

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 other Forms** – **MUST** be filled out on a computer, have electronic signatures (signed on the computer) and emailed as an attachment to the PA District Director and the PA District Officer for that program.
- The dates must be the same on all forms!

Save the forms to your computer before entering information

Officer Change/Appointment Worksheet: This form is in Word

- Position Appointed to: check the box that applies to the position
- Retiring Officer: Complete the information requested
- Chapter: Your Chapter letter - District: PA - Team GWRRA: leave blank
- Personal Information: fill in the lines with your information
- Exp. Date: date your membership expires with GWRRA
 - Your membership with GWRRA must be the same length or longer than your term of office.
 - If your effective date is 01/01/2018 and your membership runs out on 08/2018; your membership needs to be extended.
- Appointment Date: is the last day for the officer stepping aside. This should be the last day of a month. Typically, this will be December 31st.
- Effective Date: is the date your term begins. Typically, this will be January 1st.
- Appointing Officer's Signature: the signature is done on the computer.
 - Your signature will look like all the other information you have typed.
 - District Director signs on this line for Chapter Director
 - Chapter Director signs on this line for Chapter Officers.
- Save document
- Email this form to your PA District Director and PA District Program Officer.

Officer Candidate Memorandum of Understanding (MOU): This form is a pdf and will open in Adobe Acrobat Reader (free)

- Fill in the date: typically, it is "1st day of January, following year"
- Next line: type in your name
- Probationary period is six months: typically, it is "June 30, same year as above"
- Officer Candidate & Candidate Spouse: complete the required information
 - Usually, this information is the same
 - Expiration Date: date your membership expires with GWRRA
 - ~ Your membership with GWRRA must be the same length or longer than your term of office.
 - ~ If your office appoint is 01/01/2018 and your membership runs out on 08/2018; your membership needs to be extended.
 - ~ Signature of Candidates: see "How to add your signature to MOU"
- Appointing Officer
 - District Director completes this area for the Chapter Director
 - Chapter Director completes this area for Chapter Officers
 - ~ Type in information
 - ~ Signature: see "How to add your signature to MOU"
- Save document

- Email this form to your PA District Director and PA District Program Officer.

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”
 - 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 (Remember your password there is no way to retrieve it)
 - “sign”
 - Save document under a new file name.
 - ~ Note: Once you do this you will not be able to change any information on the MOU
 - Note: Once you do this you will not be able to change any of the information on the document.
- Name will appear on signature line
- Remember to save the document

Oath of Office: This form is a pdf and will open in Adobe Acrobat Reader (free)

- District: PA
- Chapter: your chapter
- Installed: typically, it is “1 day of January, following year”
- Appointing Officer: On the computer type: Name and Office
 - District Director signs on this line for Chapter Director
 - Chapter Director signs on this line for Chapter Officers.
- New Officer: On the computer type: Name and Office
- Save document
- Email this form to your PA District Director and PA District Program Officer.

IRS Form 8822B: **MUST** be filled out on the computer

- This form is a pdf and will open in Adobe Acrobat Reader (free)
- 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: enter outgoing Chapter Director’s address
 - #6 New mailing address: enter incoming Chapter Director’s address
 - #8a Old name responsible party: Outgoing Chapter Director’s name
 - #8b New name responsible party: Incoming Chapter Director’s name
 - #9a Old SS, ITIN or EIN: the number the Outgoing Chapter Director used when they signed the document (either their social security number or Chapter’s EIN)
 - #9b New SS, ITIN or EIN: may use the Chapter’s EIN; you do not need to use the incoming Chapter Director’s social security number
 - Title: Chapter Director
- Save your file and print
- Signature: Incoming Chapter Director is the only one that can sign

- Date: 01/01/year your term begins
- Make a copy
- Send original to PA District Director

Bank Signature Card: at the Chapter's financial institution for checking

- Who should be on the Chapter's checking account
 - Chapter Director, Assistant Chapter Director, Chapter Treasurer and District Director
- A new bank signature card will be necessary
 - If there is a change of officer(s) that are
 - If there is a change in financial institution for the Chapter checking account.
- Meet with your bank and get the current officers' signature on the account
- Once all of the officers have signed; have the bank make you a copy of the signature card
- Send a copy your PA District Director