

2017 MEMBERSHIP REPORTING PROCEDURES

The Membership Reporting Procedures are designed to have accurate listings of the membership in each of the AIM-IRS chapters. These procedures include the processing of the ***official membership spreadsheet*** distributed by the ***National Membership Chair***. ***The spreadsheets will be emailed directly to the Chapter President with a copy to the RVP, NSVP and National President.***

PART 1: Membership Spreadsheet (official listing)

- A. Take this opportunity to verify the member chapter, region and contact information to include a personal, not IRS, email address.
- B. All entries on this form must be typed with a FONT SIZE OF 12 AND FONT TYPE OF TIMES NEW ROMAN, ARIAL OR COURIER
- C. On the membership spreadsheet, in the “2017” column, indicate with the word “**Yes**” all 2016 renewals, returning (previously a member; not a member in the prior year) and new members (never been a member).
- D. On the Membership Spreadsheet:
 1. Highlight the line in **yellow**, for those members requiring any corrections including updated contact information (name, address and phone numbers), AIM-IRS position/title, business unit where applicable and non IRS email address.
 2. Highlight the line in **green**, for all renewals. Insert a line as needed, and highlight in **green**, any new and returning members. A membership number and/or new card will be issued where applicable.
 3. Highlight the line in **red**, for those members that need to be deleted from the chapter membership.
- E. Indicate retirees by placing a “Y” in the “Retiree” column

PART 2: The Membership Spreadsheet Submission Process

- A. All checks for per capita dues (made payable to AIM-IRS) must be sent to the National Treasurer:

David Hines
P. O. Box 398743
Dallas, Texas 75339
- B. The chapter membership spreadsheet will be emailed to the National Membership Chair Jennifer Williams (jennidenise@aol.com) and National Treasurer David Hines (hin@flash.net).
Do not mail the spreadsheet with check.
- C. Both per capita dues and Membership Spreadsheet must be received by the National Treasurer by May 1, 2017 (Postmark will be used as the received by date)

- D. Indicate with each submission, the submission #, date, chapter, name, and total (membership payments included in the submission)
- E. Per Capita Dues and names on the membership spreadsheet must agree with each other. In other words, make certain there is not more money (dues) than members (names) or vice versa.
- F. Membership numbers, where applicable, will be emailed to the chapter for distribution to the respective member(s).
- G. Chapters are also responsible for providing an electronic membership card to members. If you need the electronic version of the card, send an email to the national treasurer.