

**Chicago Lodge Membership System
YEAR END PROCEDURE
For CLMS 1.0 adapted from Yuma6**

BACKUP YOUR DATABASE

- Perform a local backup
- Perform a Offsite backup

Lodge Officers Maintenance

- Print the "Officers Information report and review.
- Find the member record of any officer that is no longer serving, blank out the officer title and uncheck the officer box (do this even if the position is vacant).
- Find the member records of the replacement officers check the officer box and select the position help.
- Rerun the "Officers Information" listing and verify it is correct.
- Repeat until it is correct

Committee Maintenance

- Print the "Committees Report" and review.
- Find the member record of any committee person that is no longer serving, press COMMITTEES and unselect the title by changing the reference to "Select" (do this even if the position is vacant).
- Find the member records of the replacement officers, press COMMITTEES and select the appropriate position of the committee the member is serving as.
- Rerun the "Committees Report" and verify it is correct.
- Repeat until it is correct

System or Lodge Settings

- Do not change the system date at this instance.
- Change the Exalted Rulers and Secretary names
- Press enter and save by clicking on the floppy disk symbol in the lower right hand corner

Members 5505 Card

- Go to the Exalted Rulers card, click to put an "X" in the Officers box
- Click on the space next to the Officers to get a dropdown menu, double click on "EXALTED RULER" and save the changes.
- Repeat the same procedure however select "SECRETARY"
- Go to last years Exalted Ruler and Secretary and change the officer title, save the change.

REPORTS - There are several reports that should be printed for the purpose of gathering the statistics in order to fill out Pages 10 & 11 of the Annual Audit report for verification of monies collected.

RAPID REPORTS

1. Click the selection filter for the designated filter names shown with the check boxes below. You will see a message (“No Members in that group” if there are no names to report – skip to next report group)
2. Click on the “RAPID REPORTS” button located upper tool bar of the member edits screen
3. Fill in the HEADING box and optionally change the sort
4. Click OK to print the report.
5. Repeat this for the remaining selection filters shown above

On the members edit screen use the selection Filter drop down to change the filter to each of the following filters below repeat steps 1 through 5 for each of these reports.

- Initiated (Inits+)
- Affiliated (Affil+)
- Reinstatements (Reins+)
- Drops (Drops-)
- Transferred Out (TransOut-)
- Absolute Demits (Absolute-)
- Deceased (MbDied-)
- Expelled (Exp-)

ADDITIONAL REPORTS NEEDED FOR REFERENCE (PRINT AND KEEP FOR REFERENCE

To print these reports:

1. Click on REPORTS
2. Check DUES AND FEES
3. Select the required reports one at a time.
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.
6. Repeat this for the remaining lists provided that they contain data.

Reports to print:

- Absolute Dimit Fees other Lodge
- Absolute Dimit Fees this Lodge
- Certificate of Release Fees
- Daily Dues Payment Register
- Dues Paid by New Members
- Initiation Fees by Months
- Ledger Transactions Summary by Types/Date
- Reinstatement Fees
- Transfer Dimit Fees

Report needed for Grand Lodge

- Click REPORTS
- Check GRAND LODGE

Select one at a time:

- Grand Lodge Annual Reports Page 1 (Secretary access only)**
 - Preview and print membership counts worksheet for sec a&b (for internal review only – CLMS will not print hardcopy that is suitable for submission, the report MUST be submitted online using the GREEN submit button in the reporting section of the program)
 - Use the GREEN submit button to link to elks.org website to submit and print final report. You can save the report to PDF if you desire to save an electronic copy or have it available for emailing purposes. Note that the submission dialogue will ask you for the Lodge FEIN tax number as confirmation.
 - If using the elks.org website to file the report, it is not necessary to send Grand Lodge hardcopy of the Annual Report Page 1, just the check.
 - If using the elks.org website to file the report, it is not necessary to send carbon copies to the traditional list of recipients since they will be able to retrieve the information from the website.
- Grand Lodge Annual Reports Page 2 (Secretary access only)**
 - Use the GREEN submit button in the reporting section to link to the elks.org website for data-entry and submission to Grand Lodge
- Grand Lodge Statutory Committees Report

After completion of all these reports and before entering data for the new year

- Click Lodge Settings button
- Change the NEW “Elk Year Begins” year
- Change “Number of Reported Elks” should agree with the ending members on page 1 submitted to Grand Lodge
- Change “Number of Life Members” should agree with the ending members on page 1 submitted to Grand Lodge
- Click SAVE button at bottom of screen
- Restart the CLMS program to update internal counters