

## Instructions for Completing Officer Change Forms

- Who needs to complete these forms? **All Officers**
- **Chapter Officers** are: Chapter Director (CD); Chapter Treasurer (CT), Chapter Ride Coordinator (CRC), Chapter Membership Enhancement (CME) and any Assistant
- **All Forms** – **MUST** be filled out on a computer, electronic signatures (signed on the computer) are required. Emailed completed forms as an attachment to the PA District Director.
- The dates that must be the same on all forms! (exception is IRS Form 8822B)
  - Your appointment or effective date
  - Date documents are signed

**Save the forms to your computer before you follow the instructions below**

**Forms are pdf documents ---- Open them in Adobe Acrobat Reader DC  
Adobe Acrobat Reader DC is a FREE program**

### Applies to all pdf documents:

- Open document with Adobe Acrobat Reader DC
- Right side (usually) – click of “Fill & Sign”
- Again – Click on “Fill and Sign”

### Officer Change/Appointment Worksheet:

- **Applicant** – review the information for accuracy.
  - If changes were made - Save the document with the changes
  - Email document to your Appointing Officer
- **Appointing Officer**
  - On the signature line, type your name, office and date (this is your electronic signature)
  - Email this form to your PA District Director

### Officer Candidate Memorandum of Understanding (MOU):

- **Signature** see “How to add your signature to MOU” listed below
- **Appointing Officer**
  - Fill in the information on page 1 and 2
  - Do NOT date or add signatures at this point
  - Save the form
  - Email to candidate for signatures
- **Candidate and Candidate Spouse**
  - Date and electronically sign
  - Save the document after you have added signatures
  - Email to appointing officer
- **Appointing Officer**
  - Date and electronically sign once candidate has signed
  - Save document after you have added your signature
  - Email this form to your PA District Director

### How to add your signature to MOU

- **First time users:** When you click on the signature box; a sign document box will appear
  - Configure New Digital ID: (There are three Choices)
  - Create a New Digital ID “continue”

- Save to a file (or Save to Window Certified Store) “continue”
- Fill in Information “continue”
- Password “save” (Remember your password there is no way to retrieve your password)
- Follow instructions below for “Already set up”
- **Already set up** on signature box
  - Click on your name (may have more than one name) “Continue”
  - Enter password
  - “sign”
  - Save document – under a new file name
  - Your name and a time stamp will appear on the signature line

### **Oath of Office:**

- **New Officer**
  - Review form for accuracy
  - Click on line above “Name of New Officer”
  - A box will appear, type your name and office (this is your electronic signature)
  - Save document
  - Email signed document to your Appointing Officer
- **Appointing Officer**
  - Click on line above “Name of Appointing Officer”
  - A box will appear, type your name and office (this is your electronic signature)
  - Save document
  - Email this form to your PA District Director.

### **IRS Form 8822B: Complete when there is a Chapter Director change**

- Check the following boxes
  - Tax exempt
  - #3 Business Location
- Fill in the following information
  - #4a Business Name: This is the legal name of your chapter
  - #4b Employer identification number
  - #5 Old mailing address: outgoing Chapter Director’s address
  - #6 New mailing address: incoming Chapter Director’s address
  - #8 New responsible party: Incoming Chapter Director’s name
  - #9 New responsible party SS, ITIN or EIN: use the Chapter’s EIN
  - Title: Chapter Director
- Review the information for accuracy
- Save the document and print
- Signature: Incoming Chapter Director is the only one that can sign
- Date: is the date your term begins (01/01/year your term begins)
- Make a copy
- Send original to PA District Director