

Lodge Secretary Training

October 26, 2024

ISEA Fall Training Session

Salmon Elks #1620

Help and Where To Get It.

- CLMS Coordinators
 - Deborah Nadrchal – 208-691-9790 (c) jazzd@prodigy.net (e)
 - Edward Sanman – 406-756-5744 (h) 208-750-5075 (c) sanman3ee@pm.me (e)
- Your ER and PERs
- Nearby Lodge Secretary
- District Deputy
- District Leader
- State Sponsor – Keith Mills 208-850-1418 (c) idahoger2122@gmail.com
- Grand Secretary's Office 773-755-4708 (w) grandlodge@elks.org (e)

Help and Where To Get It (cont)

- Secretary Manual
- ER, Officers & Committee Members Manual
- GL Auditing & Accounting Manual
- Secretary Reference – find on the ISEA Website:
www.idahoelks.org/member-resources/#handbooks
- Grand Lodge Manuals -
<https://www.elks.org/leadership/manuals.cfm>

Hints !

- Accounting:
 - Any “Miscellaneous Income” or “Miscellaneous Expense” accounts should NOT have LARGE amounts in them. **RED FLAG** to DD, District Leader and State Sponsor.
- Installing New Officers (March or April):
 - Make sure they have paid their DUES for the new year before Installation. Otherwise, starting April 1st, they can NOT enter Club areas, attend Lodge meetings, Officer meetings, Committee meetings until their dues are paid current.
- Take the various Officers Tests:
 - <https://www.elks.org/lodges/training.cfm>

Hints !

- **Use** the CLMS2WEB Wizarding Menus.
- Incoming Transfer Dimit, Certificate of Release, or Certificate of Status:
 - Do NOT enter them into CLMS until the other Lodge has released them. Normally they will come in electronically in CLMS.
- CLMS – Initiation, Regular Reinstatement, Certificate of Release, Absolute Dimit, MAKE SURE you have their pro-rated DUES before you do the final CLMS STEP to show them Initiated, Reinstated, or Affiliated. Otherwise, you make end up with the Member being 120 months delinquent.

Hints !

- Check your Lodge Fees page in CLMS2WEB.
 - Granted Fee – Cert. of Release is set to \$20. (GLS 14.180)
 - Granted Fee – Transfer Dimit is set to \$0. (GLS 14.110)
 - Granted Fee – Absolute Dimit is set to \$0. (GLS 14.110)

Edit Lodge Fees

NOTE: You must be in **expert mode** to edit fees.

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

Type	Description	Amount
GCR [1A]	Granted Fee - Cert of Release	35.00
GTD [1C]	Granted Fee - Transfer Dimit	0.00
GAD [1D]	Granted Fee - Absolute Dimit	15.00
ARN [05]	Application Fee - Reinstatement	20.00
ATD [06]	Application Fee - Transfer Dimit	15.00
AAD [07]	Application Fee - Absolute Dimit	5.00
ACR [08]	Application Fee - Cert of Release	15.00
ACS [1F]	Application Fee - Cert of Status	0.00
ANM [3A]	Application Fee - Initiation - under 26	35.00
ANM [3R]	Application Fee - Initiation 26 plus	35.00

Hints ! (Dues Changes – GLS 17.060)

- Using GL Billing System: Make sure that your new Dues are approved by GL Committee on Judiciary and entered into CLMS2WEB in the Pre-paid column **before December 31st**.
- Use CLMS2PC to manually print Dues Notices: Make sure your new Dues are approved by GL Committee on Judiciary and entered into CLMS2WEB in the Pre-paid column before you print the Dues Notices.
- NOTE: You do NOT need to enter Grand Lodge Dues and Fees or ISEA Dues into CLMS. This is done automatically.

Hints !

- Lodge Year End Processing (March 31st):
 - Read the “Year-end Procedures for 2024”. Find in CLMS2WEB / Home Tab / Lodge Secretary News. This will be updated in January for 2025.
 - You have ALL Pre-paid Dues entered into CLMS
 - Have ALL Candidates entered and up to date in CLMS
 - After the last Lodge Meeting in March, drop Delinquents. If you don't, you will have to pay GL and State Association Dues for each Delinquent on April 1st. They can use the 60 Day Reinstatement Process.

Hints !

- If you receive a Dues Notice back indicating that the Member wants to be dropped:
 - If Paid Current, issue an Absolute Dimit
 - If Delinquent, Drop them. They can use the 60 Day Reinstatement Process.
- 60-Day Reinstatement. Is now exactly 60 days from the Drop Date
- Secretary and Treasurer are optionally Board of Directors members if specified in the Lodge By-Laws
- The Treasurer is NOT required to attend DD Clinics
- The Membership Application form is now available at www.elks.org/leadership/manuals.cfm

Hints !

- Lodge Secretary Training Course can be found at:
www.elks.org/lodges/training.cfm
- Check the attached ZipCode Jurisdiction (see attached) CLMS2WEB/Reports/Zip Code Jurisdiction Lookup. Any corrections, please send copy of corrections to Ed Sanman. New Meadows, ID 83654 is assigned to Ontario, OR Lodge #1690.
- **OPEN SESSION: QUESTIONS & PROBLEMS**