

**Shriners International
Summary of General Office Deadlines**

Mail to: Shriners International
P. O. Box 31356
Tampa, FL 33631-3356
Attn: (Department noted in parenthesis)

Shriners International EVP Office

Membership Reports: (Shriners International)

Payment for the Monthly Membership reports due by the 5th day of every month.
Annual Recapitulation Report due by January 15th.

Per Capita Tax & Hospital Assessment Payments: (Shriners International)

50% Postmarked not later than March 31st.
35% Postmarked not later than June 1st.
Remaining 15% Postmarked not later than October 1st.

Annual Election Returns: (Shriners International)

Should be updated and temple verified immediately after your temple's annual elections are held, but no later than January 31. Do not wait for installation.

Requests for Dispensations

Per General Order No. 1, Series 2024-2025, page 33, all requests for dispensations should be addressed to the Imperial Potentate, with copy to the Executive Vice President, and both original letter and copy with any waivers involved should be sent in care of the Executive Vice President.

Please send the request for dispensation at least 1-2 weeks prior to the date of the meeting that is to be rescheduled. **If emailing the request for dispensation, please email the request to Suzanne Magnin at Suzanne.Magnin@shrinenet.org with a copy to officeoftheexecutive@shrinenet.org.

Temple Accounting

(The following reports are to be sent directly to the Director of Temple Accounting)

Annual Operating Fund Budget and Comparison Report

Original budget not later than March 1st.
Budget revisions within 30 days after adoption.

Outside auditor's annual financial statements

Before May 1st following the end of year reported on.

U.S. Federal tax returns: Form 990 and 990-T

Before May 15th following the end of year reported on unless an extension has been granted by the Internal Revenue Service.

Temple's Annual Report of Hospital Patient Transportation Fund

Complete and submit by May 15th following the end of year reported on.

Request permission to hold a Shrine Charitable Fundraiser by applying for permission online through the WebFez Charity Activity Event Forms tab at least 30 days prior to the start of the event.

Shrine Charity Activity Fundraising Event Form (CAF)

Submit within 60 days following the end of the event along with a check distributing the net proceeds or a copy of check that was forwarded to Shriners Hospitals for Children to the attention of events@shrinenet.org.

Risk Management

Insurance Advisory Committee and Report

Annually: General Order No. 1, Series of 2024-2025, requires that the temple Potentate appoint an Insurance Advisory Committee. See “1. Insurance Advisory Committee” on page 37 of General Order No. 1, Series of 2024-2025.

By February 1 of each year, the temple Recorder is to notify the Corporate Risk Manager at Shriners International Headquarters of the name of the chairman of the temple Insurance Advisory Committee, together with his address, email address, telephone number, mobile phone number and telecopier number. See “5. Chairman of Insurance Advisory Committees” on page 39 of General Order No. 1, Series of 2024-2025.

By May 1 of each year, it is also the responsibility of the Potentate and Recorder to send a copy of the annual Insurance Advisory Committee Report, and any supplements thereto, to the Corporate Risk Manager at Shriners International Headquarters. See “5(b) Insurance Advisory Committee” on page 37 & 38 of General Order No. 1, Series of 2024-2025.

It is vitally important that the Insurance Advisory Committee be appointed, complete its required work, and report the results of that work. If you have not done so already, please provide the required information to Laurie Spieler, Vice President Legal, via email to Lspieler@shrinenet.org.

Certificate of Insurance

Annually: The certificate of insurance issued by the insurance company shall be “irrevocable” so that no coverage may be canceled or materially altered until notice is provided by the insurance company to the Corporate Risk Manager, Shriners International Headquarters, Tampa, Florida, at least 30 days prior to such action. See General Order No. 1, Series of 2024-2025, page 39, 3(3).

Fraternal Information Services

Dues Related

- **Temple preparations in WebFez for dues assessment and dues notice distribution must be completed by July 15th.
- Dues Classes - review every dues class for proper amounts and noble assignments (ex: hardship dues classes)
- Dues Assessment “Rollover” – August 1st
- Email First Dues Notice – September
- Hardcopy Dues Notice – October
- NPD Postcard to ‘at risk members’ – November
- Email Reminder Dues Notice – December
- Retention “Please come back” Postcard to newly suspended – January
- Past Due Email is sent – January
- Past Due Notice Hardcopy –February

**If dues amount is listed in the temple’s bylaws, the temple bylaws must be changed, voted on by Nobility and approved by Imperial before the revised dues amount can be listed in WebFez. Temple bylaws can take up 2-4 weeks to be reviewed. If they are rejected, the temple would need to resubmit them to Imperial for approval. Therefore, it is recommended that the temple submit the proposed bylaws to Imperial no later than April if your dues amount is listed in the temple bylaws and you wish to change the dues amount. It is also recommended NOT to list the dues amount in the temple bylaws for this reason.

Units and Clubs

Per General Order No. 1, Series 2024-2025, page 50, units/clubs complete elections for upcoming year’s officers by October 31st.

December 31- Deadline for the upcoming year’s unit and club officers to be entered in WebFez, per General Order No. 1, Series 2024-2025, page 50.