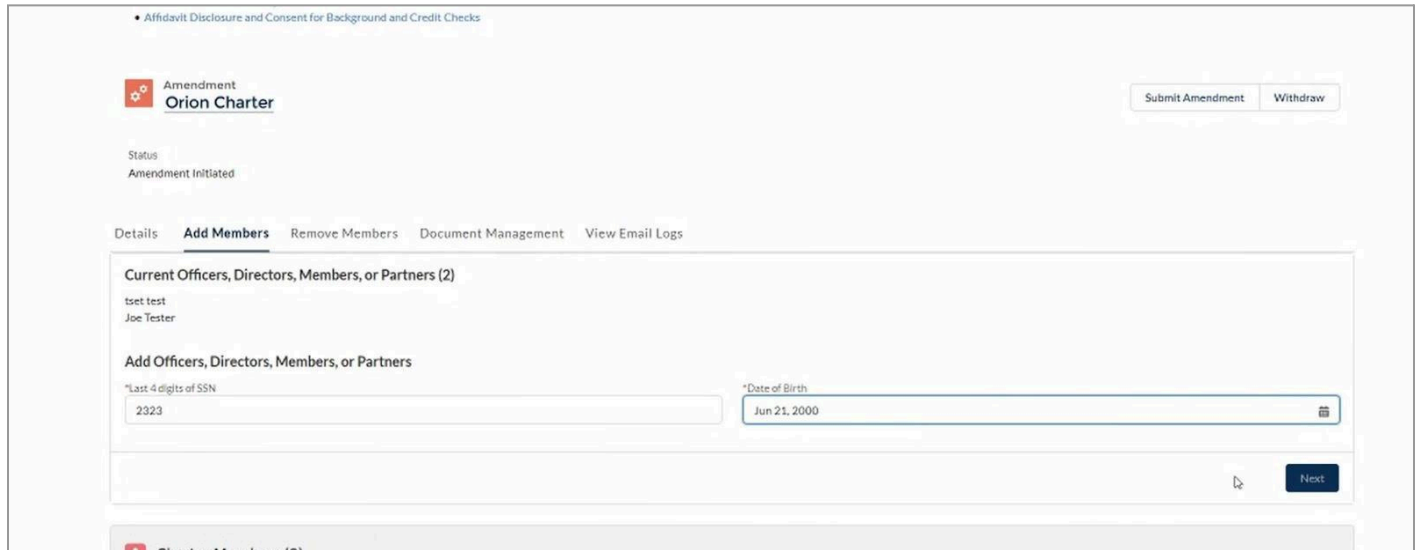


Adding a Charter Principal in a Charter Holder Governance Request

The following guidance is to highlight the steps for adding a new charter principal in the **Add Members** tab of a CHG. You can also view this portion of the [demo video](#) from minute 2:07 through 4:39.

Step 1: Enter the required information and click Next to advance to the next step.



The screenshot displays the Orion Charter amendment interface. At the top, it shows the title "Amendment Orion Charter" and buttons for "Submit Amendment" and "Withdraw". Below this, the status is "Amendment Initiated". A navigation menu includes "Details", "Add Members" (which is selected), "Remove Members", "Document Management", and "View Email Logs". The main content area is titled "Current Officers, Directors, Members, or Partners (2)" and lists "tset test" and "Joe Tester". Below this, there is a section for "Add Officers, Directors, Members, or Partners" with two input fields: "*Last 4 digits of SSN" containing "2923" and "*Date of Birth" containing "Jun 21, 2000". A "Next" button is located at the bottom right of the form.

IMPORTANT NOTES

- If the CHG amendment form will not accept the entered information or an error message is received in **Step 1**, email daniel.cobin@asbcs.az.gov for assistance prior to attempting to complete the CHG amendment.*
 - In the email provide the charter holder entity name and Entity ID and the name(s) of the person(s) being added that are not being accepted by the AOS in Step 1.

*Due to certain system parameters and the importance of security for each charter holder profile, this issue may occur when a member being added is also linked to another charter holder profile in the system.

Step 2: Enter the required information and click Next to advance to the next step

Amendment
Orion Charter

Submit Amendment Withdraw

Status
Amendment Initiated

Details Add Members Remove Members Document Management View Email Logs

Add Charter Principal
It looks like that individual isn't in our system, so we'll need some additional information.

▼ Identification

Last 4 digits of SSN
2323

Date of Birth
June 21, 2000

*FirstName
Sue

*Email
test@test.com

*LastName
Test

Role
Charter Principal

Cancel Next

Step 3: Upload the required documentation. Until all the required documentation is uploaded, the Finish button on the bottom right of the amendment will remain gray.

Details Add Members Remove Members Document Management

Success
File(s) uploaded successfully.

Add Charter Principal

▼ Documents

*Fingerprint Clearance Card

| File Name | Category | Sub-Category | Status |
|------------------|-----------------------|----------------------------|----------------|
| GAO-75_Final.pdf | Add Members Amendment | Fingerprint Clearance Card | Pending Review |

*Affidavit
Download empty template

| File Name | Category | Sub-Category | Status |
|------------------------|-----------------------|--------------|----------------|
| test - Copy (2)(3).pdf | Add Members Amendment | Affidavit | Pending Review |

*Resume

Upload Files
Choose or drag files from your device to upload.

Choose files / folder or drag here

Upload Cancel

File Name Category Sub-Category Status

Cancel Finish

Step 4: After all the required documentation is uploaded, the Finish button will turn blue.

The screenshot shows a web interface for 'Add Charter Principal'. At the top, there are navigation tabs: 'Details', 'Add Members', 'Remove Members', and 'Document Management'. A green success message box is displayed, stating 'Success File(s) uploaded successfully.' Below this, the 'Add Charter Principal' section is visible, containing a 'Documents' dropdown menu. Underneath, there are three sections: '*Fingerprint Clearance Card', '*Affidavit', and '*Resume'. Each section has a table with columns for 'File Name', 'Category', 'Sub-Category', and 'Status'. The 'File Name' column has a dropdown arrow. The 'Status' column has a dropdown arrow. In the bottom right corner, there are two buttons: 'Cancel' and 'Finish'. The 'Finish' button is highlighted in blue, indicating it is the active state.

| File Name | Category | Sub-Category | Status |
|------------------------|-----------------------|----------------------------|----------------|
| GAO-75_Final.pdf | Add Members Amendment | Fingerprint Clearance Card | Pending Review |
| test - Copy (2)(3).pdf | Add Members Amendment | Affidavit | Pending Review |
| test.pdf | Add Members Amendment | Resume | Pending Review |

- The **Finish** button must be clicked to save all the information and documents that have been entered/uploaded in the **Add Members** section.
- The **Finish** button should be clicked prior to advancing to any of the other amendment sections to ensure your work has been saved prior to submission.
- If the **Finish** button is not selected prior to submitting the amendment, the information will not be saved and will not be included with the submitted amendment, which may lead to an administratively incomplete submission.