

INSTRUCTIONS FOR ONLINE FILING OF THE FINANCIAL STATEMENT (FORM D17)

NOTE: The Lodge President and Treasurer or Financial Secretary as well as the Audit Committee Chair must be able to sign the electronic form by signing in to the Sons of Norway website with their own member name and password. If it is not possible for all of these people to electronically sign the form, you will have to file the paper form.

- A. To access the editable form:
- On the Sons of Norway website (www.sofn.com), log in so that you have access to the appropriate menus.
 - Navigate to your member profile. On the right hand side of the screen, there should be an option to access the D17.
 - If you have never used the online form option before, this will open the form in a new window
 - If you had previously used our Editable .pdf, selecting this option will take you to the “Lodge D17 Income Statements” page where you will need to select the “ENTER A NEW INCOME STATEMENT” button.

If you do not see the D17 link, please follow the below instructions.

- Search for “Lodge Forms” by selecting the magnifying glass (🔍) next to the “Member Resources” button
- Select “Lodge Form”
- Under “Financial Forms,” *second section on the right side of the page*, Select “Financial Statement - D-17 (Online form)”
 - If you have never used the online form option before, this will open the form in a new window
 - If you had previously used our editable form, selecting this option will take you to the “Lodge D17 Income Statements” page where you will need to select the “ENTER A NEW INCOME STATEMENT” button.

- B. To prepare the form:
- Enter the information in the appropriate fields
 - Click on the “Calculate” buttons to update the totals (if you change any of the information, you will need to click on these buttons again before submitting the form)
 - Select “Continue” to proceed to the approval process or “Save Draft” to save the form and return to it at another time.

- C. To edit the form:
- Follow the directions in A to log in as you would to “get the form”
 - Select “Edit” for the appropriate form
 - Enter the information in the appropriate fields

- Click on the “Calculate” buttons to update the totals (if you change any of the information, you will need to click on these buttons again before submitting the form)
- Select “Continue” to proceed to the approval process or “Save Draft” to save the form and return to it at another time.

D. Approval process:

- After the form has been completed, the Treasurer should e-mail the link (<https://members.sofn.com/reports/lodgeD17/lodgeList>) to the people that have already been identified to approve the form (lodge president, audit chair, and the District President).
- Select “Approve” button by the appropriate form and that will provide you with the form that needs approval.
- Each person identified will review the form and enter their member number in the appropriate field, verifying their approval of the information provided to them.
- Complete the approval by selecting “Submit My Approval” button.

E. Submission to Headquarters (by DP):

- Verify that all identified people have approved the form.
- Select “Notify headquarters that all authorizations are complete” button on the approval form.
- Enter any notes you may have to Headquarters.
- Select “Send email to Headquarters” button and the office will be notified of your compliance.