

# California Society Sons of the American Revolution

## Check Request Form

Completed check request forms are required by all members when seeking reimbursement of expenses. The form and supporting documentation with receipts should be emailed, mailed or faxed to the California Society state president. Be sure to sign your check request before sending to the president.

### **INSTRUCTIONS FOR COMPLETING THIS FORM**

The fillable form fields allow you to complete your check request form using your computer. Use the tab key to move from field to field. Complete all of the fields except those under the heading "THE FOLLOWING IS TO BE COMPLETED BY THE CASSAR TREASURER AND THE APPROVING OFFICER."

#### ***Expense, Expense Category, Amount***

Five (5) spaces are provided for assigning expenses between five different expense categories. The field titled "Amount Requested" at the top of the request form is automatically calculated as you enter the dollar amounts in the "Amount" column(s). Selecting the correct expense category from the drop down list guarantees your expenses will be charged against the proper expense category.

#### ***"The space below is provided for listing the details of these expenses"***

Use this space to completely describe your expense(s). Providing additional details makes easier for the CASSAR Treasurer to verify your expenses were charged against the proper category.

#### ***"Press this button to print"***

Press this button after you finish entering data in the necessary fields on your check request form. In most cases you should print two copies, one for your records and one to sign and then mail or scan/e-mail to the California Society president. Once received, he will review your request and, if approved, will sign it, and then mail/e-mail it to the CASSAR Treasurer for reimbursement.

#### ***"Press to submit by email"***

Though optional, the use of this button may expedite the processing of your request for reimbursement. This button emails an unsigned PDF of your request directly to the state president. This alerts him that you are seeking reimbursement and provides him an advanced opportunity to review your request before he receives your hard copy. It also informs him that your signed copy will be arriving soon.

**IMPORTANT:** The "Press to submit by email" option is only functional when using Adobe Acrobat or Adobe Reader. If an error message pops up, the user should upgrade to a newer version of the program.

#### **Email or Mail all check request forms to:**

Robert Taylor  
5277 Shiloh Way  
Ventura, CA 93003-7351  
Tartar-Taylor@att.net

#### ***"Approved by President" button***

This button is for the president's use only. It alerts the CASSAR treasurer that the president has approved your expense and that a copy containing his signature has been emailed or mailed to the treasurer.

# THE CALIFORNIA SOCIETY

SONS OF THE AMERICAN REVOLUTION

## CHECK REQUEST FORM

Date: \_\_\_\_\_

Amount Requested: \_\_\_\_\_

Name of Payee: \_\_\_\_\_ Email: \_\_\_\_\_

Address of Payee: \_\_\_\_\_

Officer or Committee Chairman: \_\_\_\_\_ Phone: \_\_\_\_\_  
Officer or Chairman's Name Officer or Chairman's Phone

Signature: \_\_\_\_\_ Email: \_\_\_\_\_  
Officer or Chairman's Signature Officer or Chairman's Email

Description of Expense	Expense Category	Amount
TOTAL		

The space below is provided for listing the details of these expenses:

THE FOLLOWING IS TO BE COMPLETED BY THE CASSAR TREASURER AND APPROVING OFFICER

Check No. \_\_\_\_\_ Dated: \_\_\_\_\_

Approving Officer and Title: \_\_\_\_\_  
Signature Title

Check requests should include supporting documentation unless prior approval has been received from the Executive Committee. The Executive VP, VP North, or VP South may approve check requests in the absence of the President. A check request submitted by the CASSAR President must be approved by one of the society's vice presidents.