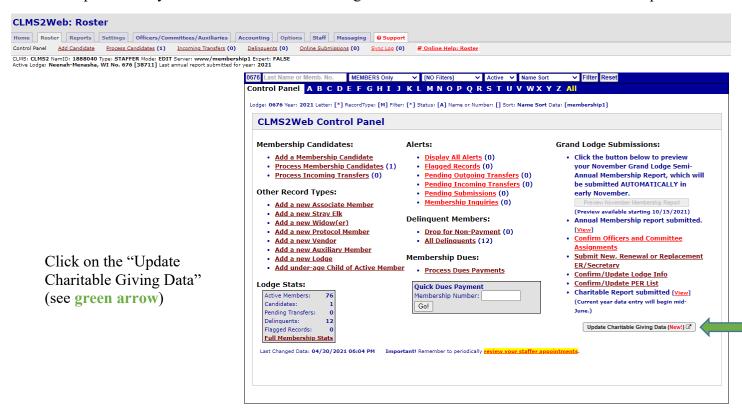
Quick Guide to Charitable Reporting in CLMS

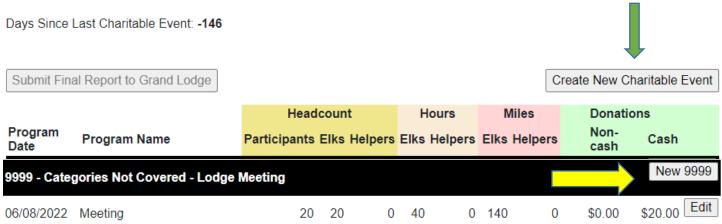
It's amazing just how much of the Lodge's Charitable work is eligible to be reported in CLMS. Below are some general instructions on the what, when, and how to report this information. You may find shortcuts of your own and it is encouraged that you share them with other Secretaries, State Chairpersons,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



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!



For each new <u>Program Type</u> 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 | t |
| 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: | |
| | |
| | |
| Aileage Elk Mileage: | |
| Lik Miledyc. | |
| Listen Milenen | |
| Helper Mileage: | |
| | |
| Donations | |
| Non cash: | |
| | |
| Cash: | |
| | |
| | |

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 putton (**red arrow**).

You should receive a message that is saved successfully.

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

Submit New Charitable Program

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 ^{7/10/22}

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