

# GRAND LODGE OF OHIO



## SECRETARY'S MANUAL

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# The Grand Lodge of Free & Accepted Masons of Ohio

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GRAND SECRETARY



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This Secretary Manual is available to the Lodge Secretary with the intention of providing the proper guidelines for any paperwork and maintaining membership records in the Grand Lodge Membership Database (MORI).

**MORI** (Masonic Online Registry Interface) was established for use in Ohio in 2008 to replace an outdated system used for reporting and tracking membership. MORI allows the Lodge Secretaries and Grand Lodge an evolving system using real-time updates. No software downloads are required or special computer needs other than an internet connection and Adobe for the ability to open the PDF document downloads. The web address is <http://mori.freemason.com>.

Each Lodge Secretary will create his own account to access his Lodge records in MORI. You will create a Login and Password, both of which are case sensitive, that will be used to access the account along with a “Key” after account creation. This “key” will be entered in according to instructions received with the “key”. This “key” is stored in your internet browser as a “cookie”. Please retain this “key”, as you may need to re-enter it as your computer cleans up or erases “cookies” periodically.

The membership information is used to track and maintain the individual Lodge Membership and, in July, the Annual Returns for each Lodge.

In August, dues cards for all Master Masons in good standing are printed as well as a listing of those members eligible for a Senior Membership Award, using the data updated continuously throughout the year.

Careful preparation and prompt maintenance of all changes in the status of membership will assure that the Lodge and the Grand Secretary’s Office will always be working with the most up-to-date and current information available on all the members in the State of Ohio.

## OBLIGATIONS OF LODGE SECRETARIES

I can think of no finer way to point out the obligations and duties of a Secretary than quoting the charge given by the Installing Officer when you were installed in the office of the Secretary. I quote as follows:

“My Brother: You are elected Secretary of this Lodge. It is your duty to observe all the proceedings of the Lodge; to make a fair record of all things proper to be written, to receive all moneys due the Lodge, and to pay them to the Treasurer, taking his receipt therefor. Your good inclinations to Masonry and this Lodge, I hope, will induce you to discharge the duties of your office with fidelity; and, by so doing, you will merit the esteem and applause of your brethren.”

In many instances we are prone to overlook the “fine print in the contracts” which we make with our fellow men. This “fine print” is copied below in quotation marks for your particular benefit and points out almost the whole duty of a Secretary with a few additions by the Grand Lodge from the Code Book of Masonic Law and deserves your special attention. The “fine print” is as follows:

“The Secretary is the fifth constitutional officer of the Lodge, and is elected annually. His duties are substantially of a business character, and are of the highest importance to the welfare and prosperity of the Lodge. Punctuality in attendance at the meetings of the Lodge is an indispensable prerequisite of the Secretary. He should be among the first in his place at its meetings, and the nature of his duties is such that he can scarcely avoid being among the last to leave the Lodge room. He is particularly charged with the duty of watching the proceedings of the Lodge, and making a complete record of all things proper to be written; to keep the financial accounts between the Lodge and its members; to receive all monies due the Lodge and pay them into the hands of the Treasurer; to prepare the Annual Reports for the Grand Lodge; to have in charge the seal of the Lodge, and to perform all other duties pertaining to the office, as may be ordered by the Master.

The qualities which should distinguish a Secretary are a quick comprehension, prompt attention to business, good penmanship, neatness in the manner of keeping his books, and sterling integrity in his financial dealings with the Lodge and its members. To be a good and proficient Secretary is worthy of the ambition of any Mason. He becomes the historian of the Lodge, and his records are the current history of the events as they transpire. The records that he prepares, being the property of the Lodge, will be conveyed to future generations, and may, in the years hereafter, when the brethren have left their labor on earth (and even the Lodge may cease to exist), remain the only monument by which their work will be remembered. Frequently, matters of the highest importance must be settled by reference to the Secretary’s book of minutes, as the only reliable evidence.”

“The Lodge which has secured for this office a brother thoroughly competent for the discharge of its duties, and who feels interested in the work, will do well to value him highly and retain him in office.”

Further, we call your attention to the real importance of a Lodge Secretary’s job. He must serve the Lodge at all times with dedication, devotion, and total commitment if he is to be effective.

The Secretary’s job is equally as important as the Worshipful Master’s, but the Secretary must always remember that he does not have the authority of the Worshipful Master.

A Secretary must be a good listener, slow to anger, and patient with every member of his Lodge. He must be willing to advise with the Worshipful Master and officers and do his best to prevent violations of the Code Book of Masonic Law at all times in his Lodge.

The violations of the Code Book of Masonic Law which have occurred in the past indicate an ignorance of the Law itself. The Worshipful Master must be encouraged to refer to the Code Book of Masonic Law when in doubt, and the Secretary must satisfactorily inform himself of the various Sections of the Code which enumerate Lodge activities and regulations so that he can help prevent embarrassment to himself and the Lodge Officers.

LET US ALL REMEMBER THAT WHETHER OR NOT WE AGREE WITH THE LAW, WRITTEN IN THE CODE, IS NOT THE IMPORTANT POINT. IF THE LAW IS BAD, LET US PROPOSE AMENDMENTS TO THE GRAND LODGE COMMUNICATION IN AN HONEST EFFORT TO CHANGE THE LAW. LET US NOT FALL INTO THE TRAP OF TRYING TO IGNORE THAT PART OF THE LAW WE DO NOT LIKE OR DISAGREE WITH.

Two Final Admonishments:

1. The Lodge elects **both** a Secretary and a Treasurer; do **not** be both. The Treasurer has his duties to perform (to receive money from the Secretary, deposit the funds of the Lodge, write checks and pay out monies at the order of the Lodge and keep a set of books to compare with the Secretary’s books), and the Secretary should not be expected to do the work of a Treasurer. These two offices are meant to be a system of checks, and balances, one against the other.
2. Do not keep your records in your head; always operate under the premise that today could be your last and leave your affairs orderly and well documented for your successor.

# MORI SCREEN AFTER LOG-IN

## Stay Informed

We've added a number of ways for secretaries to stay up to date on MORI developments, share tips with the user community, and learn more about MORI. Please take advantage of the following tools:

### Social Networking



Follow MORI on Twitter



Become a MORI fan on Facebook

### Support Forums



Subscribe to MORI Ohio Users (visit)

Email:

### Documents

MORI Users Guide

MORI Training Videos

**MORI Users Guide** is available to print or to view on screen.

**MORI Training Videos** – By clicking on this available option a new screen will open with currently 9 tutorials available to watch. These are precise and to the point with screenshots showing you exactly what they are explaining. They are not long in length and will be helpful to view. Please use the tools available to you.

## Contacting Support

Support is just a phone call or email away. If you need assistance, contact us:

Email:

[MORIsupport@vitarara.net](mailto:MORIsupport@vitarara.net)

Phone: (518) 272-4455 (M-F 9-5:30 ET)

## Latest News

### Address Changes

We've introduced changes to how MORI tracks and handles addresses.

First, we've expanded the number of address types. The full list of types are:

- Shipping - an alternate address that Grand Lodge can use to ship to officers who's regular address is a post office box.
- Correspondence - an alternate address that members can have mail sent to if they do not wish to have mail sent to their home.
- Residential - the member's home address
- Snowbird - an alternative address for members who are away from home for part of the year
- Work - the member's work place and address

When you request an address for a member, the address will be selected as follows: Shipping (if Shipping filter is used, GL only), Correspondence, Active Residence (either Residential or Snowbird). To put that another way, the Correspondence address supercedes the home address for mailings if it is filled in.

Second, going forward, MORI will keep a history of address changes for each type of address.

To edit an address, click "edit" to edit the member and then "add" or "edit" next to the address type in question.

### Member Search Changes

We've radically re-imagined the Find Member screen to give you a number of new options for finding members. Here's a list of the changes:

- pagination replaced with "infinite scroll" - When you select a large list of members, you can move through them quickly by scrolling down through the list. The next set of matches will automatically load as you scroll.
- lodge/chapter field changed to "type-ahead" - Instead of being limited to typing a number or selecting a lodge, grand lodge users can type any part of the lodge information (number or name) and MORI will suggest matches as you type.
- status and type separated - This allows more fine tuning of searches, for example only active ("good standing") entered apprentices instead of all of them
- distance search - If you click the minus(-) next to distance to turn it into a plus(+), you can specify a zip code and a radius in miles to find members within that many miles of the center point of that zipcode.



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## MORI User Screencasts

Submitted by MORI on Wed, 11/19/2008 - 15:13.

As part of Vita Rara's ongoing program to create easy to use training materials, we have created a series of screencasts for users to view. These short video programs allow users to actually see MORI in use while listening to detailed instructions on how to perform many of the common functions of MORI.

They will give you a good idea of how the MORI interface works and what you can do with it. Use them in conjunction with the MORI User Guide to get a head start on using MORI to manage your lodge's data.

We strongly recommend using the Quicktime formatted videos due to the quality and smaller file size. We do provide the Windows Media Player version for those without the Quicktime player, but it is not recommended. To get the Quicktime player go [here](#) and download it.

- [Getting Started](#)
- [The Member Screen](#)
- [The Mail Room](#)
- [Starting Your Dues in MORI](#)
- [Setup Dues and Dues Notices](#)
- [Recording Member Payments](#)
- [The Budget](#)
- [Vouchers](#)
- [Entering a Foreign Affiliate](#)

[Getting Started >](#)

» [Printer-friendly version](#)

## Contact Us

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## **GENERAL RULES AND PROCEDURES**

The Lodge Secretary must report all membership activity in MORI, the lodge membership management database. This would include current member updates (address changes, deaths, degree work, NPD's, reinstatements) and the addition of new members.

Upon completion of the last meeting of your report year (June or July), you need to notify the Grand Lodge office that all activity has been updated for the year and that you are ready for your Annual Return to be printed and mailed to you. You may do this by calling the Grand Lodge office or emailing with your name and lodge name and number to [gkozak@freemason.com](mailto:gkozak@freemason.com). Be sure to notify us prior to July 31<sup>st</sup>. If we do not hear from you by August 15<sup>th</sup>, we will run your report "as is". Please check this report and return payment of your lodge per capita to the Grand Lodge office prior to August 31<sup>st</sup> to have your lodge representative receive per diem payment for attending the Grand Lodge session in October.

Remember the accuracy of your Annual Return is dependent upon the accuracy of the information you enter.

Once Grand Lodge receives the Lodge per capita payment in full, the Membership Award Order Form and Report and the Lodge Dues Cards will be mailed to the Lodge Secretary.

## CERTIFICATE OF ELECTION

After your Lodge has the Election of Officers in November, a Certificate of Election will need to be completed. As the Lodge Secretary you are responsible for submitting the Certificate of Election. There are two different Certificates of Elections you need to complete. There is the Certificate of Election (form #52) that will be submitted to your District Deputy Grand Master indicating the Election of the Worshipful Master and the electronic version of a Certificate of Election in MORI that notifies Grand Lodge of your elected officers and updates the Lodge Officer information in your Lodge information.

In MORI, you will go to the menu across the top to Lodge, Certificate of Election and select Add at the middle of the screen. Then proceed to follow through and complete the information. When you have filled in all required information, click Add at the bottom center of the screen. It will then be sent to Grand Lodge for approval. Once approved the list of Officers in the Lodge Information in MORI will be updated with the new Officers. Be sure the Year of Installation reflects the correct year.

**Starting with the election in November 2012 the Lodge will no longer be required to submit a written Election of Officers card to Grand Lodge. Since this is the case, it is more important than ever to be sure that all of the Officers information is updated and current in MORI. This means a current address, phone number and email if available.** This will be our only means of contact information available from this point forward. This information also transfers into the content of the Masonic Directory that is printed and distributed each year.

## COMMUNICATIONS WITHIN AND WITHOUT OHIO

The by-law's of The Grand Lodge of Ohio require the Grand Secretary to conduct *all* correspondence between Lodges in Ohio and Lodges in other Grand Jurisdictions concerning candidates for degrees. Section 27.04(b).

The laws of many Grand Lodges require that all correspondence between their Lodges and other Grand Lodges be carried on through the respective Grand Secretaries regardless of the nature of the correspondence.

Therefore, in the interest of conserving wasted time, money, postage, etc. it is strongly suggested that if your Lodge has any correspondence it wishes to carry on with a Lodge in any other recognized Grand Jurisdiction that it do so through the Grand Secretary of Ohio.

Typical examples of the type of request you should make through the Grand Secretary are:

1. Investigation of a member under SNPD for possible reinstatement.
2. Locating a missing member.
3. Courtesy Work.
4. Requesting Certificates of Good Standing, dimitts, etc.
5. Request for the presentation of service awards to a member who has requested another jurisdiction present it to them.

Correspondence concerning the conducting of **funerals** is best handled directly with the Lodge or Grand Secretary in the other jurisdiction, as in this one instance, time is of the essence.

The Grand Lodge also receives requests from other Jurisdictions in regards to Certificates of Good Standing and Dimitts from our subordinate Lodges. The Grand Lodge will forward on Requests for Dimitt to the Lodge. However, the Grand Lodge will handle and process the Request for Certificates of Good Standing from other Jurisdictions. With the implementation of MORI, the Grand Lodge and subordinate Lodges operate on one system. Therefore, the Grand Lodge has the ability to lookup a member in MORI and issue that Certificate. This will save time and money on both ends. The only exception will be from December 31 to March 31 when NPD's are being entered.

## LODGE JURISDICTION

Chapter 23 of the Code of The Grand Lodge of F. and A.M. of Ohio defines the territorial jurisdiction of each Symbolic Lodge as follows: The jurisdiction of each Lodge in this state shall extend over all territory of Ohio, and all Lodges shall have concurrent jurisdiction therein. A Lodge shall not receive a petition from a person residing within the jurisdiction of another recognized Grand Lodge.

In other words your Lodge's jurisdiction stops at the Ohio border; your Lodge may consider for **degrees or affiliation** only persons **residing** in Ohio. A person residing in another jurisdiction but working in Ohio is **not** an Ohio resident and is not within your Lodge's jurisdiction.

An unaffiliated Mason (one holding a dimit) who does NOT reside in Ohio is not in your Lodge's jurisdiction (regardless of whether his former Lodge was your Lodge or another Ohio lodge.) and your Lodge cannot accept his application for affiliation unless he does reside in Ohio. (The only two exceptions to this rule are: a former member of your Lodge canceling his dimit within six months of issuance, Section 33.04-a; or a holder of a dimit who resides in a territory over which no recognized Grand Lodge exercises territorial jurisdiction, Section 33.06).

A resident of another jurisdiction may petition your Lodge if he receives a **WAIVER OF JURISDICTION** from another Grand Lodge. Such a **Waiver** may only be requested through the Ohio Grand Secretary's Office and is normally only requested if the individual is a family member of a brother in your Lodge. Even then, some jurisdictions prohibit such a waiver.

An Ohio Lodge retains perpetual jurisdiction over its candidates who have received either or both the Entered Apprentice or Fellow Craft degrees. Ohio Lodges may withdraw Entered Apprentices or Fellow Craft members in certain circumstances. A dimit will not be issued; a dimit is only for a Master Mason.

The Masonic progress of Entered Apprentice or Fellow Craft members is at the pleasure of the member's Lodge. Should his residence make it desirable and should the member's Lodge agree, courtesy work in a Lodge convenient to the member can be arranged. If said courtesy work is to be performed in another jurisdiction, the courtesy work **MUST** be arranged through the Grand Secretary's Office.

## DUES

Many Secretaries ask about the proper manner of collecting dues of (a) newly raised Master Mason candidates or (b) newly affiliated (by dimit) Master Masons.

The matter of the annual dues and the dimit fee is covered by the Uniform Code of By-Laws.

While some may say the answers to the above questions are not specifically to be found in the Uniform Code of By-Laws, I believe the intent is clear.

Article VII says “**Each** member shall pay annually, in advance, the sum of “X” dollars into the funds of the Lodge, at or before the stated meeting for the election of officers”.

Article VII makes 3 points: (a) **every** member is liable for dues. (b) the specific amount of the dues for each member ( no mention is made of pro-rating, etc.), (c) the time “dues are due,” namely **one day** in the year, the night of the annual meeting in November.

It is implied the fee of conferring the Master Mason degree (Article IV) is the amount the candidate pays to move from a Fellow Craft to a Master Mason.

It would seem unusual to raise a Master Mason in one breath and so declare him a Master Mason and then stick out your Lodge’s hand and request additional dues money. On the contrary, the Master Mason fee should be set at a value sufficient to satisfy the Lodge on the average until every member’s dues fall due in November.

Similarly, the fee for **membership** on dimit (Article IV) should be set at a value sufficient to satisfy the Lodge on the average until the following November. After all, we say the fee for **membership** on dimit is “Y” dollars; it seems strange to say to the new member “Yes, you paid the **fee**, but now you owe for your **dues**.” It is implied, I believe, that the fee for **membership** on dimit should make the person a member until the next November when everybody’s dues fall due.

No section of the Code of the By-Laws speaks of pro-rating dues; this would seem to imply pro-rating of dues was not intended. No mention was made of dues being due at any time other than the annual meeting.

## REJECTED PETITIONERS

It is the responsibility of the Lodge Secretary to **promptly** report to the Grand Secretary the following information **each time** the Lodge rejects a petitioner: (Code Section 24.03d)

- a. Petitioner's name
- b. Petitioner's address
- c. Petitioner's date of birth
- d. Date of rejection by the Lodge

The Grand Secretary's office provides a blue card (form 29) at no cost to facilitate the reporting of this information.

*NOTE:*

These cards are kept on file in the Grand Secretary's office. Lodge Secretaries and/or Lodge Investigating Committees are **expected** to make use of this file in determining if Petitioners living some distance from the Lodge have been rejected and are possibly under the jurisdiction of the rejecting Lodge.

## DISPENSATIONS

A Lodge may request the Grand Master to grant the Lodge a Dispensation (authorization) to make certain approved modifications in the usual manner of operating.

Generally speaking Dispensations are granted to a Lodge to:

- a. Meet temporarily in an undedicated building.
- b. Meet temporarily in a dedicated building.
- c. Hold a special election and/or installation to fill an unfilled elected officer's station.
- d. Receive a Lodge from another recognized jurisdiction to permit the visiting Lodge to exemplify a degree.
- e. Visit a Lodge in another recognized jurisdiction to open Lodge to confer a degree on a candidate.

Requests for Dispensation, for whatever reason, must be supported by:

1. A statement of the reason for the Dispensation. (Form No. 61).
2. A statement that all bodies affected by the Dispensation have given their approval.
3. The time and date the Dispensation is to be effective.
4. The date the Lodge voted to request the Dispensation.
5. The recommendation of the **District Deputy Grand Master along with his signature.**
6. The signature of the W. Master and Secretary of the Lodge over the Seal of the Lodge.

The Grand Secretary provides a Form 61 at no cost to facilitate Lodge Secretaries in requesting a dispensation. These forms are available at [www.freemason.com](http://www.freemason.com) – Grand Lodge Forms.

After the Lodge Secretary fills out Form 61 it needs to be sent to the District Deputy Grand Master for his recommendation; he forwards it to the Grand Secretary's office.

A Grand Master's Dispensation expires on the date indicated or when the issuing Grand Master's term of office ends. Lodges meeting in undedicated buildings must secure a new Dispensation from the succeeding Grand Master to continue the granted variance.

# Grand Lodge of Free and Accepted Masons of Ohio

\_\_\_\_\_, Grand Master

c/o Grand Secretary  
P.O. Box 629  
Worthington, Ohio 43085

M.W. Grand Master:

Please issue a dispensation to \_\_\_\_\_ Lodge No. \_\_\_\_\_  
authorizing it to (state purpose or authority sought, location and date involved):

This request was authorized by vote of the Lodge at its stated meeting held on \_\_\_\_\_,  
20\_\_ as shown by its minutes. (If not authorized by vote of the Lodge, so state, with reason for  
emergency request.)

The following Masonic groups will be **directly affected** by this dispensation and have given their assent:

attest: \_\_\_\_\_ Secretary \_\_\_\_\_ W.M.

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

\_\_\_\_\_  
City Zipcode

\_\_\_\_\_  
City Zipcode

(seal)

I \_\_\_\_\_ recommend the issuance of the above requested dispensation.  
do - do not

\_\_\_\_\_  
D.D.G.M. District

## GRAND LODGE RECORD RETENTION POLICY – SUBORDINATE LODGES

<u>SECRETARY (RECORDS IN KEEPING OF: )</u>	<u>RECOMMENDED RETENTION</u>
Charter .....	Permanent (while valid)
By-Laws and Code .....	Latest version
Grand Lodge Annual Reports .....	Permanent
Meeting minutes and attachments .....	Permanent
Cash book and Treasurer’s receipts .....	7 years and current**
IRS 990 or related reports .....	7 years and current**
Candidate petitions .....	Permanent
Candidate questions propounded (each) .....	Permanent
Computer Membership listing .....	10 years and current
Annual Return .....	10 years and current
Service Award sheet (pin list) .....	10 years and current
Registration sheets (meeting attendance) .....	1 year and current
Grand Lodge Proceedings (Annual Book) .....	Permanent
Lodge History .....	Permanent
General correspondence .....	1 year and current
Ritual register sheets .....	1 year and current
Visitors card file (if applicable) .....	1 year and current
Insurance policies .....	Current and Previous
Mailing Permit .....	Permanent (while valid)
Mailing permit renewal receipts .....	Current and previous
Dimit request letter and Form 60 .....	Permanent
Endowed Member Application, Form 90 .....	Permanent
Payroll records (if applicable) .....	7 years and current
Social Security records (if applicable) .....	7 years and current
W-2 form copies (if applicable) .....	7 years and current
Unemployment compensation records (if applicable) .....	7 years and current
Annual Inspection report .....	Permanent
Grand Lodge notices and edicts .....	Permanent
 <u>TREASURER (RECORDS IN KEEPING OF:)</u> .....	 <u>RECOMMENDED RETENTION</u>
General Ledger .....	7 years and current**
Invoices and bills .....	7 years and current**
Cancelled checks .....	7 years and current**
Check stubs .....	7 years and current**
Bank statements .....	7 years and current**
1099 Interest & Dividend statements .....	7 years and current**

\*\* unless undergoing audit, retain until completed

# RECORD RETENTION POLICY

## BUSINESS RECORDS (KEEP FOREVER)

- income tax returns
- income tax payment checks
- investment trade confirmations
- important correspondence
- legal records
- retirement and pension records
- CPA audit reports
- annual financial statements and books of account
- corporate documents (incorporation, charter, by-laws, etc.)
- stock records
- licenses, patents, and trademarks and registration packets
- documents substantiating fixed asset additions

## BUSINESS RECORDS (KEEP SIX YEARS)

- bank reconciliation and cancelled checks
- canceled payroll and dividend checks
- personnel and payroll records
- purchase records
- sales records
- travel and entertainment records
- supporting documents for tax returns
- property records / improvement receipts (if tax-related)
- sales receipts (if tax-related)
- utility records (if tax-related)
- other bills (if tax-related)
- note: consult your accountant before getting rid of any financial paperwork
- note: consult your attorney before getting rid of any legal paperwork

## BUSINESS RECORDS (KEEP THREE YEARS)

- monthly financial statements
- credit card statements (for internal use)
- employment applications (unless your profession requires longer)
- expired insurance policies
- note: consult your accountant before getting rid of any financial paperwork
- note: consult your attorney before getting rid of any legal paperwork

## PERSONAL RECORDS (KEEP FOREVER)

- income tax returns
- income tax payment checks
- investment trade confirmations
- important correspondence

- legal records
- retirement and pension records
- CPA audit reports
- note: consult your accountant before getting rid of any financial paperwork
- note: please consult your attorney before getting rid of any legal paperwork

### **PERSONAL RECORDS (KEEP SIX YEARS)**

- supporting documents for tax returns
- accident reports and claims
- medical bills (if tax-related)
- property records / improvement receipts (if tax-related)
- sales receipts (if tax-related)
- utility records (if tax-related)
- other bills (if tax-related)
- note: consult your accountant before getting rid of any financial paperwork
- note: consult your attorney before getting rid of any legal paperwork

### **PERSONAL RECORDS (KEEP THREE YEARS)**

- credit card statements
- medical bills (in case of insurance disputes)
- utility records (for internal use)
- expired insurance policies
- note: consult your accountant before getting rid of any financial paperwork
- note: consult your attorney before getting rid of any legal paperwork

### **SPECIAL CIRCUMSTANCES**

- car records (keep until the car is sold)
- credit card receipts (keep until verified on your statement)
- insurance policies (keep for the life of the policy)
- mortgages / deeds / leases (keep 6 years beyond the agreement)
- pay stubs (keep until reconciled with your W-2)
- property records / improvement receipts (keep until property sold)
- sales receipts (keep for life of the warranty)
- stock and bond records (keep for 6 years beyond selling)
- warranties and instructions (keep for the life of the product)
- other bills (keep until payment is verified on the next bill)
- note: consult your accountant before getting rid of any financial paperwork
- note: consult your attorney before getting rid of any legal paperwork

## SENIOR MEMBERSHIP AWARDS

The Grand Lodge of Ohio awards gold 50, 60, 65, 70, and 75 year membership awards to members found to be eligible in accordance with Resolution No. 11 of The Grand lodge of F. and A.M. of Ohio. Special awards for 80 and 85 years are presented by the Grand Master or a Brother representing him.

### *A CERTIFICATE ACCOMPANIES ALL AWARDS*

The Grand Lodge of Ohio awards these emblems for **continuous active, affiliated membership.** They do not merely commemorate the 50<sup>th</sup>, 60<sup>th</sup>, 65<sup>th</sup>, 70<sup>th</sup>, or 75<sup>th</sup> anniversary of a member's raising. Any time a member was not active (by virtue of being on dimit or under suspension)it is not counted towards active membership.

The Lodge Secretary may return to the Grand Lodge office, one copy of the annually issued Award Eligibility List and request the appropriate award. **This list is sent to your Lodge after Grand Lodge has received your per-capita check and is sent along with your dues cards.** There is no charge for 50, 60, 65, 70, or 75 year awards. These are made available at no cost to the Secretary for the **specific member.** These are Grand Lodge Awards and should be presented *as early after your Annual Meeting in November as possible.* See Resolution #11 of The Grand Lodge Code. Please involve your DDGM and/or District Advisor in these presentations. **There will be no awards mailed until after the Grand Lodge Communication in October.** However, please place your order by sending one copy of the printout as soon as possible after receipt of the same.

If it is necessary to present a Senior award to a member **outside of Ohio,** please double check the address listed. The Grand Lodge can mail the award directly to the member along with a letter from the Grand Master congratulating him on his service. If the member is active in a lodge in his community in another jurisdiction, and if requested, can be presented by that lodge. **PLEASE NOTE:** In 2007 we stopped sending awards to other Grand Lodges asking them to make the presentations. This change was intended to reduce the number of delayed presentations and lost pins, and make our process more sure and effective. If your eligible member has requested the presentation be made in a particular out-of-state Lodge, we will honor that request.

If the award is to be presented by **another Ohio Lodge,** arrangements should be made through the respective **Ohio Lodge Secretaries.**

If the intended recipient has passed to our Celestial Lodge Above, then please, return the pin and certificate to the Grand Secretary. **PLEASE DO NOT** present a pin to anyone other than the single individual for whom is was **originally intended.**

For example, suppose you ask us to send a 60 year pin for Brother A, but before you can present it, Brother A passes away. If a Secretary then retains the pin and later determines to go ahead and use the pin for Brother B and not order a pin for Brother B, then we have created a problem.

Why? Because by not returning Brother A's unused pin and then later not ordering a pin for Brother B, we never enter into the records that Brother B got his pin. Our records keep telling us Brother B is eligible for a pin, but he really has one (Brother A's pin). And Brother B never receives his certificate.

### **TWENTY-FIVE, THIRTY-FIVE and FORTY YEAR AWARDS**

The Grand Secretary also makes available 25, 35 and 40 year pins at a cost to those Lodges wishing to award them to members. These pins may be ordered in quantity **without** reference to the member's name and member number, as the 25, 35 and 40 year awards are made by the individual Lodge, not the Grand Lodge. The Grand Lodge prepares a print out of those eligible to receive the awards. These can be ordered at any time on the Lodge Supply Order Form.

These awards should be sent to the Brother receiving the award if he cannot be present to receive it by his primary Lodge. The volume is too great to request other Ohio Lodges, or other Grand jurisdictions to handle the presentation of such awards.

## **ENDOWED MEMBERSHIP PROGRAM**

Grand Lodge approved funds of constituent Lodges for the purpose of installment purchase of endowed memberships and application and purchase agreement to purchase endowed memberships on the installment plan.

Any member in good standing may purchase an endowed membership for the benefit of the Lodge and thereby be relieved from the further payment of dues in the endowed Lodge effective as of November of the 2<sup>nd</sup> calendar year after money is deposited with the Grand Secretary. An endowment may be purchased in honor or memory of any Master Mason or member of his family, living or deceased.

### **RULES AND REQUIREMENTS TO ESTABLISH FUNDS**

1. Any plan of a Lodge to permit a member (or other person authorized under the provisions of Code Section 29.02) to purchase Endowed Memberships on an installment basis must first be approved by the Lodge at a regular Stated Meeting, and such action by the Lodge shall be recorded in the minutes of that meeting.
2. The written agreement shall be executed in duplicate and a copy shall be placed in the files of the Lodge.
3. All monies of such fund shall be placed in an account separate and apart from the Lodge general fund, and the depository shall be a reputable financial institution whose deposits are insured and interest bearing.
4. The principal balance of such fund shall not be used for any purpose except to purchase Endowed Memberships for those who contribute to the fund.
5. An annual accounting of the fund shall be included in the audit of the Lodge funds, and the fund shall be designated as "Installment Purchase Fund for Endowed Memberships."
6. The maximum period of time allowed to accumulate the eight hundred dollar (\$800.00) purchase price of Endowed Membership shall not exceed five (5) years.
7. Any principal amount less than eight hundred dollars (\$800.00) remaining to the credit of any depositor at the end of five (5) years shall be returned to the depositor, but such depositor, his heir or legal representative may donate any such remaining balance to the Lodge at any time, and the Lodge may either leave the balance in the fund or transfer same to the Lodge general fund.
8. All interest earned from the fund shall accrue to the credit of the Lodge, and any such earned interest may be transferred to the Lodge general fund on an annual basis. No interest shall be charged the purchased by the Lodge.
9. Any purchaser who has less than Eight hundred dollars (\$800.00) in the fund may withdraw such principal balance at any time upon written notice given thirty (30) days in advance of such withdraw. Any balance in the fund not withdrawn prior to five (5) years from the date of purchase shall be transferred to the Grand Secretary to be credited to the Endowed Membership fund.

## HOW ENDOWMENTS WORK

- A. The Lodge Secretary will forward a **Lodge** check to the Grand Lodge, which manages the Endowed Membership Account.
- B. The Endowment will be entered on the member's record to reflect an Endowed Membership. The Lodge will be mailed an Endowed Membership Certificate to present to member.
- C. The Grand Secretary will deposit the check in the Endowed Membership Account. Such fund shall be invested under the supervision of the Investment Committee. The Investment Committee shall determine the distribution to the endowed Lodges, with distribution not to exceed 5% of the Endowed Membership fund balance. The annual distribution to the Lodge shall be made in November. No income shall be distributed on any endowed membership until November 1 of the 2<sup>nd</sup> calendar year after such fee is deposited with the Grand Secretary.
- D. The Lodge Secretary will bill the member one more time for payment of annual dues, if the enrollment is **prior** to July 31, while Endowed Membership funds are invested and begin to earn interest.
- E. The next year, and each year thereafter, the Secretary will send the endowed member a dues card.
- F. Endowed memberships are not transferable and remain to the benefit of the Lodge where membership is purchased; provided however, when two or more Lodges consolidate, the holder of the endowed membership *not* of the surviving Lodge may transfer the endowed membership to another Ohio Lodge with which he affiliates.

(\* The annual interest could be more or less than annual dues, but will be forever.)

**PLURAL MEMBERSHIP** (Sec 29.04)

Receive *Application for Plural Membership (Form 68)* from Brother who wishes to affiliate with your Lodge. Be sure to obtain his membership number and place in the upper right hand corner in designated area. You will need this member number to add in to your membership once elected. Upon receipt of the application and recorded into the records of the Lodge, immediately forward a *Request for Certificate of Good Standing for Plural Membership (Form 67)* to the Brother's Primary Lodge.

Upon receipt of the completed *Certificate of Good Standing* and the investigation report, you may now vote to receive this Brother as a Plural Member. A ballot must be taken and found clear. At the instant of election, the Brother becomes a Plural member without further ceremony.

Payment of the Lodge's affiliation fee, or such Lodge's current annual dues, whichever is the greater, shall be made. No further dues or fees shall be payable until the next annual meeting of the Lodge.

When a Brother wishes to discontinue his Plural Membership, it will be necessary to submit a *Notice of Withdrawal of Plural Membership (Form 69)*, which is available along with all Grand Lodge Forms on [www.freemason.com](http://www.freemason.com).

Upon electing a Brother to Plural Membership, the Lodge Secretary will report the affiliation in **MORI** as detailed below.

The member must maintain membership in his Primary Lodge to continue his Plural Membership. Upon suspension in his Primary Lodge or expulsion in any Lodge, his membership shall cease in all Lodges. A Plural Member who is suspended for non-payment of dues from a Plural Lodge may retain his membership in all other Lodges.

**MORI ENTRY** – A member is entered as a Plural Member as follows:

**Membership**

**Add Affiliate** – Enter GL Member Number, Date elected and click on "next". Name will appear and when sure this is the correct entry, click on "confirm". Sample screen shot of both appear below:

Erigone #1265 - Add Affiliation

Enter the GL Number of the member to affiliate with a lodge you represent and select that lodge

GL Number	Lodge	Date (mm/dd/yyyy)	Honorary
a031324	1265 - Erigone	4/24/2012	<input type="checkbox"/> next

Please confirm the affiliation. It will not take affect until you press 'confirm'.

GL Number	Lodge	Date (mm/dd/yyyy)	Honorary
a031324	Erigone #1265	4/24/2012	
<b>Name:</b>	ALBERT C. SMITH	<b>Status:</b>	Good Standing

**Affiliations**

Lodge	Date (mm/dd/yyyy)	Jurisdiction	Status
Kerstin #0891	03/20/1958		Dimitted
Caprera #1444	11/09/1992		Lodge Merged
Caprera #1444	08/24/2004		Master Mason

confirm

**REQUEST FOR CERTIFICATE OF GOOD STANDING FOR PLURAL MEMBERSHIP**

Date \_\_\_\_\_.

\_\_\_\_\_, Secretary

\_\_\_\_\_  
Address \_\_\_\_\_ OH.  
City \_\_\_\_\_

Brother \_\_\_\_\_, a member of \_\_\_\_\_.

Lodge No. \_\_\_\_\_, Located at \_\_\_\_\_ has presented a petition for Plural Membership.

Please certify his standing as a member and his Masonic record in order that his petition may be received by this lodge. After receipt of this certificate, and if he is elected to plural membership, I will notify your office of the date of election.

\_\_\_\_\_, Secretary

(SEAL)

\_\_\_\_\_ Lodge No. \_\_\_\_\_.

Address: \_\_\_\_\_.

City, State & Zip \_\_\_\_\_.

**CERTIFICATE OF GOOD STANDING FOR PLURAL MEMBERSHIP**

This is to certify Brother \_\_\_\_\_, a member of \_\_\_\_\_  
\_\_\_\_\_ Lodge No. \_\_\_\_\_ at \_\_\_\_\_.

Is a member in good standing, with dues paid to \_\_\_\_\_ and there are no charges pending against him.

His Masonic Record is as follows:

Birthday: \_\_\_\_\_ UMC: \_\_\_\_\_ Lodge/St: \_\_\_\_\_.  
EA: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ RES: \_\_\_\_\_ Lodge/St: \_\_\_\_\_.  
FC: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ EXP: \_\_\_\_\_ Lodge/St: \_\_\_\_\_.  
MM: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ RES: \_\_\_\_\_ Lodge/St: \_\_\_\_\_.  
NPD: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ DEM: \_\_\_\_\_ Lodge/St: \_\_\_\_\_.  
RES: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ AFF: \_\_\_\_\_ Lodge/St: \_\_\_\_\_.

*(If more space is needed please complete on reverse side)*

This certificate is not a demit and is issued only for affiliation as a plural member.

(SEAL)

\_\_\_\_\_  
Secretary

\_\_\_\_\_ Lodge No. \_\_\_\_\_.

Fee: \$ \_\_\_\_\_

Member No. \_\_\_\_\_

# Application for Plural Membership

To the Worshipful Master, Wardens and Brethren of  
Lodge No. \_\_\_\_\_

Free and Accepted Masons of Ohio

The Application of the Subscriber Respectfully Showeth:

That he is a member in good standing of \_\_\_\_\_  
Lodge, No. \_\_\_\_\_; located at \_\_\_\_\_ under the Grand Lodge of \_\_\_\_\_  
That he was initiated the \_\_\_\_\_ day of \_\_\_\_\_ A.D. \_\_\_\_\_ passed the \_\_\_\_\_ day of \_\_\_\_\_  
A.D. \_\_\_\_\_ and raised the \_\_\_\_\_ day of \_\_\_\_\_ A.D. \_\_\_\_\_, in  
Lodge No. \_\_\_\_\_ located at \_\_\_\_\_ under the Grand  
Lodge of \_\_\_\_\_

And that he is desirous of being admitted a plural member of your lodge, if found worthy.

His present residence is \_\_\_\_\_

He was born at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_ A.D. \_\_\_\_\_

His occupation is: \_\_\_\_\_ place of business \_\_\_\_\_

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ A.D. \_\_\_\_\_

RECOMMENDED BY

NAME IN FULL (No Initials) \_\_\_\_\_

Bro. \_\_\_\_\_

ADDRESS \_\_\_\_\_

Bro. \_\_\_\_\_

CITY \_\_\_\_\_ ZIP \_\_\_\_\_

Brother Grand Secretary:

This is to advise you that on \_\_\_\_\_  
date

Brother \_\_\_\_\_, a member in good standing of \_\_\_\_\_

Lodge No. \_\_\_\_\_, located at \_\_\_\_\_ under the Grand Lodge of \_\_\_\_\_

\_\_\_\_\_ was elected a plural member of \_\_\_\_\_ Lodge

No. \_\_\_\_\_, F. & A.M. of Ohio.

Lodge Secretary \_\_\_\_\_

Date \_\_\_\_\_

**APPLICATION FOR  
PLURAL MEMBERSHIP**



Bro. \_\_\_\_\_  
From \_\_\_\_\_ Lodge  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_  
Phone \_\_\_\_\_  
Received \_\_\_\_\_ A.D. \_\_\_\_\_  
Admitted \_\_\_\_\_ A.D. \_\_\_\_\_

**COMMITTEE**

Bro. \_\_\_\_\_  
Bro. \_\_\_\_\_  
Bro. \_\_\_\_\_

**REPORT OF  
INVESTIGATING  
COMMITTEE**

\* \_\_\_\_\_ Favorable \_\_\_\_\_  
\* \_\_\_\_\_ Favorable \_\_\_\_\_  
\* \_\_\_\_\_ Favorable \_\_\_\_\_

*\* If the report is Unfavorable write  
"Un" before the word Favorable.*

# Grand Lodge of Free and Accepted Masons of Ohio

## FORM 69—NOTICE OF WITHDRAWAL OF PLURAL MEMBERSHIP

Code §29.04(p)

Date: \_\_\_\_\_

To: \_\_\_\_\_, Secretary

\_\_\_\_\_ Lodge No. \_\_\_\_\_

Address  
\_\_\_\_\_

City, State

ZIP  
\_\_\_\_\_

Brother Secretary,

I, \_\_\_\_\_, a plural member in good standing in  
\_\_\_\_\_ Lodge No. \_\_\_\_\_, hereby withdraw my plural  
membership in your lodge and request that my name be stricken from the roll of the craft of  
\_\_\_\_\_ Lodge.

Fraternally yours,

Signature  
\_\_\_\_\_

Address  
\_\_\_\_\_

City, State

ZIP  
\_\_\_\_\_

Acknowledged:

\_\_\_\_\_  
Secretary

### INSTRUCTIONS

**Member:—** Sign two copies in ink and deliver both to the lodge in which you hold plural membership.

**Secretary:—** Record change in MORI and forward one copy to the Grand Secretary; retain second copy for the lodge's records.

*This instrument is not a request for a demit nor can it be used to transfer membership  
as this member holds primary membership in another lodge  
under the jurisdiction of the Grand Lodge of Ohio.*

**REDESIGNATION OF PRIMARY LODGE** (Sec 29.04p)

A member may change his designated Primary Lodge from the existing Lodge to a Lodge in which he is a Plural Member by submitting a *Redesignation of Primary Lodge (Form 70)*. This form is submitted to the Secretary of the Primary Lodge, who must sign it, and send to the Grand Secretary's Office for processing. Any member has the authority to redesignate his Primary Lodge and no vote is required by either Lodge. When this action is taken, the Lodge which had been the Primary Lodge automatically becomes the Plural Lodge.

The action in **MORI** to change Primary Membership is required to be completed at the Grand Lodge level. The Lodge Secretary cannot alter the action that drives Primary Membership, simply the description.

# Grand Lodge of Free and Accepted Masons of Ohio

## FORM 70—REDESIGNATION OF PRIMARY LODGE

Code §29.04(p)

Date: \_\_\_\_\_

To: \_\_\_\_\_, Secretary

\_\_\_\_\_  
Name of member's primary lodge

Lodge No. \_\_\_\_\_

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State ZIP

Brother Secretary,

I, \_\_\_\_\_, a member in good standing in your lodge, wish to redesignate \_\_\_\_\_ Lodge No. \_\_\_\_\_, as my **new primary lodge**. I understand that this action will automatically cause \_\_\_\_\_ Lodge to become my **new plural lodge**.

Fraternally yours,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State ZIP

Acknowledged:

\_\_\_\_\_  
Secretary

### INSTRUCTIONS

**Member:—** Sign two copies in ink and deliver both to the lodge in which you hold *primary* membership.

**Secretary:—** Record change in MORI and forward one copy to the Grand Secretary; retain second copy for the lodge's records.

*This instrument is not a request for a demit,  
nor does it terminate membership or require a vote in either lodge.*

**HONORARY MEMBERSHIP** (Sec 29.03)

A Lodge may give the distinction of *HONORARY MEMBERSHIP* upon any Master Mason not a member of such lodge. The proposal must be made at a Stated Meeting and lie over for action at a subsequent Stated Meeting. Election to Honorary Membership shall be by ballot taken in the same manner as the election of candidates to receive the degrees and shall be unanimous.

Honorary Membership confers the right to participate in all business of the Lodge without subjecting the Brother to the ordinary labors of the Lodge, or to the payment of dues, but no Honorary Member shall have the right to hold office in such lodge or to vote therein.

A Lodge may not confer the title of Honorary Past Master, as a distinction or any person.

**MORI ENTRY** -- *A member is entered as an Honorary Member in MORI by the following:*

**Membership**

**Add Affiliate** – Enter GL Member Number, Date elected and “check the box” below Honorary. Click on “next”. Name will appear and when sure this is the correct entry, click on “confirm”. Sample screen shot of both below:

Erigone #1265 - Add Affiliation

Enter the GL Number of the member to affiliate with a lodge you represent and select that lodge

<b>GL Number</b>	<b>Lodge</b>	<b>Date (mm/dd/yyyy)</b>	<b>Honorary</b>
<input type="text" value="a031324"/>	<input type="text" value="1265 - Erigone"/>	<input type="text" value="4/24/2012"/>	<input type="checkbox"/> <input type="text" value="next"/>

<b>GL Number</b>	<b>Lodge</b>	<b>Date (mm/dd/yyyy)</b>	<b>Honorary</b>
a031324	Erigone #1265	4/24/2012	yes

<b>Name:</b>	ALBERT C. SMITH	<b>Status:</b>	<input type="text" value="Good Standing"/>
--------------	-----------------	----------------	--------------------------------------------

**Affiliations**

<b>Lodge</b>	<b>Date (mm/dd/yyyy)</b>	<b>Jurisdiction</b>	<b>Status</b>
Kerstin #0891	03/20/1958		<input type="text" value="Dimitted"/>
Caprera #1444	11/09/1992		<input type="text" value="Lodge Merged"/>
Caprera #1444	08/24/2004		<input type="text" value="Master Mason"/>



## Foreign Memberships

Jurisdiction	GL Number	GL Status	Lodge	Lodge Location	Date	Lodge Status	Action
--------------	-----------	-----------	-------	----------------	------	--------------	--------

There are no foreign affiliations for this member

**Grand Lodge Information**

---

**Jurisdiction:**

**GL Number:**

**GL Status:**

**Lodge Information**

---

**Number**

**Name**

**City**

**State**

**Foreign Country**

**Lodge Status:**

**Date (mm/dd/yyyy)**

- Use the drop-down selection to choose Jurisdiction.
- GL Number is not necessary
- This is "good standing" for dual memberships

- Click on [find] and another screen will pop up. Type in the lodge number from the other jurisdiction you are seeking and select correct one. This will close this window automatically and fill in the number, name, City, State
- Lodge Status will be good standing for Dual Memberships
- Date: Put his EA date here from the other jurisdiction
- When complete, click the add button again to save the information

## Events

Type	Lodge	Date (mm/dd/yyyy)	Action
------	-------	-------------------	--------

There are no events for this member

This is where each event that is on the new Dual Member's record from the other jurisdiction should be entered. All degree dates, any suspensions, etc. will need to be entered in this area one by one. Be sure to select the event from the drop down along with the lodge and input the date. Remember to click the add button on the far right side to save that event before proceeding to the next event. A new blank will appear once you click add button on the right.

**Contact Information**

	Home	Snowbird	Work
<b>Company:</b>			
<b>Address 1:</b>			
<b>Address 2:</b>			
<b>City:</b>			
<b>State / Province:</b>	---	---	---
<b>Zip / Postal:</b>			
<b>Foreign Country:</b>	---	---	---
<b>Phone:</b>			Ext
<b>Fax:</b>			
<b>Snowbird Effective</b>	<b>From (MM/DD):</b>	<b>To (MM/DD):</b>	
<b>Email Address:</b>		<b>Cell Phone:</b>	

[submit for approval](#)

[print page](#)

After entire entry is complete, click on the “submit for approval” button. This will come through to Grand Lodge where we will verify all paperwork has been received and everything is entered in correct form.

Fee: \$ \_\_\_\_\_

Member No. \_\_\_\_\_

# Application for Dual Membership

To the Worshipful Master, Wardens and Brethren of  
Lodge No. \_\_\_\_\_

## Free and Accepted Masons of Ohio

The Application of the Subscriber Respectfully Showeth:

That he is a member in good standing of \_\_\_\_\_  
Lodge, No. \_\_\_\_\_ ; located at \_\_\_\_\_ under the Grand Lodge of \_\_\_\_\_  
That he was initiated the \_\_\_\_\_ day of \_\_\_\_\_ A.D. \_\_\_\_\_ passed the \_\_\_\_\_ day of \_\_\_\_\_  
A.D. \_\_\_\_\_ and raised the \_\_\_\_\_ day of \_\_\_\_\_ A.D. \_\_\_\_\_ , in  
Lodge No. \_\_\_\_\_ located at \_\_\_\_\_ under the Grand  
Lodge of \_\_\_\_\_

And that he is desirous of being admitted a dual member of your lodge, if found worthy.

His present residence is \_\_\_\_\_

He was born at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_ A.D. \_\_\_\_\_

His occupation is: \_\_\_\_\_ place of business \_\_\_\_\_

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ A.D. \_\_\_\_\_

### RECOMMENDED BY

Bro. \_\_\_\_\_

Bro. \_\_\_\_\_

NAME IN FULL (No Initials) \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ ZIP \_\_\_\_\_

Brother Grand Secretary:

This is to advise you that on \_\_\_\_\_  
date

Brother \_\_\_\_\_ , a member in good standing of \_\_\_\_\_

Lodge No. \_\_\_\_\_ , located at \_\_\_\_\_ under the Grand Lodge of \_\_\_\_\_

\_\_\_\_\_ was elected a dual member of \_\_\_\_\_ Lodge

No. \_\_\_\_\_ , F. & A.M. of Ohio.

Lodge Secretary \_\_\_\_\_

Date \_\_\_\_\_

**APPLICATION FOR  
DUAL MEMBERSHIP**



Bro. \_\_\_\_\_  
From \_\_\_\_\_ Lodge \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_  
Phone \_\_\_\_\_  
Received \_\_\_\_\_ A.D. \_\_\_\_\_  
Admitted \_\_\_\_\_ A.D. \_\_\_\_\_

**COMMITTEE**

Bro. \_\_\_\_\_  
Bro. \_\_\_\_\_  
Bro. \_\_\_\_\_

**REPORT OF  
INVESTIGATING  
COMMITTEE**

\* \_\_\_\_\_ Favorable \_\_\_\_\_  
\* \_\_\_\_\_ Favorable \_\_\_\_\_  
\* \_\_\_\_\_ Favorable \_\_\_\_\_

*\* If the report is Unfavorable write  
"Un" before the word Favorable.*

**REQUEST FOR CERTIFICATE OF GOOD STANDING FOR DUAL MEMBERSHIP**

DATE \_\_\_\_\_.

**Grand Secretary  
Grand Lodge of F.&A.M. of Ohio  
P.O. Box 629  
Worthington, Ohio 43085-0629**

Brother \_\_\_\_\_, a member of \_\_\_\_\_.

Lodge No. \_\_\_\_\_, located at \_\_\_\_\_, has presented a petition for dual membership.

Please obtain from the Grand Secretary of \_\_\_\_\_ certification of his standing for dual membership and his Masonic record in order that his petition may be received by this lodge. After receipt of this certificate, and if he is elected to dual membership, I will notify your office of the date of election.

(SEAL)

\_\_\_\_\_, Secretary  
\_\_\_\_\_  
Lodge No. \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State & Zip: \_\_\_\_\_

**CERTIFICATE OF GOOD STANDING FOR DUAL MEMBERSHIP**

This is to certify Brother \_\_\_\_\_, a member of \_\_\_\_\_  
\_\_\_\_\_ Lodge No. \_\_\_\_\_ at \_\_\_\_\_.

Is a member in good standing, with dues paid to \_\_\_\_\_ and there are no charges pending against him. His Masonic Record is as follows:

Birthday: \_\_\_\_\_ UMC: \_\_\_\_\_ Lodge/St: \_\_\_\_\_  
EA: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ RES: \_\_\_\_\_ Lodge/St: \_\_\_\_\_  
FC: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ EXP: \_\_\_\_\_ Lodge/St: \_\_\_\_\_  
MM: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ RES: \_\_\_\_\_ Lodge/St: \_\_\_\_\_  
NPD: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ DEM: \_\_\_\_\_ Lodge/St: \_\_\_\_\_  
RES: \_\_\_\_\_ Lodge/St: \_\_\_\_\_ AFF: \_\_\_\_\_ Lodge/St: \_\_\_\_\_

*(If more space is needed please complete on reverse side)*

This certificate is not a demit and is issued only for affiliation as a dual member.

The Grand Lodge(1) allows dual membership; (2) will notify the Grand Lodge of Ohio when one of its Masons is elected to dual membership there or his membership is terminated; (3) and will recognize the suspension or expulsion by the lodge in Ohio of a Mason holding dual membership.

(SEAL)

\_\_\_\_\_  
Grand Secretary

The above certification from the Grand Lodge of \_\_\_\_\_ having been received in this office, you are hereby authorized to accept the petition of the above named Brother for dual membership. After election, return the lower section of the **Petition for Dual Membership** to this office and report his election on your blue monthly activity report (Form 81)

(SEAL)

\_\_\_\_\_  
Grand Secretary of Ohio

## DIMIT PROCESS

A Master Mason in good standing is entitled upon proper application to a dimit certifying that he is a Master Mason in good standing. An application for dimit filed on or before the annual meeting in November shall be granted without the payment of dues for the dues year beginning on the date of the annual meeting.

At any time, as long as he is in good standing, a member may request a dimit from his lodge. This may be done himself, by submitting a request in writing to his Lodge Secretary. A dimit may also be requested on the member's behalf, by the new lodge he wishes to join. After the member has filled out the *Application for Affiliation* to the new lodge, that lodge should submit a Request for Certificate of Good Standing. Once received and the member is provisionally elected, that Lodge Secretary will submit a *Notice of Provisional Election and Request for Dimit* to the members primary lodge. This form has the signature of the Secretary requesting the dimit and the member's signature on the bottom.

When a dimit is granted by the lodge (a vote of the lodge is not necessary; it is the member's right to dimit as long as he is in good standing), the Lodge Secretary will enter the dimit event on the member's record in MORI. This will notify the Grand Lodge, who will then print the actual dimit and forward to the Secretary of the Lodge. The Secretary must then sign and deliver it to the dimitted Brother or to the Lodge requesting the dimit on behalf of the Brother.

The member's new Lodge will make sure the member signs the dimit on the indicated area and keep the dimit in the member's file. To add him to MORI for your lodge, you will go to "Membership", "Add Affiliate". Enter the member number, date elected/dimit date, and click the "add" button on the far right. His name will appear and verify you have entered the correct number and hit "confirm".

Freedonia - Add Affiliation

Enter the GL Number of the member to Affilliate and select the lodge to which they are to be affiliated.

GL Number	Lodge	Date (mm/dd/yyyy)	Honorary	
a031324 <small>find</small>	1265 - Erigone	4/27/2012	<input type="checkbox"/>	<u>next</u>

Freedonia - Add Affiliation

Please confirm the affillation. It will not take affect until you press 'confirm'.

GL Number	Lodge	Date (mm/dd/yyyy)	Honorary
a031324	Erigone #1265	4/27/2012	no
<b>Name:</b>	ALBERT C. SMITH	<b>Status:</b>	Good Standing

**Affiliations**

Lodge	Date (mm/dd/yyyy)	Jurisdiction	Status
Kerstin #0891	03/20/1958		Dimitted
Caprera #1444	11/09/1992		Lodge Merged
Caprera #1444	08/24/2004		Master Mason

confirm

**INSTRUCTIONS FOR PROCESSING AFFILIATION UNDER PROVISIONS OF  
PREFERRED DIMIT PROCEDURE, SECTION 33.02 (a)**

1. A Brother expresses interest in affiliating with your Lodge.
2. Secretary provides Brother with an “Application for Affiliation” (form 86). An “Application for Membership” (form 28) may be used by scratching the word “unaffiliated”.
3. Upon receipt of **completed** “Application for Affiliation” (form 86), (at a Stated Meeting of the Lodge), the application is referred to an Investigating Committee. Secretary prepares and mails “Request for Certificate of Good Standing” (form 84) to Brother’s current Lodge, **only if in Ohio. *If out of state, see below\*\*\****
4. After receipt of completed “Certification of Good Standing” (form 84) and upon completion of Lodge’s normal investigation procedure, a ballot is taken to elect or reject the Brother.
5. When ballot is found clear, the Brother is **provisionally** elected to membership, pending receipt of Dimit from current Lodge.
6. Secretary prepares *Notice of Election and Request for Dimit* (form 85). Be sure to have Brother fill out and sign the authorization section at the bottom of form 85. Mail to Secretary of Brother’s current Lodge, **only if in Ohio. *If out of state, see below\*\*\****
7. Current Lodge enters the dimit event in MORI. This triggers a notification to Grand Lodge, who will print the Dimit and return to the Lodge for forwarding to requesting Lodge.
8. When the requesting Lodge receives the Dimit, the affiliation needs to be entered in MORI (“membership”, “add affiliate”). The affiliation date will be the same as the date shown on the Dimit.
9. Be sure to have the Brother sign the Dimit in the space provided. The Dimit stays in the lodge files. **Note: it is not necessary to return the stub at the bottom of a Dimit. This is for Out of State Affiliations only.**

**\*\*\* Please remember, all out of state correspondence must come through the  
Grand Secretary’s office.**

# The Grand Lodge of Free and Accepted Masons of Ohio

## REQUEST FOR CERTIFICATE OF GOOD STANDING

Date: \_\_\_\_\_

To: \_\_\_\_\_, Secretary  
 \_\_\_\_\_, Lodge No. \_\_\_\_\_

\_\_\_\_\_  
 Address  
 \_\_\_\_\_  
 City, State ZIP

Brother Secretary,

Kindly be advised that Brother \_\_\_\_\_,  
 whose address is \_\_\_\_\_,  
 has submitted an application for membership in or affiliation with \_\_\_\_\_  
 \_\_\_\_\_ Lodge No. \_\_\_\_\_. Please provide us with the information requested  
 below and return to me as soon as possible. Upon election to membership, we will request a demit from  
 your lodge on the member's behalf.

\_\_\_\_\_  
 Secretary  
 \_\_\_\_\_, Lodge No. \_\_\_\_\_  
 \_\_\_\_\_  
 Lodge Name and Number  
 \_\_\_\_\_  
 Address  
 \_\_\_\_\_  
 \_\_\_\_\_  
 City, State ZIP

### CERTIFICATE OF GOOD STANDING

This is to certify that Brother \_\_\_\_\_, a member of  
 \_\_\_\_\_ Lodge No. \_\_\_\_\_, is in good standing with dues paid to  
 \_\_\_\_\_. There are no charges pending against him, and his masonic record is as  
 shown below. This certificate is not a demit and is issued for informational purposes only.

Born: _____	UMC: _____	Lodge/Jur.: _____
EA: _____	REIN: _____	Lodge/Jur.: _____
FC: _____	EXP: _____	Lodge/Jur.: _____
MM: _____	REIN: _____	Lodge/Jur.: _____
NPD: _____	DEMIT: _____	Lodge/Jur.: _____
REIN: _____	AFFIL: _____	Lodge/Jur.: _____

\_\_\_\_\_, Secretary  
 \_\_\_\_\_, Lodge No. \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**NOTICE OF PROVISIONAL ELECTION AND REQUEST FOR DEMIT**

Date: \_\_\_\_\_

To: \_\_\_\_\_, Secretary  
\_\_\_\_\_, Lodge No. \_\_\_\_\_

\_\_\_\_\_  
Address  
\_\_\_\_\_  
City, State ZIP

Brother Secretary,

Kindly be advised that Brother \_\_\_\_\_,  
member no. \_\_\_\_\_, was provisionally elected to membership in \_\_\_\_\_  
\_\_\_\_\_ Lodge No. \_\_\_\_\_, on \_\_\_\_\_.

His affiliation will become effective upon the date of issuance of a demit from your Lodge, which we kindly ask you to issue and mail to the undersigned at your earliest convenience.

Very truly yours,

\_\_\_\_\_  
Secretary

Brother Secretary,

Please issue the above-requested demit to the Secretary of \_\_\_\_\_ Lodge  
No. \_\_\_\_\_ at the address shown above.

\_\_\_\_\_  
Member's Signature

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State ZIP

## **SUSPENSIONS**

There are three types of suspensions listed below:

### **FAILURE TO COMPLETE MASTER MASON EXAMINATION (MME)**

If a member has been suspended for failure to complete his Master Mason examination, enter "MMX" under type of activity followed by the date of suspension.

### **UNMASONIC CONDUCT (UMC)**

If a member has been suspended for Unmasonic Conduct, enter "UMC" under type of activity followed by the date of suspension. (See By-Laws, Section 11.06)

### **NON-PAYMENT OF DUES (NPD)**

A member who fails to pay his dues by the last day of December of the same year, shall have Non-payment of Dues (NPD) entered against his record as of that date. More information in regards to Dues Requirements and Restorations can be found in Chapter 30 of the Code Book.

# **MORI**

Screen Shots of Member Screen

Online Manual

*Available in the Help Menu in MORI*

ANY LODGE #000—Member

**Member data**

This area is where you would edit or correct the members name, preferred name, birthdate, birthplace, occupation and spouse name and birthdate. Their degree dates are also listed here, though they are not entered in this screen.

Photos

Lodge Info

**Member Data**

**A181280 - SMITH, JOHN P.**

**First Name:**

**Middle Name:**

**Last Name:**

**Full Preferred Name:**

(include Last Name)

**Aliases:**

Edit

**Birth Date (mm/dd/yyyy):**

**Birthplace:**

**Foreign Birth Country:**

**Deceased Date:**

**Gender:**

**Occupation:**

**Spouse:**

**Spouse's Preferred Name:**

(include Last Name)

**Spouse's Birthday (mm/dd):**



**GL Number:** A181280

**Lodges:** Erigone #1265 (Good Standing)

**GL Status:**

**Lodge Status:**

**Proposed By (GL#):**

Member of same lodge

**Mentor (GL#):**

**Initiation Date:** 10/26/1992

**Passing Date:** 11/23/1992

**Raising Date:** 12/21/1992 (20 years)

**Current Degree:** Master Mason

**Lodge Member Type:**

**Options:**

**Lodge Member Type:** This is where you can individually edit a member type. This is what determines the category for which they pay dues. This would be whatever member types your Lodge has determined and may vary By Lodge. (Regular, Endowed, Reinit, etc)

If you need a replacement dues card click on this [request dues card] area and Grand Lodge will automatically receive this notification.

**Notes**

Last Edit: John (Grand Lodge) - 2/8/2006 @ 3:56:29 PM  
 null  
 HAUG EVENT: MERGE 0943 LODGE #0163 (4/28/2000)

[edit](#)  
[view history](#)

ANY LODGE #000—Member

Member data

Contact Info

Contact Info is where you would edit or correct the members address and contact information. Notice there is an Edit Button next to each: Residential, Snowbird and Work address. Click on whichever address you would like to edit. Remember it may be helpful in the future to have phone numbers and emails as additional contact sources.

Lodge info

### Contact Information **A181280 - SMITH, JOHN P.**

**Correspondence** [ add ]

**Residential** [ edit ] [ history ]

JOHN SMITH  
123 Any Street  
Any City, Freedomia  
00000-0000

**Phone:** None  
**Cell Phone:** None  
**Fax:** None  
**Other Phone:** None

**Email:** None  
**Other Email:** None

**Bad Address:** No  
**Date of last change:** 10/10/96  
**Source of last change:** Lodge

**Shipping** [ add ]

**Snowbird** [ edit ] [ history ]

JOHN SMITH

**Phone:** None  
**Cell Phone:** None  
**Fax:** None  
**Other Phone:** None

**Email:** None  
**Other Email:** None  
**Start Day:** None  
**End Day:** None

**Bad Address:** No  
**Date of last change:** None  
**Source of last change:** None

**Work** [ edit ] [ history ]

JOHN SMITH

**Phone:** None  
**Cell Phone:** None  
**Fax:** None  
**Other Phone:** None

**Email:** None  
**Other Email:** None

**Bad Address:** No  
**Date of last change:** None  
**Source of last change:** None

**Send Magazine (as allowed):**

**Prefer Email:**

ANY LODGE #000—Member

Member data

Contact Info

**Memberships**

Events

Other Info

Photos

Lodge Info

**Memberships** - This area list lodges, past and present, where the member belonged. It is divided by Domestic, within the State of Ohio, and Foreign, which would be out of State memberships. Domestic memberships are not added in this area, simply listed for reference purposes.

**Lodge Affiliation**

**A181280 - SMITH, JOHN P.**

**Domestic Affiliations**

Lodge	Level	Date	Description	Rec'd	AR Period	Type	Status
Erigone #1265	Primary	10/26/1992	Primary Lodge	10/28/1992		Master Mason	Good Standing

**Foreign Affiliations**

Jurisdiction	GL Number	GL Status	Lodge	Lodge Location	Date	Lodge Status	Action
There are no foreign affiliations for this member							

ANY LODGE #000—Member

- Member data
- Contact Info
- Memberships
- Events
- Other Info
- Photos
- Lodge Info

**Events**—This section is where any event relevant to the member is listed or added. All Degree work, Suspensions, Reinstatements, Dimits, expulsions and deaths are entered here. Select the event from the drop-down “add event” and put the date and click the [add] button on the right.

**Events** **A181280 - SMITH, JOHN P.**

**Add Event:**

Date	Event Description	Jurisdiction	Type	Rec'd	AR Period	Paperwork
10/26/1992	AFFILIATED Erigone #1265, Any Town, Freedonia	Freedonia	Affiliation	10/28/1992	0	
10/26/1992	Initiated (10/26/1992)		Lodge	10/28/1992	0	
11/23/1992	Passed (11/23/1992)		Lodge	11/25/1992	0	
12/21/1992	Raised (12/21/1992)		Lodge	12/30/1992	0	

ANY LODGE #000—Member

Member data

Contact Info

Memberships

Events

Other Info

Photos

Lodge Info

**Other Info** - This section is where you can view or add offices held, awards, education and military service.

**Other Info** **A181280 - SMITH, JOHN P.**

**Offices Held**

Office	Jurisdiction	From	To	Options
No Offices Found				

**Awards**

Award	Date	Status	Presenter	Comment	Options
No Awards Found					

**Education**

Course	Started	Completed	Source	Options
No Education Records Found				

**Military Service**

Start Date	End Date	Branch	Conflicts	Comments	Options
No Military Records Found					

ANY LODGE #000—Member

Member data

Contact Info

Memberships

Events

Other Info

Lodge Info



**Photos** - You may upload a photo from your system to this area. Once loaded, it will appear on the Member Data Screen where there is currently a silhouette.

**Photos** **A181280 - SMITH, JOHN P.**

**Add Photo**

**To upload a photo of this member, click 'browse' to the right**  
If you would like to upload a photo of this member, click the browse button at right to locate the photo on your system.

Browse...

# Masonic Online Registry Interface

## Secretary's Manual

© 2005-2006 Vita Rara, Inc.

Last Update: 6/8/2006

## **Forward**

This book is a compilation of entries in the MORI Help System that pertain to Lodge Secretarial functions. As such, there are skips in the numbering of sections where Grand Lodge Secretarial and Fundraising functions have been omitted.

As features are added to MORI, the documentation will first appear in the Help System before it appears in this manual. If you cannot find the answer you desire in this manual, please consult the Help System (found under Help in the MORI Menu.) If the help system fails to address your question, please contact Lodge Services at Grand Lodge for assistance.

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---

# 1 Membership

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## Navigation

The membership section of MORI can be reached under the "Membership" heading of the menu.

## Access

Nearly anyone logged into MORI has some level of access to this section of MORI.

## Instructions

The actual Membership screen is just an index of Membership functions

## Notes

- Functions on the Membership screen are only listed if they are accessible to the user.

---

## 1.1 Find Member

---

### Navigation

The Find Member screen can be reached by going to "Membership > Find Member" in the menu.

### Access

This feature is open to anyone logged into MORI (with some restrictions)

### Instructions

To find a member, you can look for them by any of the following cumulative options:

- Name (Last, First)
- Lodge
- Grand Lodge Number
- Status
- Excluded statuses

The system will return the first 25 matches and will provide for paging through the remaining matches.

### Summary Function

The Summary link next to each match updates the summary data at the bottom of the window.

### Edit Function

The Edit function brings you to the member's screen in a mode to edit the member. (Limited to users with Read/Write access to the record)

### View Function

The View function brings you to the member's screen in a mode to view the member.

### Label Function

The Label function will generate a single label for addressing a communication to the member. (Limited to Grand Lodge users)

### Profile Function

The Profile function will generate a report of the member's Masonic history.

## Notes

- Users from a specific lodge will have all searches limited to that lodge
- Deceased, Expelled and Suspended members are excluded by default. They will be included if you either uncheck the exclusion or deliberately select the status.
- Any part of the name will be looked for at the beginning of that part in the database (e.g., ME will match "Menard" and not match "Ames")
- Lodge and Grand Lodge numbers can be entered partially. (e.g.,Lodge #0001 can be entered as "1" or "0001") (e.g., Grand Lodge number A2345 can be entered as "A2345" or "A 2345")

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### 1.1.1 Edit / View Member

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#### Navigation

The Edit (or View) Member screen can be accessed either by clicking "edit" (or "view") on the Find Member screen, or by following a link to the member from a variety of pages.

#### Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadOnly, grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

#### Instructions

To edit a member, make your desired changes and click save. The full spectrum of the data is stored across several tabs (accessed by clicking on the name of the tab)

#### Field Descriptions:

- member data tab:
  - GL# - The member's Grand Lodge Number
  - Primary Lodge - The member's primary lodge
  - GL Status - The member's status within the Jurisdiction:
    - Inactive - A legacy record found in an invalid state during importation
    - Deceased - The member is deceased
    - Non-Affiliated - The member is not affiliated with any lodges in this Jurisdiction
    - Suspended - The member has been suspended
    - Expelled - The member has been expelled
    - Unaffiliated - The member has been unaffiliated for non-payment of dues
    - Honorary - The member's only affiliations within this Jurisdiction are Honorary
    - Widow - This is a widow
    - Entered Apprentice - This is an entered apprentice
    - Fellowcraft - This is a fellowcraft
    - Good Standing - This is a member is Good Standing
    - Subscriber - This is a subscriber record for the magazine
    - Donor - This is a donor to the fundraising. Only used if they have no other relationship to the Jurisdiction
    - Guest - This is a guest record for one of the lodges
    - <blank> - unknown
  - ESM Indicator - single letter indicator of a member's status:
    - D - deceased
    - E - expelled

- H - honorary
- I - inactive
- M - non-affiliated
- N - unaffiliated
- S - suspended
- <blank> - good standing
- Lodge Status - the member's status within the viewing lodge:
  - Lodge Suspended - The lodge has had its charter suspended
  - Lodge Forfeited - The lodge forfeited its charter
  - Lodge Merged - The lodge has merged with another lodge
  - Lodge Surrendered - The lodge has surrendered its charter
  - Lodge Under Dispensation - The lodge is under dispensation
  - Master Mason - The member is a
    - master mason
  - Fellowcraft - The person is a fellowcraft
  - Entered Apprentice - The person is an entered apprentice
  - Honorary - The member is honorary in this lodge
  - Widow - The person is a widow
  - Inactive - The person is inactive, as described above
  - Dimitted - The member has dimitted from this lodge
  - NPD - The member has been flagged for Non-Payment of Dues
  - Cleared - The member has been cleared of their NPD status
  - Dropped - The member was dropped from the roles due to Unaffiliation or Expulsion
  - Pending Restoration - The member has been restored in this lodge, but is pending restoration in another
  - Withdrawn - The person withdrew from this lodge
  - Donor - The person is a donor who's donations are associated with this lodge
  - Subscriber - The person is a subscriber to the magazine in association with this lodge
  - Guest - The person is a guest of this lodge
  - Invalid - The person/member is in an invalid state
  - Unknown - The person/member is in an unknown state
  - <blank> - Similar to unknown, above
- Options - lists of functions open to users, listed below
- Birth Date - Date of birth in MM/DD/YYYY order.
- Birthplace - City, State or City/Province of birth
- Birth Country - Country of birth
- Occupation - Their current occupation
- Age - The member's age, as of today, provided Birth Date is correct
- YGS - The member's years of good service. If 999, the member's history is somehow invalid
- Title - The member's masonic title
- DSA - A field to indicate the member has received a Distinguished Service Award
- Last Name - Usually the member's last name, but could be an organization for subscribers/donors
- First Name
- Middle Name
- Spouse - The spouse's name; first or full as needed
- Proposed By (GL#) - The member who proposed this member. Can be entered by entering the Grand Lodge number or by using the "find" function
- Mentor (GL#) - The member who is mentoring/has mentored this member. Can be entered by entering the Grand Lodge number or by using the "find" function
- Initiation Date - the date the member was initiated entered apprentice. Set while adding the member.

- Passing Date - the date the member was passed into fellowcraft. Entered through the Add Event function on the events tab
- Raising Date - the date the member was raised to master mason. Entered through the Add Event function on the events tab
- Current Degree - the member's current degree within the fraternity
- Member Type - The member's member type within the lodge (e.g., regular, life, hardship, etc)
- Notes - See the notes function below
- contact info tab:
  - Home Address - the member's address for most/all of the year
    - Address 1 - first line of the address of c/o for an organization
    - Address 2 - second line of the address
    - City - the city (required if foreign country is blank)
    - State/Province - the state or province (required if foreign country is blank)
    - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
    - Foreign Country - the country (blank for US)
    - Change Source - Whenever the address changes, a source must be cited
      - lodge - change came from the lodge
      - member - change came from the member or their family
      - post office - change came from the post office - returned mail or Address Change Service
    - Last Change - date of the last change and the source (L, M, P)
    - Phone - phone number at this address
    - Fax - fax number at this address
    - Bad Address - checkbox to indicate whether this is a bad address. If the designation came from the Address Change Service, a reason will also be displayed here
  - Snowbird Address - another address at which member summers/winters
    - Address 1 - first line of the address of c/o for an organization
    - Address 2 - second line of the address
    - City - the city (required if foreign country is blank)
    - State/Province - the state or province (required if foreign country is blank)
    - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
    - Foreign Country - the country (blank for US)
    - Change Source - Whenever the address changes, a source must be cited
      - lodge - change came from the lodge
      - member - change came from the member or their family
      - post office - change came from the post office - returned mail or Address Change Service
    - Last Change - date of the last change and the source (L, M, P)
    - Phone - phone number at this address
    - Fax - fax number at this address
    - Bad Address - checkbox to indicate whether this is a bad address. If the designation came from the Address Change Service, a reason will also be displayed here
  - Work Address - the address where the member works. (Note: the system will not produce labels for this address)
    - Company - the company where the member works
    - Address 1 - first line of the address of c/o for an organization
    - Address 2 - second line of the address
    - City - the city (required if foreign country is blank)
    - State/Province - the state or province (required if foreign country is blank)

- Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
    - Foreign Country - the country (blank for US)
    - Phone - phone number at this address
    - Fax - fax number at this address
    - Bad Address - checkbox to indicate whether this is a bad address.
  - Snowbird Effective
    - From - month/day to begin using the snowbird address as their primary address
    - To - month/day to stop using the snowbird address as their primary address
  - Send ESM (as allowed) - If all other conditions are met, send the magazine
  - Email Address - the person's email address
  - Cell Phone - the person's cell phone number
  - Privacy - if checked, limits display of the contact information in some isolate circumstances (e.g., on the Grand Lodge Roster)
- lodge affiliation tab:
  - Lodge - the number and name of a lodge to which the member is affiliated
  - Type - the type of affiliation this is:
    - Merged - the member was affiliated with a lodge that has since merged
    - Primary - the member's first affiliation or a descendant of their first affiliation
    - Secondary - other lodges to which the member has affiliated
  - Date - the date the member joined/affiliated with the lodge
  - Description - a description of the affiliation
  - Rec'd - the date the affiliation was recorded
  - AR Year - The Annual Return under which the affiliation was (or should have been) recorded
  - Status - the member's status within the lodge:
    - Lodge Suspended - The lodge has had its charter suspended
    - Lodge Forfeited - The lodge forfeited its charter
    - Lodge Merged - The lodge has merged with another lodge
    - Lodge Surrendered - The lodge has surrendered its charter
    - Lodge Under Dispensation - The lodge is under dispensation
    - Master Mason - The member is a master mason
    - Fellowcraft - The person is a fellowcraft
    - Entered Apprentice - The person is an entered apprentice
    - Honorary - The member is honorary in this lodge
    - Widow - The person is a widow
    - Inactive - The person is inactive, as described above
    - Dimitted - The member has dimitted from this lodge
    - NPD - The member has been flagged for Non-Payment of Dues
    - Cleared - The member has been cleared of their NPD status
    - Dropped - The member was dropped from the roles due to Unaffiliation or Expulsion
    - Pending Restoration - The member has been restored in this lodge, but is pending restoration in another
    - Withdrawn - The person withdrew from this lodge
    - Donor - The person is a donor who's donations are associated with this lodge
    - Subscriber - The person is a subscriber to the magazine in association with this lodge
    - Guest - The person is a guest of this lodge
    - Invalid - The person/member is in an invalid state
    - Unknown - The person/member is in an unknown state
    - <blank> - Similar to unknown, above
- events tab:
  - Add Event - a list of events that can be done with this member:
    - Died - indicate that the member has died

- Suspended - indicate that the member has been suspended
- Expelled - indicate that the member has been expelled
- Dimitted [- LODGE] - indicate that the member dimitted from the lodge
- Withdrawn [- LODGE] - indicate that the member withdrew from the lodge
- Cleared [- LODGE] - indicate that the member has been cleared by the lodge
- Unaffiliated/NPD [- LODGE] - indicate that the member has been unaffiliated/npd'd by the lodge
- Restored - indicate that the member was restored from deceased, suspended, expelled (Note: restoring a deceased person will remove the deceased event(s).)
- Restored [- LODGE] - indicate that the member was restored to good standing in the lodge
- Passed [- LODGE] - indicate that the member was passed into fellowcraft by the lodge
- Raised [- LODGE] - indicate that the member was raised to master mason by the lodge
- Date - the date the event took place (in MM/DD/YYYY format)
- Type - the type of event listed:
  - Affiliation - an affiliation inserted into the table as an event to show a complete timeline
  - Lodge - an event initiated by the lodge
  - Member - an event initiated by the member
  - Grand Lodge - an event initiated by Grand Lodge
- Date - the date the event took place
- Rec'd - the date the event was recorded
- AR Year - The Annual Return under which the event was (or should have been) recorded
- Description - a description of the event
- offices held tab:
  - Office - the office the person held and where
  - Jurisdiction - the Jurisdiction in which they held the office
  - From - the year they took office
  - To - the year they left office
  - Options - functions that can be performed on an office:
    - edit - edit the office (See the function below)
- lodge info tab:
  - Mailing Lists - the office the person held and where

### **Unlock Function**

This function is available to Grand Lodge users to make it possible to alter an Inactive record.

### **Label Function**

This function is available to Grand Lodge users and produces a single label for an attached printer

### **Profile Function**

This function produces a ready-to-print PDF of a member's profile.

### **Edit Affiliations Function**

This function is detailed on the edit affiliations page.

### **Edit Events Function**

This function is detailed on the edit events page.

### **Add Event Function**

To add an event to a member, select the event from the list on the events tab and enter the date of the event. Clicking Add or Save at that point will commit the event to the database and adjust the member appropriately.

## **Find Function**

Clicking a "find" link next to a GL Number field will launch a "Finder" window that works exactly like the find member screen. Clicking "select" on the finder screen will populate the related field with the desired GL Number.

## **Notes Function**

This function is detailed on the notes page.

## **Add Office Function**

This function is detailed on the add office page.

## **Edit Office Function**

This function is detailed on the edit office page.

## **Notes**

- Grand Lodge numbers can be entered partially. (e.g., Grand Lodge number A2345 can be entered as "A2345" or "A 2345")

---

### **1.1.1.1 Edit Affiliations**

---

#### **Navigation**

The Edit Affiliations screen can be accessed from the "lodge affiliation" tab of the Edit Member screen.

#### **Access**

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

#### **Instructions**

To edit a member's affiliations, make your desired changes and click edit.

#### **Field Descriptions:**

- Delete - yes or no, if allowed
- Description - a description of the affiliation (e.g., "Primary Lodge").
- Date - the date the member joined the lodge in MM/DD/YYYY format
- AR Year - the Annual Return on which this affiliation should appear
- Lodge (Chartered-Merged) - the lodge the person affiliated with. The entries list the name/number of the lodge, the date it was chartered and the date it merged. Lodges that are ancestors of lodges the member has an affiliation with are also listed.
- Type - one of the following
  - Primary - the lodge the member first joined in this jurisdiction or a descendant of that lodge
  - Secondary - another lodge to which the member belong(s/ed)
  - Merged - This is a lodge the member belonged to before it merged
- Honorary - indicates that this is an honorary affiliation
- Date Rec'd - the date the affiliation was recorded
- Force AR - yes or no, force the AR year on the affiliation to the date of the affiliation
- From Lodge (#,Name,Location,Jurisdiction - The number, name, location, and jurisdiction of the lodge from which the member affiliated.

## Notes

- Typical Descriptions include:
  - Primary Lodge - the member's primary affiliation
  - Merger of A, B - the affiliation was produced by the merger of lodges A and B
  - Du/Pl affil from A - secondary affiliation from lodge A
- If the lodge for an affiliation is set to an ancestor lodge (i.e., one that has merged), additional affiliations with all descendants will be created when the form is submitted
- All secondary affiliations should have a "From Lodge" although the system does not require it
- Forcing the AR year for an affiliation can cause a variance on the current annual return

---

### 1.1.1.2 Edit Events

---

#### Navigation

The Edit Events screen can be accessed from the "events" tab of the Edit Member screen.

#### Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

#### Instructions

To edit a member's events, make your desired changes and click edit.

#### Field Descriptions:

- Event Description - the last generated description for this event
- Date - the date the event occurred
- Lodge (Chartered-Merged) - the lodge the person affiliated with. The entries list the name/number of the lodge, the date it was chartered and the date it merged. Lodges that are ancestors of lodges the member has an affiliation with are also listed.
- Delete - yes or no, if allowed
- AR Year - the Annual Return on which this event should appear
- Force AR - yes or no, force the AR year on the event to the date of the event

## Notes

- Deleting events will not alter a member's status
- Deleting degree events for a member will revert the member through the degrees
- Forcing the AR year for an event can cause a variance on the current annual return
- Affiliations, in MORI, are not events so they do not appear on this screen. Consult the Edit Affiliations screen for more information

---

### 1.1.1.3 Add Office

---

#### Navigation

The Add Office Held screen can be accessed from the "offices held" tab of the Edit Member screen.

#### Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

## **Instructions**

To add an office held record, make your desired changes and click add.

### Field Descriptions:

- Office - select the office, or enter the office under 'Other' to the right
- Lodge - select the lodge, or enter the lodge under 'Other' to the right
- District - select the district, or enter the district under 'Other' to the right
- Jurisdiction - select the jurisdiction, or enter the jurisdiction under 'Other' to the right
- From (year) - the 4-digit year that they started
- To (year) - the 4-digit year that they started
- Comments - any additional notes about the office
- Remove - yes or no -- removes the record

### Notes

- If the jurisdiction is not listed, it may not be recognized by Grand Lodge and therefore the office might not be either.

---

## **1.1.1.4 Edit Office**

---

### **Navigation**

The Edit Office Held screen can be accessed from the "offices held" tab of the Edit Member screen.

### **Access**

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

### **Instructions**

To edit an office held record, make your desired changes and click edit.

### Field Descriptions:

- Office - select the office, or enter the office under 'Other' to the right
- Lodge - select the lodge, or enter the lodge under 'Other' to the right
- District - select the district, or enter the district under 'Other' to the right
- Jurisdiction - select the jurisdiction, or enter the jurisdiction under 'Other' to the right
- From (year) - the 4-digit year that they started
- To (year) - the 4-digit year that they started
- Comments - any additional notes about the office
- Remove - yes or no -- removes the record

### Notes

- If the jurisdiction is not listed, it may not be recognized by Grand Lodge and therefore the office might not be either.

---

## **1.2 Add Member**

---

## Navigation

The Add Member screen can be accessed by selecting "Membership > Add Member" from the menu.

## Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

## Instructions

To add a member, enter the information into the form and click 'next'. If the form reloads without error, click 'confirm' to complete the form.

## Field Descriptions:

- First Name - the member's first name
- Middle Name - the member's middle name
- Last Name - the member's last name
- Spouse - the first or full name of the spouse
- Lodge - the lodge to which the member is being added
- Birth Date - the member's date of birth in MM/DD/YYYY format
- Birth Place - the member's city/state of birth
- Occupation - the member's occupation
- Proposed By (GL#) - the GL Number of the member who proposed the member being added. This can be found using the Find Function detailed below.
- Special Status
  - None - This is a normal member
  - Guest - This person is being entered as a guest of the lodge to be included in mailings and such
  - Subscription Only - This person is being entered to receive the magazine
  - Widow - This is a widow of a member
- Degrees
  - Initiated - The date the member was initiated in MM/DD/YYYY format
  - Passed - The date the member was passed into fellowcraft in MM/DD/YYYY format
  - Raised - The date the member was raised to Master Mason in MM/DD/YYYY format
- contact information
  - Home Address - the member's address for most/all of the year
    - Address 1 - first line of the address of c/o for an organization
    - Address 2 - second line of the address
    - City - the city (required if foreign country is blank)
    - State/Province - the state or province (required if foreign country is blank)
    - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
    - Foreign Country - the country (blank for US)
    - Phone - phone number at this address
    - Fax - fax number at this address
  - Snowbird Address - another address at which member summers/winters
    - Address 1 - first line of the address of c/o for an organization
    - Address 2 - second line of the address
    - City - the city (required if foreign country is blank)
    - State/Province - the state or province (required if foreign country is blank)
    - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
    - Foreign Country - the country (blank for US)
    - Phone - phone number at this address

- Fax - fax number at this address
- Work Address - the address where the member works. (Note: the system will not produce labels for this address)
  - Company - the company where the member works
  - Address 1 - first line of the address of c/o for an organization
  - Address 2 - second line of the address
  - City - the city (required if foreign country is blank)
  - State/Province - the state or province (required if foreign country is blank)
  - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
  - Foreign Country - the country (blank for US)
  - Phone - phone number at this address
  - Fax - fax number at this address
- Snowbird Effective
  - From - month/day to begin using the snowbird address as their primary address
  - To - month/day to stop using the snowbird address as their primary address
- Email Address - the person's email address
- Cell Phone - the person's cell phone number
- Privacy - if checked, limits display of the contact information in some isolate circumstances (e.g., on the Grand Lodge Roster)

### Find Function

Clicking a "find" link next to a GL Number field will launch a "Finder" window that works exactly like the find member screen. Clicking "select" on the finder screen will populate the related field with the desired GL Number.

### Notes

- A member is only added when they are completely new. A member from another lodge affiliating with a lodge should be entered through either the Add Affiliation or the Add Foreign Affiliation screen
- degrees are only required if the person being added is a member

---

## 1.3 Add Affiliation

---

### Navigation

The Add Affiliation screen can be accessed by selecting "Membership > Add Affiliation" from the menu.

### Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

### Instructions

To affiliate a member of a lodge in this jurisdiction with another lodge in this jurisdiction, enter the information on this form and click 'next'. If you are then permitted, click 'confirm'.

### Field Descriptions:

- GL# - the Grand Lodge Number of the member affiliating. This can either be typed or selected through the Find Function detailed below.
- Lodge - the Lodge with which the member is affiliating

- Date - the date of the affiliation in MM/DD/YYYY format
- Honorary - indicates that this is an Honorary affiliation
- Name - the member's name
- Status:
  - Inactive - this is a member from the inactive database
  - Deceased - this member is deceased
  - Non-Affiliated - the member is not an active member of any lodge in this jurisdiction
  - Suspended - the member is suspended
  - Expelled - the member is expelled
  - Unaffiliated - the member is unaffiliated
  - Honorary - the member is honorary in every lodge to which they are affiliated in this jurisdiction
  - Widow - this person is a widow
  - Entered Apprentice - this person is an Entered Apprentice
  - Fellowcraft - this person is a Fellowcraft
  - Good Standing - this person is in Good Standing
  - Subscriber - this person is a subscriber to the magazine
  - Donor - this person is a donor
  - Guest - this person is a guest
- Affiliations - a list of lodges to which they are affiliated already:
  - Lodge - the number of the lodge.
  - Name - the name of the lodge
  - Date - the date they affiliated with the lodge
  - Jurisdiction - the jurisdiction the lodge is in
  - Status:
    - Lodge Suspended - The lodge has had its charter suspended
    - Lodge Forfeited - The lodge forfeited its charter
    - Lodge Merged - The lodge has merged with another lodge
    - Lodge Surrendered - The lodge has surrendered its charter
    - Lodge Under Dispensation - The lodge is under dispensation
    - Master Mason - The member is a master mason
    - Fellowcraft - The person is a fellowcraft
    - Entered Apprentice - The person is an entered apprentice
    - Honorary - The member is honorary in this lodge
    - Widow - The person is a widow
    - Inactive - The person is inactive, as described above
    - Dimitted - The member has dimitted from this lodge
    - NPD - The member has been flagged for Non-Payment of Dues
    - Cleared - The member has been cleared of their NPD status
    - Dropped - The member was dropped from the roles due to Unaffiliation or Expulsion
    - Pending Restoration - The member has been restored in this lodge, but is pending restoration in another
    - Withdrawn - The person withdrew from this lodge
    - Donor - The person is a donor who's donations are associated with this lodge
    - Subscriber - The person is a subscriber to the magazine in association with this lodge
    - Guest - The person is a guest of this lodge
    - Invalid - The person/member is in an invalid state
    - Unknown - The person/member is in an unknown state
    - <blank> - Similar to unknown, above

## Find Function

Clicking a "find" link next to a GL# field will launch a "Finder" window that works exactly like the find member screen. Clicking "select" on the finder screen will populate the related field with the desired GL Number. This feature is only available to Grand Lodge users and the Finder will only allow lodge users to search within their lodge.

## Notes

- If an attempt is made to affiliate a person who is not eligible, no "confirm" button will be present after hitting next.
- After hitting next, no changes can be made on the form. If something is wrong, please begin again

---

## 1.4 Add Foreign Affiliation

---

### Navigation

The Add Foreign Affiliation screen can be accessed by selecting "Membership > Add Foreign Affiliation" from the menu.

### Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

### Instructions

To affiliate a member from another jurisdiction, enter the information and click 'next'. If the form reloads without error, click 'confirm' to complete the form.

### Field Descriptions:

- First Name - the member's first name
- Middle Name - the member's middle name
- Last Name - the member's last name
- Spouse - the first or full name of the spouse
- Lodge - the lodge to which the member is being added
- Birth Date - the member's date of birth in MM/DD/YYYY format
- Birth Place - the member's city/state of birth
- Occupation - the member's occupation
- Proposed By (GL#) - the GL Number of the member who proposed the member being added. This can be found using the Find Function detailed below.
- Special Status
  - None - This is a normal member
  - Honorary - This is an honorary affiliation
- Degrees
  - Initiated - The date the member was initiated in MM/DD/YYYY format
  - Passed - The date the member was passed into fellowcraft in MM/DD/YYYY format
  - Raised - The date the member was raised to Master Mason in MM/DD/YYYY format
  - Lodge - The number of the lodge that either granted the degree or they are affiliating from
  - Lodge Name - The name of the lodge
  - Location - The city where the lodge is located
  - Jurisdiction - The Jurisdiction the lodge is in
- contact information
  - Home Address - the member's address for most/all of the year

- Address 1 - first line of the address of c/o for an organization
- Address 2 - second line of the address
- City - the city (required if foreign country is blank)
- State/Province - the state or province (required if foreign country is blank)
- Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
- Foreign Country - the country (blank for US)
- Phone - phone number at this address
- Fax - fax number at this address
- Snowbird Address - another address at which member summers/winters
  - Address 1 - first line of the address of c/o for an organization
  - Address 2 - second line of the address
  - City - the city (required if foreign country is blank)
  - State/Province - the state or province (required if foreign country is blank)
  - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
  - Foreign Country - the country (blank for US)
  - Phone - phone number at this address
  - Fax - fax number at this address
- Work Address - the address where the member works. (Note: the system will not produce labels for this address)
  - Company - the company where the member works
  - Address 1 - first line of the address of c/o for an organization
  - Address 2 - second line of the address
  - City - the city (required if foreign country is blank)
  - State/Province - the state or province (required if foreign country is blank)
  - Zip/Postal Code - The zip or postal code (must be ##### or #####-#### if foreign country is blank)
  - Foreign Country - the country (blank for US)
  - Phone - phone number at this address
  - Fax - fax number at this address
- Snowbird Effective
  - From - month/day to begin using the snowbird address as their primary address
  - To - month/day to stop using the snowbird address as their primary address
- Email Address - the person's email address
- Cell Phone - the person's cell phone number
- Privacy - if checked, limits display of the contact information in some isolate circumstances (e.g., on the Grand Lodge Roster)

## Notes

- If someone is affiliating from a Jurisdiction not in the list, it is possible that the Jurisdiction is not recognized. Contact Grand Lodge for assistance.

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## 1.5 Lodge Roster

---

### Navigation

The Lodge Roster report can be accessed by selecting "Membership > Roster" from the menu.

## Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

## Instructions

Selecting this menu item produces the roster report.

## Notes

\* The produced roster is up to the minute and contains the people who've gone inactive in the last year.

---

## 1.6 Pending Foreign Affiliations

---

### Navigation

The Pending Foreign Affiliations screen can be accessed by selecting "Membership > Pending Foreign Affiliations" from the menu.

### Access

This feature is open to anyone logged into MORI in any of the following roles: grandLodgeReadOnly, grandLodgeReadWrite, lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen is used to manage the queue of pending affiliations. The queue is broken down into five sections: New, Pending, Approved, Elected and Denied. These are each detailed separately after the list of fields they have in common:

#### Field Descriptions:

- Name - the name of the potential new affiliate
- Lodge - the lodge with which they are affiliating
- Date / Date Elected - the date they are affiliating
- User - The user that added the pending affiliation
- Status As Of - The date the pending affiliation was added to this part of the queue.
- Options - broken down by list:
  - New - pending affiliations that have not been acted upon:
    - pending - moves the member to pending list
    - profile - generates a PDF of the pending affiliation profile
    - notes - access the Notes about this affiliation
    - edit - link to the Edit Pending Affiliation screen
  - Pending - pending affiliations that are being pursued with other jurisdictions:
    - profile - generates a PDF of the pending affiliation profile
    - notes - access the Notes about this affiliation
    - edit - link to the Edit Pending Affiliation screen
  - Approved - pending affiliations that have been approved:
    - profile - generates a PDF of the pending affiliation profile
    - notes - access the Notes about this affiliation
    - delete - remove the affiliation from the list. Can only be done by the lodge.
  - Elected – the lodge has elected the person to be a member
    - profile - generates a PDF of the pending affiliation profile
    - notes - access the Notes about this affiliation
    - delete - remove the affiliation from the list. Can only be done by grand lodge.

- Denied - pending affiliations that have been denied:
  - notes - access the Notes about this affiliation
  - delete - remove the affiliation from the list. Can only be done by the lodge.
  - reason - the reason for the denial is displayed under the affiliation

### **Editing Pending Affiliations**

Editing pending affiliations is nearly identical to the Add Foreign Affiliation screen. The following changes are the only differences:

- "confirm" marks the pending affiliation approved
- "deny" marks the pending affiliation denied
- Reason allows for the documenting of a reason for the denial

### **Elect Function**

Allows the lodge to enter the date the member was elected to join the lodge. The date must be on or after the day that the pending affiliation was approved.

### **Notes**

- None

---

## **2 Lodge**

---

### **Navigation**

The lodge section of MORI can be reached under the "Lodge" heading of the menu.

### **Access**

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### **Instructions**

The actual Lodge screen is just an index of the Lodge functions

### **Notes**

- Functions on the Lodge screen are only listed if they are accessible to the user.

---

## **2.1 Member Types**

---

### **Navigation**

The Member Types screen can be accessed by selecting "Lodge > Member Types" from the menu.

### **Access**

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### **Instructions**

This screen is used to manage the member types for a lodge. The top form lists the current member types and the second form allows for adding to the list. When updating the list, make the desired changes and click 'update'. When adding a member type, make the desired changes and click 'add'.

## Field Descriptions:

- Member Types Form:
  - Member Type - the label given for this member type
  - Total Annual Dues - the total dues members of this type must pay (this should include any per capita to Grand Lodge)
  - Rename Type - a new label for this member type
  - Change Dues - a new amount for the dues
  - Delete - if no members have this member type, it can be deleted
- Add Member Type Form:
  - New Member Type - the label for the type being added
  - Total Annual Dues - the total dues members of this type will have to pay

## Notes

- changing the dues for a member type will not adjust the dues retroactively

---

## 2.2 Dues Notices

---

### Navigation

The Dues Notices screen can be accessed by selecting "Lodge > Dues Notices" from the menu.

### Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen is used to author the dues notices to be mailed to members. As you make changes, they will appear in the preview section of the form. Changes will not be permanent until you click 'save'.

## Field Descriptions:

- Dues Payable Date - this should be the complete phrase as to when payment is due (e.g., Payable upon receipt)
- Description - this provides three lines for entry of a description, comments, or anything
- Instructions - this provides two lines for instructions at the bottom of the notice (e.g., Make check payable to ...)

## Notes

- The three lines of description can be used to request optional contributions.
- Clicking 'print' saves the form before proceeding to the Print Dues Notices screen.

---

### 2.2.1 Print Dues Notices

---

#### Navigation

The Print Dues Notices screen can be accessed by clicking "print" on the Dues Notices screen

#### Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

## Instructions

This form is used to generate a PDF of Dues Notices for printing. What notices go into the PDF can be parameterized based on form input. Clicking 'preview notices' will generate the PDF of the notices. Clicking 'preview labels' will generate a PDF of the labels for the recipients of the notices.

### Field Descriptions:

- Options:
  - Member Type - limit the PDF to one member type or include all
  - Sort By - sort by either their last name or their zip code
  - Number Per Page - Generate notices either three per page or one per page

### Notes

- The labels produced through this function are 3 x 10 (30 labels per page).

---

## 2.3 Arrears Notices

---

### Navigation

The Arrears Notices screen can be accessed by selecting "Lodge > Arrears Notices" from the menu.

### Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen is used to author the arrears notices to be mailed to members. As you make changes, they will appear in the preview section of the form. Changes will not be permanent until you click 'save'.

### Field Descriptions:

- Arrears Payable Date - this should be the complete phrase as to when payment is due (e.g., Payable upon receipt)
- Description - this provides three lines for entry of a description, comments, or anything
- Instructions - this provides two lines for instructions at the bottom of the notice (e.g., Make check payable to ...)

### Notes

- The three lines of description can be used to request optional contributions.
- Clicking 'print' saves the form before proceeding to the Print Arrears Notices screen.

---

### 2.3.1 Print Arrears Notices

---

#### Navigation

The Print Arrears Notices screen can be accessed by clicking "print" on the Arrears Notices screen

#### Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

## Instructions

This form is used to generate a PDF of Arrears Notices for printing. What notices go into the PDF can be parameterized based on form input. Clicking 'preview notices' will generate the PDF of the notices. Clicking 'preview labels' will generate a PDF of the labels for the recipients of the notices.

Field Descriptions:

- Options:
  - Member Type - limit the PDF to one member type or include all
  - Sort By - sort by either their last name or their zip code
  - Number Per Page - Generate notices either three per page or one per page

## Notes

- The labels produced through this function are 3 x 10 (30 labels per page).

---

## 2.4 Lodge Summons

---

### Navigation

The Lodge Summons screen can be accessed by selecting "Lodge > Lodge Summons" from the menu.

### Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen is used to author lodge summonses. As you make changes, they will appear in the preview section of the form. Changes will not be permanent until you click 'save'. If you want to print a summons, click 'print'.

Field Descriptions:

- Summons Type:
  - Annual Meeting - includes standard copy for an annual summons
  - Other Meeting - includes standard copy for any other summoned communication
- First Paragraph (Annual) - paragraph to be included if this is an annual summons
- First Paragraph (Other) - paragraph to be included if this is an other summons
- Meeting Location - where the meeting will be held
- Meeting Date - date of the meeting
- Meeting Time - time of the meeting
- Meeting purpose - the purpose of the meeting
- Additional Text - any additional comments to go in as a last paragraph

## Notes

- Clicking 'print' will also save changes made to the form before generating the PDF

---

## 2.5 Annual Report

---

### Navigation

The Annual Report screen can be accessed by selecting "Lodge > Annual Report" from the menu.

### **Access**

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### **Instructions**

This screen is used to generate the Annual Secretary's Report for a given year. To print the report, enter the year and click 'print'.

### **Notes**

- The system will generate incomplete reports for future years.

---

## **2.6 Subordinate Roles**

---

### **Navigation**

The Subordinate Roles screen can be accessed by selecting "Lodge > Subordinate Roles" from the menu.

### **Access**

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary

### **Instructions**

This screen is used to manage Lodge Subordinate Roles (e.g., assistant secretaries). The list of subordinate roles will always contain one more than is defined to accomodate adding roles. Click 'update' when you are finished.

### **Field Descriptions:**

- GLNumber - the Grand Lodge number of a member of the lodge who will act in this role. This can be found using the Find Function detailed below.
- Name - the name of the selected member
- Role - the role the member will act in
- Remove - yes to remove the member-role assignment or no to leave it

### **Find Function**

Clicking a "find" link next to a GL Number field will launch a "Finder" window that works exactly like the find member screen. Clicking "select" on the finder screen will populate the related field with the desired GL Number.

### **Notes**

- none

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## **2.7 Certificates Of Election**

---

### **Navigation**

LODGE USERS: The Certificates Of Election screen can be accessed by selecting "Lodge > Certificates Of Election" from the menu.

GRAND LODGE USERS: The Certificates Of Election screen can be accessed by selecting "Lodges > Certificates Of Election" from the menu. This functionality is also available from the History Tab on a lodge's screen

## Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, grandLodgeReadWrite, grandLodgeReadOnly

## Instructions

**LODGE USERS:** This screen lists the Certificates Of Election for your lodge. To add the most recent Certificate Of Election, click "add". To add a historical Certificate Of Election, click "add historical". To access an individual Certificate, click 'view'.

**GRAND LODGE USERS:** This screen lists Certificates Of Election for all lodge where the certificate needs to be either approved or rejected. To add the most recent Certificate Of Election, click "add". To add a historical Certificate Of Election, click "add historical". To access an individual Certificate, click 'view'.

## Field Descriptions:

- Lodge - the name and number of the lodge
- Year - The year the election took place
- Date - The date the election took place
- Status - The status of the Certificate
  - new - a new Certificate
  - new historical - a new Historical Certificate
  - approved - an approved certificate
  - rejected - a rejected certificate
- Options - Functions to act on the Certificate
  - view - takes you to the completed Certificate Of Election Form.

## add button

Clicking the add button will bring you to the Certificate Of Election Form. The submitted certificate will be "new." If it is approved, it will change the active officers for the lodge

## add historical button

Clicking the add historical button will bring you to the Certificate Of Election Form. The submitted certificate will be "new historical." If it is approved, it will not change the active officers for the lodge

## Notes

- none

---

## 2.7.1 Certificate Of Election

---

### Navigation

This screen is reached by clicking 'view', 'add', or 'add historical' on the Certificates Of Election screen.

### Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, grandLodgeReadWrite, grandLodgeReadOnly

### Instructions

This screen details a certificate of election. If you are entering a new certificate of election, fill in the appropriate fields and click 'submit'.

### **Field Descriptions:**

- Lodge - the lodge in question. For historical certificates, ancestor lodges may be selected.
- Date - The date the election took place in MM/DD/YYYY format.
- Year - The year the election took place in YYYY format.
- Officers - These people must be members of the lodge (except the Tiler) and be a Master Mason in Good Standing. Each officers must be a different person.
  - Master - The GL Number of the new Master.
  - Senior Warden - The GL Number of the new Senior Warden.
  - Junior Warden - The GL Number of the new Junior Warden.
  - Treasurer - The GL Number of the new Treasurer.
  - Secretary - The GL Number of the new Secretary.
  - Senior Deacon - The GL Number of the new Senior Deacon.
  - Junior Deacon - The GL Number of the new Junior Deacon.
  - Tiler - The GL Number of the new Tiler.
  - Trustee(s) - The GL Number and years of service (in YYYY format) -- three are required

### **submit button**

Clicking the submit button will queue the Certificate for Approval or Rejection by Grand Lodge.

### **approve button**

Clicking the approve button will make the Certificate approved. If the certificate is new (as opposed to historical) the lodge will be updated accordingly.

### **reject button**

Clicking the reject button will make the Certificate rejected.

### **delete button**

Rejected Certificates can be deleted. Approved Certificates can not be deleted.

### **Notes**

- none

---

## **5 Financial**

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### **Navigation**

The Financial section of MORI can be reached under the "Financial" heading of the menu.

### **Access**

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### **Instructions**

The actual Financial screen is just an index of the Financial functions.

### **Notes**

- Functions on the Financial screen are only listed if they are accessible to the user.

---

## 5.1 Setup Dues

---

### Navigation

The Setup Dues screen can be accessed by selecting "Financial > Setup Dues" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary

### Instructions

If you are ready to setup dues, the screen will display the form to do so. When you're done filling out the form, click 'setup'.

Field Descriptions:

- Year - the year for which the dues will be collected. This will accept either the current year or next year only.

### Notes

- This screen depends on the Lodge having defined Member Types and that all active members have member types.
- When this function is used, it creates dues for the specified year using the current rates specified for the Member Types.
- If the same year is entered twice, a dues liability will be created for members who have already paid their dues for that year.
- When this process runs, all outstanding dues for years before the year entered will be rolled to arrears.

---

## 5.2 Edit Arrears / Dues

---

### Navigation

The Edit Arrears and Dues screen can be accessed by selecting "Financial > Edit Arrears / Dues" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary

### Instructions

To use this screen, begin by selecting a member of the lodge from the list at the top of the screen. Members are broken down into "active", "inactive" and "non-master-mason" and listed alphabetically in that order.

Once a member is selected, you can edit their arrears and dues by year. There will always be one extra blank row of each kind to facilitate adding values. To remove an entry, erase its values. Click 'update' when you are done.

Field Descriptions:

- Member - the member in question

- Arrears - the member's arrears:
- Amount - the amount they owe
- Year - the year for which the arrears are owed
- Dues - the member's dues:
  - Amount - the amount they owe
  - Year - the year for which the dues are owed

## Notes

- A negative amount for dues gives a credit toward the next payment.
- The arrears and dues displayed on this screen are the amounts the member currently owes.

---

## 5.3 Initialize Dues

---

### Navigation

The Initialize Dues screen can be accessed by selecting "Financial > Initialize Dues" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen allows you to set the member types and the total arrears and dues for all the members of your lodge. This screen is most handy when migrating to MORI from another application as it puts most of your dues management data entry into one place.

### Field Descriptions:

- Active Members - these are members presently in good standing:
  - Member - the member in question
  - Member Type - the type of member the member is in the lodge (e.g., regular)
  - Total Arrears - the member's total outstanding arrears
  - Total Dues - the member's total outstanding dues
- Inactive Members - these are members not in good standing:
  - Member - the member in question
  - Member Type - the type of member the member is in the lodge (e.g., regular)
  - Total Arrears - the member's total outstanding arrears
  - Total Dues - the member's total outstanding dues

## Notes

- Dues entered on this screen will be dated for the current year.
- Arrears entered on this screen will be dated for the previous year.
- In relation to the Setup Dues screen, you only need to set the member type for the active members to proceed.
- Once a value is set on this screen, it cannot be changed. Member Types can be set on the Edit Member screen. Dues and Arrears can be set on the Edit Arrears and Dues screen

---

## 5.4 List Paid / Unpaid

---

## **Navigation**

The List Paid and Unpaid screen can be accessed by selecting "Financial > List Paid / Unpaid" from the menu.

## **Access**

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

## **Instructions**

This screen collects reporting options for detailing the Dues and Arrears payments for a lodge's members.

## **Payments Made**

This lists the payments made by users. It will list all the payments or just those made since a specified year (inclusive). This will produce a PDF report.

## **Dues and Arrears Owed**

This builds a combined list of all the Dues and Arrears payments owed by either active members or all members. This will produce a PDF report.

## **Dues Owed**

This builds a combined list of all the Dues payments owed by either active members or all members. This will produce a PDF report.

## **Arrears Owed**

This builds a combined list of all the Arrears payments owed by either active members or all members. This will produce a PDF report.

## **Notes**

- None

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## **5.5 Member Payments**

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### **Navigation**

The Member Payments screen can be accessed by selecting "Financial > Member Payments" from the menu.

### **Access**

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### **Instructions**

To use this screen, begin by selecting a member of the lodge from the list at the top of the screen. Members are broken down into "active", "inactive" and "non-master-mason" and listed alphabetically in that order.

Once a member is selected, you can enter new payments for the member, view their outstanding dues and view their payment history. When you are done entering new payments, clicking "calculate" will show how a dues payment will affect their outstanding dues. Clicking 'post' will commit the payments to the database.

### **Field Descriptions:**

- Enter New Payments:
  - Member Name - the name of the member

- Total Outstanding - the member's total owed dues and arrears
- Arrears - the amount, by year, that the member owes
- Dues - the amount, by year, that the member owes
- Payments - the five rows are for entering payments with the following attributes:
  - Date - the date the payment was made
  - Amount - the amount of the payment in ####.## format (i.e., no dollar signs or commas).
  - Type - the type of payment (e.g., cash)
  - Category - the income category to which the payment should be attributed. Only 'DUES' category payments will be applied to outstanding arrears and dues
  - Comment - any notes about the payment (e.g., check number)
- Payment History:
  - Payments - the payments this member has made -- in reverse date order
    - Date - the date of the payment
    - Amount - the amount of the payment
    - Type - the type of payment
    - Category - what income category (this will show the year as well for dues payments)
    - Comment - any comments associated with the payment

## Notes

- Once entered, payments are immutable.
- To correct a mis-entered payment, simply enter the same payment again, but with the amount being negative. Explain that that is a VOID TRANSACTION in the comments.
- Reversing an invalid payment will not restore an unpaid arrears amount. If you are cancelling a dues payment, you may need to proceed to the Edit Arrears and Dues screen to restore the outstanding balance to the right years.

---

## 5.6 Non-Member Payments

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### Navigation

The Non-Member Payments screen can be accessed by selecting "Financial > Non-Member Payments" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen is used to enter payments to the lodge when the payer is not a member. Each row in the table represents either a whole payment or part of a payment of the payment must be allocated to multiple categories.

### Field Descriptions:

- Date - the date the payment was made
- Amount - the amount of the payment in ####.## format (i.e., no dollar signs or commas).
- Type - the type of payment (e.g., cash)
- Category - the income category to which the payment should be attributed.
- Comment - any notes about the payment (e.g., check number). This should include the name of the Payer.

## Notes

- Non-Member payments appear in the Budget , the Cash Book, and the Cash To Treasurer Reports.

---

## 5.7 Budget

---

### Navigation

The Enter Budgets screen can be accessed by selecting "Financial > Budget" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

The budget is broken down into three sections: Income Categories, Budget Categories and Budget Items. For each section, there will always be an extra blank row for entering the next item. When you are done editing your budget, click 'update'.

It is important to note that Budgets are tracked in arbitrary "Periods." The first period begins when a lodge starts using MORI. A period ends whenever the lodge closes the current budget period by clicking on the "close budget period" button on this screen (detailed below).

### Income Categories

Income categories categorize all money received by the lodge. The system will always generate a "DUES" income category -- this category should be used to track dues payments.

Field Descriptions:

- Description - the name of the category
- Amount - the amount of income expected in #####.## format (i.e., no dollar signs or commas).
- Delete - if there is no income allocated to this category, the category can be deleted.

### Budget Categories

Budget Categories allow for the aggregation of Budget Items. For example, a budget category of 'Building Expenses' may have Budget Items like 'Heat'.

Field Descriptions:

- Description - the name of the category
- Delete - if there are no budget items associated with this category, it can be deleted.

### Budget Items

Budget Items, in conjunction with Vouchers track all money spent by the lodge.

Field Descriptions:

- Description - the name of the item
- Category - the Budget Category to which this item belongs
- Amount - the amount of income expected in #####.## format (i.e., no dollar signs or commas).
- Delete - If there are no expenses allocated to this Item, it can be deleted

## **Budget Report**

Clicking 'print' on the Enter Budgets screen will allow you to print a report of the budget for any given period.

## **Close Budget Period**

Clicking 'close budget period' on the Enter Budgets screen will close the budget for the current financial period and will create a new budget that is a duplicate of the one just closed as a starting point.

## **Notes**

- If the "DUES" Income Category is not used to track dues payments, the payments will not automatically lower the dues and arrears owed.

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## **5.8 Vouchers**

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### **Navigation**

The Vouchers screen can be accessed by selecting "Financial > Vouchers" from the menu.

### **Access**

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### **Instructions**

By default, this screen lists the vouchers for the current period. (For an explanation of periods, see Enter Budgets). To list vouchers for a different period, select the period and click 'find'. The list can be resorted by clicking on the headings at the top of the list.

### **Field Descriptions:**

- Number - the number of the voucher
- Date - the date of the voucher
- Check - the number of the check used for the expense
- Payee - to whom the voucher is written
- Amount - the total amount of the voucher
- Options:
  - edit - edit the voucher on the Edit Voucher screen

### **Add Voucher**

To add a voucher, click the 'add' button. Functionality on the add voucher screen is identical to the Edit Voucher screen.

### **Voucher Reports**

Access the Voucher Reports screen by clicking "reports". On that screen you can generate a list of vouchers by date and/or payee. The resulting report will be in PDF format.

## **Notes**

- none

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### **5.8.1 Edit Voucher**

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## Navigation

The Edit Voucher screen can be accessed by clicking "edit" next to a voucher on the Vouchers screen.

## Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

## Instructions

Use this screen to edit vouchers. Click "save" when you are done, or click "add another" to create a new voucher. Any changes made to a voucher will appear immediately in the preview pane but will not be saved until the save button is clicked.

## Field Descriptions:

- Voucher Number - the number of the voucher
- Voucher Date - the date of the voucher
- Check Number - the number of the check
- Pay To The Order Of - the payee for the check
- Amount - the amount in ####.## format (i.e., no dollar signs or commas)
- Purpose - the purpose of the expense (to appear on the printed voucher)
- Void - if the voucher is invalid, that can be indicated here
- Budget Allocation - if your lodge has established budget items on the Enter Budgets screen, you can allocate the expense here:
  - Budget Item - The Budget Category/Budget Item to which the expense should be allocated
  - Amount - the amount for this allocation in ####.## format (i.e., no dollar signs or commas)

## Print Voucher

You can print a voucher by clicking "print" under the preview pane. Before the voucher prints, MORI will first attempt to save the changes. If the changes are not valid, the voucher will not print

## Notes

- If the voucher is not void and your lodge has a budget, the allocation must be completed.
- Three lines are initially provided for the allocation of expenses to budget items. More will appear as needed
- The total of allocations must match the amount of the voucher.
- Voiding a voucher will remove any budget allocations

---

## 5.9 Cash Book

---

### Navigation

The Secretary's Cash Book screen can be accessed by selecting "Financial > Cash Book" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen allows for the printing of a Secretary's Cash Book report. Simply fill in the desired parameters and click 'print'.

## Field Descriptions:

- From Date - in MM/DD/YYYY format, the inclusive date to start the report
- To Date - in MM/DD/YYYY format, the inclusive date to end the report
- Sort Order - order to sort the report:
  - date/category - date first then income category
  - category/date - income category first then date
- Exclude Non-Member Payments - useful to see only payments from members

## Notes

- Either the from or to date must be present

---

## 5.10 Cash To Treasurer

---

### Navigation

The Cash Paid To Treasurer screen can be accessed by selecting "Financial > Cash Paid To Treasurer" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen serves two purposes: the collection of payments received by the lodge into a dated grouping and the reporting of those dated groupings.

To group together payments received but not given to the treasurer into a report, click 'tabulate'. Once you click 'tabulate' a Receipt Summary appears totalling the amount by income category. Click 'confirm' to date the receipts as given to the treasurer.

To view a Receipt Summary of cash given to the treasurer, select the date the cash was given and click 'find'. Once the summary is displayed, you can elect to print either a Treasurer's Report or a segment of the Secretary's Cash Book containing the receipts that went into this dated grouping.

### Notes

- The 'tabulate' button is only the first step in grouping payments. To actually group the payments, you must click 'confirm'.

---

## 5.11 Calculate Checkbook

---

### Navigation

The Calculate Checkbook Balance screen can be accessed by selecting "Financial > Calculate Checkbook" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

## Instructions

This screen generates a PDF resembling a checkbook register that starts with the starting date and balance entered in the form. It then, in date order, subtracts vouchers and adds all cash given from the secretary to the treasurer. To get the PDF complete the form and click 'calculate'.

### Field Descriptions:

- Beginning Date - the date to begin the register at in MM/DD/YYYY format
- Beginning Balance - the amount to begin the register at in #####.## format (i.e., no dollar signs or commas)

### Notes

- Any payments collected by the secretary and not given to the treasurer (through the Cash To Treasurer screen) will not show up in the register.

---

## 6 Mail Room

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### Navigation

The Mail Room section of MORI can be reached under the "Mail Room" heading of the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: grandLodgeReadWrite, grandLodgeReadOnly, lodgeSecretary, lodgeAssistantSecretary.

### Instructions

The actual Mail Room screen is just an index of the Mail Room functions.

### Notes

- Functions on the Mail Room screen are only listed if they are accessible to the user.

---

## 6.6 Reports / Labels

---

### Navigation

The Member Reports and Labels screen can be accessed by selecting "Mail Room > Reports/Labels" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen is used to produce labels and member reports. The production of these is done in two stages.

In the first stage, you use the various criteria available to build a "buffer" of members. The buffer will persist until it is cleared or until you have to login again. To clear the buffer, click the 'clear buffer' button.

The second stage involves the actual production of the reports and/or labels. This is done by either selecting the report from the reports section of the label/file format from the labels section.

## Field Descriptions:

- **Buffer Building** - fields for building the buffer:
  - Members by Status - add members to the buffer by their status
  - Members by Birth Month - add members to the buffer by the month they were born
  - Members by Raised Date - add members by the date they were raised From and To inclusively in MM/DD/YYYY format
  - Members by Raised Month - add members by the month they were raised
  - Members by Mailing List - add members by the mailing lists to which they belong
  - Single Members - add members individually. This is broken down by active members, inactive members, and non-master mason members
- **Reports:**
  - Select Report - the report you would like (see below)
- **Labels:**
  - Select Labels - the label/file format (see below)
  - Sort By - the order by which the labels will be sorted
    - name - sort in last, first order
    - zip - sort in zip/postal code order

### **Contact List Report**

This screen can produce a Contact List in PDF format for the members in the buffer. Select "contact list" from the list of reports and click 'print'.

### **Years Of Service Report**

This screen can produce a Years of Service report in PDF format for the members in the buffer. Select "years of service" from the list of reports and click 'print'.

### **Age/Birth Date Report**

This screen can produce a Age/Birth Date report in PDF format for the members in the buffer. Select "age/birth date" from the list of reports and click 'print'.

### **Avery 5160/8160 Labels**

This screen can produce 3 columns of 10 labels formatted for the Avery 5160 labels. Select "Labels Avery 5160..." from the list of labels and click 'print'.

### **Avery 5161/8161 Labels**

This screen can produce 2 columns of 10 labels formatted for the Avery 5161 labels. Select "Labels Avery 5161..." from the list of labels and click 'print'.

### **Number 10 Envelopes**

This screen can produce label output to go onto Number 10 envelopes. Select "Envelopes No. 10" from the list of labels and click 'print'.

### **Excel (DBF) File**

This screen can produce an Excel file in DBF format of the buffer. Select "Excel (DBF) File..." from the list of labels and click 'print'. The file will not be sorted.

## **Notes**

- For most selection criteria, more than one thing can be selected at a time. For example, When doing member statuses, you can select active members and guests and add them both to the buffer with one click of 'add to buffer'
- The buffer automatically de-duplicates the members added to it. For example, if you added active members and the members of a mailing list into the buffer, anyone matching both criteria will only appear in the buffer once.

---

## 6.7 Mailing Lists

---

### Navigation

The Edit Mailing Lists screen can be accessed by selecting "Mail Room > Mailing Lists" from the menu.

### Access

This section is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

This screen controls the editing of lodge mailing lists.

### Field Descriptions:

- Mailing Lists - list of the already created lists:
  - Mailing List - name of the mailing list
  - Rename Mailing List - new name for the mailing list
  - Delete - if no members are on the list, you can delete it
- Add Mailing List - form to add new mailing lists:
  - New Mailing List - name of the new mailing list

### Notes

- If you wish to delete a list and are not sure who's on it, you can find out by producing a contact list for list members on the Reports/Labels screen.

---

## 9 Help

---

### Navigation

The help feature can be reached by selecting 'Help' from the pull-down menu

### Access

Anyone can access the complete help feature

### Instructions

The help feature has a contents page that matches the ordering of the menu

There is also an index to jump to a desired function by keyword.

### Notes

- links in blue/lavender link to functions
- links in green are glossary terms which populate the glossary frame

---

## 9.3 About

---

### Navigation

The about page can be reached by going to "Help > About" in the menu

### Access

Anyone can access the about page

### Instructions

The about page details who created MORI and when along with links to the licensing

### Notes

- none

---

## 9.4 Documents

---

### Navigation

The documents page can be reached by going to "Help > Documents" in the menu

### Access

This feature is open to anyone logged into MORI in any of the following roles: lodgeSecretary, lodgeAssistantSecretary.

### Instructions

The documents page contains documents for reference by lodge officers.

### Notes

- none

---

## 10 Language

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### Navigation

The language menu option allows you to select the language you wish to see MORI in.

### Access

Anyone has access to the language feature at any time

### Instructions

To switch languages, simply select the desired language from the language pull-down menu

### Notes

- The default language is English. It will be displayed when any text element is missing its other language alternative.

---

## 11 Account

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## **Navigation**

The account section of MORI can be reached under the "Account" heading of the menu.

## **Access**

The account section of the menu is accessible to everyone.

## **Instructions**

The actual Account screen is just an index of functions.

## **Notes**

- When a user possesses more than one role, their roles will be listed in the Account Menu and selecting a role from the menu will change the user's active role.
- It is not necessary to switch between roles unless they are mutually exclusive (e.g., a Secretary of two lodges must switch roles to access the other lodge)
- The user's active role will be highlighted in bold

---

## **11.1 Login**

---

### **Navigation**

Whenever you first visit MORI, you'll be presented with the login screen. If you navigate away from it, you can return by going to "Account > Login" in the pull-down navigation.

### **Access**

Any user who is not logged-in can access the login screen.

### **Instructions**

Enter your username (login) and password and click 'submit' to login to MORI. If your login also required a key, you'll need to Insert Your Key before logging in. The key will be retained in your browser to facilitate faster future access.

### **Notes**

- You should not access MORI from a public terminal
- If your browser stores your login information, set a master password
- Three failed login attempts will lock an account

---

## **11.2 Logout**

---

### **Navigation**

The logout function can be reached by going to "Account > Logout" while logged into the MORI system.

### **Access**

Any user who is logged-in can access the logout function.

### **Instructions**

The logout function is completely automatic and works simply by selecting it from the navigation.

### **Notes**

- Anything kept in your session (e.g., labels to print) will be lost.

---

## 11.3 Update Account

---

### Navigation

The Update Account screen, for your own account, can be reached by going to "Account > Update Account" while logged into the MORI system.

Admin and LodgeAdmin users may reach the Update Account screen for other users through the Manage Accounts screen.

### Access

Any user who is logged-in can access the Update Account screen for their own account.

Admin users can access the Update Account screen for any user.

LodgeAdmin users can access the Update Account screen for any Lodge user.

### Instructions

Instructions for this screen vary depending on both the user being updated and the role of the updater:

#### 1. Self-Update

A user updating their own account can update their full name, first name, and the password they use to access the system.

#### 2. Grand Lodge User by Admin

An Admin user can update the full name, first name, password, and allowed Grand Lodge roles of any Grand Lodge user.

#### 3. Lodge User by Admin/LodgeAdmin

Any Admin user can update the full name and first name of a Lodge User and can reset their account (allowing the user to re-create it.)

### Notes

- Under no circumstances is a members current password revealed on this screen or any other.
- All Grand Lodge users must have a role
- Lodge users roles are determined based upon Lodge records in MORI and are recalibrated with each login.

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## 11.5 Create Account

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### Navigation

The Create Account screen can be reached by going to "Account > Create Account" when not logged-in to the MORI system.

### Access

Any user who is not logged-in can access the Create Account.

### Instructions

The Create Account function is for Lodge users to create an account to access the system.

On the first screen, the user will be prompted to provide their Grand Lodge #, the number of any Lodge to which they belong, and their date of Birth. If a corresponding member record is found for which an account does not already exist, they will proceed to the next screen.

On the next screen, the user will be prompted to enter their choice of password. Once the password is entered, the account will be created.

For a lodge user, creating an account is only the first step to access. To access the system, a Lodge user will also need a key. That key will be mailed from Grand Lodge once the account has been created.

#### **Notes**

- Birth Date should be expressed in mm/dd/yyyy format.
- Passwords must consist of a minimum of 8 characters made up of letters and atleast one number.

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## **11.7 Insert Key**

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#### **Navigation**

The Insert Key screen can be reached by going to "Account > Insert Key" when not logged-in to the MORI system.

#### **Access**

Access to the Insert Key screen is open to anyont not logged-in to the system

#### **Instructions**

The purpose of the Insert Key screen is to set a Lodge user's key in their browser.

To set your key, enter the key provided by Grand Lodge into the form and click "insert".

#### **Notes**

- To test that your browser is retaining the key, simply press 'test' on this screen.
- If more than one person uses the same computer to access MORI, you'll need to change keys using this screen as well.

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## **A. Auxiliary Functions**

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This section is coming soon.