INTRODUCTION

The use of this CLMS Trainer's Outline is optional, but encouraged.

This outline is developed to be used as a guide and reminder pad for the trainer. There are several `Trainer's TIPs >` throughout the document that highlight special uses of a CLMS function that either applies to special navigation or in most cases, the 'business use' of that feature of CLMS.

It can be used in conjunction with a 'walk thru' of CLMS on a computer projection screen, navigating thru the program in the flow of the outline.

There is also a screen-by-screen PowerPoint developed by Edwin Geishert, Jr, Michigan CLMS Coordinator and refined by Greg Mullen, Oklahoma CLMS Coordinator. It is a good visual or printed document to guide users through the system in a training session. Several dedicate Elks in their CLMS Coordinator roles have developed great training materials that are available through the message boards at www.elks.org/ChicagoLMS.

This outline can be used in training sessions for the Secretaries or clerks that are new to CLMS, either by a change in membership management system or election, or as a refresher course. If used as a refresher course this guide may be the only materials needed, as screen to screen navigation and open discussion, feedback and sharing of ideas can be an effective learning method.

Use this outline as you see fit and please provide feedback with your thoughts on improvement and/or expansion.

Check back to www.elks.org/ChicagoLMS occasionally for the most recent version of this trainers outline.

OPEN THE SESSION

Welcome

- Hello, Hey, Howdy, Hey Y'All, Hi, Hey Man, depending on what part of the country you're in.

Introduction

- Introduce Trainers
    - o Name, Lodge, Position, Experience
    - o General statement on purpose of training
- Secretaries Introduced
    - o Name
    - o Lodge
    - o How Long a Secretary
    - o What "system" have you been using?
    - o What do you expect to get out of this session?

`Trainer's TIP >` *Tally the different systems (ELMS, Yuma, manual) and list expectations, maybe on a flip chart.*

    - o Address expectations and how you think they will be met

`Trainer's TIP >` *Make note and spend extra time when you hit areas of expressed interest.*

Advantages of Centralized System

- First, technology in general has many advantages
    - o Lodge newsletter publishing
    - o Typewriters to word processors to Word to PDF
    - o Lodge, State Association and Grand Lodge web sites
        - ▪ Instant communication of calendars and events
        - ▪ Mass distribution of forms and publications
- Reports have always been a burden
    - o Automatic uploads mean that the "data" is already there
    - o Chairmen can "pull" reports at any time
    - o Elks Magazine address changes are automatic
    - o Automatic disaster recovery
- Down-the-road benefits that we can't even think of yet

GETTING STARTED

CLMS opens to the main "Membership" screen

All critical data right at your finger tips
- "**Contact**" information at top-left
  - "**Tabs**" allow for capturing more information on address, phone, email
- "**Membership**" dates at top-right
  - Sponsor, Critical Dates: Birth, Initiation process, Affiliation
- "**Out**" dates at bottom-left
  - Dropped, Deceased, Dimit-out, Suspended, Expelled
- "**Position**" information at bottom-right
  - Lodge Officer, Committees, Life Member, Veteran, PER, Elk of the Year, etc.
- "**Remarks**" and very bottom-left
  - Catch-all. Notes on ANYTHING you need to capture.

`Trainer's TIP >` *Good spot to collect extra "in and out" dates for members who have multiple Drop and Reinstatement dates.*

Navigation
- Click into any cell to edit
- "Tab" key between cells
- Date format is: 00 / 00 / 0000 - ALWAYS type all the digits you need
- When you make a change, the "Save" button will become available – USE IT!

`Trainer's TIP >` *Once you've changed a field, click into another field so that the change is recognized by CLMS.*

Who can I find here? - Filtered List

- Selection Filter shows "who's available"; what group is listed
  - o Make selections from button group at top-left
    - Active Elks – Current members, paid and delinquent
    - Candidates – In process of joining your Lodge
    - Delinquents – Only those Active and Delinquent in Dues
    - All Records – All Active and Inactive records, Widows, Lodge, Advertisers, Lodges…EVERY record that has been imported or entered

`Trainer's TIP >` *If you just CAN'T FIND someone, select "All Records". They may not be in the group you think they are!*

  - o Use the "drop down" list from the Selection Filter drop down
  - o Either method will display that group in the Selection Filter
- Find someone in the active group
  - o Use the Top, Previous, Next or End buttons to "scroll" through the list
    - Use the "Asc" button to sort the active group either Ascending or Descending on the data element you select. It could be Last Name, First Name, Member Number, etc.
  - o Use the "Find" button
    - Click on the "Find" button
    - Click on the box next to the criteria you want to search on
    - Enter something in the box
      - If looking for "Andersen" and you're not sure if it is "AndersOn or AndersEn", type in: Ander This will bring up more than you probably need, but the one you want will be in the list at the bottom. The more you type, the less you get.

`Trainer's TIP >` *The more you type in, the more restrictive the returned list will be. The less you type, the broader the results.*

    - Click on the "Select" button at the bottom
    - Click into the row that has the person you are looking for
    - Click on the "Open" button at the bottom and that record is displayed in the Membership screen

LODGE SETTINGS

BE SURE to review the Lodge Settings and confirm the information there. This should be the information that identifies your Lodge, its address and dues and fees. Have a copy of your Lodge ByLaws, Section X handy, as the fees entered here are in that section.

Elk Year Initial Settings

- Elk Year Begins… - This is the CURRENT Lodge year, as of April 1
- Number of Report Elks – LINE #1 from ANNUAL REPORT – stays the same all year
- Number of Life Members – Both Life and Honorary Life
- Jurisdiction District – District number from Annual Report or DDGER Visit report
- Exalted Ruler and Secretary – Current Lodge Year Officers

DUES and FEES

- From Lodge ByLaws

`Trainer's TIP >` *Does NOT include Grand Lodge, Insurance or State Dues.*

- **Next Year** - Entries ONLY necessary if there is a change in Dues
- **Optional Dues** – Can be used for ENF, Lodge charity, State fundraiser, etc., and will appear on the Dues Statement
- **Fees (all)** – all fees should come directly from Section X of your ByLaws

Grand Lodge and State Assessments – From Grand Secretary – sent to Lodge in January.

`Trainer's TIP >` *Lodge ByLaws should account for Lodge Dues PLUS Grand Per Capita, Insurance, State Per Capita and any other assessments approved by the Lodge. Changes in Grand Lodge or State assessments should NOT impact the base Lodge dues.*

- **Next Year** - Entries ONLY necessary if there is a change in assessments from year to year
- The Grand Secretary will issue a letter and notice on the Elks web page in January with final Grand Lodge dues and assessments and insurance fees

Lodge Settings

- Each field has its own purpose; some for reports, some for membership cards, etc.
- Hover mouse over each field for explanation of where the info will be used

Reinstatement Fees, Affiliation Fees, INITIATION FEES and Special Initiation Fees

- All are found in Lodge ByLaws, Section X, Dues and Fees

ENTERING A NEW MEMBER

Entering a new Member is a 2-step process. FIRST they must be a "**Candidate**", then they complete the process to become a "**Member**".

In addition to those proposed for Membership, "Candidate" includes those who are coming to your Lodge via Transfer Dimit, Certificate of Release, Absolute Dimit or Reinstatement.

All use the same process with slight variations.

TRAINER'S NOTE:
REFER NOW TO THE "QUICK TIP" SHEET ON ENTERING NEW MEMBERS.

MEMBERS OUT

Bringing Members into the Lodge is covered in the "Entering A New Member" section. *This* section discusses how to move members 'out' of the Lodge.

`Trainer's TIP >` *When dates are entered here, the are effective when you step out of that field.*

Deceased

- Enter the date the member passed away
- If informed well after they have died, be sure the date you enter is in the current Lodge year
- Once the date is entered and you go to another field, the change takes effect
- If they are married, an option to create a Widow(er) record will pop up

`Trainer's TIP >` *It the Widow(er) is a Member, you may consider not creating the Widow(er) record, or at least check the Send No Mail box once it is created*

Dropped

- These dates should all be **03/31/20xx**
- Physically drop members ON OR BEFORE **MARCH 31st**

Absolute Dimit

- Date Absolute Dimit was granted; does NOT require Lodge floor approval

Certificate of Release

- Date Certificate of Release was granted; does NOT require Lodge floor approval
- This will be a member who is INACTIVE, having been Dropped in the past

Suspended / To

- Enter dates effective and expired

`Trainer's TIP >` *ONLY for Subordinate Forum action – NOT for Home Club disciplinary action*

Transfer

- ONLY enter the APPROVED date on the portion of the APPROVED Transfer Dimit that is returned from the receiving Lodge (Lodge name in "To Join" field)
- Do NOT enter a date here when the Transfer Dimit is sent to the Receiving Lodge. There is a chance that the Transfer could be voted down. If so, the member retains their current membership status

Expelled

- Enter the date the Expulsion is final
- Be sure to send a report to the Grand Secretary as noted in the Grand Lodge Statutes

Printing Action Forms – 5505

- Form 5505 needs to be generated for most actions where a Member is leaving the Lodge. In some cases the receiving Lodge gets the form (Transfer Dimit, Certificate of Release) and in some cases the Member gets the form (Absolute Dimit).

- The form is printed from the middle-right portion of the Membership Screen
- Use the "**5505**" button.

Trainer's TIP > *You may need to select the All Records button to find the ex-Member and print the 5505. Since a date may have been entered in one of the "out" fields, they have been taken off of the Active Member list.*

- It is a good idea to print two copies of the form, especially in the case of a Transfer Dimit. The second copy should go into a suspense folder, awaiting the response with the election result from the receiving Lodge.
- A hard copy can be retained with any records kept, such as the original application, when it is moved to the Inactive file cabinet.

OOPS! I CAN'T FIX IT (THE 'BROWSE' FUNCTION)

The "Browse" function of CLMS could be called the "back door" for the data.

This is a "spreadsheet" view of the active group available on the Membership screen.

Trainer's TIP > *BE CAREFUL HERE!!! There is no "Save" button. When you change it, it IS CHANGED!*

Review Data Fields en mass
- Double-Click on a column header to sort that column from ascending or descending
  - Review "bad" dates (Paid To 2015, etc.)
  - See what "stands out" at one extreme or the other
- Move column locations left or right for easier review
  - Click on the column header and drag it left or right and release the mouse button when you have the right spot

Editing Records
- Click the "Edit" button at the bottom of the screen

Trainer's TIP > *If you know you're going to edit, go ahead and click this button first. If you sort and find the record you want to edit and then click Edit, you will have to find that record again, as it will go to the top of the data set.*

- Click into the field that needs to be change and type the changes

Trainer's TIP > *BE CAREFUL HERE!!! There is no "Save" button. When you change it, it IS CHANGED!*

FIX the Paid To dates
No matter how much you attempt to change the Ledger entries, it won't change the Paid To date.
- In BROWSE, click into the "Dues" field for the Member who's date is incorrect
- Change the date
- Once you return to the Membership screen you may have to 'step off' the record, click the **Next** button, then **Previous**, for the change to be visible

LABELS

Labels come before reports in this training because you've been piddling with CLMS for a few weeks, and IT'S TIME TO SEND OUT THE NEWSLETTER!!!

There are TWO options for Labels: "Lodge Bulletin" labels and all other "Labels"

LODGE BULLETIN
- Click on the "Lodge Bulletin" button at the top of the screen
- Select the type of label paper to use
    - 1-across for Dot Matrix printers
    - 2-across for Inkjet or Laser (wide labels)
    - 3-across for Inkjet or Laser (30 per sheet)
    - Envelopes
- Select what will appear on the label
    - Barcodes may not print on the 3-across labels
    - Carrier Route is only required if getting that US Postal Service discount
    - Member Number can be printed as well
- Select what you want the labels sorted on: Last Name, ZIP Code, etc.
    - Select Ascending (low to high) or Descending to put them in order
    - ZIP Code order is best for Postal Service sortation
    - Other sort options are available such as Last Name, City, State, etc.
- Select who you want to send to
    - Include All

`Trainer's TIP >` *If This will exclude those with the "Send No Mail" box checke*d
    - Exclude those with email addresses is just that. IF you maintain and use emails within CLMS, this is a good option.

LABELS
- Click on the "Labels" button at the top of the screen
- Select the group that you want labels for
    - Lodge Bulletin includes several groups: Members, Widows, Lodges, Protocol, Strays, etc.
    - Different groups will have different selection options
        - Dues Notices will have different payment ranges
        - Old Timers will have different member year ranges

`Trainer's TIP >` *If "Send No Mail" is checked, those records will NOT appear on the labels.*

`Trainer's TIP >` *For Widow(er)s the "Send No Mail" option can be bypassed. This is nice for invitations to the Elks Memorial Service, etc.*

REPORTS

Current reports can help keep a Lodge on track.

The Exalted Ruler, Club Management, Visitation Committee and Committee Chairs are in need of current Membership information, to include phone numbers. The Lapsation Committee, Club Management and bartender are in need of the most current Delinquent list. The Past Exalted Rulers Association needs contact information on Past Exalted Rulers. And so on, and so on….

Some "key" reports are detailed here. The "how to" applies to all reports.

Report Screen Overview

- Select the "Reports" button a the top of the screen
- Select the "Report Category"
  - GENERAL will be discussed here
- Select the report to print
  - Report sort and/or filter options will appear at the bottom-left of the screen
  - Group options will vary by report; member years for "Old Timers", Month for Birthdays, etc.
- Select the "Order"
  - Options are for ascending (top to bottom) or descending (bottom to top)
  - Choose your field to sort on; Last Name, Member Number, ZIP Code, etc.

Trainer's TIP > *Member Number order might be needed for a drawing or 'most recent' Members. Age, member years or date Initiated could be useful for special reports.*

- Select the "Report" button at the bottom of the page to preview and print or save the report
- Preview using the page forward buttons

Trainer's TIP > *These are referred to as the "VCR" buttons in CLMS Help*

- Print by selecting the printer button
- Reports can be exported to Microsoft Word, Excel, RTF format, HTML or PDF

Trainer's TIP > *Saving to a PDF format and emailing the file is a great way to delivery reports to the Exalted Ruler, Home Club Chairman, Committee Chairs, etc.*

GENERAL REPORTS

All Active Members

- Choose the field in which to sort in "Order"; Last Name, Member Number, etc.
- Choose Ascending (low to high) or Descending
- Click on "**Report**" button at bottom
- Choose to print immediately or save to another format

`Trainer's TIP >` *Saving to a PDF format and emailing the file is a great way to delivery reports to the Exalted Ruler, Home Club Chairman, Committee Chairs, etc.*

Membership/Lapsation

- This is an excellent "point in time" report of where the Lodge stands in Membership; accounting for all members brought in this year, those who have left, those awaiting Membership and those on the Delinquent list.

`Trainer's TIP >` *This should be printed monthly and used by the Exalted Ruler and Membership Committee for membership management and planning.*

Birthdays and Anniversaries

- The Lodge Bulletin editor will need this information
- Select the appropriate "**Event**"; Elk Birthday if needed for the Lodge Bulletin
- Select the "**Month**" that is needed
- Select the best output format to deliver the data in

Rapid Reports

- Rapid Reports are available for any group selected as the group viewed on the main Membership screen
- From the main Membership screen, click on the "**Rapid Reports**" button on the top-left of the screen
- If you want a title on the report, type in the "**Header**" field
- Select what filed the report is to be sorted on, and in what order
- Click the OK button to view the report
- View, save and/or print

MEMBERSHIP DUES NOTICES

Depending on the time of year, a different set of Membership Dues Notices are available. Some will be for the next dues period and some will be for those who are currently Delinquent.

- Click on the "**Reports**" button
- In the **Report Category**, select "**Membership Dues Notices**"
- The Output Format provides flexibility in how the Notices are viewed and/or saved
  - The default is Preview/Print
  - Adobe PDF is a handy way if the document is to be printed later or emailed

`Trainer's TIP >` *Other output options are still available from the "view" screen when using Preview/Print*

- Statements can be printed out in Order of Last Name, Member Number, or other fields
- Format choices are Custom Dues Statement or Grand Lodge Laser/Inkjet Form Code 591100
  - Custom allows for editing within CLMS (forms)
  - Statements can be printed and an MS Word document created with a text block that can be printed as statements are run thru the printer again

Dues Statements to be Run Between Apr 1 and Oct 1 of this Elk Year
- **6 Month Delinq – Life & Regular**
  - These Members are paid to 3/31/ of the current calendar year

`Trainer's TIP >` *Lodges that do not have 1/2-year dues will still use the 6 Month Delinq option for those who have not paid this Lodge year's dues. It will bill the Member for a full year's dues.*

- **12 Month Delinq – Life & Regular**
  - These Members are paid to 9/30/ of the PREVIOUS calendar year
  - They will be billed for the full current Lodge year as well as the last 6 months of the previous Lodge year

`Trainer's TIP >` *Lodges that do not have 1/2-year dues will not have any Members in this category*

- **Paid to October this Lodge Year – Life & Regular**
  - These Members are current it their dues, but paid 1/2-year for the current Lodge year
  - They will need to be billed in August or September, as they will be Delinquent on Oct 1

`Trainer's TIP >` *Lodges that do not have 1/2-year dues will not have any Members in this category*

Dues Statements to be Run Between Oct 1 and Apr 1 of this Elk Year
- **Six Month Delinquents**
  - These Members are paid to 9/30 of the current Lodge year (if Lodge has 1/2-year dues)
- **Twelve Month Delinquents**
  - These Members are paid to 3/31 of the current calendar year; not paid this Lodge year

First Dues Statements Run Between Jan 1 and Apr 1 of this Calendar Year

- **Regular Members Initial Dues Statements (before April 1 for Non-Delinquents)**
    - These are "regular" Members who are current in their dues
    - They will received a statement with full dues amounts

- **Life Members Initial Dues Statements (before April 1 for Non-Delinquents)**
    - These are "Life" Members who are current in their dues
    - They will receive a statement with the Life Member dues, a reduced amount as determined in the Lodge Bylaws

- **Members Six Months Delinquent (before April 1 – paid to Oct 1)**
    - These are Members who have paid 1/2-year's dues for the current Lodge year

Trainer's TIP > *Lodges that do not have 1/2-year dues will not have any Members in this category*

- **Members Twelve Months Delinquent (before April 1 – paid to Previous April)**
    - These Members have been Delinquent ALL Lodge year
    - They will be billed for the current Lodge year AND the next Lodge year
    - *THESE MEMBERS ARE SUBJECT TO BEING DROPPED MARCH 31st IF THEY DO NOT RESPOND TO THESE DUES NOTICES*

MEMBERSHIP CARDS

Preprinted membership cards can be obtained from Grand Lodge with all necessary information already on the cards. Accuracy of the cards are determined by the upkeep of the Elks Magazine list via the Secretary access to the Grand Lodge web site, or by regular updates of CLMS when this feature if fully functional.

BUT, it will only be accurate for the point in time when the request is made. Any membership changes after the cards are requested will need to be handled manually.

CLMS has options for printing various membership card types. Check the Grand Lodge code number of the membership cards that the Lodge has used to be sure it is supported by ELMS.

ANNUAL MEMBERSHIP CARD PRINTING
- Click on the "**Batch Cards**" button at the top of the screen
- In the "**Pre-Print Membership and ID Card**s" section, note the membership card code numbers
- If yours is there, select the "**Member Cards and Members with Spouse ID**" button
- Select the correct GL code number for the cards your Lodge uses
- Select the "Paid Thru" date

`Trainer's TIP >` *For annual membership cards, select April 1 of the next calendar year*

- To print all cards, start with card 00001 and it will default to the earliest member number that is not a Life Member
- If the **Last Card to print** is not the last Member added to the rolls, change it to a high number and it will default to the last member number
- Select the "Print" button at the bottom of the page
  - The only options here are to review and to print; there are no "save" options
- If you printed Regular Members first, repeat the process for Life Members

PRINT CARDS AS DUES ARE PAID
- Click on the "**Batch Cards**" button at the top of the screen
- Click on the "**Print Cards as Dues are Paid**" button
- Select the membership card code number
- Select the "**Date posted**" for the date that dues were recorded as paid
- Select the "**Paid to Date**" that will appear on the card
- Select the "Print" button at the bottom of the page
  - The only options here are to review and to print; there are no "save" options

`Trainer's TIP >` *Choosing this option requires being on top of the process as dues are paid*

NEW MEMBER CARD PRINTING

- Click on the "**Batch Cards**" button at the top of the screen
- Select the "**Print cards for a range**" button
- Select the membership card code number
- Select the "**Paid to Date**" that will appear on the card
- Select the "First Card to print" as the next new member number assigned
- Select the "Last Card to print" as the last new member number assigned
- Select the "Print" button at the bottom of the page
    - The only options here are to review and to print; there are no "save" options

Trainer's TIP > *Be careful that the total number of new members shows up in the "Total Selected" box. Until CLMS is updated, the "Send No Mail" button will have an impact on the cards that are printed.*

SINGLE MEMBER or ID CARD PRINTING

- Click on the "**Mb Card**" button in the middle-right of the Membership screen
- Select the membership card code number
- Select the "**Paid to Date**" that will appear on the card
- Select the next blank card from the template that shows where the cards will print on the sheet
- Select the "Print" button at the bottom of the page
    - The only options here are to review and to print; there are no "save" options

- For an ID card, click on the "**ID Card**" button in the middle-right of the Membership screen
- Select the membership card code number
- In the drop down box for "**ID Card For**", select who the card is for; Spouse, Widow, Daughter, etc.
- Select the "**Paid to Date**" that will appear on the card
- Select the next blank card from the template that shows where the cards will print on the sheet
- Select the "Print" button at the bottom of the page
    - The only options here are to review and to print; there are no "save" options