

Quick Guide to Charitable Reporting in CLMS

It's amazing just how much of the Lodge's Charitable work is eligible to be reported in CLMS. Below are some general instructions on the what, when, and how to report this information. You may find shortcuts of your own and it is encouraged that you share them with other Secretaries, State Chairpersons, and the Membership. Contact your State Chair or Grand Lodge Area Chair of Government Relations with questions.

CLMS2Web: Roster

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

Control Panel Add Candidate Process Candidates (1) Incoming Transfers (0) Delinquents (0) Online Submissions (0) Sync Log (0) # Online Help: Roster

CLMS: CLMS2 NamID: 1888040 Type: STAFFER Mode: EDIT Server: www/membership1 Expert: FALSE
Active Lodge: Neenah-Menasha, WI No. 676 [38711] Last annual report submitted for year: 2021

0676 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: 0676 Year: 2021 Letter: [*] 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 (1)
- Process Incoming Transfers (0)

Alerts:

- Display All Alerts (0)
- 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 in early November.
- Preview November Membership Report (Preview available starting 10/15/2021)
- 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.)

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 (12)

Membership Dues:

- Process Dues Payments


Lodge Stats:

Active Members:	76
Candidates:	1
Pending Transfers:	0
Delinquents:	12
Flagged Records:	0
Full Membership Stats	

Quick Dues Payment

Membership Number:

Go!

Update Charitable Giving Data (New) 

Last Changed Data: 04/30/2021 06:04 PM Important! Remember to periodically [review your staffer appointments](#).

Click on the "Update Charitable Giving Data" (see **green arrow**)

Charitable Giving: Neenah Menasha, WI Lodge No. 0676

Lodge Year: **2022/2023**

Please submit details of your charitable activities within seven days of the event date. Thank you!


Days Since Last Charitable Event: **-146**



Submit Final Report to Grand Lodge

Create New Charitable Event

Program Date	Program Name	Headcount		Hours	Miles	Donations					
		Participants	Elks Helpers	Elks Helpers	Elks Helpers	Non-cash	Cash				
9999 - Categories Not Covered - Lodge Meeting											
06/08/2022	Meeting	20	20	0	40	0	140	0	\$0.00	\$20.00	<input type="button" value="Edit"/>



For each new Program Type you would click on the Create New Charitable Event. (**green arrow**) Click on the drop-down arrow for Program Type (**purple arrow**) and look for the program/item you would like to enter. If the one you need isn't there, click on the very bottom for the "Categories Not Covered". See example on the next page.

To add to existing categories, click on the New button under that category. (**yellow arrow**)

Charitable Giving: Neenah Menasha, WI Lodge No. 0676

Lodge Year: **2022/2023**

Please submit details of your charitable activities within seven days of the event date. Thank you!

Days Since Last Charitable Event: **-146**

Event Date & Program Type

Event Date:

06/08/2022



(Valid dates: 4/1/2022 through 3/31/2023)

Program Type:

9999 - Categories Not Covered



Other Category Name:

Lodge Meeting



Program Name:

Meeting



Participation

Head Count:

Number of Elks:

Number of Non-Elks:

Volunteer Hours

Elk Hours:

Helper Hours:

Mileage

Elk Mileage:

Helper Mileage:

Donations

Non cash:

Cash:

Submit New Charitable Program



A new window pops up where you will enter your Program Type (**purple arrow**) Other Category Name, if applicable, (**green arrow**) and Program Name (**blue arrow**) and then continue completing the events as you would with any other program.

!! Be sure to click on the Submit New Charitable Program button (**red arrow**).

You should receive a message that is saved successfully.

Click on the Close Window button (if applicable) and you're done!

The event Chairpersons should be submitting the form to the Secretary or Charitable Report Coordinator no later than two weeks after the event end date. If it's a season long program, i.e. cookout during the summer, the

event chair can keep a running total but should be submitting a report monthly. Report submission should not go longer than one month – and NEVER cross Lodge Years.

All reports should be submitted to the Secretary or Charitable Report Coordinator by the end of March so there is time to enter and verify the information before the final report is due May 1st.

Attached:

- Partial list of reportable items

- Fillable PDF of the Charity Records page

- Poster to remind the membership about reporting

- Monthly reminder list for Lodge Chair