



California Society
Secretary Forum
Transfers, Dual Members, & Reinstatements
January 20, 2021



What Now?

Change of Managers Report

Reinstatement Letters

Thank You Notes

National Data Updates

Awards & Medals Project

Year End Reports

Taxes



CASSAR Web Page

Log on to the CASSAR web page.

On the Red tool bar is a tab
"Members Section."

Hit that tab and it will take you to
the Members section of the web
site.

The screenshot shows the homepage of the California Society of the Sons of the American Revolution. The header features the organization's name in large, bold letters. Below the header is a red navigation bar with white text links: "About the SAR", "Chapters", "Programs", "Officers & Chairmen", "Photo Gallery", "Events", "Members Section", and "Contact". A yellow arrow points to the "Members Section" link. The main content area has a light blue background with the title "How to Join the SAR" in large green letters. Below the title is a list of three bullet points: "Eligibility Requirements", "How to find a Revolutionary Patriot Ancestor", and "Informational Brochures and Worksheets". At the bottom of this section is the text "find out more..." in a green script font. Below the main content area is a grey bar with a search box labeled "Search Site" and a set of navigation controls (play, stop, and other icons). At the bottom of the page, there is a footer with text about the organization's mission and a small graphic of a document with the text "How to the Download Information" and "Calif".

California Society
Sons of the American Revolution

About the SAR Chapters Programs Officers & Chairmen Photo Gallery Events Members Section Co

How to Join the SAR

- Eligibility Requirements
- How to find a Revolutionary Patriot Ancestor
- Informational Brochures and Worksheets

find out more...

Search Site

How to the
Download
Information
Calif



CASSAR Web Page

On the Members Section of the web site, there are several tabs.

Scroll down to the Secretary Tab.

Hit the Secretary tab and it will open to several forms.

Members Section

About California SAR

[About California SAR](#)

Youth Programs

[Youth Programs](#)

Registrar

[Registrar](#)

Secretary

[Secretary](#)



CASSAR Web Page










In the Secretary Tab, are the general forms that chapter secretary's use.

Here is where you will find the form which is the Chapter Change of Officers Reporting Form.

This needs to be filed with the State Secretary so he can send the information to NSSAR to give access to the Chapter Secretary and the Chapter President.

Forms are filed after the Reconciliation Reports are completed and filed with NSSAR.

Secretary

-  [November 2020 Secretary Forum Presentation](#)
November 18, 2020 Forum on Transfers, Dual Members, & Reinstatements — 
-  [2021 Annual Dues & Reconciliation](#)
September 5, 2020 Open Forum on the 2021 Annual Dues Process Member Reconciliation — Also available 
-  [October 2020 Secretary Forum Presentation](#)
A copy of the Powerpoint Presentation for Secretaries regarding the Change of Managers Form and how to use it. Also available  [as a PDF Document](#) (Posted 10/26/20)
-  [Chapter Change of Officers Reporting Form](#)
Please provide this information to the California State Secretary within 10 days of the election of Chapter Officers. You may fax or email the completed form.
-  [California SAR Chapter Transfer Form](#)
Members should use the Chapter Transfer form when transferring between Chapters within California. (Updated 9/21/20)
-  [California SAR Reinstatement Form](#)
Chapter Secretaries in California should use this Reinstatement Form when reinstating members. (Posted 9/21/20)



What's Next

Now that the Reconciliation Reports are completed, what's next?

Change of Managers Report

This form can be found on the CASSAR web site, members section.

Go to the CASSAR Web site.

California Society Sons of The American Revolution ELECTED CHAPTER OFFICERS REPORT

Please provide the following information to the California State Secretary no later than January 30 or when there is a change of Chapter Officers.

CHAPTER NUMBER: _____ CHAPTER NAME: _____

Office(title)	Officer Name	Mailing Address	City	9 digit Zip	NSSAR #	Calif #	PHONE #
PRESIDENT	Email:						
V.P.	Email:						
SECRETARY	Email:						
TREASURER	Email:						
REGISTRAR	Email:						
HISTORIAN							
CHAPLAIN							

Meeting Dates and Time: _____
Meeting Place: _____
Are Your Meetings for Members Only? _____ Or Do Wives, Friends and Companions Attend? _____
What Chapter Officer is to receive official California email? _____

Mail to: **Frederick Schuster**
State Secretary, CASSAR
1044 W Notre Dame St
Upland, CA 91786-2671 EMAIL: **schuster6789@aol.com**



Reinstatement Letters

It is not required that every chapter send members a letter letting them know that their membership has lapsed, it is just a good idea.

It is a good way to make one last attempt to keep your membership.

Send a letter and the reinstatement form which can be found in the secretary's section on the CASSAR web page.



Thank You Notes

It is not required that every chapter send its members a thank you note, it is just a good way to let them know you appreciate them.

Remember the members have just paid a considerable amount of money to remain a member of the California Society, paying chapter, state and national dues.

Let your chapter members know that you appreciate them.



Updating the NSSAR Data Base

As the chapter secretary, you have the responsibility to keep the membership records up-to-date for your chapter.

This would include the National Data Base records.

Address

E-mail

Phone numbers



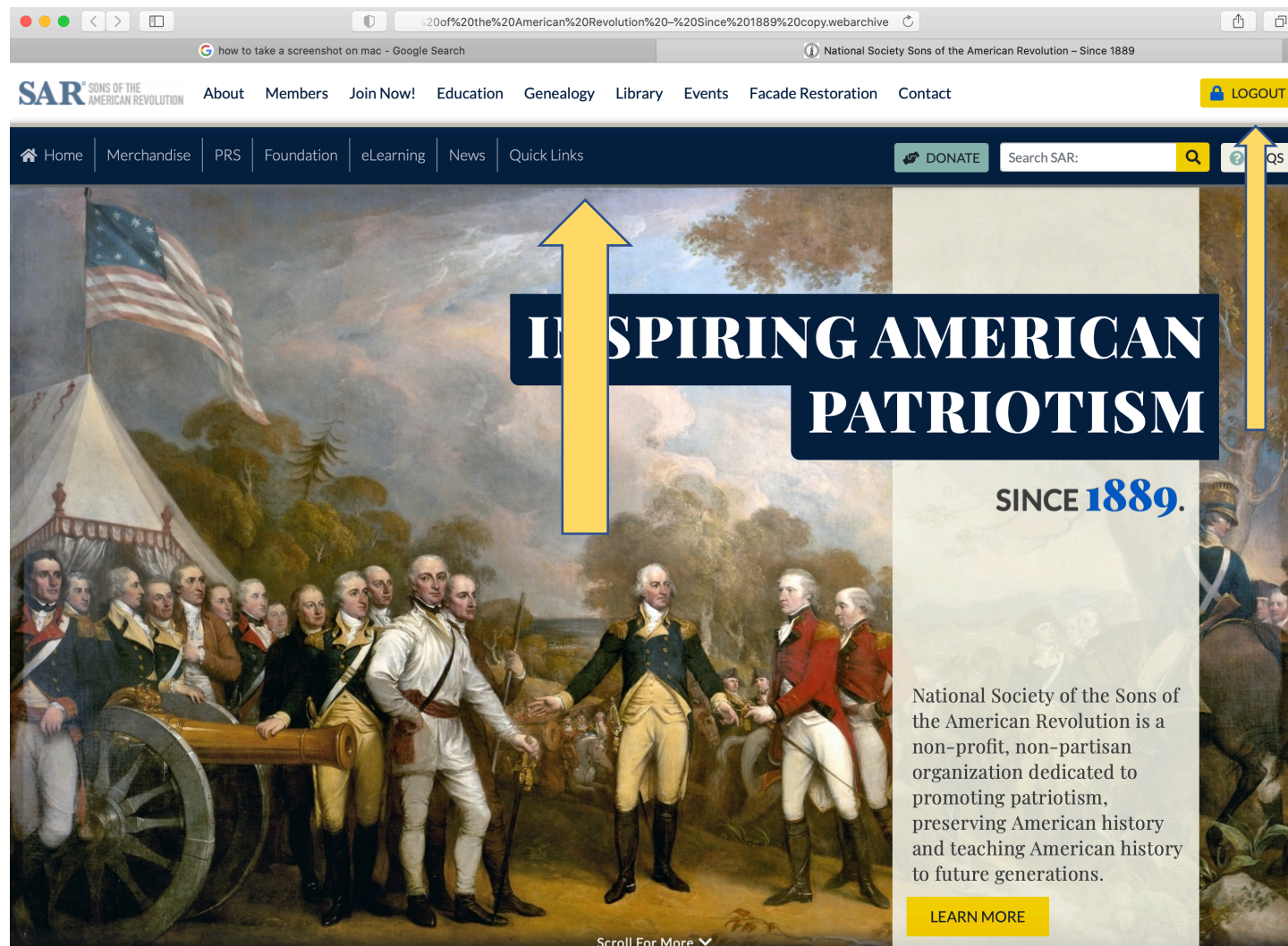
How do I Log into the National Data Base?

Log into the National Web Site.

On the left side of the Blue Bar is a tab “Quick Links”.

A drop down Box will appear..

**There will be a tab,
Members Info (Yellow), hit
this tab.**





How do I Find the Member Information

The Member's Info (Yellow) tab will take you to the National Data Base, old system.

The Yellow Data Base is where all of the current members information is being stored and the Chapter Secretary and Chapter Presidents have access to information in the data base.

The screenshot shows the SAR.org website. The top navigation bar includes links for About, Members, Join Now!, Education, Genealogy, Library, Events, Facade Restoration, and Contact. A 'LOGOUT' button is in the top right. Below this is a secondary navigation bar with links for Home, Merchandise, PRS, Foundation, eLearning, News, and Quick Links. A 'DONATE' button and a search bar are also present. The main content area features a large historical painting of Revolutionary War soldiers. Overlaid on the painting is a dropdown menu from the 'Members' tab, which includes the following options: Members DB (Blue), Members Info (Yellow), Online Record Copy and Patriot Search Systems, and SAR Magazine Sign Up. A yellow arrow points to the 'Members Info (Yellow)' option. To the right of the painting, there is a dark blue banner with the text 'BIG AMERICAN PATRIOTISM' and 'SINCE 1889.' Below this, a text box describes the organization as a non-profit, non-partisan organization dedicated to promoting patriotism, preserving American history, and teaching American history to future generations. A 'LEARN MORE' button is located at the bottom right of the text box.



Yellow Data Base

Log into the National Web Site.

At the top of the page is a White Tool Bar.

Look For the “Members” tab.

There will be drop down, go to “Forms & Manuals.”

Scroll down to the middle of the Forms to the the “Organizational Forms” section.

In this section you will find most of the forms that are used by the chapter secretary in a PDF printable format.

The screenshot shows a web browser window with the address bar displaying "memberinfo.sar.org". The page has a yellow background. At the top, there is a white tool bar with the text "National Society Sons of the American Revolution - Since 1889" and "SAR Member Information Directory". Below the tool bar is the SAR logo, which features an eagle perched on a shield with a cross, and the text "National Society of the Sons of the American Revolution". To the right of the logo is the text "National Society of the Sons of the American Revolution". Below the logo and text are three buttons: "Login", "Create User", and "Change Password". To the right of these buttons is a text box that says "First time users must use the Create User function to create a user id and password before being able to log in. Please do not use national id or date of birth as either of these pieces of information." Below the buttons and text box are two input fields labeled "User ID" and "Password", and a "Submit" button.



Using the Data Base

Type in the Members name.

Hit the search tab.

There is a set of arrows which will when hit will show all the names of the members with the last name typed into the box.

 **National Society of the Sons of the American Revolution**

Logout

Last Name Search

Select Member

Frederick Allen Schuster MSC
National Number: 187940

Member Info	Awards	Patriots	Positions Held	Status Chronology	Reports
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California Society

Last Updated: 08/13/2020

State Number: DOB 07/10/1953

Address

Home () Other () Ext

Wife Email

Sponsor Dana Forrest Dunlap ☐ Please do not contact me via email



Using the Data Base

In the drop down box find the correct members name and double click.

The members information will show in the in the boxes under the light green bar Member Info.

This is where you can find most of the information about the member.

You can change his address, phone number, wife, E-mail, and degree information.

In this section you can also see the Status of the member.

The screenshot shows the website interface for the National Society of the Sons of the American Revolution. At the top left is the organization's logo. The main header reads "National Society of the Sons of the American Revolution". Below the header is a "Logout" button and a search section with a "Last Name Search" label and a "Search" button. A dropdown menu is open under "Select Member", listing several names, with "Schuster MSC, Frederick Allen" selected and highlighted by a red arrow. Below the search section is a horizontal navigation bar with tabs: "Member Info", "Awards", "Patriots", "Positions Held", "Status Chronology", and "Reports". The "Member Info" tab is active, displaying a form for member details. The form includes fields for "California Society" (set to "Riverside"), "Last Updated" (08/13/2020), "Frederick" (last name), "Allen" (first name), "Schuster" (middle name), "Master of Science" (degree), "State Number" (9388), "DOB" (07/10/1953), "Address" (1044 West Notre Dame Street), "Upland" (city), "California" (state), "91786-2671" (zip), "Home" (1 (909) 985 7510), "Other" (1 (909) 938 6789), "Ext" (0), "Wife" (Sherry), "Email" (schuster6789@aol.com), and "Sponsor" (Dana Forrest Dunlap). There is a checkbox for "Please do not contact me via email" and a "Submit" button at the bottom right.



Using the Data Base

The Status Box will show when the member was approved, and the chapter he was a member of when he became a member.



National Society of the Sons of the American Revolution

[Logout](#)

Last Name Search [Search](#)

Select Member

Frederick Allen Schuster MSC
National Number: 187940

Member Info	Awards	Patriots	Positions Held	Status Chronology	Reports
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Status Date	Status	Society	Chapter
07/19/2013	New Member	California	Sons Of Liberty



Awards and Medals Project

In CASSAR is taking on a project to update the Awards section of the Yellow Data Base.

Each Chapter Secretary will be asked to send to the CASSAR Secretary the list of Active Members their awards and medals.

The CASSAR Secretary and the CASSAR Awards and Medals Chairman will enter all of this information into the National Data Base.

WHY?

This information is useful to the chapter presidents when deciding who should receive a Medal or an Award.

This may be you.

The screenshot shows the website of the National Society of the Sons of the American Revolution. At the top left is the organization's logo, featuring an eagle and a star with the text "NATIONAL SOCIETY OF THE SONS OF THE AMERICAN REVOLUTION". To the right of the logo is the organization's name in a stylized font. Below the logo is a "Logout" button. In the center, there is a "Last Name Search" field with "Schuster" entered, and a "Search" button. Below that is a "Select Member" dropdown menu showing "Schuster MSC, Frederick A". Below the dropdown, the member's name "Frederick Allen Schuster MSC" and "National Number: 187940" are displayed. A red arrow points down to the "Awards" tab in the navigation bar. The "Awards" tab is active, and it shows a table of awards.

	Award Date	Award Desc
Edit New Delete	04/01/2020	State Roger Sherman Medal
Edit New Delete	08/17/2018	5 Year Membership Award
Edit New Delete	08/17/2018	Chapter Roger Sherman Medal
Edit New Delete	11/11/2017	The Harold L. Putnam Award
Edit New Delete	12/20/2016	Chapter Meritorious Service Medal



Other Useful Information

When you are in the Yellow Data Base, you can run different types of reports.

Address Labels

Chapter Current Roster by date

Can Export your Roster in Excel format

Run a Reconciliation Report of:

New Members

Deceased Members

Transfers

Junior Members

Logout

Last Name Search

Select Member

Frederick Allen Schuster MSC
National Number: 187940

Member Info Awards Patriots Positions Held Status Chronology **Reports**

☒ Address Labels
☐ Current Membership Roster
☐ Current Member Roster Export
☐ Dropped Membership
☐ Deceased Membership
☐ Reconciliation Report



Year End Reports

The CASSAR bylaws and Article of Incorporation have specific information which must be reported each year to the CASSAR governing board.

The CASSAR Secretary has published an example of a Chapter Year End Annual Report which has all of the information which needs to be reported to the state.

The reports need to be submitted to the CASSAR between March 1st and March 15th of each year.

The reports need to include the Tax Information for the Chapters.

EXAMPLE

XYZ CHAPTER

Chapter #209

January 1, 2020 to December 31, 2020

Reporting Date: January 15, 2020

Submitted by: Chapter President John Doe

Prepared by: Chapter Secretary James Moe

Reporting officers:

President John Doe

Treasurer John Moneybags

Secretary Fred Bugsmetomuch

Chapter Board:

Elected Officers:

President John Doe

1st Vice President Jerry Ready

2nd Vice President Jose Nextinline

Historian Jake Keepingrecords

Chaplain Jerry Praysalot

Registrar Alex Signthemup

Secretary Fred Bugsmetomuch

Treasurer John Moneybags

Appointed Officers:

Youth Programs Chair Gerry Posterchild

Knights Essay Henry Speechwriter

Veterans Affairs Nick Warman

JROTC/ROTC Chair Rex Armedforces

Color Guard Commander Robert Musketman

XYZ Chapter Summary:

The past year The XYZ Chapter saw tremendous growth with 365 new members and less than 5% of the membership dropping from the roster for 2020; leaving our total membership at 405 members for the coming year. Our chapter activities were equally impressive, our Color Guard participated in the annual Fourth of July parade in Celebration City, the Veterans Day parade in Fireworks Mall and were honored guests at the Memorial Day and Labor Day festivities at city Hall in downtown America City.

The youth programs had entries in all categories of the CASSAR youth platforms, including, a poster, brochure, a high school oration entry, a Knights Essay Contestant, local JROTC Essay entry and one from our local Eagle Boy Scout Troop. The 2nd Vice President found an array of exciting speakers for each of the 11 monthly meetings and this was the year of our 50th anniversary and we had a special event to honor the occasion with a special guest speaker-Donald J. Trumpetman.



The CASSAR bylaws and Article of Incorporation require that each chapter file their taxes.

The bylaws require that the chapters report in their annual report that the taxes were filed.

Each chapter must submit a copy of the tax forms with the CASSAR Compliance Officer, Luke Dziurzynski; email- lukaszad@gmail.com

There are four forms that need to be filed each year.

form 990N

form 199N

form CT-TR-1

form RRF-1

Each Chapter must File their Taxes every year.

Send Luke a copy of your e-post card of the filing.





Questions

Call me if you help with any issues; (909) 985-7510