



Shaping Tomorrow's Global Built Environment Today

180 Technology Parkway, Peachtree Corners, GA 30092 ▪ Tel 404.636.8400 ▪ Fax 404.321.5478 ▪ www.ashrae.org

The following document contains important information and answers to some of the frequently asked questions about the process of registering your chapter in your state. To assist you with the registration process and to help keep up the registration each year, ASHRAE works with a company called URS Compliance (through their Charitable Registration Management Service, or CRMS). They will file all necessary paperwork on our behalf and remind the Chapters each year when new paperwork must be filed. They will also track each new registration through the process and ensure that it's completed in a timely manner.

A copy of the original informational webinar is available

here: <https://ashrae.webex.com/ashrae/ldr.php?RCID=fde5dea5993dce193bd6d46bad7fa38f>. Please review if you were unable to attend or if you would like a reminder of what was discussed.

What do I need to complete registration?

You will need to COMPLETELY FILL OUT:

- ✓ The CRMS Control Sheet
- ✓ The URS Compliance Agreement
- ✓ Most recent fiscal year end Audit or Financial Statements
- ✓ Fundraiser/Consultant Contract (if applicable)
- ✓ IRS Determination Letter - You can request a copy of this on the IRS website
- ✓ IRS Form 1023 (if available)
- ✓ Most Recent IRS Form 990
- ✓ Certificate/Articles of Incorporation - You can request these on the Secretary of State website of your domicile state.
- ✓ Bylaws
- ✓ Officer & Director List

Where do I find these documents?

- The **CRMS Control Sheet** and **URS Compliance Agreement** have been emailed to you by ASHRAE Staff.
- Your most recent **fiscal year end Audit or Financial Statements, IRS 990 Form, Bylaws, and Officer & Director List** should be with your Chapter leadership.
- You can request a copy of the **IRS Determination letter** by completing this form on the IRS website [here](#).
- The **1023 form** is the official form that would have been completed and submitted to the IRS to become a public charity. Once the IRS reviews and approves it, then they would have issued the determination letter. You should be able to request a copy of this on the IRS website as well.
- Your **Articles of Incorporation** would've been filed when your chapter was established. You can request the articles from the Secretary of State in your domicile state. Most states will allow you to request them online on the SOS website.

Do I need to complete registration every year?

While this initial set up is a bit time consuming, by using URS you will not have to do this process again. Moving forward, URS will handle the annual registration process (this is the ARMS). They may reach out occasionally to get some updated documents from your Chapter, but nothing as intensive as this initial registration process.



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What are the costs associated with the CRMS and ARMS? What about RAS?

Your Chapter will only be responsible for paying the state registration fees, both in this initial set up process and annually moving forward. Your Chapter will only be responsible for paying the fees associated with state registration in your domicile state. ASHRAE covers the cost of using URS. However, if you elect to use the RAS services provided by URS, your Chapter will be completely responsible for that cost.

Where can I find the IRS Determination letter?

You can request a copy of the IRS Determination letter [HERE](#).

Where can I find my Certificate and Articles of Incorporation?

Your **Articles of Incorporation** would've been filed when your chapter was established. You can request the articles from the Secretary of State in your domicile state. Most states will allow you to request them online on the SOS website.

Are there any safety concerns emailing these documents to the URS Specialists?

Due to the nature of this business, URS uses a very robust and secure firewall system that protects the client's information. That said, none of the documents needed to prepare and complete the registrations should contain any sensitive or proprietary information. Most of the information required is already publicly available through the IRS or the Secretary of State in the organization's domestic state. Each state also offers a public records search where this information can be accessed. URS does not request or require any sensitive personal data such as Social Security numbers, birthdates, driver's license information or other confidential information in order to prepare the filings.