



Guidelines for the Masonic Returns Program. (Scottish Constitution)

THIS PROGRAM IS APPROVED BY SGRAC OF SCOTLAND

Main Page: www.masonicreturns.com

Description of Main Page and Buttons.

Important Notice:

- This Program was developed to facilitate annual returns for all the Royal Arch Degrees, and is at present **live Globally (on behalf and for SGRAC and authorized by SGRAC) and directly connected to Supreme Grand Chapter of Scotland Offices.**
- Scribe's who still want to submit Annual Returns manually, can now download and print all the relevant forms from this website, and then manually complete and forward them. (Click on the "Downloads" button and select the Items to open/download).

Description of Buttons on the Main Page:

- **"Annual returns" Button:** Used by Chapters only to do their Chapter's **initial setup**, and also for **submission of Annual returns**. Please note that **this function will not work unless Province/District has first done their basic setup.**
- **"Province/District" Button:** Used by Provinces/Districts to **verify** Annual Returns received from Chapters before electronically submitting them to SGRAC. In certain Provinces returns from Chapters are submitted directly to SGRAC. In such cases the e-mail address for the Province must be changed to that of SGRAC, and in such case the returns will go directly to SGRAC of Scotland. (On page two: Under Item **"District E-Mail"** - To change this, click on the "Administration" button as per page two).
- **"Scotland" Button:** **Strictly used by Supreme Grand Chapter** of Scotland only.
- **"Forum" Button:** Not for general use.
- **"Administration" Button:** Used by Provinces/Districts to do the **Initial setup, and also to update the program** as required.
- **"Documents" Button:** To **download Annual return forms** for manual submission.
- **Link to "Webmaster":** to be used for **queries and/or possible mistakes** during the setup process. Notify webmaster of problem.

Important: Kindly **read all Instructions carefully during the SETUP and SUBMISSION** process. If you make a mistake, kindly e-mail the Webmaster and state problem to be fixed.

Advantages of Electronic Returns:

- No Human error possible, as system calculates exactly what you submit.
- System calculates payments automatically according to present exchange rate.
- No returns delayed, and no returns lost in system e.g. Postage.
- Once you press the "Submit" button, your Invoice is immediately generated and you can print it out.
- You can immediately print out a copy of your generated (detailed) returns for future reference.

- You can immediately print your Annual certificate. (Where applicable).
- No more envelope, printing or postage charges.
- Returns at SGRAC within seconds after submission.
- After initial Setup, you never submit existing names of Members again.
- You can reprint a specific return by locking onto your Province/District area.

Guidelines for the Masonic Returns Program.



Initial setup to be done by the Province/District (Step one and step two).

(Step One)

Starting for the first time (Initial setup to be done by the Province/District)

1. Before you can submit any returns, your Province/District must first setup the "Province/District". This must be done by firstly requesting a username and password for your Province/District from the webmaster at: webmaster@masonicreturns.com.
2. Once you are in possession of your username and password, go to the Masonic returns main page at: www.masonicreturns.com, and click on the "Administration" button.
3. On the next page, submit your username and password, and select your Province/District from the dropdown Menu. Now click "Submit".
4. On the next page, click on "Province/District" Administration.
5. Your Province/District Setup page will now open.
6. Now fill in the amounts Companions are charged from your particular Province/District only. This is also where you will change your figures to Chapters with future increases. Note: This has nothing to do with SGRAC Charges to Provinces/Districts, as this charge has been pre-programmed by SGRAC of Scotland, and you cannot change them!
7. Under Item "Discount Percentage", fill in a discount percentage (if any) allowed to your Province/District by SGRAC.
8. Under Item "District E-Mail", fill in the Prov/District SE E-Mail address. This is where notifications will be send, confirming a Chapter has submitted a return. (For verification purposes by the Province/District)
9. Under Item "Grand Superintendent E-Mail", fill in the Grand Superintendent E-Mail address. This is where (A Copy) notifications will be send, confirming a Chapter has submitted a return. (This is optional and for checking purposes only, if needed).
10. Under Item "Provincial/District Badge", this is your badge that will appear on all your stationary and web pages. (Also your Annual Certificate if required). You need to e-mail your badge in GIF format only to the webmaster with the request to place it onto your configuration. NOTE: This badge could be left out and is not compulsory!
11. Under Item "Certificate online", Click on YES if you want to implement an automated annual certificate for your Chapters. This will allow Chapters to immediately print out their own Annual Certificates after submission of the Annual Return. (Providing there is no outstanding payments to your Province/District from the specific Chapter. If there are any outstanding payments, the Certificate "Print" button will not appear, and the Certificate cannot be printed.) It is Important to remember that any monies due to Province/District, must be filled in by Province/District on the Chapter Administration drop down menu. (Only if you need to block Annual Certificates to Chapter owing money to Province/District).If you don't want to implement Annual Certificates, Simply click NO on the drop down menu.

NOTE: If you decide to implement Annual certificates, you need to forward a Province/District badge as well as an appropriate signature to the webmaster who will then configure it to your particular program.

Please note that you [can also change your username and password at the top of the page](#), if you so require.

Congratulations, you are finished setting up your Province/District. (Step One)

Click [“Update”](#). Now you will be redirected to a page asking you what you would like to do next. [Now click on “More Administration”](#) This will take you to the Initial page with the drop down menu. Click on [“Chapter Administration”](#)

Next Step: **(Step Two)**

Setting up your Chapters (Setup to be done by Province/District)

1. On the Initial page with the drop down menu. Click on [“Chapter Administration”](#)
2. On the next page, on the dropdown menu, select one of your Chapters.
3. On the next page, here you will [change your Chapter settings](#).
4. On the [outstanding balance field](#), here your Province/District must fill in any outstanding monies owing to the Province/District from this particular Chapter. [If this field reflect any outstanding figure, your Chapter will not be able to print the Annual Certificate.](#) (If enabled).
5. On the [Certificate required field](#), here you determine whether you want to [enable or disable](#) the Annual certificate function ([for a particular Chapter only](#)). Please note that the Certificate option is NOT compulsory, and is only used by certain Provinces/Districts, [by choice](#).
6. Complete the rest of the fields as required.
7. Click [“Update”](#)
8. On the next page, click on [“Edit another Chapter”](#).

Now follow the same procedure with all your Chapters.

After completing details for all your Chapters, now click on [“Back to homepage”](#).

Congratulations, your Province/District setup is now complete and you never have to do the same exercise again.

The Province/District will only enter the Administration pages in future for the following:

1. To enter outstanding monies on the Chapter Administration page.
2. To enable/disable Annual Certificates.
3. To change your Provincial/District charges to Chapters after an increase.

[It is very important that the password and username for the Province/District is kept in a secure place to prevent any unlawful entry into you particular “Administration” pages. Remember this is the brain of your system.](#)

Please note that Step one and Step two is the only Items for this program required to be completed by the Province/District.

Province/District setup is now complete and you never have to do the same exercise again!

The following pages will guide Scribes for individual Chapters how to setup their particular Chapters, (Only for the first time, and a once off), and thereafter guide them through the electronic submission of Returns.

Next Step: **(Step Three) Done by Chapter!**

Flow of annual returns program (Setting up your Companions)

Before you can start you must request a username and password for your Chapter from your District/Provincial Grand Scribe who would have obtained these from the webmaster at www.masonicreturns.com.

1. From the main page click on the “**Annual Returns**” button
2. The program then splits into A&AS Rite, Craft, and Royal Arch.
3. When you select RA, you again get **three** options and they are Royal Arch, Lodge & Council and Cryptic Council.
4. Once you select Royal Arch (or appropriate), you will then be prompted for your **username, password, District and Chapter**
5. If this is the first time the returns are being run for a specific chapter, the system will prompt you to enter the **number of companions**. This should be the number as per the last returns, (Previous year).
6. After the number has been entered a screen appears that allows you to **assign members to your chapter**. You must **first search for the members** to see if they haven’t been entered by another chapter. This is to avoid duplicates on the database.
7. If the companion exists on the database, then you can click on the name and you will be taken to the setting up of a companion screen, **if the member does not exist**, then you can **click on the new member screen** to enter the companion’s details
8. On the setting up of a companion screen click the “**select companion**” button (if this is the correct companion), or click the back to search results if it is the incorrect companion.
9. Once the select companion button has been pressed, all the details of the companion will appear on a form. Details can be changed but you must be sure that the changes are correct.
10. Click the “**next**” button
11. You will then reach the confirmation for the Constitution, District and Chapter where the companion was exalted. If these details are correct then you can click the “**confirm**” button, however if they are incorrect, then you can click the “**change**” button to change them.
12. If the confirm button is clicked it will take you to the screen to search for the next companion. This will only happen if you have more companions to enter, else it will take you to the end of the section where you input data.
13. If the change button is pressed, then you will go to a screen where you choose what constitution the companion was exalted. **This is important** because if it is Scottish, you will get a dropdown with all the Districts globally in the Scottish constitution and a dropdown with all the Chapters that are members of that District. **If any other constitution** is selected then the District and Chapter will need to be typed in.
14. Once all the members have been entered you will get an option to continue with the returns or exit the webpage. This is done to give chapters the option if they would like to enter the members before they submit the actual return.
15. The above process will only appear for the first time.

Next Step: **(Step four) Done by Chapter!**

1. **The next process that follows is the submission of the actual return:**
2. The first screen that appears allows the chapter to enter the following information:
 - a. The return year (enter the year in which the Installation took place), It is important to remember that once you submitted a return, you will NOT BE ALLOWED to submit a return for a year earlier than your last return.
 - b. How many existing companions on your return? (Same amount as your **PREVIOUS YEAR!**)
 - c. How many **new** companions on your return? (Newly joined **this year** only!)
 - d. How many companions affiliated to your chapter **in the past year?** (**This year!**)
 - e. How many companions (from previous return year) completed their Excellent Masters in the past year? (**They joined the previous year!**)
 - f. How many companions (from previous return year) were exalted in the past year? (**They joined the previous year!**)
3. If the incorrect number is entered, you can send a query to your district, and continue with the return. The number of chapters will be changed to match that of your District
4. All the existing members are shown on the forms. You can press submit until all of the existing members have been done. Enter all the members that should not show on next year's return. The members will still show on the database, but will not show on the return because they will be flagged that they should not appear.
5. Once you have entered all of your existing members, and if you have new members to enter, you will get a button to enter new members
6. Fill in the information for the new members, there will be a form for each new member. Once you have completed all of the new members and if you have new affiliations to your chapter, you will then get a button to enter new affiliations.
7. The first screen for new affiliations asks what constitution they affiliated from. This is important because if it is Scottish, you will get a dropdown with all the Districts globally in the Scottish constitution and a dropdown with all the Chapters that are members of that District. If any other Constitution is selected then the District and Chapter will need to be typed in.
8. If you selected Scottish Constitution you will get a list of all the members in that Chapter. You can select the one which affiliated to you. If the Constitution is not Scottish, then the District, Chapter and personal information must be typed in.
9. Once all of the affiliations have been entered, and if you have new excellent masters from existing companions in your chapter, then you will get the button Enter new excellent masters. (This is Companions that did the Excellent Maters Degree **THIS** return year!)
10. The Excellent Masters screen will list all the companions in your chapter that has not completed their excellent masters. You can choose the companions name and the date that they completed their Excellent Masters.
11. Once you have entered all of your Excellent Easters and have new Exaltations from existing members, then press the Enter "new exaltations" button.
12. The new exaltations screen will list all the companions in your chapter that has not completed their exaltation. You can choose the companions name and the date that they completed their exaltation.
13. You have now entered all of the data for your Chapter, now Press the "continue" button.
14. You can now enter all of the **office bearers** in your Chapter.
15. You now fill in the certificate of obligation.
16. You will now fill in the return of office bearers.
17. You now fill in the form "Supreme Grand Royal Arch Chapter of Scotland".
18. You will now get the details of remittance. The portion for the members is pulled in from what you filled in. The optional items you can select.

19. You will get a summary of the Scotland dues in pounds.
20. You will now get your statement of fees for your District.
21. Congratulations! Your annual returns are now completed. You can now **print out your invoice or/and Annual Certificate (Providing you have selected the option for Annual Certificate, and you are not in arrears with your payments)**. An email will now be sent to District/Provincial or Supreme Grand Chapter, depending on your **DISTRICT SETUP** settings.

Next Step: (Step five)

This is only for District or Provincial to verify Chapter returns before sending to SGRAC. (Providing District/Provincial has set it up accordingly)

1. District/Province now logs on from the main screen and selects the District/Provincial button.
2. You enter the username, password and district.
3. Select verify chapter returns.
4. Here you select the chapter and return year. This will appear in the email sent to District/Province.
5. Here you will get a button to print the Chapter return documents. These will contain the same information from the old (Manual) return system.
6. Enter the name of who completed the return. The documents must be saved for future reference. The District/Provincial verification is now completed.



If you encounter any problems with the submission of returns, forward your query to the webmaster at www.masonicreturns.com with the appropriate details.

It is important to remember that you cannot stop your actual submission of a return half completed as the program will then erase all your data for the return only, and NOT the Chapter setup.

Note: Feel free to submit your return as a trial, if you make a mistake we will erase the return and notify you to re-submit!

Guidelines by: MEC Braam Visser (Hon Second Grand Principal SGRAC).