

MORI AND PREPARATION FOR A NEW DUES YEAR

I've had a number of calls and emails regarding how to prepare for a new dues year. It is really quite simple however there are some things you should be aware of.

Here are a few points to consider before you start a new dues year.

1. Non Payment of Dues (NPD) are voted on at your September regular. Be sure to enter those before printing your dues notices.
 - a. In the event a Brother pays their dues prior to September 30th, and you've already entered the NPD event in MORI, contact the Grand Lodge to have them remove the entry.
2. When a Brother has not paid his dues in full for the year ending, the amount owed will carry over to the 'arrears' in the new dues year.
 - a. There are some lodges that accept payments for their dues and that Brother may have failed to pay up their dues in entirety. If these are not taken care of before you start the processing of a new dues year, they will show up with arrearages.
3. MORI does 'not' change a Brother's *Member Type* to 'Lifetime Member' even if you enter a 'Lifetime Membership' event. Failure to change this will result in the Brother being sent a dues notice with the full amount of the dues owed.
 - a. You have to manually change the Brother from a 'Regular' member to a 'Lifetime Member'. Instructions to do this are explained later in this document.
4. Plural Members and Lifetime Memberships. If a lodge grants a member a Lifetime Membership, and they change the member type from "Regular" to "Lifetime Membership" that will only affect their lodge.
 - a. Each lodge has to change the Brother's *Member Type* to "Lifetime Membership".
 - b. Be courteous and contact the other lodges to inform them of the award.

HOW TO START NEW DUES YEAR

Update Member Types

Check to make sure your member types have the correct dollar amounts for the new dues year.

1. Click on 'Lodge' 'Member Types'
2. Review and make sure your Total Annual Dues is correct for the new year.
 - a. Remember Grand Lodge Assessments go up \$6.25 this year.

Doric #0342 - Edit Member Types

Use this form to add/change/delete the member types for your lodge.

Member Type	Total Annual Dues	Rename Type	Change Dues	Active Members	Delete
Honorary Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	6	
Lifetime + Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no
Lifetime Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	131	
Member Dues Remit	\$0.00	<input type="text"/>	\$ <input type="text"/>	2	
Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	3	
Regular	\$150.00	<input type="text"/>	\$ <input type="text" value="156.25"/>	155	
Secretary	\$0.00	<input type="text"/>	\$ <input type="text"/>	1	

If the amount changes for the new year, change it here.

Click 'update'

3. If you have any missing member types, add them.

Member Type	Total Annual Dues	Rename Type	Change Dues	Active Members	Delete
Honorary Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	6	
Lifetime + Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	0	<input type="radio"/> yes <input checked="" type="radio"/> no
Lifetime Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	131	
Member Dues Remit	\$0.00	<input type="text"/>	\$ <input type="text"/>	2	
Prepaid Member	\$0.00	<input type="text"/>	\$ <input type="text"/>	3	
Regular	\$156.25	<input type="text"/>	\$ <input type="text"/>	155	
Secretary	\$0.00	<input type="text"/>	\$ <input type="text"/>	1	

If you are missing any member types, add them here. Add a dollar amount, and finally click 'add'

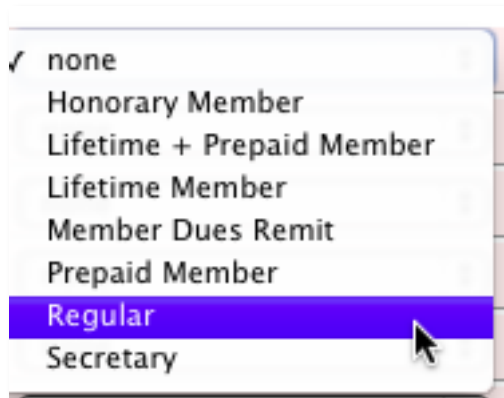
Add Member Type	Total Annual Dues:
New Member Type: <input type="text" value="New Type"/>	\$ <input type="text" value="10.00"/>

Initialize Dues - Check Member Types

Make sure each member has a member type. During the course of the year, if any Brother has been added to your lodge, either by a Master Mason Degree, a Transfer In, a Plural Membership or through a Consolidation, you must assign them a Member Type. MORI does not do this for you.

1. Click 'Financial' 'Initialize Dues'
2. Make sure every record has a 'Member Type'. If not, then there will be a list box similar to this, with the word none.

3. Click on the arrows and select the correct Member Type.



4. When all the Brothers have a member type, click the update button on the bottom of the Active Members.

M273975 - Woolley , Benjamin Peter	Regular
M288611 - Zandstra , Michael Raymond	Regular
M166074 - Zimmer, Walter Jack - (LTM)	Lifetime Member
<input type="button" value="update"/>	

5. Next is to make sure each member has the correct member type. E.g. if you added a life membership event but didn't remember to update their member type to 'Lifetime Member'
- Follow each member name and check to make sure (Prepaid), (LTM) etc, all have the correct type.
 - Don't forget 'Secretary'. Make sure you have one secretary listed. He does not pay dues.
 - If any are incorrect, click on the member's id or name as shown below.

Doric #0342 - Initialize Dues

Use this form to set the Member Types, Arrears and Dues for any member for which these values have not already been set.

Active Members

Member	Member Type
M193824 - Abbott , Danny Guy - (Prepaid)	Prepaid Member
M115107 - Allen , Robert H - (LTM)	Lifetime Member
M282077 - Allen, David N	Regular
M093411 - Amon , Martin Richard	Regular
M093414 - Antvelink , Gerald A	Regular
M084535 - Averill Jr, Ralph - (LTM)	Lifetime Member
M114394 - Avila , Rudolfo	Regular
M093986 - Baker , Frank G - (LTM)	Lifetime Member
M269800 - Baker , Patrick Jonathon	Regular
M093985 - Baker, E Bruce - (LTM)	Lifetime Member
M115088 - Baldwin, Charles E (LTM)	Regular
M093987 - Baldwin, Mark W	Regular
M084538 - Beardmore , Bruce W	Regular
M084539 - Belding, Marshall	Regular
M415811 - Bell, Christopher Timothy	Regular
M067359 - Benson , Gordon W - (LTM)	Lifetime Member
M093438 - Berg , Robert C - (LTM)	Lifetime Member

Every record needs to have a 'Member Type'

Incorrect member type. Correct this.

Click on the member to go to his record to correct the member type.


- d. This brings you to the Member's record, in view mode. Click on edit and fix the Member Type as shown.

Membership ▾	Lodge ▾	Lodges ▾	Grand Lodge ▾	Financial ▾	Mail Room ▾	Help ▾	Other ▾	Account ▾	MORI: Blue Lodge Edition
--------------	---------	----------	---------------	-------------	-------------	--------	---------	-----------	--------------------------

Doric #0342 - Member

[member data](#) | [contact info](#) | [lodge affiliation](#) | [events](#) | [other info](#) | [photos](#) | [lodge info](#)

Member Data **M115088 - Baldwin, Charles E**

First Name: Charles		GL Number: M115088
Middle Name: E		Lodges: Doric #0342 (Good Standing)
Last Name: Baldwin		GL Status: Good Standing
Full Preferred Name: (include Last Name)		Lodge Status: Master Mason
Aliases:		Proposed By (GL#): Member of same lodge
Birth Date (mm/dd/yyyy): 07/21/1942	Age: 69	Mentor (GL#):
Birthplace: Detroit, MI	YGS: 43	Initiation Date: 11/24/1967
Foreign Birth Country:	Title:	Passing Date: 03/15/1968
Deceased Date:		Raising Date: 05/03/1968 (43 years)
Gender:		Current Degree: Master Mason
Occupation:		Lodge Member Type: Regular
Spouse:		Card URL:
Spouse's Preferred Name:		Options: [envelope] [profile] [request dues card] [reports]
Spouse's Birthday (mm/dd):		

We need to fix this. →

Initiation Date:	<div style="border: 1px solid gray; padding: 5px;"> <p>none</p> <p>Honorary Member</p> <p>Lifetime + Prepaid Member</p> <p style="background-color: #4a7ebb; color: white;">Lifetime Member</p> <p>Member Dues Remit</p> <p>Prepaid Member</p> <p>✓ Regular</p> <p>Secretary</p> </div>
Passing Date:	
Raising Date:	
Current Degree:	
Lodge Member Type:	
Card URL	

- e. Be sure to save your changes.
6. Return to 'Financial' 'Initialize Dues' if necessary and continue till all your membership records are correct.

List Paid/Unpaid

Print out a copy of anyone who still may owe dues from the closing year.

1. Click 'Financial' 'List Paid/Unpaid'
2. Under 'Dues Owed' select 'Active Members'
3. Click 'Print'
 - a. Review each entry. If there are any members who owe dues, either resolve these before starting a new year or zero them out. If you want to carry these as arrearages then skip this step and go to Setup Dues below.
 - b. If these are not zeroed out, the amount owed will become 'arrears' in your new dues year.

- c. To zero them out do the following:
- d. Click 'Financial' 'Edit Arrears/Dues'
- e. Search for the member who still owes dues. Click 'find'

The screenshot shows the top navigation bar with menus: Membership, Lodge, Lodges, Grand Lodge, Financial, Mail Room, Help, Other, Account. The page title is "Doric #0342 - Edit Arrears / Dues". A search bar contains "Member Denton, John Leet - (M288595)" and a "find" button. A red arrow points to the "find" button. Below the search bar is a text box: "Use this form to make corrections to a members arrears and/or dues. Begin by selecting the member from the list above." A red text annotation says: "Search for the member owing dues, then click 'find'" with an arrow pointing to the "find" button.

- f. Enter 0 and click 'update' only if you want to carry no arrearages.

The screenshot shows the "Edit Arrears / Dues" form for member "Denton, John Leet - (M288595)". The form has a table with columns for "Member", "Arrears", and "Dues". The "Arrears" row has an "Amount" field with a dollar sign and a "Year" field. The "Dues" row has an "Amount" field with a dollar sign and a "Year" field. A red arrow points to the "Amount" field in the "Dues" row, which contains "100.00". A red text annotation says: "The amount here is the balance due for the current year." Another red text annotation says: "If left unchanged, this amount will show up in the arrears when you process a new dues year." A third red text annotation says: "Type 0 and click 'update' if you want to blank this out." with an arrow pointing to the "Amount" field in the "Dues" row. At the bottom of the form is an "update" button.

Setup Dues

At this point, you have made sure you have the correct Member Types, your Dues Amount is Correct, All Members have a Member Type and they are correct, All Member's who owed in the previous year are either zeroed out or you are aware they will carry arrearages and All your NPD's are entered. You can now process your new dues year.

1. Click 'Financial' 'Setup Dues'
2. Enter in the New Year and click 'setup'.

Doric #0342 - Setup Dues

Before setting up your dues, go to "Lodge" > "Member Types" and confirm that the amounts are correct. Those amounts will be used to generate the dues when this form is submitted.

Enter the year for which the dues will be set and press "setup". **This process will take existing dues from other years and make them arrears and will create dues for the specified year based on the defined member types. This process can only be undone by hand -- one member at a time.**

Setup Dues

Year: **Enter in your new dues year and click 'setup'**

3. You are now ready to print your dues notices.

Printing Dues Notices

Dues notices preparation and printing is covered in the "MORI TRAINING MANUAL" found in the 'Helpful Links' link on this web page: <http://grandlodgemi.org/mori/>

END

For further assistance contact:

Robert LaFleur, PM
Grand Lodge of Michigan
rlafleur@GrandLodgeMI.org
989-466-3088

or

Ken Crandall
Enable Labs
MoriSupport@Vitarara.net
518-272-4455