

## **LA210 – How To: Lodge Master/Recharter**

National OA Adviser Training

**Session Length:** 25 Minutes

### **Overview:**

This session will prepare you to complete the on line Lodge Master Re-charter, which includes JTE Petition, Re-charter Report, and submitting the Re-charter to National. The most important and critical part of this process is planning and gathering all your necessary data before you start the JTE Wizard. This training also offer suggestions on ways to use Lodge Master to collect your Lodge's data as it happens during the year, and this will facilitate or eliminate the need to try to collect that data in December at reporting time. It contains step by step instructions on what data you need to prepare and how to enter that data into the JTE Wizard.

### **Learning Objectives:**

At the end of this session the students should:

- Understand the data required and mechanics of completing the re-charter process using Lodge Master.
- Know how to solve any problems with the existing data in Lodge Master that will prevent them from successfully completing the process.
- Provide ideas on how to better use Lodge Master next year to collect the data needed in Lodge Master Events, so that Lodge Master will automatically supply the need data to the JTE Wizard.

### **Introduction:**

This course has been divided into 5 parts. Each part covers a different phase of the JTE / Re-charter process. Each of the 5 phases cover the process and steps required to complete that phase. By following these 5 phases you will find that the JTE / Re-charter process is not as complicated as it looks.

### **Phase 1 - Getting Prepared /Preparation (Slides 3 to 11)**

Before you jump into the Lodge Master JTE Wizard you must make sure that your membership data in Lodge Master does not have any issues that will prevent you from running the JTE Wizard. The two most common problems are members whose birth date is null, and members where their OA Level (Ordeal, Brotherhood, and Vigil) is not assigned. This section shows you how to determine if either of these problems exists in your data, and if it does how to resolve it. While a missing birth date is easy to fix, the second problem of unknown OA level can be more difficult to fix. Most of the OA Level problems are solved by fixing issues on the Member Level Tab. Having a date in the Election Date Field is what is used to determine who is an Ordeal Candidate. Populating the Ordeal, Brotherhood and Vigil Date Fields determines a members level in the system. The other common problem that occurs is when Non-Member (Ordeal Candidate or someone who has no OA Level) has their current year's dues paid. This user will appear in the Level query on slide 11 as a Non-Member. To fix this problem either clear the current years dues or add an OA Level. Dues should not be accepted until a Scout or Scouter has completed the induction process as an Ordeal Member.

### **Phase 2 – Gathering the Data (Slides 12 to 23)**

This section is the most important section. If you have all the necessary data when you start the JTE Wizard, then the actual process of running the Wizard is a simple process. If you don't have the data you can stretch the process out over days. You should note that you cannot re-enter the JTE Wizard where you left off, but rather you have start at the beginning every time you enter the Wizard. This means that you must answer all the questions every time you run the Wizard. This section shows you what data is needed in the order you will encounter it when running the JTE Wizard. It explains where there are ways to enter the data into Lodge Master, so the data will automatically populate the Wizard fields. It is important to understand where to gather this data. When reviewing this section, just take each slide in order and understand what data is to be collected. You may have to work with the Council Registrar to obtain some of the information as well as reviewing the lodge's log book/logs of past Ordeals, Lodge events, Brotherhood and Vigil Ceremonies

### **Phase 3 – Running the JTE Wizard (Slides 24 to 49)**

This section is a screen by screen explanation of the screens that will be encountered when running the JTE Wizard. In this section you will go through each screen and enter the data gathered in the prior section. If you have done a thorough job in the last section, then this section will be very easy. Depending on the size of your lodge, the running of the JTE Wizard can be completed in about a half hour to an hour. You will note that the bottom part of each screen in the JTE Wizard has been omitted from the screen shots in an effort to make the data entry part of the screen as large as possible.

The bottom part of the screen contains your Lodge's JTE score for that Item and your Lodge's current overall JTE score.

#### **Phase 4 – Printing the JTE Petition / Re-charter (Slide 50 to 53)**

This section shows the screen shots used to print a hard copy of the JTE Petition and Charter Renewal Form. This section is important because the Lodge must then scan the documents and Email them to National, after gathering the necessary signatures.

#### **Phase 5 - Submitting the JTE Petition and Re-charter to National (Slides 54 to 55)**

This slide shows how to finalize and make permanent the JTE / Re-charter process. You should explain that once the submit button is clicked the process is done and final, and that no changes to your JTE data can be made. So it is extremely important that all the data entered is correct before clicking the Submit icon.

#### **Final Thoughts**

While the JTE / Re-charter process is completed in mid to late December each year, it is important to stress that the JTE process is about continual improvement. If the Lodge waits until December to gather and review their JTE data, then it is too late to make changes or take actions to fix JTE items that are not as strong as your Lodge would like. This is the Rearview Mirror to Excellence or Failure, rather than the Journey to Excellence. The Lodge Executive Council should review the Lodge's JTE progress each month for the items that are currently happening during that month. This allows them to make changes to correct any short comings. Also, they know where their Lodge stands, and there are no surprises in December if they come up short on their JTE goals. To further address JTE, please refer to "[LA200: How To: JTE](#)".