

## IAFN Chapter End of Year Transition 2020-2021

Instructions: Click on the arrow to the left of the # in the blue headings below for specific information on how to complete each task. The title in the (parentheses) is the officer that most commonly completes these tasks but it might be different for your chapter.

Need help? Have Questions? Contact Christina Presenti at 410.626-7805 x 120 or [cpresenti@forensicnurses.org](mailto:cpresenti@forensicnurses.org) anytime.

### Outgoing Officers

1.  Complete the 2021 Officer List (President) after elections  
You can submit [online](#). If completing online, you will be able to start, resume, and share a unique link to your chapter specific Officer List.
2.  Complete the 2020 Annual Progress Report (President)  
You can submit [online](#). If completing online, you will be able to start, resume, and share a unique link to your chapter specific Officer List.
3.  Complete the Bank Form & Return Debit Card(s) (Treasurer)
  1. Complete the Bank Form for the Annual Report
    - Download the Bank Form from the [Chapter annual renewal website](#) and complete. Email to [Christina Presenti](#).
  2. Return any debit cards for Officers that need to be removed from the bank account for 2021.
    - Using a trackable method, return your card to Stacy Robertson at 6755 Business Parkway, Suite 303, Elkridge, MD 21075.
    - The incoming treasurer will receive a Visa Debit card for the account once the previous treasurer returns their card to Stacy Robertson at 6755 Business Parkway, Suite 303, Elkridge, MD 21075.
4.  Complete the Chapter Financial Report (Treasurer)  
Download the Chapter Financial from the [Chapter annual renewal website](#) and complete. Email to [Christina Presenti](#).
5.  Complete 1099 paperwork – anyone the Chapter paid more than \$600 during 2020 you must provide a 1099 by January 31, 2020 (Treasurer)

Below are some instructions for what 1099s are and how to prepare them. More formal instructions can be found on the IRS website (<https://www.irs.gov/pub/irs-pdf/i1099misc.pdf>).

IRS Form 1099-MISC summarizes income from all non-employee compensation. This is an information return that is filed with the IRS so that the IRS can match vendor payments with the income they report on their tax returns. (Essentially, it's telling the IRS what you paid contractors throughout the year, and what the contractors will owe as well.)

You must send out a Form 1099-MISC to all vendors you've hired and paid more than \$600 during the calendar year. This includes any partnerships or LLCs you may have contracted.

There are a few exceptions to these rules: You don't have to send 1099s to most corporations (note: you must send 1099s to all lawyers you've hired, even if they're incorporated), property managers for rent, sellers of merchandise, etc.

#### Prepare the 1099s

Have a filled-out Form W-9 for each vendor, which includes their name, address, and Social Security number (SSN) or Employer Identification Number (EIN). The W-9 will also include their tax filing status, so you can check to see if you need to issue a 1099 for that vendor. You should collect these throughout the year from anyone contracted by the Chapter.

You cannot use a downloaded Form 1099-MISC or a sample from the IRS. If you are filing on paper, you're required to use specific forms that are readable by the IRS scanner used to process all 1099s.

You can order these forms from the IRS by calling 1-800-TAX-FORM (1-800-829-3676) or going on their website.

You can order them from some office-supply stores, or you can use financial software like QuickBooks to create, distribute, and file your 1099s online.

#### Fill out the forms

Start with your Federal Tax ID number, which could be your SSN or EIN. Then add in the contractor's information, which includes their SSN or EIN.

Each 1099 should also include the amount of money paid to the contractor, which is entered in Box 7 under the title "Non-employee compensation."

Finally, confirm that their taxpayer ID is accurate. (This is typically their social security number.)

#### Send out the forms



You must mail or hand each 1099 Copy B to the contractor no later than January 31st.

Mail form 1096 to the IRS.

IRS Form 1096 summarizes the totals from your returns — in this case, from your 1099s. If you file through snail mail, you must mail Form 1096 and Copy A of each Form 1099 to the IRS no later than February 29th.

## 6. Compile 2020 Meeting Minutes and Agendas (Secretary)

Compile any meeting agendas or minutes from 2019 Board meetings, open meetings, trainings, conferences etc. Once compiled, email this information to [cpresenti@forensicnurses.org](mailto:cpresenti@forensicnurses.org).

## 7. Complete the E-990 filing (incoming or outgoing Treasurer in January 2020)

Each chapter is required to file the E-990 postcard with the IRS every year. This is a simple process that is done online and only takes a few minutes. You will need your Chapter's EIN # when filing. Please use the IAFN home office address for the location. Once it is complete, you will receive a confirmation email that needs to be forwarded to [Christina Presenti](#). Chapters are required to file prior to March 1st as part of their annual renewal with IAFN.

Begin the IRS filing of the E-990 postcard process, [here](#). Christina will host or provide a webinar on how to complete this early in 2021.

## 8. Meet with incoming officers who are taking over your position (all officers)

Make a list of your files, passwords, helpful hints, daily activities, monthly activities, and share with the incoming officer who is taking your position. If there is anything you learned in 2020 that you wish you knew before hand – share that too. Share your contact information if you are available for questions.

## Incoming 2021 Officers – to be completed Feb. 29, 2021

As a new officer, familiarize yourself with the tools and expectations of your new roll. There is a lot of information here and Christina Presenti, IAFN Membership Manager, is available to assist you anytime questions come up. We are happily available to assign with media requests, local policy review including support with testimony, protocol review, meeting planning, CE for trainings, conference planning, and more.

### 1. Review (all) and sign (President) Chapter Bylaws

All Chapter Officers should review the Chapter Bylaws. Chapter Bylaws need to be reviewed on a regular basis in accordance with the timeframe designated in your Chapter Bylaws.

Incoming presidents must sign and provide a copy of the Chapter Bylaws to **Christina Presenti** upon starting their role. Draft bylaws are available on the [Chapter annual renewal website](#).

### 2. Review (all) and sign (President) the Chapter Affiliation Agreement

All Chapter Officers should review the Affiliation Agreement available on the [Chapter annual renewal website](#). Incoming presidents must sign and provide a copy of the Chapter Affiliation Agreement to **Christina Presenti** upon starting their role.

### 3. Complete the E-990 filing (Treasurer in January 2021)

The outgoing treasure might have completed this form. Each chapter is required to file the E-990 postcard with the IRS every year. This is a simple process that is done online and only takes a few minutes. You will need your Chapter's EIN # when filing. Please use the IAFN home office address for the location. Once it is complete, you will receive a confirmation email that needs to be forwarded to **Christina Presenti**. Chapters are required to file prior to March 1st as part of their annual renewal with IAFN.

Begin the IRS filing of the E-990 postcard process, [here](#). Christina will host or provide a webinar on how to complete this early in 2021.

### 4. Review the Chapter Logo Style Guide (all officers)

As a new officer, part of your role is ensuring the Chapter logo is up to date and displayed in accordance with the IAFN Style Guidelines. Review the Chapter Logo Style Guide available on the [Chapter annual renewal website](#). If your outgoing officer didn't transfer your unique Chapter Logos to you - **Christina Presenti** can provide those files to you anytime. You might not need these today but be aware they exist.

5.  Review the Chapter Reimbursement Form (all officers)

Be aware that tools like this exist to you as officers. The [Chapter Reimbursement Form](#) is a tool- you can update to your needs- that can be used anytime you are hiring someone or need to complete a reimbursement to a contractor, officer, chapter member etc. This is available on the [Chapter annual renewal website](#). The individual receiving reimbursement would provide this completed form with corresponding receipts to the Treasurer who will issue a reimbursement through the Chapter's PNC bill pay.

6.  Review the IAFN online resources for incoming Chapter Officers (all officers)

IAFN provides onboarding resources and training for incoming officers. You can review the ppts and tools on the [Chapter Officer Resources Tab](#). These are one piece of familiarizing yourself with your new role. Christina is always available to support chapter officers anytime.

7.  Learn how to access your member rosters (all officers)

The following information will be covered in the January New Officer Orientation. Chapter Officers, can pull the roster of current Chapter Members anytime. Members join and expire on a rolling basis so it is important to use the community to email current members or pull a new roster anytime you do member outreach. See this [how to pull member roster video](#).

**Things to know:**

1. For lists of expired Chapter members and for expiration dates of current Chapter members- email [Christina Presenti](#)
2. Your Chapter Members may need some instructions/information on accessing and setting their preferences for this community. Ask them to double check their [Group Subscription Settings](#) to be sure they are receiving their Chapter emails through the Member Community.
3. Chapter Members are automatically added to their Officer Community the day they join the Chapter and removed the day their Chapter Member expires.

9.  Chapter Officer Community: Verify you have access and are set up to receive emails (all officers)

New Officers will be added to the Chapter Officer Community when the 2020 Officer list is complete.

The Chapter Officer Community is your space. It is the primary means of communication between IAFN and Chapter Officers. It is also a great resource to you because you have



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access to the other Chapter Officers. We are a community that is focused on supporting one another with the resources you need for the success of your chapter.

- Make sure you are a member of the Chapter Officer Community: Log into your IAFN account & locate the community. [How to Access the Member Community](#)
- Update your email settings: Most officers prefer “real time” or “daily digest”. If you are currently receiving the “daily digest” from the Open Community make sure that you are reading it for important chapter updates. [How to update your email settings](#)
- Add a photo to your profile and make sure your information is updated so folks on the member community can contact you.