

Branch Submittal Quick Guide

Review at each BEC meeting monthly to ensure compliance

Following is a Quick Guide for Branch compliance to State document submittal requirements. This is not a substitute for the Annual SIR Schedule of Branch Operations, but a supplement to assist the Big Sir in ensuring that critical and essential documents and payments are submitted on a timely basis. SIR Forms, the Schedule of Branch Operations and the SIR Policy and Procedures Manual are available for review and downloading via www.sirinc.org (click on Branch Policies and Procedures).

REQUIRED MONTHLY by the End of the MONTH:

Form 28- Monthly Cash Report -The revised Form 28 displays the monthly branch membership. **Send to** Form28Recipient@sirinc.org and Area Representative (if your area has one).

BEC Minutes

Send to Area Representative (if your area has one). Memo only if meeting wasn't held due to special event.

Bulletin/Newsletter

Send to all Branch members, Bir Sirs of Area Branches and Area Representative (if your area has one).

Review your Branch Roster on sirinc.org and ensure it is correct. If not, use Form 20 Update (online).

REQUIRED QUARTERLY (Branch Assessment- Payment):

January Assessment - Due by 1/15, basis is **October** (previous year) active members from Form 28.

April Assessment - Due by 4/15, basis is **October** (previous year) active members from Form 28.

July Assessment- Due by 7/15, basis is **October** (previous year) active members from Form 28.

October Assessment - Due by 10/15, basis is **October** (previous year) active members from Form 28.

Send Assessment checks to the State Treasurer as documented on the Roster page of the State website, www.sirinc.org.

BRANCH ACTIVITIES SCHEDULES:

January - Approve Branch activities for the year (bowling, golf, RV outings, etc.), the schedules (dates can be on or about) and record in BEC minutes.

February - File Caterer Insurance **Form 63 or 64** (as applicable) prior to the expiration date of the current insurance.

Send **Form 63** to CFINES@ATT.NET and a copy to the Area Representative

Send **Form 64** to CFINES@ATT.NET for processing and a copy to the Area Representative

BRANCH AUDIT:

February - Form 29- Report of Branch Audit (includes previous year December Form 28)

Send to Area Representative (if your area has one), Branch Secretary and Treasurer

BRANCH PERSONNEL:

March 31st - Send Form 65 Branch Membership List to Form65Recipient@sirinc.org

July or August – Online – Branch Leadership Update (as needed)

Go to Sirinc.org Forms and complete on-line, then submit by August 31st even if no elections were held (if this wasn't done in July due to a special event).

March 15, 2024