



HERMES

Hermes Changes Impacting Masonic Processes



UNITED GRAND LODGE
OF ENGLAND

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Introduction

Purpose

This document is to detail the impact that the introduction of Hermes will have on current paper-based processes. This document will be sent to the various Metropolitan, Provincial and District Offices throughout UGLE and is intended to be used by the recipients either as part of the training for the introduction of Hermes or as an update to their Secretaries/Scribes Handbook or possibly both, if relevant. Alternatively, this document can be forwarded to each Secretary and ScribeE.

Philosophy

Hermes will facilitate the administration of each Lodge and Chapter and their members, as well as the updating of incorrect historical information. As part of the 'Agenda Creation' process, prior to a meeting, certain agenda items must be generated, ensuring that they comply with the rules contained within the Book of Constitutions. 'Post-Meeting Reports' simply confirm that the planned items took place as expected.

Data

All of your Lodge/Chapter data is securely stored and protected within the database located, and backed-up, at Freemasons' Hall in London and compliance with Data Protection Law is handled for you. It is therefore important that you consider Hermes as the single place where that data is held. Please resist the temptation to retain your own copies of data, as this may inadvertently lead you to use data that is no longer accurate or worse, to break the law. Hermes provides easy access to all the data you require.

For example, if a member informs one of his Lodges or Chapters of a change in his email address, once that unit has updated his record in Hermes, that change will automatically apply in every other Lodge or Chapter of which he is a member. Therefore, any separate email lists kept would be outdated. Details such as email addresses should be taken from Hermes immediately before use and not kept separately.

Glossary of Terms Used

"MPDI" is short for Metropolitan, Province, District or Group (with an Inspector). It is the organisation centre for your Lodge/Chapter. UGLE fulfils this purpose for unattached Lodges.

"ORF" is short for Online Registration Form. It is a form that all new candidates can access on the Internet, to register their willingness to join a Lodge or Chapter.

“PMR” is short for Post-Meeting Report and is a function used in Hermes after a Lodge/Chapter meeting, to confirm that each agenda item took place.

“GLC” is short for the printed Grand Lodge Certificate.

“PGMO” is short for the Provincial Grand Membership Officer appointed to generate and allocate new prospective candidates.

“FJ” is short for a Foreign Joiner

New Concepts Introduced as Part of Hermes

Agenda Creation

This is a new mandatory process to ensure that the correct wording, which will be compliant with the Book of Constitutions, is produced for each Lodge/Chapter Summons. After submitting the required agenda items, Hermes, will return a Word document with the correct agenda wording, which must be copied and pasted into the Summons for your meeting. This will be further explained in the Hermes Help Guide and Training Webinars.

Post Meeting Report

This is a new mandatory process that follows every Lodge/Chapter meeting. It contains several elements;

- a) Attendance Register
- b) Confirmation of meeting items that were generated by Agenda Creation including ceremony participants
- c) Charitable donations made by the Lodge/Chapter.
- d) Installation Returns will also be part of this process following an Installation Meeting

Amended Processes as a Result of Hermes

Online Registration Form

The existing paper registration form has been replaced with a dynamic Online Registration Form. Please see below for further information related to each join type.

Initiate Process

Sponsored route via Lodge

The Lodge Secretary will enter a new Enquirer on Hermes and thereby start the new process for a sponsored Candidate. Once entered, an email will be sent to the Enquirer containing a link, and by clicking that link he will be able to confirm that he genuinely wishes to be received into the Lodge.

Registration Forms will become obsolete from the moment your Lodge/Chapter goes live on Hermes. However, if you are already in possession of a completed Registration Form but this Candidate has not been Proposed in open Lodge/Chapter and/or has not been balloted, you should still enter his information on Hermes and follow the process to get him to Candidate status. You are also able to enter his Proposed and Balloted date in Hermes should the process have progressed further but this is only available for the first few months of transition. Further information is contained in the Training and Help System.

Un-sponsored route via PMO

An "Un-sponsored" enquiry (e.g. an enquiry through a Provincial website) will be entered in ADELPHI by the PMO, or MPDI Office, prior to being allocated a Lodge to join. Once allocated, an "Enquiry" status applicant will appear in Hermes for the relevant Lodge. After the applicant has met the Lodge and agreed to join, the Lodge Secretary may progress him to the next stage by sending an email link to the Online Registration Form. Follow the Initiate process as explained in the Hermes Help Guide and Training Webinars.

Rule 158 Book of Constitutions

Grand Lodge has amended this Rule to be only relevant for an Enquirer who lives and works in a Country outside of UGLE jurisdiction. Therefore, if that is not applicable to your potential Initiate, you do not need to make an enquiry to the MPDI where he resides. Any previous attempt to join the organisation in the last 10 years will be recorded on the database and will be picked up in the search after he has submitted his ORF.

Rule 158 amended to read: "Except in a case to which Rule 161 applies if a candidate for initiation has neither a permanent residence nor a regular place of business or employment in a state or country where a Lodge under the Grand Lodge meets, the matter shall be referred to the Grand Secretary in order that he may make such enquiries as he deems appropriate as to the candidate's suitability. A candidate coming within the provisions of this Rule shall not be proposed in open Lodge until the Grand Secretary shall have confirmed that there is no objection to the candidate."

Candidate, Proposer, Secunder, WM process

As the paper form is redundant, a new online process is activated once you go live on Hermes. Clear guidance will be given to Proposers, Seconders and WMs, who will also complete their sections online.

Halt process for a Declaration

The ORF contains the same questions as the paper form with the notable addition of "Do you believe in a Supreme Being?"

Declaration 1 questions answered differently from the expected answer will cause a HALT on submission and a notification is sent to the Secretary/Hermes Administrator to discuss with the Prospect. If there has been a mistake when selecting these answers, changes can be managed by resending the login details to him and he can amend. If the Prospect confirms that his answers are correct, the Secretary will have to add a ""Did Not Continue"" flag on his record with a reason why, selected from a dropdown list.

The questions in Declaration 1 are:

1. Have you ever been proposed for membership in any lodge, or has your admission to any Lodge/Chapter ever been sought either by yourself or by anyone on your behalf?
2. Please can you confirm that your application is entirely voluntary?
3. I understand my duties as a Freemason would include an overriding duty to obey the law of the country to which I am subject
4. I do not expect, anticipate or seek any preferment of financial benefit as a consequence of my being a member of the Craft

5. I understand that I may freely declare my membership of the Order on any occasion when I can be seen not thereby to be pursuing any business, professional or personal advantage

All Questions in Declaration 2 (Convictions, Tribunals etc.) that are answered differently from the expected answer will be routed to UGLE Member Services - Registration Department further consideration by the DepGSec.

Rule 160 Book of Constitutions

This Rule gives the ability to Propose, Ballot and Initiate a Candidate on the same night, provided that a case of serious hardship to the Candidate can be justified and approved by the WM.

Once Hermes goes live, the WM will be able to select the option to use R160 for this Candidate when he is approving the application to join, which will return the appropriate wording for the Agenda item. When the summons is received at the MPDI Office prior to the meeting date, they will have the opportunity to question this decision if they do not think it is an appropriate use of this Rule. Abuse of this Rule may lead to Masonic sanction by the respective masonic authority.

Registration Process & Fee

The process for recording a new member to the Lodge is managed via the Post Meeting Report following the Initiation, whereby the Candidate's status is updated to member. There is no need to notify anyone at MPDI or UGLE as this is now recorded on ADelphi. The UGLE Registration Fee is now automatically added to the Annual Return and, in most cases, this is the same for each MPDI Registration Fee.

Grand Lodge Certificate

This is a new process. The Secretary does not need to complete a LP&A5 Form to request a GLC. Once the PMR is submitted, following a Raising ceremony, Hermes will automatically send the GLC request to UGLE Member Services – Registration Department. The Secretary will receive notification of receipt as well as when it is ready to be sent out.

Craft Joiner and Re-Joiner

No paper form

Enter Enquirer details on Hermes and follow new process to Candidate status, including Joiner giving consent to share his information with the new Lodge

A Craft Joiner/Re-Joiner follows the same process as the Initiate using the Enquiry - Prospect - Candidate steps. When the Secretary adds him as an Enquirer, an email is sent to the address held on ADelphi asking whether this is a genuine Enquiry and for his consent to share his data with the new Secretary. Nothing further can progress until this consent has been received. The next step is for the Secretary to send him, via Hermes, a link to the Online Registration Form, which will be pre-populated with all the information currently held on the database. He will review and can update as required. A missing Passing or Raising date and/or a Grand Lodge Certificate Number will trigger an email to UGLE Member Services – Registration Department to investigate further.

No Clearance Certificates - In Arrears process

Once Hermes is live **in every MPDI**, Clearance Certificates from all of the English Constitution Lodges that an Applicant is currently, or previously, a member will no longer be required. On submission of the ORF by the Prospect, the Secretary of each Lodge where he is a current subscribing member will be automatically sent an email asking whether this member is considered "In Arrears". This is actioned by going to the member's details in the membership screen and updating the "In Arrears" from No to Yes. If the member is not In Arrears, there is no need to take any action.

A similar email will go to a Secretary of a Lodge where he was previously a member but only if he has an arrears flag showing. He will be asked whether the arrears have been cleared and, if so, this will be actioned as above by amending from Yes to No.

In both of these cases, an email message will be sent to the Secretary of the Lodge to be joined, without mentioning which lodge, and it is up to him/the lodge to take any action or request clarification from the Joiner.

If the Lodge/Chapter has been erased or a Lodge/Chapter is missing from the member's record for historical reasons, the email will be sent to UGLE Member Services – Registration Department for validation and updating on ADelphi.

EA/FC differences

An EA/FC who is currently a subscribing member of his Mother Lodge is not permitted to join a new lodge until he is a MM. However, if the member has re-located, it is possible that the Passing/Raising ceremonies can be managed as a Degree by Request (DbR). If the EA/FC is unattached, the DbR can be actioned by his Mother Lodge or by reference to the MPDI Office.

NB. If a member has been excluded from the Lodge in which he was Initiated then another Lodge cannot confer any ceremonies as a Degree by Request . The same applies when a Lodge has been erased. In both cases, the EA/FC would have to join and the Secretary applies for a First/Second Degree certificate. For a FJ, the Secretary must obtain written permission to confer a degree from UGLE.

Foreign Joiners

An ORF from a Foreign Joiner, once submitted, will trigger a Halt Process, which will be sent to UGLE Member Services - Registration Department to investigate further. The Secretary will need to provide supporting documentation from the FJ, which should be sent to UGLE via the MPDI Office. Once membership has been verified with the FGL, the Halt will be released, notifications sent to the Joiner and Secretary and the process can proceed.

Never Subscribing Honorary Member (NSHM)

The process for a NSHM will be managed outside of Hermes for now but may be added as a new feature in the future.

RA Exaltee/Joiner/Re-Joiner

No paper form

The Chapter ScribeE (SE) will enter the Enquirer details on Hermes and follow the new process to progress the Candidate, including the Joiner giving consent.

An Exaltee and a RA Joiner/Re-Joiner follow the same process as the Initiate in following the Enquiry - Prospect - Candidate steps with one exception. When the SE adds him as an Enquirer, it will send him an email to the address held on ADelphi asking whether this is a genuine Enquiry and for his consent to share his data with the new SE. Nothing further can progress until this consent has been received. The next step is for the SE to send him, via Hermes, a link to the Online Registration Form, which will be pre-populated with all the information currently held on the database. He will review and can update as required. A missing Passing, Raising or Exaltation date and/or a missing Grand Lodge Certificate Number or a Supreme Grand Chapter Certificate Number will trigger an email to UGLE Member Services – Registration Department to investigate further.

Validation of Reg 66A

The ORF for a RA Exaltee or Joiner will be validated to ensure that the applicant is a current subscribing member of a Craft Lodge. If this is not the case, the process is halted and a message is sent to the SE and Applicant notifying them that he cannot proceed until he has joined or re-joined a Craft Lodge.

FJ process

An ORF from a RA Foreign Joiner, once submitted, will trigger a Halt Process and this will be sent to UGLE Member Services - Registration Department to investigate further. The SE will need to provide supporting documentation from the FJ, which should be

sent to SGC via the MPDI Office. Once membership has been verified with the FGL/FGC, the Halt will be released, .notifications sent to the Joiner and SE and the process can proceed.

NSHM

The process for a NSHM will be managed outside of Hermes for now but may be added as a new feature in the future.

SGC Certificate

Once the PMR is submitted following an Exaltation ceremony, Hermes will automatically send the Certificate request to SGC Registration. The SE will receive notification of receipt as well as when it is ready to be sent out.

Degree by Request

The requesting Lodge Secretary should first check offline with the performing Lodge Secretary that it can carry out the ceremony and when. The Degree By Request can then be added in Hermes and approved by the WM. The performing Lodge Secretary can then add the Degree By Request to its Agenda and it can therefore be confirmed in the PMR, so that the member concerned can be updated from EA to FC or FC to MM. This will automatically trigger the GLC process too.

NB. A validation routine will be in place to ensure that the brother concerned can be Passed or Raised as a Degree by Request, i.e not excluded or mother Lodge has been erased.

Installation Return

This is a new process. The Secretary/SE will be directed to complete a Pre-Installation Return when he logs into Agenda Creation prior to the Installation Meeting. This will validate to ensure that no member is holding two Regular Offices or a Regular Office with more than one additional office, as per Rule 104(a) and that all members are eligible to hold Office. Following the Installation Meeting, part of the PMR process will include reviewing the pre-filled I/R and updating, if required. Once submitted, the WM/MEZ will receive an email detailing the Officers for the Year and, if there are any discrepancies, this should be raised with the Sec/SE who will need to raise a support request to amend in ADELPHI by the MPDI Office.

Annual Return

This is a new process. The Annual Return documents will no longer be sent to the Sec/SE by UGLE/SGC and the MPDI. Each Sec/SE is sent an email to inform him that his A/R is due in 30 days and he should check that his member information is correct,

including new and past members. He will receive a further email on the day the A/R becomes due and he will need to generate the return, which will have the values included. The Sec/SE is still able to make last minute changes to members, particularly resignations that often occur in the last week or so before the new subscription year starts. Once he is happy that it is correct, the Sec/SE sends to the Treasurer, via an email link, for final approval. Payment is due by the end of the month and should be paid by the Treasurer.

Reminder emails will be sent throughout this process with copies to the MPDI Office if not adhered to.

Change of Member Details

Changes to a member record can now be made in Hermes with the exception of Title, First Names, Surname, Date of Birth and Preferred Name (Grand Officers only). All updates to a member's address (UK only), contact numbers and email address are validated by a third party application to ensure accuracy.

Change of Member Status

a) Resignations

Member resignations can now be accepted by email to the Sec/SE as well as by letter or orally in the meeting. It is not necessary to inform the MPDI Office

Once the Sec/SE, or perhaps the Almoner, has spoken to the member about his resignation, it should be recorded in Hermes by updating his membership status to Resigned, selecting the reason from the dropdown list and entering the date the resignation was received.

When submitted via Hermes, it will trigger an email to the MPDI who will make contact with the resigned member to see if they can resolve any issues or identify another Lodge/Chapter for this mason, particularly relevant if he is relocating.

There is a 60-day window for the resignation to be withdrawn, which starts from the actual date of the resignation email, letter or announcement. Any changes to this status within the 60-day period can only be made in ADELPHI by UGLE and should be notified by the relevant MPDI.

b) Deceased

It is not necessary to inform the MPDI Office of the death of a member, instead it should be recorded directly in Hermes by updating his membership status to deceased. You will also need to record how you were informed and provide additional corroboration.

The death of a member recorded in Hermes will send a notification to all the other units where he was a current or past subscribing member as well as any Honorary memberships.

c) Cessation

It is not necessary to inform the MPDI of a Cessation (R148/Reg71), instead it should be recorded directly in Hermes by updating his membership status to R148/Reg71.

d) Exclusion

It is not necessary to inform the MPDI of an Exclusion (R181), instead this should be recorded directly in Hermes. As this requires a ballot to exclude, this will be

managed via Agenda Creation and PMR, which will automatically update the member's status.

Dispensations

Many Dispensations can be requested via Hermes. Once approved by the relevant authority, they can be downloaded as a pdf document to refer to or read in the lodge/chapter meeting as required. All UGLE/SGC fees for Dispensations will be added to the Annual Return. This may not be the case in all MPDIs, so please check this with the relevant authority.

Dispensations available within Hermes:

Craft Dispensations

- Qualify for election as Master a Warden who has not served full year as Warden in a Lodge under UGLE [BoC 109]
- Master for a third year in succession [BoC 115]
- Master of more than one Lodge [BoC 115]
- Move date of a Regular Meeting by not more than 28 days either way [BoC 139 (c)]
- Change of meeting date and place [BoC 139 (c), 142]
- Emergency meeting [BoC 140]
- Change of venue pending permanent removal [BoC 141 (v)]
- Change of venue for a specified meeting or meetings [BoC 142]
- Initiate more than two candidates on same day [BoC 168]
- Pass more than two candidates on same day [BoC 168]
- Raise more than two on same day [BoC 168]
- Wearing of regalia in public (where non-masons are present) [BoC 178]
- Elect a Brother to act temporarily as Treasurer [BoC 112 (b)]

RA Dispensations

- Qualify for election as a Principal a Companion who has not served full year as a Scribe or Sojourner in a Chapter under SGC [Reg 49]
- Qualify for election as Second Principal a Companion who will not have been installed as Third Principal and have served full year since his election as Third Principal [Reg 50]
- Qualify for election as First Principal a Companion who will not have been installed as Second Principal and have served full year since his election as Second Principal [Reg 50]
- Principal for a third year in succession [Reg 51]
- First Principal of more than one Chapter [Reg 52]
- Move date of a Regular Convocation by not more than 28 days either way [Reg 58]
- Change of venue for one or more Convocations [Reg 58]

- Change of meeting place and date [Reg 58]
- Change of venue pending permanent removal [BoC 141 (v)]
- Exalt more than two Companions on same day [Reg 65]
- Wearing of regalia in public (i.e. where non-Masons present) [BoC 178]
- Elect a Companion to act temporarily as Treasurer [Reg 57]



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