



HOW - TO - DO - IT - MANUAL

1 A. INTRODUCTION

2 1. The purpose of this manual is to provide information and guidance for Chapter and
3 Department officers. This manual is not intended to replace the MOPH Constitution
4 and Bylaws, or to replace direction or orders of national officers. Rather, the intention is
5 to act as a supplementary reference. The **DATE MOPH Bylaws** are the **final authority**.

6 2. Primary reference materials include:

7 *Military Order of the Purple Heart Constitution, Bylaws, and Ritual*

8 *Military Order of the Purple Heart Web Site: <http://www.purpleheart.org/>*

9 *Roberts Rules of Order*

10 3. Purple Heart There are six Regions that consist of various states, territories and other geo-political
11 entities. Consult the current bylaws for the current configuration of the Regions

12 *~~ Reference: ARTICLE I, Section 1; MOPH Bylaws*

13 4. Departments may be organized where there are two or more active Chapters, with a
14 minimum combined membership of 100 members and associate members. Two or more
15 states can form a Regional Department if the states do not meet the minimum standard
16 of two Chapters, or a combined membership of 100.

17 *~~ Reference: ARTICLE I, Section 2; MOPH Bylaws*

18 5. A Chapter must have a minimum of 12 members and three officers (Chapter Commander,
19 Finance Officer and Adjutant).

20 *~~ Reference: ARTICLE I, Section 3; MOPH Bylaws*

21 B. MEMBERSHIP

22 1. *Eligibility.* Only recipients of the Purple Heart may be admitted to membership.

23 Associate membership has other requirements. Proof of receiving the Purple Heart can
24 be documented with a copy of a DD-214, DD-215, WD AGO 53-55, NAVPER-33,
25 General Orders, Transmittal of Awards, or other documentation specifying the receipt of
26 the Purple Heart. The Purple Heart Medal Certificate is NOT sufficient proof.

27 *~~ Reference: ARTICLE II, Section 2; MOPH Bylaws*

1 2. *Applying for Membership.* Application for membership can be done by mail or e-mail. The
2 membership application can be down-loaded from the *Purple Heart Web Site*
3 (*www.purpleheart.org*). The completed application accompanied dues payment and proof of
4 receiving the Purple Heart. The application, dues and proof of medal receipt must be
5 sent to:

6 MOPH Headquarters (Attn: Membership)
7 5413-B Backlick Road
8 Springfield, VA 22151-3960

9 Or e-mail to: <mailto:membership@purpleheart.org>

10 ~ ~ Reference: *ARTICLE II, Section 1; MOPH Bylaws*

11 3. *Dues.* Dues are established by the National Convention and appear on the membership
12 application form.

13 ~ ~ References: *ARTICLE II, Section 4; ARTICLE XIII; MOPH Bylaws*

14 4. *Military Service Records.* Military Service Records can be requested by mail or on-line.
15 Attachment provides specific information regarding making a request.

16 5. *Associate Members.* Associate membership may be granted to spouses, widows, widowers,
17 ancestors, parents and lineal descendants of a living or deceased recipient of the Purple
18 Heart. Siblings are not eligible for associate membership.

19 An associate member has all the privileges of an active member of the MOPH, and is
20 subject to the various rules, restrictions, regulations and limitations set forth in the
21 Constitution and Bylaws. Associate members may not hold an elective office, but may
22 hold an appointed office, except that of Adjutant. An associate member is not eligible to
23 vote on MOPH matters.

24 ~ ~ Reference: *ARTICLE XVIII; MOPH Bylaws*

25 **C. CHAPTER PROCEDURES**

26 1. A Chapter must have a minimum of twelve (12) members and three officers; Chapter
27 Commander, Finance Officer and Adjutant.

28 ~ ~ Reference: *ARTICLE I, Section 3; MOPH Bylaws*

29 2. Elected officers of a Chapter include Commander, Senior Vice Commander, Junior Vice
30 Commander, Finance Officer, Sergeant-at-Arms, and two (2) Trustees. The Commander
31 shall appoint an Adjutant and Chaplain. Elected officers serve for a one (1) year term.
32 Appointed officers serve at the pleasure of the commander.

33 ~ ~ Reference: *ARTICLE III, Sections 2 and 5; MOPH Bylaws*

- 1 3. Duties of Chapter officers are outlined in *ARTICLE IV; MOPH Bylaws*.
- 2 4. Chapter elections shall be held in April of each year, with installation of officers
3 conducted by April 30th. Chapter election reports must be submitted to MOPH national
4 headquarters by April 30th. Chapter elections will be held in face-to-face meetings.
5 Except that elections may be held by digital means in instances when normal meetings
6 cannot be held because of inclement climatic conditions or inability of a quorum to make a
7 face to face meeting.

8 *~~ Reference ARTICLE III, Section 4; MOPH Bylaws.*

- 9 5. Chapter Election Reports must be sent to MOPH National Headquarters either by mail or
10 online, when due. Except that elections may be held by digital means in instances when
11 normal meetings cannot be held because of inclement climatic conditions or inability of a
12 quorum to make a face to face meeting. The election report form may be downloaded from
13 the MOPH website under Chapter and Department forms.

14 ***NO ELECTION REPORT means***

15 ***No Life Membership Rebate to a Chapter or Department***

16 ***No Vote at Department or National Conventions***

- 17 6. **FINANCES.** The Chapter Finance Officer may pay out monies only in response to a
18 warrant drawn by the Chapter Adjutant and approved by the Chapter Commander.
19 Chapter Trustees shall, semi-annually, in September and March, audit Chapter accounts
20 and make a report to the membership.

21 *~~ Reference: ARTICLE IV, Sections 5 & 8; MOPH Bylaws*

22 Chapter Finance Reports include the annual period May 1 through 30 April and must be
23 submitted to MOPH national headquarters, either by mail or digitally, no later than May
24 15th. The Finance Report must include a copy of the IRS Form 990 for the Department.
25 As a non-profit tax-exempt organization, a Chapter is required to annually file an IRS
26 Form 990. A small non-profit organization whose annual gross receipts are less than
27 \$50,000 is required to submit the 990-N (Electronic Notice). A one-time registration is
28 submitted through the IRS website (irs.gov). If you experience a problem with the 990-N
29 electronic filing system. contact IRS Customer Account Services at 877-829-5500 (toll
30 free). If the IRS 990 is not current, the Department must submit to the National
31 Adjutant a report of circumstances surrounding the lack of a IRS 990, as well as the steps
32 being taken to resolve the issue.

1 ~~ Reference ARTICLE VII, Section 5; MOPH Bylaws

2 **7. LIFE MEMBERSHIP REBATES.** Chapters annually receive a rebate for all eligible life
3 members on record as of June 30th, and who have been verified by October 1st. The per
4 capita rebate payment is based on a National Convention vote; 50% to chapters, 50% to
5 departments. To be eligible to receive a rebate, a chapter must submit an election report
6 as required.

7 **NO ELECTION REPORT means No Life Membership Rebate to a Chapter**

8 ~~ Reference ARTICLE XIII, MOPH Bylaws

9 **8. FUND RAISING.**

10 MOPH is an IRS designated 501(c)(19) organization. The Purple Heart Service
11 Foundation is a 501(c)(3) organization. Many businesses or other entities require an
12 organization to have 501(c)(3) status to receive a donation.

13 Chapter(s) and/or Department(s) should respond to inquiries that the Chapter or
14 Department is a segment of and funded by the Purple Heart Foundation.

15 Chapter(s) and/or Department(s) may consider using the 501(c)(3) status of the Purple
16 Heart Service Foundation for fund raising. **For more information, contact the**
17 **National Adjutant.**

18 Departments can incorporate and be designated by the IRS as a 501(c)(3) organization.
19 Many businesses or other entities require an organization to have 501(c)(3) status to
20 receive a donation.

21 **9. CHAPTER MEETINGS.** Chapter meetings are conducted in accordance with *Roberts*
22 *Rules of Order* and by following the MOPH Ritual which may be downloaded from the
23 MOPH website under Chapter and Department Forms. <http://www.purpleheart.org/>

24 The recommended Chapter meeting sequence is:

- 25 Call to order
- 26 Salute the Colors
- 27 Invocation
- 28 Roll call of officers
- 29 Introduction of guests and new members
- 30 Minutes of last Chapter meeting
- 31 Financial report
- 32 Committee reports

- 1 Orders and communications
- 2 Unfinished business
- 3 New business
- 4 Good of the Order
- 5 Benediction
- 6 Salute the Colors
- 7 Adjourn

8 **D. DEPARTMENT PROCEDURES**

9 1. A Department may be organized with two or more active Chapters and a minimum
10 combined membership of 100 members and associate members.

11 *~~ Reference: ARTICLE I, Section 2; MOPH Bylaws*

12 2. A Department is governed by a Department Convention. The Department must have a
13 minimum of twelve (12) members and three officers; Chapter Commander, Finance
14 Officer and Adjutant.

15 *~~ Reference: ARTICLE VI, Section 1; MOPH Bylaws*

16 3. Elected officers of a Department include Commander, Senior Vice Commander, Junior
17 Vice Commander, Finance Officer, Sergeant-at-Arms, Judge Advocate and Inspector.
18 Appointed officers include Adjutant and Chaplain; appointed officers may also include a
19 Legislative officer and Chief of Staff. Elected officers serve for a one (1) year term,
20 and/or as designated by the department. Appointed officers serve at the pleasure of the
21 commander.

22 *~~ Reference: ARTICLE IV, Sections 2 and 5; MOPH Bylaws*

23 4. Duties of Department officers are outlined in the MOPH Bylaws.

24 *~~ Reference: ARTICLE VIII; MOPH Bylaws*

25 5. The Department Executive Committee (DEC) includes all elected officers of the
26 Department, Past National Commanders and Past Department Commanders who are
27 members of the Department, appointed officers of the Department, and Chapter
28 Commanders of the Department. The DEC meets immediately prior to the Department
29 Convention, or at the call of the Department Commander.

30 *~~ Reference: ARTICLE VI, Sections 8 and 9; MOPH Bylaws*

31 6. Department elections are held at the Department Convention, held between May 1 and
32 June 30 of each year. The Department election report is due to MOPH national

1 headquarters no later than June 30. Department elections will be held in a face-to-face
2 meeting.

3 *~~ Reference ARTICLE VI, Section 1; MOPH Bylaws.*

4 **NO ELECTION REPORT means**

5 **No Life Membership Rebate to a Department**

6 **No Vote at the National Convention**

7 7. NATIONAL CONVENTION. The Department delegate to the National Convention is
8 the Department Commander, Department Senior Vice, or Department Junior Vice.

9 *~~ Reference: ARTICLE VIII, Section 2; MOPH Bylaws.*

10 8. NATIONAL EXECUTIVE COMMITTEE. The National Executive Committee (NEC)
11 includes each Department. The NEC meets immediately prior to the National
12 Convention, as well as within 24 hours following the adjournment of the National
13 Convention. The NEC may meet during the interval between national conventions; such
14 meetings may be conducted digitally, and the National Adjutant may count a digital vote
15 on any matter. The Department delegate to the NEC is the Department Commander,
16 Department Senior Vice, or Department Junior Vice. Duties of the NEC are specified
17 in ARTICLE VII, MOPH Bylaws.

18 *~~ Reference: ARTICLE XII; MOPH Bylaws*

19 9. FINANCES. The Department Finance Officer may pay out monies only in response to a
20 warrant drawn by the Department Adjutant and approved by the Department
21 Commander. The Department Finance Committee should annually review and audit
22 Department accounts and make a report to the membership.

23 *~~ Reference: ARTICLE VII, Section 5; MOPH Bylaws*

24 Department Finance Reports include the annual period May 1 through 30 April and must be
25 submitted to MOPH national headquarters no later than June 30. The Finance Report must
26 include a copy of the IRS Form 990 for the Department. As a non-profit tax-exempt
27 organization, a Department is required to annually file an IRS Form 990 (The online
28 document has an active hyperlink below)

29 <https://sa.www4.irs.gov/eauth/pub/login.jsp?Data=VGFvz2V0TG9BPUI%253D&TYPE=33554433&REALMOID=06-000ca231-ad53-16bc-8663-483c0adb40e7&GUID=&SMAUTHREASON=0&METHOD=GET&SMAGENTNAME=-SM-m50rA+7FvbGU+gLvTS4wrt26VgObWqx+78E5Bj5nDroJHeUNEeLTNGIERDz+h%2FE&TARGET=-SM-http%3a%2Fsa.www4.irs.gov%2Fepostcard%2Fsecure%2Fhome%2F>

32 A small non-profit organization whose annual gross receipts are less than \$50,000 is
33 required to submit the 990-N (Electronic Notice). A one-time registration is submitted

1 13. DEPARTMENT MEETINGS and CONVENTION. Department meetings and the
2 Department Convention are conducted in accordance with Roberts Rules of Order and
3 the MOPH Ritual that may be downloaded from the MOPH website under Chapter and
4 Department Forms. The recommended Department meeting sequence is:

- 5 Call to order
- 6 Salute the Colors
- 7 Invocation
- 8 Roll call of officers
- 9 Introduction of guests and new members
- 10 Minutes of last Department meeting
- 11 Financial report
- 12 Committee reports
- 13 Orders and communications
- 14 Unfinished business
- 15 New business
- 16 Good of the Order
- 17 Benediction
- 18 Salute the Colors
- 19 Adjourn

20 **E. OTHER STUFF**

- 21 1. VETERANS AFFAIRS VOLUNTARY SERVICE (VAVS). At VA Medical
22 facilities, VAVS volunteers supplement personnel, facilities and programs for the direct
23 and indirect care, treatment and welfare of patients. The MOPH VAVS handbook is
24 available online at the MOPH website www.purpleheart.org. Additional information is
25 available from the National VAVS Officer at <http://www.purpleheart.org/>.
- 26 2. SCHOLARSHIPS. The MOPH Scholarship Program may award scholarships may be
27 funded by a grant from the Purple Heart Foundation. Students eligible for a Purple
28 Heart scholarship include members of the Order, spouses or widows of a veteran killed in
29 action or died of wounds, and direct descendants (child, step-child, adopted child, or
30 grandchild) of a member of the Order. Additional information and applications are
31 available online at the MOPH website <http://www.purpleheart.org/>.
- 32 3. ROTC Leadership Awards. MOPH ROTC and JROTC Leadership Awards honor
33 underclass Cadets and Midshipmen for outstanding military performance, leadership and
34 scholarship; seniors are not eligible. Additional information can be obtained from the
35 National ROTC Officer and is also available on the MOPH website under the Advocacy Tab

1 and the ROTC Program Tab <http://www.purpleheart.org/>. 4. PURPLE HEART TRAIL
2 and LEGACY PROGRAM. The Purple Heart Trail Program provides for the naming
3 of highways and roads as a Purple Heart Highways/Trails or other Purple Heart entities.
4 It is an honorary designation approved by a state Transportation department, local
5 government, or other entities. The Purple Heart designation has been expanded to
6 include bridges, cities, counties, schools, and other entities. For additional information,
7 contact the National Purple Heart Trail and Legacy Program Coordinator
8 <http://www.purpleheart.org/>.

9 5. PURPLE HEART MEDAL and MOPH LOGO.

10 It is essential to protect the integrity of the Purple Heart Medal and the MOPH LOGO
11 to preserve the honor of the Military Order of the Purple Heart, the Purple Heart
12 Foundation, and the Purple Heart Auxiliary. The Purple Heart Medal as presented by the
13 US Government image is controlled by the US Army Institute of Heraldry, not the
14 MOPH.

15 Use of the image of the Purple Heart Medal must not be made or used in any manner
16 that would degrade the award or permit any commercial use. Replicas of the medal may
17 be used only for the official papers of the Order. This includes letterhead, banners and
18 other signage used for recognition purposes.

19 The MOPH Logo is a trademark licensed to Purple Heart Holdings, LLC. MOPH and
20 the Foundation are allowed to use the logo for fundraising purposes for the benefit and
21 the work of the Order. A one-time request for the use of the MOPH logo on stationary,
22 a banner, or other semi-permanent signage should be made to the National Adjutant.
23 Requests to use the MOPH logo for specific event advertisements, etc., must be
24 submitted to the National Adjutant for approval. <http://www.purpleheart.org/>.

25 ~ ~ Reference: ARTICLE XV, Section 10: MOPH Bylaws

26 6. PURPLE HEART FOUNDATION. The purpose of the Purple Heart Foundation is to
27 raise funds for the service, welfare, and rehabilitation work of the MOPH, liaison with the
28 VA, legislative service, and any other purpose consistent with the programs of the
29 MOPH. <http://www.purpleheartfoundation.org/>

30 ~ ~ Reference: ARTICLE XVII: MOPH Bylaws

1 7. **PURPLE HEART AUXILIARY.** The purpose of the Purple Heart Auxiliary is to assist
2 in fundraising and perpetuating the objectives of the MOPH.

3 <http://www.mophhq.org/auxiliary-home.html>

4 ~ ~ Reference: *ARTICLE XVI: MOPH Bylaws.*

5 8. **MOPH AWARDS & HONORS:**

6 **George Washington Medallion of Merit.** The George Washington Medallion of Merit
7 is the highest award presented by the MOPH. The medal is not presented on a regular
8 basis but presented to those who are honored for extraordinary service to our country
9 and its veterans. Past recipients include:

10 1966 - Bob Hope, Entertainer

11 1972 - Lyndon Johnson, President of the United States

12 1972 - Carl Parmenter, MOPH Member

13 1974 - Olin E Teague, US Representative (Texas) (Chairman Veterans Affairs Committee)

14 1974 - Richard Golick, Past National Commander

15 1979 - Harold Russell (Double amputee Purple Heart veteran ~actor ~The Best Years of Our Lives)

16 1992 - Robert Dole, US Senator (Kansas)

17 1993 - George H W Bush, President of the United States

18 1994 - George Skyepeck, Combat Artist

19 2001 - Harvey Thiede, Past National Commander

20 2002 - Frank Athanason, Past National Commander

21 2006 - Lane A. Evans, US Representative (Illinois)

22 2007 - James McEachin. Actor and Member

23 **National Commander's Award.** Awarded by the National Commander to recognize
24 individuals for exceptionally meritorious service to MOPH. Not presented on a regular
25 basis.

26 **Patriots of the Year.** Recognizes Patriots of Chapters, Departments and Regions for
27 outstanding contributions to the Order during the previous year. The National Patriot of
28 the Year is selected by previous recipients from the Region Patriots of the Year.

29 **Carol Fyffe Commander's Award.** An annual award to recognize the efforts of a
30 member during the preceding year for new programs he or she developed that has a
31 national impact for MOPH.

32 **Distinguished Service Award.** Chapter and Department Commanders may use this
33 award to recognize organizations, Patriots and other individuals who have made

1 significant or unique contributions to MOPH. There is no limit to the number of awards
2 and no set time for presenting the awards.

3 **Carl H. Blanchard Americanism Award.** Presented annually to the Patriot who has
4 contributed the most to promote Americanism in the community and schools.

5 **Publication Awards.** Publication awards are evaluated by the Publications Committee
6 and presented annually by the National Commander:

- 7 - Most Outstanding Department Newsletter
- 8 - John Binnion Chapter Newsletter Award for a Chapter with more than 150 members
- 9 - John Binnion Chapter Newsletter Award for a chapter with 149 members or less
- 10 - Best Photograph Award taken by a non-professional photographer
- 11 - Victor Kubly Award for the best magazine article

12 **Membership Awards.** Four awards for membership recruiting excellence are presented
13 annually by the National Commander:

- 14 - Department Membership Award - Greatest Numerical Membership Increase
- 15 - Department Membership Award - Greatest Percentage Increase in Membership
- 16 - Chapter Membership Award - Greatest Numerical Membership Increase
- 17 - Chapter Membership Award - Greatest Percentage Increase in Membership

18 **Annual Recruiting Awards:**

- 19 - Top Recruiter in the Nation
- 20 - Recruiter of 26 or more new members
- 21 - Recruiter of 16 to 25 new members
- 22 - Recruiter of 10 to 15 new members
- 23 - Top NSO Recruiter in the Nation
- 24 - NSO Recruiter of 26 or more new members
- 25 - NSO Recruiter of 16 to 25 new members
- 26 - NSO Recruiter of 10 to 15 new members

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F. ATTACHMENTS

If you are having difficulty getting an answer to a question, work your way through your chain of command (Chapter Commander, Department Officers, Region Commanders).

- 1) Key Reporting Dates
- 2) MOPH Blank **Reports**, Forms, and Documents (Click on link)
<http://www.mophhq.org/members.html>
 - a. Election Reports
 - b. Finance Reports
 - c. Warrants (Chapter/Department)
 - d. Resolutions procedures <http://www.mophhq.org/resolutions.html>
- 3) How to do a IRS 990 form
<http://nebula.wsimg.com/41740f8fba276ccfc12f9ec95843d262?AccessKeyId=CD0AD7D276FD9E346B33&disposition=0&alloworigin=1>
- 4) Missing Military Records & Missing Medals <http://vetrecs.archives.gov/>
 - a. Use this link for your nearest National Service Office for assistance
<http://nebula.wsimg.com/7a6740961e6c9897df09153442ea815e?AccessKeyId=CD0AD7D276FD9E346B33&disposition=0&alloworigin=1>
- 5) Public Relations Guide Click
here <http://nebula.wsimg.com/d3918f6d0eeeeaf102a750fa78ad8aeb?AccessKeyId=CD0AD7D276FD9E346B33&disposition=0&alloworigin=1>
- 6) Extracts from Robert's Rules of Order (Click here) <http://www.mophhq.org/coming-soon.html>

**KEY DATES FOR DEPARTMENTS, CHAPTERS &
NATIONAL OFFICERS FROM 7/1/2017 – 6/30/2018**
(List of key dates of Important Mailing and Filing Deadlines)

Complete Roster is available to download from website. Hard copies mailed upon request from Commanders or Adjutants.	
Fiscal Year, Membership Recruiting & Membership Strength Accounting	1 JULY 2017 to 30 JUNE 2018
Annual Mailing Labels Invoices Sent to DEPT & CHAP on order list	2nd Week in SEPTEMBER 2017
<p>IRS 990 Form filing due for DEPT and CHAP</p> <ul style="list-style-type: none"> • - 990-N electronic filing for DEPT and CHAP less than \$50,000 Gross Receipts • - 990 EZ or 990 for DEPT and CHAP not qualified to file 990-N <p>Due 15th day of 5th month following the end of organization's taxable year.</p>	<p>Example: 15 NOVEMBER 2017 (for Fiscal Year ended 30 JUNE 2017. Can file as soon as 1 JULY 2017).</p> <p>Submit IRS receipt <i>accepting</i> the 990 filing with the Finance Report.</p>
LM Verification Form* Due (Must be received at Nat'l HQs or postmarked by date indicated; No Exceptions)	3 OCTOBER 2017
LM Rebates Sent to DEPT & CHAP (for verified Life Members as of 30 June 2017)	NOVEMBER/DECEMBER 2017
Report Forms Update on Website - (Election, Finance, Americanism, VAVS, Welfare & LM Verification)	1 st Week in February 2018
CHAPTER ELECTIONS* to be held in March each year and Reports Due at National Upon Installation of Officers; Must be received or postmarked no later than 30 April 2018	1 MARCH 2018 – 31 MARCH 2018
CHAPTER Report Forms due (Finance* with 990, Property List - if required, Americanism, and Welfare).	15 MAY 2018

DEPARTMENT Inspection Report to National Inspector. See sample format in Finance and Inspection Guide on the website.	31 MAY 2018
DEPARTMENT Report Forms due (Finance* with 990, Property List - if required, Americanism, VAVS and Welfare).	6 JUNE 2018

1 *Chapters and Departments which have NOT **timely** Submitted a Current valid Election
2 Report will NOT qualify for Delegates at the National Convention, and in addition, non-filing
3 of current validated Finance Report (includes the IRS 990 Form **Accepted** Filing Receipt
4 and Property List, if required) and Life Member Verification will NOT be paid LM Dues
5 Rebates!

6 **KEY DATES FOR PURPLE HEART MAGAZINE**

7 Deadline for Articles for PURPLE HEART Magazine 1st day of even months

8 Distribution of PURPLE HEART Magazine 4th week of odd months

9 **KEY DATES FOR 2018 NATIONAL CONVENTION REPORTS**

10 Deadline for DEPARTMENT COMMANDER'S REPORTS 15 JUNE 2018

11 Deadline for NATIONAL OFFICER'S REPORTS 15 JUNE 2018

12

NEW PROCEDURE FOR FILING 990N e-Postcard

The IRS changed the procedure for completing the 990-N e-Postcard effective February 29, 2016. This change took place effective March 1, 2016. You do not need to; but if you use the previous website <http://epostcard.form990.org>, you will see a statement that says “This e-Postcard system is no longer available.” However, the link to the new website will be listed (www.IRS.gov/990N).

PROCEDURE

- 1) Go to website www.irs.gov/990N; it will take you to a page entitled “Annual Electronic Requirement for Small Exempt Organizations. Under the How to File section will be the link entitled: **Form 990-N Electronic Filing system (e-Postcard)**. Click on that link and it will take you to a secure IRS webpage. This webpage will outline steps for **First Time Users and Returning Users**.
- 2) Click on **First Time Users** to create your Login and Password. After you review the instructions, click on **“Get Started”**
- 3) It will take you to a page where you will need to enter certain information; i.e., *your first name, last name and email address*. Then select *“Send email confirmation code”*. An email will be sent to the email address entered; you need this code before you can complete the set up of your account. (It could take up to 10 minutes before you receive the email.) This email will be sent to you from IRS.online.services@irs.gov and will begin with “Dear User” and the first sentence will read *“Your confirmation code is.”*
- 4) Once you have received the code, go back to the IRS website you were on previously and complete step 2 of 4: **Verify Identity** and it will prompt you when to enter the code. Enter the code and select “Continue”. **NOTE: When entering the code, do not include the dash; the system will insert the dash.**
- 5) You will then be directed to step 3 of 4, which is setting up a **security profile** by completing the following steps:
 - a) Create a user ID and password. Follow the instructions for these two items as indicated on the webpage.
 - b) After setting up your user ID and password, you will be required to enter a unique phrase (be brief) which will be included in confirmation emails sent to you by the IRS Online Services.

- c) Next item to complete is a site phrase. This phrase will be visible to you when you log into the IRS website to complete your 990-N e-Postcard.
 - d) Select a site image that you will recognize when you login again. Select from the images that are available on the webpage.
 - e) The final step in setting up your security profile is selecting four security questions. The answers cannot be used more than once and cannot be a word or number that is part of the secret question.
- 6) After you complete step 5) above, select “Continue”. You should see a page that states “Your user profile was successfully created.” Don’t forget to write down your User ID and password for future reference. Click “Continue” for the next step.

[NOTE: After completing step 6), I got an error message several times and had to start over. Hope it won’t be that way for you. I think my problem was getting the confirmation code entered correctly and in the given timeframe. Once I got the message that my profile was successfully completed, I didn’t have any problems creating my e-Postcard profile.]

- 7) The next step is to “Manage your e-Postcard profile”. Before you can create a Form 990-N e-Postcard, you need to create your e-Postcard profile. This profile allows you to designate the filer type, add EINs and remove EINs from your profile. This step is especially beneficial to the ones who file e-postcards for multiple entities. **(This was helpful for me because I file for the Department (which I will do June 1, 2016) and for the DAVA (which I did on April 5, 2016) and was able to put both EIN’s under one login.)**
- 8) Once you click on “Manage Your e-Postcard profile”, the system will ask you for information pertaining to your unit. To add the EIN, complete the following steps:
- a) Select a user type – Exempt Organization -- Click “Continue.”
 - b) Enter your EIN – the first two digits go in box one; the remainder go in box two. Click “Add EIN”.
[NOTE: If you file more than one 990-N, continue this process until all are added.]
 - c) After all EIN’s are added, click “Create New Filing”.
[NOTE: If you are ready to file your e-Postcard, continue to step 8)d); if not you may logout of the IRS website and log in at a later date as a “Returning User” to complete your e-Postcard at the end of your unit’s tax year.]
 - d) Using the drop down, select the EIN you are filing the 990-N for and click “Continue”.
- 9) After you click “Continue”, you will come to the Organization Details screen where you will only need to answer questions 2 and 3. The other fields on this screen already contain the necessary information. Click “Continue”.

- 10) The next screen is contact information. Enter the DBA Name (whatever you have used in the past when completing your 990-N e-Postcard). Enter the address of the Unit Treasurer. Select "United States" from the country drop down box. For principal officer, select "*Person*" from the name dropdown. Enter the Unit President's name and address. Then click "*Submit Filing*".
- 11) A warning will come on the screen that asks if you want to save the data and submit the filing to the IRS. **[Once you submit the e-Postcard, you will no longer be able to edit the information.]** Select "OK" to confirm submission, or *Cancel* if you need to review it or make changes.
- 12) You will receive a confirmation page that the information has been submitted. It will include the organization name, EIN, tax year, start date, end date, submission ID, filing status date, and status. Always **PRINT** this page for your records. Once you leave this page you are unable to access it again.

A confirmation email will be sent to the email address you gave when you registered and will state whether the postcard has been accepted or denied. **[In the past these confirmation emails were almost immediate. Presently it takes up to four to five days to receive this information per the IRS.]**