from another lodge.
- ☐ is **affiliating** to this lodge via a **certificate of status**.
- ☐ is a former member of this lodge who is **reinstating** his or her membership.

[Submit](#)

[CLMS Terms of Service](#)

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This Candidate...

- **Has never been a Member of the Elks** *** means exactly that, not 20 years ago, not from a Lodge that has closed, **NEVER** been an ELK, so please read their application carefully and investigate carefully.
- **Is Transferring to this Lodge***** Use this **ONLY** If the name of the transferring member does not appear on the Process Incoming Transfer list shown, also contact the Lodge they are dimitting from to ensure they are removed from their roster.
- **Is affiliating to this Lodge via an Absolute Dimit from another Lodge***** This means they have presented you with a paper copy of the dimit or you can verify it by continuing the process and accessing their record from the old Lodge (Look Up). If you can't verify this, please call me as I have resources to obtain the information.
- **Is affiliating to this Lodge via Certificate of Release from another Lodge***** They have presented you with a COR from their previous Lodge and you can obtain it by continuing the process and accessing their record; or you can assist them by contacting the old Lodge and forwarding the \$20 for a COR which when posted will allow you to add them. Reinstatement fees will apply.

This Candidate...

- **Is affiliating to this Lodge via Certificate of Status from another Lodge***** This is a member, who through no fault of their own, was a member of another Lodge that closed. They were issued a Certificate of Status to affiliate with any other Lodge of their choosing. If they don't have a paper copy you can still process them and (Look Up) their information which will transfer to your candidates list.
- **Is a former member of this Lodge who is reinstating his or her membership***** Pretty self-explanatory, this means they were once a member of your Lodge and were dropped per their request or for non-payment. Reinstatement fee's will apply

**What you do will have impact to
CLMS2 Membership Records.
Think carefully about how you
bring new members into your Lodge!**

**THINK
BE
CAREFUL**

Process Membership Candidates

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

Process Membership Candidates

Folders:

- New Applications Ready to be Read at the Next Lodge Meeting (0)
- [Applications in the Hands of the Investigating Committee](#) (9)
- Applications Ready for Balloting (0)
- Applications Ready for Orientation (0)
- Applications Ready for Initiation (0)
- Applications Ready for Affiliation (0)
- Applications Ready for Reinstatement (0)

[CLMS Terms of Service](#)

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Date Investigated: (mm/dd/yyyy)

[\[check all\]](#)

Candidate	Last Milestone Date
<input type="checkbox"/> Jerry D Mitchell	04/15/2015
<input type="checkbox"/> Gregory W Renn	04/20/2015
<input type="checkbox"/> Laura Ann Harris	04/20/2015
<input type="checkbox"/> Paul Dorrity	04/20/2015
<input type="checkbox"/> Darrell P. Bailey	04/27/2015
<input type="checkbox"/> Patsy R Wood	04/27/2015
<input type="checkbox"/> William G VanDoren	01/06/2015
<input type="checkbox"/> Nathan Krueger	04/02/2015
<input type="checkbox"/> Johnathan Miller	04/02/2015

[Process Candidates](#)

Process Incoming Transfers

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):

https://www.elks.org/clms2web/processTransfers.cfm

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

Process Incoming Transfers

The following members have been granted transfer dimits (or certificates of release) to lodge 2011.

If the name of the transferring member does not appear on the list below, you may need to [enter the candidate's data manually](#).

If this is not what you want to do, [click here to cancel](#).

Name	Current Lodge	Transfer Dimit/COR Date	
George W Ray	San Diego, CA, No. 0168	04/03/2016 (GRNTTD)	<input type="button" value="Process Transfer"/>

[CLMS Terms of Service](#)
Copyright ©2016 BPO Elks.

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, less typing!**

Process Incoming Transfer

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. When the transfer has been converted into a candidate for membership into your lodge, it 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.)

CLMS2Web - Internet Explorer
https://www.elks.org/clms2web/rosterRecord.cfm?frankid=2323231&tab=history

ContactALT InfoSpouseHistoryRolesCommitteesMiscPaymentsCustomRemarksFlags

History:Help

Personal History

Birthdate:02/23/1921

Deceased date:

Elk History

NOTE: "Paid-to" dates will be retained for seven years.
Bold date type names, if any, denote current lodge year membership transactions affecting lodge membership total.

Current Year Membership Total Impact: +0 (Adds - drops = total impact)

Type	Date	LodgeNum1	Number1	Comment1	Comment2	LodgeNum2	Number2	LostYears	Chg	Chg Year
Elected:	04/07/2016	[0168]	[]	[]	[]	[]	[]	[0]	[]	[]
Paid to:	04/01/2016	[1687]	[006979]	[]	[]	[]	[]	[0]	[]	[]
Investigated:	03/30/2016	[0168]	[]	[]	[]	[]	[]	[0]	[]	[]
Proposed:	03/17/2016	[0168]	[]	[San Diego, CA No. 168]	[]	[0000]	[000000]	[0]	[]	[]
Applied:	02/25/2016	[0168]	[]	[TD]	[46071975]	[]	[]	[0]	[]	[]
Paid to:	04/01/2015	[1687]	[006979]	[]	[]	[]	[]	[0]	[]	[]
Paid to:	04/01/2014	[1687]	[006979]	[]	[]	[]	[]	[0]	[]	[]
Paid to:	04/01/2013	[1687]	[006979]	[]	[]	[]	[]	[0]	[]	[]
Paid to:	04/01/2012	[1687]	[006979]	[]	[]	[]	[]	[0]	[]	[]
Paid to:	04/01/2011	[1687]	[006979]	[]	[]	[]	[]	[0]	[]	[]
Paid to:	04/01/2010	[1687]	[006979]	[]	[]	[]	[]	[0]	[]	[]
Transferred:	03/19/1996	[0168]	[010358]	[1492]	[1968]	[]	[]	[0]	[-1]	[1995]
Initiated:	06/25/1964	[0168]	[]	[]	[]	[]	[]	[0]	[+1]	[1964]

Transfer Dimit Cautions

- **Never** accept a transfer dimit with unpaid dues from their previous Lodge. If this transfer appears in the March time frame, communicate well with the Lodge they are coming from and inform your candidate that they **must** pay dues to their previous Lodge **if you can't pick them up by the end of the month.**
- Never add a member of another Lodge to your roster, they **MUST** be processed through the CLMS2 system. To do so will result in this member being in both rosters and clearly misrepresent membership numbers.
- Communicate well with the Incoming and Outgoing Transfer Dimit Lodges and call for help when mistakes are made that you don't know how to fix.

Other Record Types

Adding New Associate Members, Stray Elks, Widow(er's), Protocol, Vendors, Auxiliary Members, Lodges or Under-Age Child of Active Member

Other Record Types:

- [Add a new Associate Member](#)
- [Add a new Stray Elk](#)
- [Add a new Widow\(er\)](#)
- [Add a new Protocol Member](#)
- [Add a new Vendor](#)
- [Add a new Auxiliary Member](#)
- [Add a new Lodge](#)
- [Add under-age Child of Active Member](#)

- **Associate Members** are admitted with a vote of the House Committee
- **Stray Elks** are Members who belong to another Lodge but reside in your jurisdiction
- **Widow (er)**
- **Protocol Members** are Dignitaries in your District & State
- **Vendors** are usually Non-Members who advertise in your newsletter
- **Auxiliary Member**
- **Lodges** in your District/State that you may communicate with
- **Under-Age Child of Active Member**

Lodge Stats

- Easily access current Membership Stats or click on Full Membership Stats for a complete report

Lodge Stats:

Active Members:	178
Candidates:	10
Pending Transfers:	0
Delinquents:	0
Flagged Records:	0
Full Membership Stats	

Last Checked Date: 10/20/2010 10

ise Window



Membership/Lapsation Report Los Banos, CA Lodge 2510

Beginning Membership Total 4/1/2019: 184

Increases

Initiated	7
Affiliated:	0
Reinstated:	2
Subtotal:	9

Decreases

Dropped:	14
Transferred Out:	0
Absolute Dinit:	0
Deaths:	1
Expelled:	0
Subtotal:	15

Calculated Membership Total:	178
CLMS Active Members:	178
Average Age:	65.51
Gain/Loss:	-6

Delinquency

Six Months:	0
One Year:	0
Over One Year:	0
Total:	0
Lapsation Rate:	0.00%

Applications on Hand

Waiting to read at next lodge meeting:	0
In the hands of the investigating committee:	7
Ready for balloting:	3
Ready for Orientation:	0
Ready for Initiation:	0
Ready for Affiliation:	0
Ready for Reinstatement:	0
Other:	0
Total:	10

Life Members

Life Members:	1
Honorary Life Members:	1
Total:	2
Life Percentage:	1.09%

Alerts; Delinquent Members and Membership Dues

- Make a regular practice of addressing Alerts each time you access CLMS2; Flagged Records MUST be looked at and handled; Pending Outgoing Transfers should be monitored with a follow up call to the receiving Lodge if members are not picked up in a reasonable time; Incoming Transfers should be picked up immediately and processed as timely as possible; Pending Submission and Membership Inquires should be addressed promptly.
- Delinquent Members; Drop for non-payment will populate once the system shows them more than 12 months delinquent; All Delinquents can easily be accessed by clicking on this prompt.
- Process Dues Payments give you a list of members by name or input a membership number that takes you directly to their dues payment.

Alerts:

- [Display All Alerts \(0\)](#)
- [Flagged Records \(0\)](#)
- [Pending Outgoing Transfers \(2\)](#)
- [Pending Incoming Transfers \(0\)](#)
- [Pending Submissions \(0\)](#)
- [Membership Inquiries \(0\)](#)

Delinquent Members:

- [Drop for Non-Payment \(0\)](#)
- [All Delinquents \(177\)](#)

Membership Dues:

- [Process Dues Payments](#)

Quick Dues Payment
Membership Number:

Grand Lodge Submissions

- Here you will be able to submit your **Semi-Annual and Annual Membership Report**, which are automatically submitted on the dates given.
- **Confirm Officers and Committee Assignments** each time you make a change
- **Submit New, Renewal or Replacement ER/Secretary** *very important at the end of the year after elections so there is no break in the access for CLMS for the current or new Secretary and so Grand Lodge has the new ER in their records
- **Confirm/Update Lodge Information as it changes**
- **Confirm/Update PER List** as it changes *this would include spouses
- **Charitable Report Submitted**, is where you can review prior reports submitted. *Please remember that the current report for the new year is not be available until Mid June. You can click on the Update Charitable Giving Data to make entries or corrections that are automatically submitted to Grand Lodge.

Grand Lodge Submissions:

- Click the button below to preview your November Grand Lodge Semi-Annual Membership Report, which will be submitted AUTOMATICALLY on November 5th.

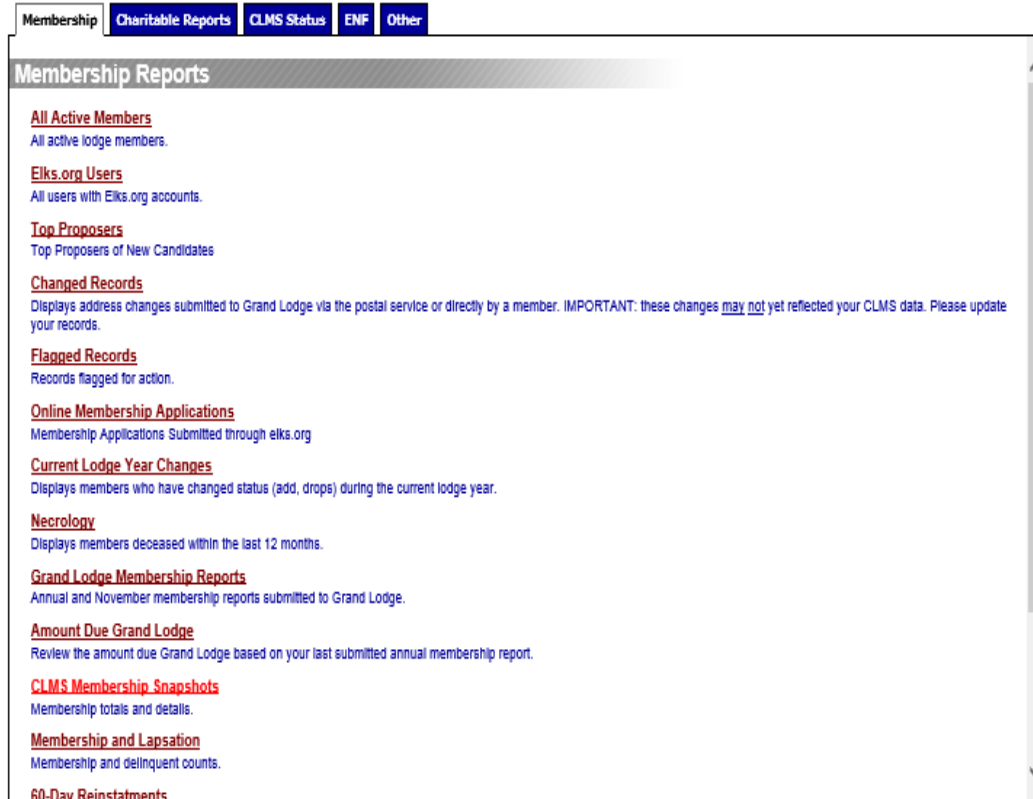
[Preview November Membership Report](#)

- Annual Membership report submitted. [\[View\]](#)
- [Confirm Officers and Committee Assignments](#)
- [Submit New, Renewal or Replacement ER/Secretary](#)
- [Confirm/Update Lodge Info](#)
- [Confirm/Update PER List](#)
- Charitable Report submitted [\[View\]](#)
(Current year data entry will begin mid-June.)

[Update Charitable Giving Data \(New!\) ↗](#)

Reports Tab Membership

Reports



The screenshot shows a web application interface with a navigation bar at the top containing tabs: Membership, Charitable Reports, CLMS Status, ENF, and Other. The 'Membership' tab is selected. Below the navigation bar, the page is titled 'Membership Reports'. A list of report categories is displayed, each with a red underlined link and a brief description:

- [All Active Members](#)
All active lodge members.
- [Elks.org Users](#)
All users with Elks.org accounts.
- [Top Proposers](#)
Top Proposers of New Candidates
- [Changed Records](#)
Displays address changes submitted to Grand Lodge via the postal service or directly by a member. IMPORTANT: these changes may not yet reflected your CLMS data. Please update your records.
- [Flagged Records](#)
Records flagged for action.
- [Online Membership Applications](#)
Membership Applications Submitted through elks.org
- [Current Lodge Year Changes](#)
Displays members who have changed status (add, drops) during the current lodge year.
- [Necrology](#)
Displays members deceased within the last 12 months.
- [Grand Lodge Membership Reports](#)
Annual and November membership reports submitted to Grand Lodge.
- [Amount Due Grand Lodge](#)
Review the amount due Grand Lodge based on your last submitted annual membership report.
- [CLMS Membership Snapshots](#)
Membership totals and details.
- [Membership and Lapsation](#)
Membership and delinquent counts.
- [60-Day Reinstatments](#)

- All Active Members
- Elks.org users
- Top Proposers
- Changed Records
- Flagged Records
- Online Membership Apps
- Current Lodge Year Changes
- Necrology
- Grand Lodge Membership Reports
- Amount Due Grand Lodge
- CLMS Membership Snapshot
- Membership & Lapsation
- 60 Day Reinstatements
- Expelled Members
- Suspended Members
- Current Lodge Secretaries

Charitable Reports & CLMS Status

CLMS2Web: Reports

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

Reports Grand Lodge Reports CLMS2PC Reports

CLMS: CLMS2 NamID: 200001 Type: STATE Mode: EDIT Server: wsprd2/membership1 Expert: FALSE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2016

Reports

Membership Charitable Reports CLMS Status ENF Other

Charitable Reports

Charitable Reports that have been submitted to Grand Lodge.

CLMS2Web - Internet Explorer

https://www.elks.org/clms2web/reports/charitableGiving.cfm

CLMS2Web: Reports

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

Reports Grand Lodge Reports CLMS2PC Reports

CLMS: CLMS2 NamID: 200001 Type: STATE Mode: EDIT Server: wsprd2/membership1 Expert: FALSE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2016

Charitable Reports

Charitable Reports that have been submitted to Grand Lodge.

Submission Date: 04/07/2016

Year Ending: 03/31/2016

Merced, CA Lodge No. 1240
Charitable Giving Report, Lodge Year Ending 3/31/2016

ProgramID	Head Count of Participants (H)	# Elks (E)	# Helpers (H)	Elks Hours (E)	Helpers Hours (H)	Elks Pledge (E)	Helpers Pledge (H)	New Cash (E+H Value)	Cash (C)
Youth Programs									
1003 - Scouting Programs	421	66	104	952	423	2456	2230	\$1,698.00	\$2,718.00
1004 - Youth Activities	3402	212	36	1541	112	2882	235	\$2,157.00	\$4,306.00
Total:	3824	278	140	2493	535	5338	2465	\$3,855.00	\$7,024.00
Needy/Handicapped Progs.									
1204 - Dene Major Project	270	32	0	192	0	320	0	\$330.00	\$284.00
1205 - Lodge Major Project	74	78	2	1632	32	963	112	\$352.00	\$45.00
Total:	344	110	2	1824	32	1283	112	\$682.00	\$329.00
Veterans Service Progs.									
1401 - Vets Service Events	1845	302	31	2766	212	11130	1041	\$2,700.00	\$1,333.00
Total:	1845	302	31	2766	212	11130	1041	\$2,700.00	\$1,333.00
Community Service Progs.									
1301 - Comm. Service Donations	3144	361	11	2138	64	3620	102	\$1,750.00	\$4,947.00
1302 - Lodge Facilities Donated	1001	509	41	1586	217	3328	286	\$750.00	\$1,786.00
Total:	4145	870	52	4144	381	7159	400	\$2,480.00	\$6,733.00
Elks Hall Foundation									
1701 - ENF Donations	0	13	0	90	0	150	0	\$70.00	\$0.00
Total:	0	13	0	90	0	150	0	\$70.00	\$0.00
Drug Awareness Programs									
1801 - Drug Awareness Programs	1241	24	0	239	0	229	0	\$330.00	\$1,309.00
Total:	1241	24	0	239	0	229	0	\$330.00	\$1,309.00
Categories Not Covered									
9999 - Categories Not Covered	1138	828	77	7293	474	32445	9884	\$500.00	\$4,736.00
Total:	1138	828	77	7293	474	32445	9884	\$500.00	\$4,736.00

CLMS Terms of Service
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Signed on as: Raelene Pritchard Coordinator Resources Revise Lodge By-Laws Return to elks

CLMS2Web: Reports

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

Reports Grand Lodge Reports CLMS2PC Reports

CLMS: CLMS2 NamID: 200001 Type: STATE Mode: EDIT Server: wsprd2/membership1 Expert: FALSE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2016

Reports

Membership Charitable Reports CLMS Status ENF Other

CLMS Status Reports

Balance Count

Highlights records that may be throwing your membership count off-balance.

Overdue Candidates

Membership candidates who haven't advanced for 90 or more days.

Suspect Names

Members whose CLMS records may contain errors such the inclusion of a prefix in the first name field, or a suffix in the last name field.

Officers on File at Grand Lodge

Lists the current and any pending officers (ER and Secretary) on file at Grand Lodge.

CLMS Open Issues

A list of bugs and other known issues for both clms2web and clms2PC.

CLMS Status Balance Count

- Click on Balance Count and this will display a list of possible reasons you need to look at that may be why you are Out Of Balance.

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



Balance Count San Francisco, CA Lodge 0003

Error: ACTIVE count 907 does not agree with Ending Member count 911.;0101

Records: 5

Annual Report: **03/31/2016** Date Filed:

Comparing current data to a data "snapshot" recorded immediately following annual report submission:

ID	Name	Memb. No.	Paid Thru	Deceased?	Status	Status Date	Type	Record Status
Record Type change								
Current: 55157489	Andrea Fender	020129	10/01/2016	No	INIT	03/03/2016	M	A [Current Dates]
Before: 55157489	Andrea Fender	020129		No	INDOC	01/29/2016	C	A [Snapshot Dates]
Duplicate or invalid dates found. Review History tab for redundant or conflicting dates and adjust as needed.								
Current: 55188955	Michael J Fogarty	020150	10/01/2016	No	REINS	04/22/2016	M	A [Current Dates]
Before:				No				
Record Type change								
Current: 55165493	Lynne Painter	020137	10/01/2016	No	INIT	03/03/2016	M	A [Current Dates]
Before: 55165493	Lynne Painter	020137		No	INDOC	02/26/2016	C	A [Snapshot Dates]
Record Type change								
Current: 55152305	Gregory A Rougeau	020124	04/01/2017	No	INIT	03/03/2016	M	A [Current Dates]
Before: 55152305	Gregory A Rougeau	020124		No	INDOC	01/29/2016	C	A [Snapshot Dates]
Record Type change								
Current: 55157496	Jennifer Schroeder	020139	10/01/2016	No	INIT	03/03/2016	M	A [Current Dates]
Before: 55157496	Jennifer Schroeder	020139	04/01/2016	No	INDOC	02/26/2016	C	A [Snapshot Dates]

CLMS Terms of Service

Out of Balance

- Click on the Members Name which will take you to their Contact Screen and select History. Run your cursor over the little *i* which will tell you when the record was last changed and the ID of the person who changed it.

[Member Name]

[Contact](#)
[ALT Info](#)
[Spouse](#)
[History](#)
[Roles](#)
[Committees](#)
[Misc](#)
[Payments](#)
[Custom](#)
[Remarks](#)
[Flags](#)

[Help](#)

History:

Personal History

Birthdate: **09/25/1980**

Deceased date:

Elk History

NOTE: "Paid-to" dates will be retained for seven years.
Bold date type names, if any, denote current lodge year membership transactions affecting lodge membership total.

Current Year Membership Total Impact: **+0** (Adds - drops = total impact)

Type	Date	LodgeNum1	Number1	Comment1	Comment2	LodgeNum2	Number2	LostYears	Chg	Chg Year	
Paid to:	10/01/2016	[0003]	[020129]	[]	[]	[]	[]	[0]	[]	[]	i
Initiated:	03/03/2016	[0003]	[020129]	[Todd Moreno]	[Wes Rudoi]	[]	[]	[0]	[+1]	[2015]	i
Orientation:	01/29/2016	[0003]	[]	[]	[]	[]	[]	[0]	[]	[]	i
Elected:	01/21/2016	[0003]	[]	[]	[]	[]	[]	[0]			
Investigated:	01/13/2016	[0003]	[]	[]	[]	[]	[]	[0]			
Proposed:	01/07/2016	[0003]	[]	[San Francisco, CA No. 3]	[Christopher D Robison]	[0003]	[019246]	[0]	[]	[]	i

Date Added: 04/06/2016 01:27 PM
 Changed by ID: 3411160

Date added:
04/06/2016
01:27 PM
Changed by ID
3411160

How Do I Correct my Out of Balance Status?

- Remember those of you with lodges that were out of balance at the end of the lodge year can request an adjustment from the Grand Lodge. If your **Active Count was** lower than the Ending Member Count please send the Grand Secretary's office a copy of the last page of your final Active Membership Report (That is Under Reports, Membership, then click on All Active Members) with the total membership number circled (on the last page) and your signature on the paper. Send this to the Grand Secretary's office with the request for an adjustment (cover letter requesting an adjustment). If you have questions about this please contact them at 773-755-4708.
- If your Active Count is Higher than the Ending Member Count you don't need to do anything. The Grand Lodge will automatically make an adjustment to put you back in balance.

Lodges who do not adjust are giving the CHEA Membership Committee an inaccurate account of our Membership numbers. **Get this accomplished ASAP!!!**

Settings Tab

- Lodge Information**

***This is where you must change the Exalted Ruler and Secretary to ensure Membership Cards and data to CLMS2 is correct. Please update this as changes occur!**

CLMS2Web: Settings

[Home](#) [Roster](#) [Reports](#) [Settings](#) [Officers/Committees](#) [Accounting](#) [Options](#) [Staff](#) [Messaging](#) [Support](#) [Help](#)

Settings [Update Elks.org Account](#)

CLMS: CLMS2 NameID: 200001 Type: STATE Mode: EDIT Server: wsrp1/membership1 Expert: FALSE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2016

Merced, CA Lodge Number #1240 Settings

Lodge Info	Dues	Mailings	Email	Other	Custom	Dates
<h3>Lodge Information</h3> <p>Default Values for Reports:</p> <p>Year Starting April 1: <input type="text" value="2016"/></p> <p>Reported Elks April 1: <input type="text" value="837"/></p> <p>Life Members April 1: <input type="text" value="1"/></p> <p>Lodge Name: <input type="text" value="Merced, CA No. 1240"/></p> <p>Lodge Address: <input type="text" value="1910 M St"/></p> <p>Lodge City: <input type="text" value="Merced"/></p> <p>Lodge Zip Code: <input type="text" value="95340-"/></p> <p>Lodge Phone: <input type="text" value="209 723-1240"/></p> <p>Default Values for New Membership Records:</p> <p>Lodge Name: <input type="text" value="Merced, CA No. 1240"/></p> <p>City & State: <input type="text" value="Merced"/> <input type="text" value="CA"/></p> <p>Zip Code: <input type="text" value="95340"/></p> <p>Area Code: <input type="text" value="209"/></p> <p>Exalted Ruler: <input type="text" value="Clinton Moore"/></p> <p>Secretary: <input type="text" value="Frank Semonelli"/></p> <p>Default Values for Membership Cards:</p> <p>Line 1 Lodge Name: <input type="text"/></p> <p>Line 2: <input type="text" value="Merced Lodge #1240"/></p> <p><input type="button" value="Submit"/></p>						

Settings Tab

- **Dues**; Update Message imprint on Dues Statements
- **Mailings**; Update Bar Code Information, return address and Elk Titles
- **Email**; email settings
- **Other**; Life Membership overrides and ENF account setting
- **Custom**; Custom Fields
- **Dates**; Dates Committees were confirmed and ER and Secretary were appointed

CLMS2Web: Settings

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

Settings: [Update Elk's.org Account](#)

CLMS: CLMS2 NameID: 200001 Type: STATE Mode: EDIT Server: wsprd1/membership1 Report: FALSE
Active Lodge: Merced, CA No. 1240 (ENR02) last annual report submitted for year: 03/31/2016

Merced, CA Lodge Number #1240 Settings

Dues/Fees

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

12-months Dues: ☐ Lodge accepts 12-month dues ONLY

Default Values for Dues Statements:

Message Imprint:

[Submit](#)

Mailings

Postal Mailings

Return Addresses: ☐ Suppress on Envelopes

Intelligent Mail Barcode: ☒ Use Intelligent Barcode Settings - IMb [\[More Info on Intelligent Mail Barcodes \(IMb\).\]](#)

Service Type ID: 300 - 1st Class no ASE [\[More information\]](#)

Mailer ID: 901119159 [One time assignment by USPS; nine digits. \[Application Instructions\]](#)

Elk Titles

Include Elk Titles: ☐ Include Elk titles on all labels, cards & reports

- ☐ Except on Membership/ID Cards
- ☐ Except on Labels/Envelopes
- ☐ Except on Reports

Merced, CA Lodge Number #1240 Settings

System Dates

Committees Confirmed: 04/11/2016 12:39 PM

ER Appointed: 02/17/2016 01:36 PM

Secy Appointed: 02/17/2016 01:27 PM

Officers/Committees

- Edit Lodge Officers
- Edit Lodge Committees
- Confirm Officers/Committees for Grand Lodge

HomeRosterReportsSettingsOfficers/CommitteesAccountingOptionsStaffMessagingSupportHelp

Officers/CommitteesEdit OfficersEdit Committees

CLMS: CLMS2 NamID: 200601 Type: STATE Mode: EDIT Server: wsrpd1/membership1 Expert: FALSE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2016

Committee Management

Committees Last Confirmed w/ Grand Lodge: 04/11/2016 12:39 PM [Confirm Now]

[Create a New Committee]

NOTE: Statutory Committees are mandatory for all lodges.

Committee Type	Committee Name (click to edit)	
Statutory	100 Auditing & Accounting Committee	[Display/Edit Roster]
Statutory	200 Activities Committee	[Display/Edit Roster]
Subcommittee	201 Community Project & Activities Subcommittee	[Display/Edit Roster]
Subcommittee	203 Youth Activities Subcommittee	[Display/Edit Roster]
Subcommittee	204 Hoop Shoot® Subcommittee	[Display/Edit Roster]
Subcommittee	205 Drug Awareness Subcommittee	[Display/Edit Roster]
Statutory	300 Fraternal Committee	[Display/Edit Roster]
Subcommittee	301 Americanism Subcommittee	[Display/Edit Roster]
Subcommittee	302 Elks National Foundation Subcommittee	[Display/Edit Roster]
Subcommittee	303 Flag Day Subcommittee	[Display/Edit Roster]
Subcommittee	304 Elks Memorial Day Subcommittee	[Display/Edit Roster]
Subcommittee	305 Membership Subcommittee	[Display/Edit Roster]
Subcommittee	306 Lodge Activities Subcommittee	[Display/Edit Roster]
Subcommittee	307 Veterans Services Subcommittee	[Display/Edit Roster]
Statutory	400 Accident Prevention	[Display/Edit Roster]
Statutory	500 PER Association	[Display/Edit Roster]
Statutory	600 Standing Relief Subcommittee	[Display/Edit Roster]
Statutory	700 Public Relations	[Display/Edit Roster]
Subcommittee	901 Ritualistic Subcommittee	[Display/Edit Roster]
Subcommittee	902 Soccer Shoot® Subcommittee	[Display/Edit Roster]
Subcommittee	903 Government Relations Subcommittee	[Display/Edit Roster]
Subcommittee	904 State Major Project Subcommittee	[Display/Edit Roster]
Lodge	X01 Scholarships	[Display/Edit Roster]
Lodge	X02 Relay for Life	[Display/Edit Roster]

Officers

Add New Officer:[SELECT Name]Title:[SELECT Office]Add New Officer

Office	Member	Membership No.	
@01 Exalted Ruler	Clinton Moore	006169	Remove
@02 Leading Knight	Mark E Leigh	004991	Remove
@03 Loyal Knight	John Cale	007381	Remove
@04 Lecturing Knight	Robert Davenport	007750	Remove
@05 Secretary	Francis Semonelli	007704	Remove
@06 Treasurer	Richard H Lewis	004821	Remove
@07 Trustee - One Year	Cyril Lawrence	005527	Remove
@08 Trustee - Two Years	Brian R Williams	005762	Remove
@09 Trustee - Three Year	Mike Anderson	007007	Remove
@11 Trustee - Four Years	Richard F Eason	006041	Remove
@12 Trustee - Five Years	Richard J Seymour	006606	Remove
@13 Tiler	Randall Pellissier	007505	Remove
@14 Esquire	John Williams	007554	Remove
@15 Chaplain	Dave Wells	007361	Remove
@16 Inner Guard	Dillon Colvin	007493	Remove
@17 Organist	Vacant		
@18 Presiding Justice	Susan Alberton	007317	Remove
@19 Forum Mediator	John M Lennon	006179	Remove
@21 Soloist	Richard H Lewis	004821	Remove
@22 Alternate Rep to GL	Dave Wells	007361	Remove

- Retire All Officers
Select this option to remove all Officer Assignments.

Committee Management

Committees Last Confirmed w/ Grand Lodge: 04/11/2016 12:39 PM [Confirm Now]

Create/Edit Committee

Committee Name:

Submit

- Retire All Committee Members
Select this option to make all current committee members "past" committee members.
- Delete All Committee Assignments
Select this option to remove all committee assignments for all committees.

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Accounting Tab

Payments Edit Rates Transaction Recap



- Edit Rates, Batch Editing (select) Dues

- This should take you to the list of Delinquent, Current and Prepaid Dues

CLMS2Web: Accounting

Home Roster Reports Settings Officers/Committees Accounting Options Staff

Payments Edit Rates **Transactions Recap**

CLMS: CLMS2 NamID: 200001 Type: STATE Mode: EDIT Server: wsprd1/membership1 Expert: FALSE
Active Lodge: Merced, CA No. 1240 [44882] Last annual report submitted for year: 03/31/2016

Lodge Rates

Use the form below to display the dues and fees charged. 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.

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

Batch Editing: [Fees] [Dues]

Current Dues

☐ Prorated dues/fees only

☒ All Records

☐ Regular Member

☐ Life Member

☐ Candidate

☐ Widow

☐ Associate Member

☐ Aux Member

☐ Stray Elk

☐ Lodge

☐ President

Edit Lodge Dues

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

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

Delinquent Dues		Current Dues		Prepaid Dues	
Description	Amount	Description	Amount	Description	Amount
Regular - Delinquent Dues 12 Mos	124.00	Regular - Current Dues 12 Mos	124.00	Regular - Prepaid Dues 12 Mos	124.00
Regular - Delinquent State Fees 1	6.00	Regular - Current State Fees 1	6.50	Regular - Prepaid State Fees 1	6.50
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	6.50	Life - Prepaid State Fees 1	6.50
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

Options



CLMS2Web: Options

[Home](#) [Roster](#) [Reports](#) [Settings](#) [Officers/Committees](#) [Accounting](#) [Options](#) [Staff](#) [Messaging](#) [Support](#) [Help](#)

CLMS: CLMS2 NamID: 200001 Type: STATE Mode: EDIT Server: wsprd1/membership1 Expert: TRUE
Active Lodge: Modesto, CA No. 1282 [37078] 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](#)

- **Enable Expert Mode**
 - This is where when activated you can delete, change, alter, add, pretty much do anything you want to a record in the system
*CAUTION, do so at the risk of changing things permanently!!!
- **Enable Demo Mode**
 - This is a great place to be when you want to try something you are not sure of or simply use as a training tool. Changes here are not permanent. *Another trick is to check here if you have lost important records that you think are gone forever, they just may be here!

How Do I Drop a Member who is not 12 months delinquent?

RaeLene Pritchard
[Flag this Record] [Member, #007735]

- Wizarding Menu -
[Choose a Wizard] [Go]

Contact ALT Info Spouse History Roles Committees Misc Payments Custom Remarks Flags

History: [Help]

Personal History

Birthdate: 04/26/1954 [edit]
Deceased date:

Elk History

NOTE: "Paid-to" dates will be retained for seven years.
Bold date type names, if any, denote current lodge year membership transactions affecting lodge membership total.

Current Year Membership Total Impact: +0 (Adds - drops = total impact)

Type	Date	LodgeNum1	Number1	Comment1	Comme	Chg Year
Paid to:	04/01/2017 [edit]	[1240]	[007735]	[]	[]	
Paid to:	04/01/2016 [edit]	[1282]	[008049]	[]	[]	
Affiliated:	09/03/2015 [edit]	[1240]	[007735]	[]	[]	
Elected:	09/03/2015 [edit]	[1240]	[]	[]	[]	
Investigated:	09/02/2015 [edit]	[1240]	[]	[]	[]	
Applied:	08/15/2015 [edit]	[1240]	[]	[TD]	[4401604]	
Proposed:	08/15/2015 [edit]	[1240]	[]	[Merced, CA No. 1240]	[]	
Paid to:	04/01/2015 [edit]	[1282]	[008049]	[]	[]	

[Add New Elk Milestone Date] [Go]

- >>>New Application Date
- >>>New Proposal Date
- >>>New Investigation Date
- >>>New Election Date
- >>>New Orientation Date
- >>>New Initiation Date
- >>>New Affiliation Date
- >>>New Paid To Date
- >>>New Transfer Out Date
- >>>New Drop Date
- >>>New Expelled Date
- >>>New Absolute Dinit Date
- >>>New Reinstatement Date
- >>>New Transfer Dinit Granted Date
- >>>New Cert. of Release Granted Date
- >>>New Reject Candidate Date
- >>>New Candidate Declined Date
- >>>New Reported Deceased Date

- When a Member has given you a written request to drop them and turned in their membership card, you can drop them!
- Always use every method available to retain members; however, if they insist on being dropped, you can go in to Expert Mode and Add a New Drop Date.
- When in Expert Mode access the member record, click on their History and use the drop down file in the body of that file to choose "Add a New Drop Date".

Staff/Messaging/Support



- **Staff manages website users; Appoint CLMS2 Staffers, Appoint Cyber Assistant, Appoint ENF Grant and Scholarship Coordinators, Appoint By-Laws Coordinator, Appoint Local Hoop Shoot Coordinator, Appoint Local Charitable Report Coordinator and Validate Elks.org users**
- **Messaging; Accesses your Inbox, Sent Messages and where you Compose Messages**
- **Support; CLMS2 Coordinators, Secretary Forum, Knowledge Base, CLMS Helpdesk and opening a ticket**
***Always consult with your Coordinators before doing this**

CLMS2 PC

This is the vehicle that prints the general information you have placed in CLMS2 Web! **Always**, input and update in the Web prior to accessing PC and always sync before obtaining information.

The screenshot displays the CLMS2PC Windows application interface. The title bar reads "CLMS2PC Windows - [Roster]". The menu bar includes File, Sharing, Recover, and Help. Below the menu bar, there are tabs for Roster, Reports, Settings, Officers/Committees, Accounting, Membership Cards, Queries, Labels/Envelopes, Mail Merge, Bulk Email, and Help. The main window shows the following information:

Signed on as: **RaeLene Pritchard** Active Lodge: **1240** Type: **STAFFER** Last Sync: **Tuesday, April 12, 2016 9:48 AM** [Logout](#)

Lodge: 1240 Last Name/# MEMBERS Only [NO Filters] Active Name Sort Filter Reset

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Lodge: Merced, CA No. 1240 Letter: Record Type: [M] Filter: [*] Status: [A] Name or Number: [] Sort: Name Sort Data: [(local)\CLMS2]

Records Found: **837**

Rapid Report

#	Name	Record Type	Record Status	Paid Thru
007545	Abraham, Robert D	Member		4/1/2017
007465	Abril, Aaron	Member		4/1/2016
004750	Acker, Robert S	Member		4/1/2017
007509	Adam, Robin	Member		4/1/2016
006364	Adams, Butch	Member		4/1/2017
005536	Akers, Mike	Member		4/1/2017
007314	Albertoni, Bob	Member		4/1/2017
007317	Albertoni, Susan	Member		4/1/2017
007690	Albright, Michael	Member		4/1/2016
006739	Alcaraz, David J	Member		4/1/2017
007742	Alcaraz, Ryan David	Member		4/1/2017
005405	Alcorn, Robert L	Member		4/1/2017
004435	Alcorn Jr, William G	Member		4/1/2017
007504	Alterman, Bryan D	Member		4/1/2016
004852	Althoff, Donald E	Member		4/1/2017
007430	Altomare, Michael	Member		4/1/2017
006463	Amarant, Tony	Member		4/1/2016

Statement Envelope FORMS"5505" Receipt Mb Card ID Card Send email

CLMS2PC Fiscal Year: 4/1/2016 - 3/31/2017 Version number 2.0.0.10 Last Sync: Tuesday, April 12, 2016 9:48 AM CST Sync completed successfully Sync

Windows taskbar at the bottom shows the time as 7:49 AM on 4/12/2016.

CLMS2 PC Roster

- Remember there are drop down files for types of records; filters for status of membership; active or non-active; and sorting selections...Remember to click on the Filter tab to change your selection
- Once the members name is highlighted you can then choose below in green boxes the following: Statements, Envelope, FORMS/"5505", Receipt, Mb Card, ID Card and Send email



CLMS2PC Windows - [Roster]

File Sharing Recover Help

Roster Reports Settings Officers/Committees Accounting Membership Cards Queries Labels/Envelopes Mail Merge Bulk Email Help

Signed on as: **Raelene Pritchard** Active Lodge: **1240** Type: **STAFFER** Last Sync: **Tuesday, April 12, 2016 9:48 AM** [Logout](#)

Lodge: **1240** MEMBERS Only [NO Filters] Active Name Sort Filter Reset

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Lodge: Merced, CA No. 1240 Letter: Record Type: [M] Filter: [] Status: [A] Name or Number: [] Sort: Name Sort Data: [(local)/CLMS2]

Records Found: **837**

Rapid Report

#	Name	Record Type	Record Status	Paid Thru
007545	Abraham, Robert D	Member		4/1/2017
007465	Abrell, Aaron	Member		4/1/2016
004750	Acker, Robert S	Member		4/1/2017
007509	Adam, Robin	Member		4/1/2016
006364	Adams, Butch	Member		4/1/2017
005536	Akers, Mike	Member		4/1/2017
007314	Albertoni, Bob	Member		4/1/2017
007317	Albertoni, Susan	Member		4/1/2017
007690	Albright, Michael	Member		4/1/2016
006739	Alcaraz, David J	Member		4/1/2017
007742	Alcaraz, Ryan David	Member		4/1/2017
005405	Alcom, Robert L	Member		4/1/2017
004435	Alcom Jr, William G	Member		4/1/2017
007504	Alterman, Bryan D	Member		4/1/2016
004852	Althoff, Donald E	Member		4/1/2017
007430	Altomare, Michael	Member		4/1/2017
006463	Amarant, Tony	Member		4/1/2016

Statement Envelope FORMS/"5505"
 Receipt Mb Card ID Card
 Send email

CLMS2PC
 Fiscal Year: 4/1/2016 - 3/31/2017
 Version number 2.0.0.10
 Last Sync: Tuesday, April 12, 2016 9:48 AM CST
 Sync completed successfully

Sync

Windows Taskbar: Ask me anything, 7:57 PM 4/13/2016

Reports - General

CLMS2PC Windows - [Reports]

File Sharing Recover Help

Roster Reports Settings Officers/Committees Accounting Membership Cards Queries Labels/Envelopes Mail Merge Bulk Email Help

Signed on as: **RaeLene Pritchard** Active Lodge: **1240** Type: **STAFFER** Last Sync: **Tuesday, April 12, 2016 9:48 AM** [Logout](#)

Lodge: 1240 Last Name/# MEMBERS Only [NO Filters] Active Name Sort Reset

Report Category

☒ General ☐ Membership Dues Notices
☐ Dues and Fees ☐ Custom

Report Output options for the Print Report Button only

☒ Preview/Print ☐ MS Word (RTF)
☐ HTML ☐ Adobe PDF
☐ Send mail:

Active Member Telephone Directory Data Source Parameters

[Clear Parameters](#)

Description:

Report Name	# of Downloads	Shared	Custom
▶ Active Member Telephone Directory		<input type="checkbox"/>	<input type="checkbox"/>
All Active Members - Full Directory		<input type="checkbox"/>	<input type="checkbox"/>
Anniversaries		<input type="checkbox"/>	<input type="checkbox"/>
Birthdays		<input type="checkbox"/>	<input type="checkbox"/>
Committee Members Report		<input type="checkbox"/>	<input type="checkbox"/>
Current Year - Year End Membership Lists		<input type="checkbox"/>	<input type="checkbox"/>
Deceased Members		<input type="checkbox"/>	<input type="checkbox"/>
Delinquent Members		<input type="checkbox"/>	<input type="checkbox"/>
Draw Members		<input type="checkbox"/>	<input type="checkbox"/>
Dropped Members Report		<input type="checkbox"/>	<input type="checkbox"/>
Elk Members Paid To April		<input type="checkbox"/>	<input type="checkbox"/>
Elk Members Paid To October		<input type="checkbox"/>	<input type="checkbox"/>
Email List		<input type="checkbox"/>	<input type="checkbox"/>
GL 5505 Member Report		<input type="checkbox"/>	<input type="checkbox"/>
Honorary Life Members		<input type="checkbox"/>	<input type="checkbox"/>
Life Member Eligibility		<input type="checkbox"/>	<input type="checkbox"/>
Life Members		<input type="checkbox"/>	<input type="checkbox"/>
Lodge Bulletin Distribution Coding		<input type="checkbox"/>	<input type="checkbox"/>
Member List w/Paid To Date FL4003	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Members Dropped for Date Range		<input type="checkbox"/>	<input type="checkbox"/>

Quick Print Print/Send Report Export Data Review Edit Report Rename Report Copy Report New Report Delete Report

8:03 PM 4/13/2016

Reports – Membership Dues Notices

CLMS2PC Windows - [Reports]

File Sharing Recover Help

Roster Reports Settings Officers/Committees Accounting Membership Cards Queries Labels/Envelopes Mail Merge Bulk Email Help

Signed on as: **RaeLene Pritchard** Active Lodge: **1240** Type: **STAFFER** Last Sync: **Tuesday, April 12, 2016 9:48 AM** [Logout](#)

Lodge: **1240** Last Name/# MEMBERS Only [NO Filters] Active Name Sort Reset

Report Category

☐ General ☒ Membership Dues Notices

☐ Dues and Fees ☐ Custom

Standard Options

Service Type ID: 300 - 1st Class no ASE

Report Output options for the Print Report Button only

☒ Preview/Print ☐ MS Word (RTF)

☐ HTML ☐ Adobe PDF

☐ Send mail:

Member Statement Data Source Parameters

[Clear Parameters](#)

Do Not Print Fold Lines: ☐

New Paid To Date: 4/1/2017

Only Recs with Emails: ☐

Only Recs w/o Emails: ☐

Include Life Members: ☐

Include Regular Membs: ☒

Include Candidates: ☐

Delinquent Only: ☐

Description:

Report Name	# of Downloads	Shared	Custom
Associate Member Statement		<input type="checkbox"/>	<input type="checkbox"/>
Member Statement		<input type="checkbox"/>	<input type="checkbox"/>
Widow Statement		<input type="checkbox"/>	<input type="checkbox"/>

Quick Print Print/Send Report Export Data Review Edit Report Rename Report Copy Report New Report Delete Report

8:07 PM 4/13/2016

Reports – Dues & Fees

CLMS2PC Windows - [Reports]

File Sharing Recover Help

Roster Reports Settings Officers/Committees Accounting Membership Cards Queries Labels/Envelopes Mail Merge Bulk Email Help

Signed on as: **RaeLene Pritchard** Active Lodge: **1240** Type: **STAFFER** Last Sync: **Tuesday, April 12, 2016 9:48 AM** [Logout](#)

Lodge: 1240 **Last Name/#** MEMBERS Only [NO Filters] Active Name Sort Reset

Report Category

☐ General ☐ Membership Dues Notices

☒ Dues and Fees ☐ Custom

Report Output options for the Print Report Button only

☒ Preview/Print ☐ MS Word (RTF)

☐ HTML ☐ Adobe PDF

☐ Send mail:

Absolute Dinit Granted Fees Data Source Parameters

[Clear Parameters](#)

Lodge Year: 2016

From Date:

To Date:

Description:

[Edit Description](#)

Report Name	# of Downloads	Shared	Custom
▶ Absolute Dinit Granted Fees		<input type="checkbox"/>	<input type="checkbox"/>
Certificate Of Release Application Fees		<input type="checkbox"/>	<input type="checkbox"/>
Certificate Of Release Granted Fees		<input type="checkbox"/>	<input type="checkbox"/>
Current Year - Fiscal Year End Transaction Lists		<input type="checkbox"/>	<input type="checkbox"/>
Dues Paid And Not Paid To Report		<input type="checkbox"/>	<input type="checkbox"/>
Dues Paid By New Members		<input type="checkbox"/>	<input type="checkbox"/>
Dues Payments by Date		<input type="checkbox"/>	<input type="checkbox"/>
Dues Payments By Name and Transaction		<input type="checkbox"/>	<input type="checkbox"/>
Members In Good Standing That Owe Prepaid Dues		<input type="checkbox"/>	<input type="checkbox"/>
Reinstatement Application Fees		<input type="checkbox"/>	<input type="checkbox"/>
Reinstatement Dues		<input type="checkbox"/>	<input type="checkbox"/>
Transfer Dinit Application Fees		<input type="checkbox"/>	<input type="checkbox"/>

[Quick Print](#) [Print/Send Report](#) [Export Data](#) [Review](#) [Edit Report](#) [Rename Report](#) [Copy Report](#) [New Report](#) [Delete Report](#)

8:21 PM 4/13/2016

Settings

- Lodge Information
- Dues/Fees
- Mailings
- Email
- Other Settings
- Custom
- Default Reports

CLMS2PC Windows - [Settings]

File Sharing Recover Help

Roster Reports Settings Officers/Committees Accounting Membership Cards Queries Labels/Envelopes Mail Merge Bulk Email Help

Signed on as: **RaeLene Pritchard** Active Lodge: **1240** Type: **STAFFER** Last Sync: **Tuesday, April 12, 2016 9:48 AM**

Merced, CA No. 1240

Lodge Info | Dues/Fees | Mailings | Email | Other Settings | Custom | Default Reports

Lodge Information

Default Values For Reports:

Year Starting April 1:

Reported Elks April 1:

Life Members April 1:

Lodge Name:

Lodge Address:

Lodge City:

Lodge Zip Code:

Lodge Phone:

Default Values for New Membership Records:

Lodge Name:

City & State:

Zip Code:

Area Code:

Exalted Ruler:

Secretary:

Default Values for Membership Cards:

Line 1 Lodge Name:

Line 2:

Officers & Committees



- **A listing of all the Officers and Committees with click access to individual information**
- **Committees are broken down into the Grand Lodge mandatory and prescribed Committees and Subcommittees and any others that you have created; it lists the Chairperson and members that you have designated in CLMS2 Web**

Additional Tabs

- Accounting
- Membership Cards
- Queries
- Labels/Envelopes
- Mail Merge
- Bulk Mail
- Help



Accounting - Payments

CLMS2PC Windows - [Accounting]										
File Sharing Recover Help										
Roster	Reports	Settings	Officers/Committees	Accounting	Membership Cards	Queries	Labels/Envelopes	Mail Merge	Bulk Email	Help
Signed on as: RaeLene Pritchard Active Lodge: 1240 Type: STAFFER Last Sync: Tuesday, April 12, 2016 9:48 AM										
Payments										
Start Date: 1/ 1/2016 End Date: 4/13/2016 Display Payments										
PaymentID	LedgerID	Transaction Date	Name	Check No.	Transaction Code	Paid to Date	Payment received during Lodge Year	Remitted By Indiv	Remitted By Lodge	Exp
38562097	38562097	4/11/2016	Amis, Darin	2202	CLP - Regular - Current Dues 12 Mos	4/1/2017	2016	124.00	0.00	F
38562098	38562097	4/11/2016	Amis, Darin	2202	CLP - Regular - Current GL Per Capita		2016	6.50	0.00	F
38562099	38562097	4/11/2016	Amis, Darin	2202	CLP - Regular - Current GL Insurance		2016	3.50	0.00	F
38562100	38562097	4/11/2016	Amis, Darin	2202	CLP - Regular - Current The Elks Maga...		2016	5.50	0.00	F
38562101	38562097	4/11/2016	Amis, Darin	2202	CLP - Regular - Current State Fees 1		2016	6.50	0.00	F
38562102	38562097	4/11/2016	Amis, Darin	2202	CLP - Regular - Current Other 1 Annual...		2016	1.00	0.00	F
Payment Total:		4/11/2016						147.00	0.00	-
38562613	38562613	4/11/2016	Beltrami, Pamela	cash	CLP - Dues - Associate Member 12 Mos	4/1/2017	2016	15.00	0.00	F
Payment Total:		4/11/2016						15.00	0.00	-
38561824	38561824	4/11/2016	Bigler, Alex	cash	CLP - Regular - Current Dues 12 Mos	4/1/2017	2016	124.00	0.00	F
38561825	38561824	4/11/2016	Bigler, Alex	cash	CLP - Regular - Current GL Per Capita		2016	6.50	0.00	F
38561826	38561824	4/11/2016	Bigler, Alex	cash	CLP - Regular - Current GL Insurance		2016	3.50	0.00	F
38561827	38561824	4/11/2016	Bigler, Alex	cash	CLP - Regular - Current The Elks Maga...		2016	5.50	0.00	F
38561828	38561824	4/11/2016	Bigler, Alex	cash	CLP - Regular - Current State Fees 1		2016	6.50	0.00	F
38561829	38561824	4/11/2016	Bigler, Alex	cash	CLP - Regular - Current Other 1 Annual...		2016	1.00	0.00	F
Payment Total:		4/11/2016						147.00	0.00	-
38562157	38562157	4/11/2016	Crowley, Michael J	8486	CLP - Regular - Current Dues 12 Mos	4/1/2017	2016	124.00	0.00	F
38562158	38562157	4/11/2016	Crowley, Michael J	8486	CLP - Regular - Current GL Per Capita		2016	6.50	0.00	F
38562159	38562157	4/11/2016	Crowley, Michael J	8486	CLP - Regular - Current GL Insurance		2016	3.50	0.00	F
38562160	38562157	4/11/2016	Crowley, Michael J	8486	CLP - Regular - Current The Elks Maga...		2016	5.50	0.00	F
38562161	38562157	4/11/2016	Crowley, Michael J	8486	CLP - Regular - Current State Fees 1		2016	6.50	0.00	F
38562162	38562157	4/11/2016	Crowley, Michael J	8486	CLP - Regular - Current Other 1 Annual...		2016	1.00	0.00	F
Payment Total:		4/11/2016						147.00	0.00	-
38562352	38562352	4/11/2016	Gutierrez, Robert C	1090	CLP - Regular - Current Dues 12 Mos	4/1/2017	2016	124.00	0.00	F

Membership Cards

CLM52PC Windows - [Membership Cards]

File Sharing Recover Help

Roster Reports Settings Officers/Committees Accounting Membership Cards Queues Labels/Envelopes Mail Merge Bulk Email Help

Signed on as: **Raelene Pritchard** Active Lodge: **1240** Type: **STAFFER** Last Sync: **Tuesday, April 12, 2016 9:48 AM** [Logout](#)

Lodge: **1240** Last Name: **#** MEMBERS Only [NO Filters] Active Name Sort Reset

Card Type

- ☒ Regular Members
- ☐ Associate Members
- ☐ Member Candidates
- ☐ Life & Honorary Life Members
- ☐ Identification Cards

Report Output options for the Print Report Button only

- ☒ Preview/Print ☐ MS Word (RTF)
- ☐ HTML ☐ Adobe PDF
- ☐ Send mail:

Paid Through: **4/1/2017**

☐ Based on transaction date range

☐ Unpaid thru selected paid through date

Regular Member Cards Data Source Parameters

[Clear Parameters](#)

Only Recs with Emails: ☐

Only Recs w/o Emails: ☐

Delinquent Only: ☐

Initiated Date:

Reprint: Last Name to begin printing:

Card Start Position

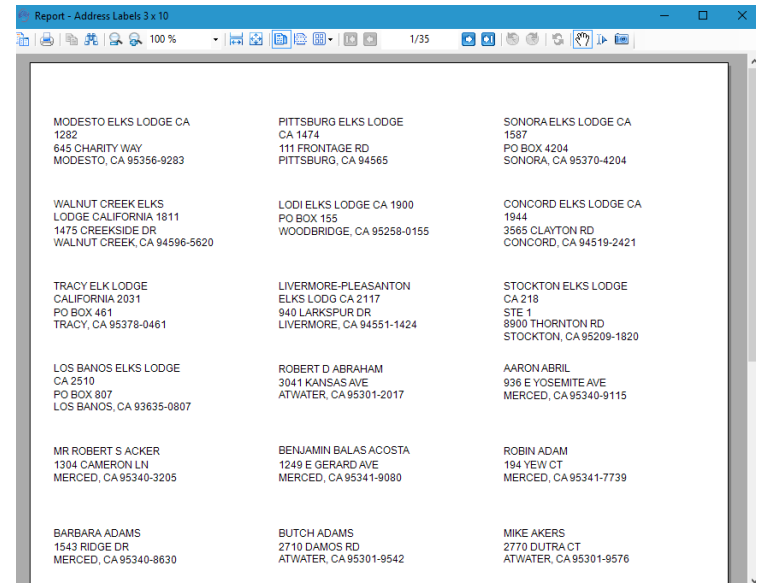
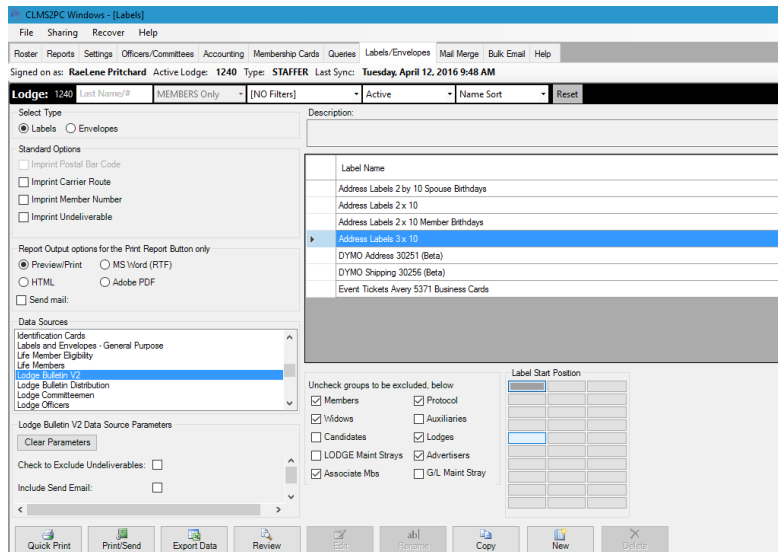
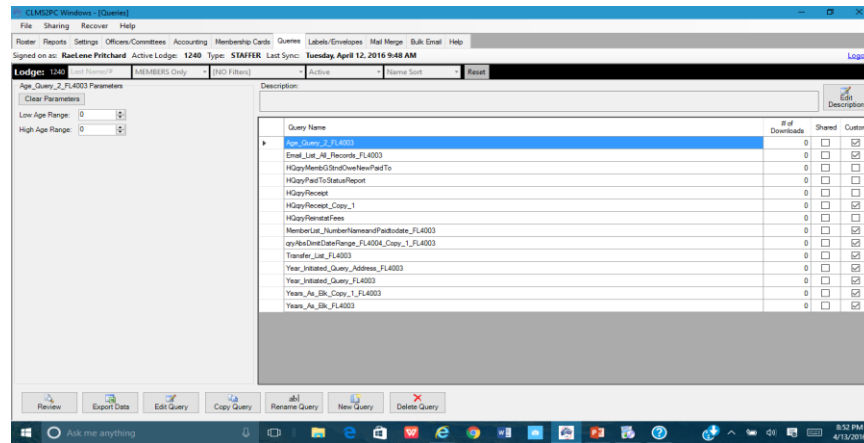
Card Name	# of Downloads	Shared	Custom
Zip Regular Member Cards		<input type="checkbox"/>	<input type="checkbox"/>
Regular Member Cards		<input type="checkbox"/>	<input type="checkbox"/>
Regular Member Cards Copy 1	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Regular Member Cards Copy 2	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Regular Member Cards Copy 3	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Regular Member Cards Copy 4	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Quick Print Print/Send Card Export Data Review Edit Card Rename Card Copy Card Delete Card

Printing Lodge Membership Cards can be very simple as long as you put in the correct information ie; Card type, Report output, Paid through date, Card start position and Card Name. Don't forget to select Print/Send to bring up your membership cards that you will be printing.

Member Name	Card Number	Card Name	Card Number	Card Name
Robert D Abraham	007545	Merced Lodge #1240	007545	Butch Adams
Butch Adams	006364	Merced Lodge #1240	006364	Merced Lodge #1240
007545	4/1/2017	Frank Semonelli	5	4/1/2017
4/1/2017				
Aaron Abril	007465	Merced Lodge #1240	007465	Mike Akers
Mike Akers	005536	Merced Lodge #1240	005536	Merced Lodge #1240
007465	4/1/2017	Frank Semonelli	7	4/1/2017
4/1/2017				
Mr Robert S Acker	004750	Merced Lodge #1240	004750	Bob Albertoni
Bob Albertoni	007314	Merced Lodge #1240	007314	Merced Lodge #1240
004750	4/1/2017	Frank Semonelli	41	4/1/2017
4/1/2017				

Queries & Labels/Envelopes



Mail Merge

CLMS2PC Windows - [Mail Merge]

File Sharing Recover Help

Roster Reports Settings Officers/Committees Accounting Membership Cards Queries Labels/Envelopes Mail Merge Bulk Email Help

Signed on as: **RaeLene Pritchard** Active Lodge: **1240** Type: **STAFFER** Last Sync: **Tuesday, April 12, 2016 9:48 AM** [Logout](#)

Lodge: 1240 **Last Name/#** **MEMBERS Only** **[NO Filters]** **Active** **Name Sort** **Reset**

Report Output options for the Print Report Button only

☒ Preview/Print ☐ MS Word (RTF)
☐ HTML ☐ Adobe PDF

☐ Send mail:

Data Sources

Anniversaries
Associate Member Cards - Active
Associate Member Strmts - Active
Birthdays
Candidates
Deceased Members
Delinquent Members - Active
Directory
Draw Members - Active
Dropped Members - Inactive
Email Directory
Form 5505 Info
Forum Members - Active
Honorary Life Members
Identification Cards

Directory Data Source Parameters

Clear Parameters

Check to Exclude Undeliverables: ☐
Check to Exclude Send No Mail: ☐

Description:

Letter Name

of Downloads

Shared

Custom

Basic Letter Format	0	<input type="checkbox"/>	<input type="checkbox"/>
Elected To Life	0	<input type="checkbox"/>	<input type="checkbox"/>
Final Notice Letter	0	<input type="checkbox"/>	<input type="checkbox"/>
Forum Appointment	0	<input type="checkbox"/>	<input type="checkbox"/>
Forum Listing (25 Names)	0	<input type="checkbox"/>	<input type="checkbox"/>
Forum Notice Of Trial	0	<input type="checkbox"/>	<input type="checkbox"/>
GER Delinquent Appeal Letter	0	<input type="checkbox"/>	<input type="checkbox"/>
Indoc/Initiation Notice	0	<input type="checkbox"/>	<input type="checkbox"/>
Letter to Applicants	0	<input type="checkbox"/>	<input type="checkbox"/>
New Member Letter	0	<input type="checkbox"/>	<input type="checkbox"/>

Edit Description

Quick Print

Print/Send Letter

Export Data

Review

Edit Letter

ab| Rename

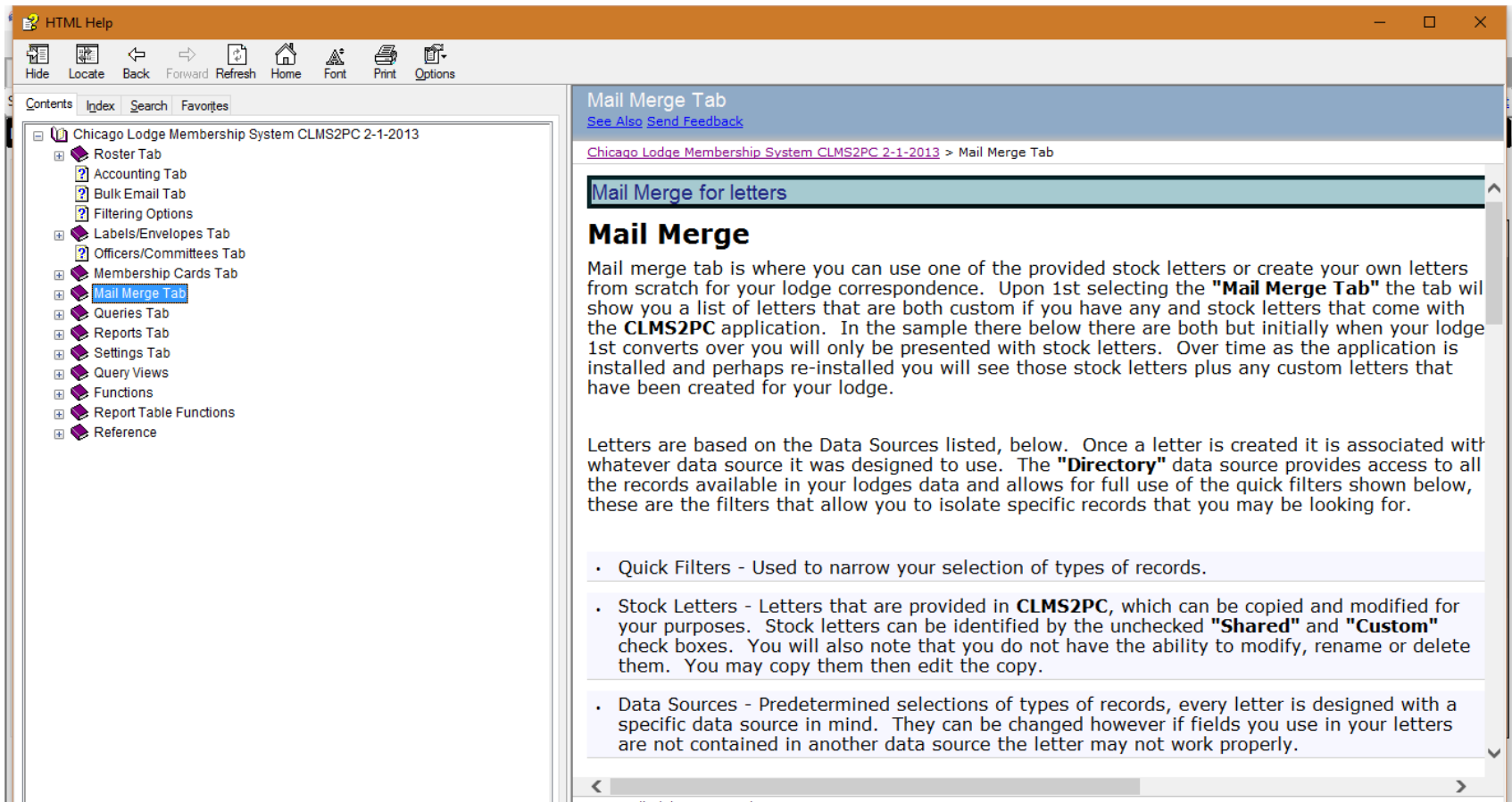
Copy Letter

New Letter

Delete Letter

Edit Template

CLMS2 PC HELP Tab





CLMS2 Web & PC For Beginners

Thank you to the CHEA Lodge Secretaries who have made my learning experience in the CLMS2 Web and PC system amazing! It is always my pleasure to serve in this capacity and I hope I have brought some valuable key learnings to your CLMS2 Web and PC experience.

Please welcome your new CLMS2 State Chair, Norm Stump! I wish you all success in the management of your Lodge Membership System.

Fraternally,
RaeLene Pritchard, PER
Merced Lodge #1240

