



HERMES

Hermes

Instructions for a
Proposer, Seconder,
WM & Treasurer

CRAFT VERSION



UNITED GRAND LODGE
OF ENGLAND

Introduction

Purpose

This document describes the process required for approving the Online Registration Form (ORF) for a Proposer and Secunder then how this is approved by the WM or MEZ. Additionally, it also describes how a Treasurer approves the Annual Return

All content below is available in the 'Help Hub' within Hermes, which you can access from the Sandbox and when you are live on Hermes.

A Step-by-Step Guide for a Proposer or Secunder using Hermes

- When you are Proposing a Candidate for Initiation to your Lodge, please ensure that you obtain from him his full First Names, Surname, Date of Birth as well as his email address and preferred contact number (mobile or landline). This information is required by the Secretary to start the process on Hermes.
- If you are Proposing a Joiner, you will need to obtain his Grand Lodge Reference Number and his email address. This may have already been provided to the Secretary as he will probably be known to the Lodge. He can get his GL Ref from his Lodge Sec if he doesn't know it, as it is recorded on Hermes
- Using the Hermes process, once the Prospective Applicant has submitted his Online Registration Form (ORF), the Secretary will add you as the Proposer or Secunder and you will receive 2 emails, generated by Hermes, which will be sent to your personal email address as listed on the UGLE database. The first email will contain a hyperlink to the ORF and the second will have a temporary password, which is only valid for 7 days.
- Copy the password, then click on the hyperlink in the other email and paste into the field "Enter temporary credentials" and click "Log In".

- You will now be asked to enter your Date of Birth in the required format as 2-factor authentication protection.
- The screen will open with Instructions, which you should read and these are similar to those contained in the blue paper form currently being used. You are now required to review the content of the ORF
- Click on Next at the top right of your screen and you will see the “Personal Details” screen, click next at the top right again and you will see the “Contact Details” screen – you should check these are correct to the best of your knowledge
- For an Initiate, click next and you will see the Declarations 1 screen and click next for the Declarations 2 screen
- For a Joiner, you will now see the “Membership Details” screen, which lists all of the units that this joiner is a current or past member and whether he is in Arrears.
- Click next and you are now required to record how long you have personally known this person by entering the month and year in the 2 fields in this screen.
- Enter using the dropdown list in the 2 boxes and then click on the blue box “Digitally Sign Candidates Application”. You will see another modal screen requesting you to confirm by clicking “OK”
- You will see a message on the screen in a green box confirming that the form has been submitted
- You now either close the window or click on your name in the top right of your screen to log out

A Step-by-Step Guide for a WM using Hermes for the Joiner Process

- Using the Hermes process, once the Prospective Applicant has submitted his Online Registration Form (ORF) and the Proposer and Secunder have digitally signed the ORF, you will receive 2 emails, generated by Hermes, which will be sent to your personal email address or, if you have one, a WM specific email address as listed on the UGLE database.
- The first email will contain a hyperlink to the ORF and the second will have a temporary password, which is only valid for 7 days.
- Copy the password, then click on the hyperlink in the other email and paste into the field “Enter temporary credentials” and click “Log In”.
- You will now be asked to enter your Date of Birth in the required format as 2-factor authentication protection.
- The screen will open with Instructions, which you should read and you are now required to review the content of the ORF

- Click on Next at the top right of your screen and you will see the “Personal Details” screen, click next at the top right again and you will see the “Contact Details” screen – you should check these are correct to the best of your knowledge
- For an Initiate, click next and you will see the Declarations 1 screen and click next for the Declarations 2 screen
- For a Joiner, you will now see the “Membership Details” screen, which lists all of the units that this joiner is a current or past member and whether he is in Arrears.
- Click next and you can now see the names of the Proposer and Seconder together with the information on how long they have known the Applicant.
- Below is a dropdown box containing 2 options to add to the statement. You should select the appropriate one and then click on the blue box “Digitally Sign Candidates Application”.
- For an Initiate only, you will see a tick box to add the reason why you believe that there is a case for him to be Initiated under Rule 160 Book of Constitutions. Please note that if it is found that you have used this tick box inappropriately, you may become liable for masonic sanction. Select the appropriate reason from the dropdown list and then click on the blue box “Digitally Sign Candidates Application”.
- You will see another modal screed requesting you to confirm by clicking “OK”
- You will see a message on the screen in a green box confirming that the form has been submitted
- You now either close the window or click on your name in the top right of your screen to log out

A Step-by-Step Guide for a Treasurer using Hermes for the Annual Return Process

- The Secretary will receive notification 30 days before the Annual Return is due requesting that he checks all of the member information and fee types. This will be for the UGLE Annual Return as well as for the Met/Prov/Dist Annual Return. If the Prov/Dist Annual Return date is different to the UGLE date, notification will be sent at the appropriate time.
- On the due date, the Sec will receive another notification asking him to submit the Annual Return. He is still able to update the list of members if he has received any last minute resignations or if you advise him of any Cessations under Rule 148
- Using the Hermes process, once the Secretary has reviewed the Annual Return, he will click on “Send to Treasurer” for you to approve. The new rules contained in the Book of Constitutions now enable the Treasurer to approve the Annual Return in place of the WM

- You will receive 2 emails, generated by Hermes, which will be sent to your personal email address or, if you have one, a Treasurer specific email address as listed on the UGLE database.
- The first email will contain a hyperlink to the ORF and the second will have a temporary password, which is only valid for 7 days. Please note that you will receive separate emails for the UGLE Return and your Met/Prov/Dist Return, so please ensure you use the correct link and password for each.
- Copy the password, then click on the hyperlink in the other email and paste into the field “Enter temporary credentials” and click “Log In”.
- You will now be asked to enter your Date of Birth in the required format as 2-factor authentication protection.
- You are now able to view the summary page for either Annual Return and you are able to view the full list of names of your members, or for any other fee types, by clicking on the link in the Fee Description (it is in blue)
- Once you are satisfied that the Annual Return is correct, click on the blue button “Approve Annual Return”.
- If, however, you believe that the Annual Return is not correct, you will need to contact the Secretary offline, as you are unable to make any changes. Once the Sec has made the adjustments, he will re-send to you and you repeat the above process
- You will now receive an email confirming receipt of the submitted Annual Return together with the amount due, bank details for sending by transfer and a Reference Number. You can also pay by cheque if you do not use online banking.
- Please note that failure to pay the amount by the due date will result in regular reminders until you do.