OFFICIAL VISIT CHECKLIST
CORRESPONDING SECRETARY

INSTRUCTIONS:

In preparation for your official visit, please be advised that many of the current manuals and supplies for your office are located on the International and Wisconsin websites. **IW** - Indicates items available on the P.E.O. International website: www.peointernational.org. **WW** Indicates items available on the WI website: www.peowisconsin.org.

If you cannot access the websites, please ask your technology contact to assist you. Go to the websites to verify that you have the current version of all manuals and supplies for your office which are listed below. Check the items listed below and discard ALL outdated materials and update your supplies, if necessary. If you have any questions, please ask your visiting officer. She will be glad to help.

Helpful Hints:

- On the **WW,** there is a "Local Chapter Officers" menu. Under this menu is a link to Wisconsin-specific documents for each officer role.
- On the **IW**, after arriving on the P.E.O. HUB, go to the upper right quadrant "My Chapter", and tab Resources. If your document is not listed here, type a "key word" into "Search Library", then ENTER. This is located in the upper left section of the P.E.O. HUB.
  - CONSTITUTION (current) – I am aware that the president has a copy for officers to share and that I can access or download a copy.
  - Instructions to Officers of Local Chapters (IOLC) corresponding secretary's section and Policies Pertaining to Local Chapters
- Ask your chapter treasurer to order any missing supplies that are not available on the **WW** or **IW**. Access and print forms, etc. from the websites as needed.
- Remember! You are not required to print every document found on the **IW** and **WW** sites. As long as you know where to find the documents, you do not have to have a print copy.

International Website (IW) Left side of HUB, search "Supplies" in the Library

— List of supplies for Officers of Local Chapters

Wisconsin Website (WW) – Local Chapter Officers – Corresponding Secretary

— Corresponding Secretary's Timeline
— Corresponding Secretary's Transition Training Checklist
— Corresponding Secretary's Chapter Visit Checklist
— COTS Corresponding Secretary Training 2026

Wisconsin Website (WW) – Resources

— Wisconsin State Bylaws

Please note the following terms:

- ✪ An **active member** is one who *pays dues*
- ✪ A **non-participating member** is one who *pays dues* but does not attend meetings or participate on a regular basis
- ✪ An **inactive member** is one who *does not pay dues* and forfeits her right to attend business meetings and conventions

Please check prior to your official visit

(You don't need to bring these to the meeting unless you have questions concerning their use.)

— My chapter president met with me to prepare for the state officer's visit.
— I have read/viewed/can access the following on the **IW**:
  - Instructions to Officers of Local Chapters (IOLC) Corresponding Secretary's section.
  - Policies Pertaining to Local Chapters found in the IOLC.
  - The Retention Record for my office (IOLC) and I have discarded outdated material and forms.
  - The Corresponding Secretary training Power Point "Staying in Touch" and any printed handouts.
— I participated in an officers' training session with my predecessor.
— I made use of the officer's transition training checklist. **(WW)**
— I am aware that the chapter corresponding secretary or yearbook committee will e-mail a PDF or Word copy to the Executive Assistant by September 15.
— I completed the form Local Chapter Report of Project Chairmen (at Resource Library>Local Chapter Officer Resources>Corresponding Secretary Forms). **(IW)**
— I completed the form Report of Election of Officers of Local Chapters (at Resource Library>Local Chapter Officer Resources>Corresponding Secretary Forms). **(IW)**

FORMS IN MY SUPPLIES:

— I can access the following forms on the **IW** (Local Chapter Forms):
  - Member Update (submit online)
  - Corresponding Secretary's Monthly Report to Chapter
  - State/Provincial/District Convention Delegates & Alternates (submit online)
  - International Convention – Nominee for Delegate (submit online)
  - Flow Chart – Transfers & Reinstatements
  - List of Supplies for Officer of Local Chapters
  - Report of Election of Officers of Local Chapter (submit online)
  - Local Chapter Report of Project Chairs (submit online)
— Invitations to Membership (3)
— Invitations to Transfer (3)
— The General Enrollment Book (for chapters organized prior to March 2, 2010; it can be kept by the Historian)

- ***Please determine to the best of your ability the number of active resident members in each of the following age categories***: (The visiting officer will ask you for this information.)

18-39: _____ 40-69: _____ 70-89: _____ 90+_____

I need extra information or help with the following:

THANK YOU! We appreciate your work on behalf of your chapter!
This is your reference to keep and use throughout the year.