

VETERANS OF FOREIGN WAR DEPARTMENT OF CALIFORNIA

DIGITAL POST INSPECTION PREPARATION GUIDE

FY 2026–2027 | Final Participant Guide | Revised 24 August 2026

FINAL — APPROVED FOR RELEASE

This guide implements the Digital Inspection Program SOP approved by the Department Commander on 17 August 2026 and incorporates participant-facing operational revisions through 24 August 2026.

Who this guide is for

Selected VFW California Posts and Ships assigned to Digital Inspection, including authorized Commanders, Senior Vice Commanders, Junior Vice Commanders, Quartermasters, Adjutants, and approved Digital Inspection Coordinators.

You do not need prior SharePoint experience. Follow the steps in this guide and the 00 - READ ME.pdf inside each Upload Folder.

What You Are Doing

The Digital Inspection process changes how your inspection evidence is presented, not what the inspection requires. Your Post or Ship remains responsible for its official records. SharePoint is the Department workspace used to provide inspection evidence and conduct the Digital Inspection.

The shortest version

Open your assigned inspection site → work through the 26 Upload Folders → follow each folder's 00 - READ ME.pdf → upload only the requested evidence → email inspector@vfwca.org when ready → work with the assigned Digital Inspector → attend the Electronic Meeting.

FY 2026–2027 Timeline

Date / Window	What it Means
17 August 2026	Initial participant guidance/access package release.
30 August 2026	Upload-preparation target. This is a soft target; there are no repercussions solely for not being ready by this date.
1 September 2026	Formal Digital Inspections may begin after Document Readiness Review.
By 15 September 2026	Department goal to complete the majority of Digital Inspections. This is a target, not a punitive deadline.
1 December 2026	Hard deadline for completion of all initial formal inspections, Digital and Physical.
30 June 2027	Controlling deadline for proof of correction of FY 2026–2027 inspection deficiencies.

If you need help

Email inspector@vfwca.org. For general assistance, use the subject: Digital Inspection Assistance – Post/Ship #####. The current-year goal is to acknowledge assistance and readiness requests within two business days when practicable.

Step 1 — Open the VFWCA Inspection Resources Page

1. Go to [VFWCA.org](https://vfwca.org).
2. Select Resources, then Inspection Resources.
3. Under Digital Inspection Site, select VFWCA SharePoint.

Tip

The Inspection Resources page also contains the current Post Inspection forms and other inspection resources. Use the live VFWCA page for the current cycle rather than an older saved copy.

Step 2 — Sign In With the Email Address Authorized for Your Inspection Site

Use the same email address that was provided to the Department for Digital Inspection access.

- If you are an external user (an account outside the VFWCA Microsoft 365 tenant), enter your email address. Microsoft will send a one-time verification code to that email address. Enter the code to continue.
- Do not share the verification code or allow another person to use your authorized identity.
- **Digital Inspection access is not a one-time invitation.** You may sign in, review the folders and instructions, leave the site, and return later as often as necessary. Each time Microsoft requires verification, use the same authorized email address and enter the new one-time code sent to that account. You do not need to complete your uploads in a single session.
- If the email account used for Digital Inspection access is compromised, notify the State Inspector immediately so the impacted identity can be removed from the access list.

VFW DEPARTMENT OF CALIFORNIA — DIGITAL INSPECTION PROGRAM

- If you cannot sign in, do not create workarounds or use another person's account. Email inspector@vfwca.org for assistance.

If your officers need technical help

The Commander may designate any VFW member in good standing as the Digital Inspection Coordinator. The Commander must request that person's access by emailing inspector@vfwca.org with the subject: Digital Inspection Access Request – Post/Ship #####. Access is not granted based only on the proposed Coordinator's own request.

Step 3 — Navigate to Your Post or Ship Inspection Site

1. From the Department SharePoint landing page, select your District.
2. Select your Post or Ship from the District page.
3. Open the Inspection Items document library if it is not already displayed.
4. Open 01 - Document Upload Folders.

Two areas you will see

01 - Document Upload Folders is your work area. 02 - Inspection Binder is the Inspector navigation area. You may view the Inspection Binder, but do not add, delete, rename, move, or edit anything inside it.

Step 4 — Work Through the 26 Upload Folders

Each Upload Folder contains a file named 00 - READ ME.pdf. Open that READ ME before uploading anything to the folder. The READ ME is the controlling instruction for that folder. A compact Upload Folder Quick Reference appears near the end of this guide to help you gather and organize records before you upload them.

Inspection period: For recurring records, provide records from the date of the Post's last completed inspection through the present. For current or standing records, provide the current controlling document.

- Start with What to Upload. Provide only the evidence requested for that record type.
- Review What the Inspector Will Verify so you understand what the evidence must demonstrate.
- Follow How to Organize It. Combine related records when the READ ME allows it; keep records separate when separate files make inspection faster or clearer.
- Review Privacy / Redaction instructions before placing sensitive records in SharePoint.
- PDF is preferred. Files must be complete, legible, and correctly oriented. Use Print to PDF when a record already exists electronically instead of printing it to paper and rescanning it.
- Upload each record only once. Do not create duplicate copies solely because the same evidence may support more than one inspection question.
- Do not delete, rename, or move the standardized Upload Folders or their 00 - READ ME.pdf files. The Inspection Binder depends on the standardized structure.
- If a category legitimately does not apply, follow that folder's READ ME. A brief Commander-signed Not Applicable memorandum is recommended where the READ ME identifies an N/A condition.

Important Folder Notes

- 01 - Bylaws: National and Department Bylaws are pre-populated. Upload the current District Bylaws and current Post Bylaws.
- 03 - Election Reports: Upload the current Post Election Report, National Convention Delegate Report (the OMS confirmation email is acceptable), and Department Convention Delegate Report. Verify that the EIN on the Post Election Report is correct; no separate EIN upload is required.
- 15 - Bonding Order or Certificates: Upload the current 2026–2027 Bond Certificate OR a PDF of the Department "Received" email confirming the bond order. If using the email, use Print to PDF. Include current certificates for other separately bonded accountable officers when applicable.

VFW DEPARTMENT OF CALIFORNIA — DIGITAL INSPECTION PROGRAM

- 24 - Document Retention Policy: No Post upload is required. The Department-approved policy is pre-populated.
- 25 - Orders and Circulars: No Post upload is required for Department-provided Orders and Circulars; applicable documents are pre-populated.
- 26 - Program Reports: Do not upload Program Reports. The Digital Inspector verifies the Post's submitted reports directly through VFWCA.org.

Step 5 — Protect Sensitive Information Before You Upload

Only provide the information needed to support the inspection. Redaction is expected when a document contains information the Inspector does not need.

- Do not upload an unredacted DD Form 214. Remove Social Security numbers, service numbers, date of birth, home address, medical information, and unrelated personal information.
- Redact unnecessary bank account and routing information. For blank-check verification, leave the first unused check number and unsigned signature lines visible, but physically cover or digitally redact the routing number and all but the last four digits of the account number.
- Do not upload unrelated member contact lists, identity documents, medical records, donor information, personnel details, or other sensitive information simply because they appear in the same source record.
- If a required record cannot be sufficiently redacted without making the inspection evidence unusable, contact the State Inspector before uploading it. An alternate Department-approved review method may be authorized.

Alternate review is not a redaction shortcut

The expectation is still to redact whenever reasonable. Alternate review is for a genuinely necessary record that cannot remain useful after appropriate redaction.

Step 6 — Upload Your Files

Inside the correct Upload Folder, use SharePoint's Upload command or drag-and-drop the file into the folder. Wait for the upload to finish before moving to the next file.

- Place the file in the folder that matches the record type described by the READ ME.
- Do not upload evidence directly into 02 - Inspection Binder.
- If you later correct or replace evidence, use the same applicable Upload Folder so the Inspector continues to reach the current source evidence through the Binder.
- If you accidentally place a file in the wrong folder, move or re-upload it to the correct Upload Folder. Do not change the Binder shortcut to point somewhere else.

Step 7 — Complete Your Own Final Check

Before sending the readiness email, work through all 26 folders and confirm that each applicable 00 - READ ME.pdf has been addressed. Use the Upload Folder Quick Reference near the end of this guide as your working checklist; use the full READ ME inside SharePoint for the complete upload, organization, privacy, and redaction instructions.

- Required evidence is present.
- Files open, are legible, and are correctly oriented.
- Sensitive information has been redacted as directed.
- Required signatures are visible where the evidence is supposed to be signed.
- Any Not Applicable memorandum specifically recommended by the applicable 00 - READ ME.pdf has been uploaded.

VFW DEPARTMENT OF CALIFORNIA — DIGITAL INSPECTION PROGRAM

- Folder 15 - Bonding Order or Certificates contains the current 2026–2027 Bond Certificate OR the Department “Received” email confirming the bond order, plus other applicable bond certificates when required.
- Folders 24 - Document Retention Policy and 25 - Orders and Circulars contain the applicable Department-pre-populated documents.
- Folder 26 - Program Reports does not require a Post upload; the Digital Inspector verifies submitted reports directly through VFWCA.org.

Step 8 — Tell the State Inspector You Are Ready

When your Upload Folders are prepared, email:

Email

To: inspector@vfwca.org

Subject: Digital Inspection Ready – Post/Ship #####

Replace ##### with your Post or Ship number. The State Inspector will then assign a Digital Inspector and update the statewide inspection status.

What Happens After the Readiness Email

1. Document Readiness Review

The assigned Digital Inspector performs a non-inspection readiness review using the SharePoint Inspection Binder and the available evidence. The review checks whether required evidence is present, legible, appropriately redacted, accessible, and appears sufficient to proceed to the formal inspection. It is intended to identify issues early and allow a reasonable opportunity for correction.

- The Digital Inspector will contact the Commander and authorized participants if evidence appears missing, incomplete, inaccessible, improperly redacted, or potentially insufficient for the formal inspection.
- You will be given a reasonable opportunity to correct the issue before the formal inspection.
- The readiness review will not be extended indefinitely when continued delay would materially interfere with annual completion targets or the required inspection deadline.
- The Document Readiness Review is not the formal inspection and does not itself create an official inspection deficiency.

2. Schedule the Electronic Meeting

Once the inspection is reasonably ready to proceed, the Digital Inspector and the inspected party schedule the Electronic Meeting at a mutually agreeable time.

- The Commander, Senior Vice Commander, or Junior Vice Commander must attend the Electronic Meeting. One of these three command officers is required for the formal inspection to proceed.
- If the Commander attends, attendance by the Senior Vice Commander, Junior Vice Commander, Quartermaster, and Adjutant is highly recommended. Regardless of whether the Commander, Senior Vice Commander, or Junior Vice Commander serves as the required representative, attendance by the Quartermaster and Adjutant is highly recommended because many inspection items involve financial and administrative records. Other Post/Ship members may also attend.
- If the required attendee becomes unavailable, reschedule by mutual agreement. Reasonable rescheduling does not create an adverse status by itself.
- The meeting may use Zoom, Microsoft Teams, or another Department-approved platform.
- The meeting will not be audio- or video-recorded unless specifically authorized in writing by the State Inspector and all participants are notified before recording begins.

3. Formal Digital Inspection

During the Electronic Meeting, the Digital Inspector shares their screen, opens your SharePoint Inspection Binder, reviews the evidence item-by-item while the required command officer and other participating Post/Ship representatives observe and answer questions, and completes the official inspection form as the inspection proceeds.

- A minor issue may be corrected during the meeting before the final determination is made.
- If an issue remains unresolved, it may be recorded as an official deficiency on the initial inspection.
- A deficiency does not mean the Digital Inspection converts to a Physical Inspection. Digital-to-Physical conversion is for technical or practical inability to complete the digital method, not for substantive inspection findings.

4. Signatures and Results

After the formal inspection, the Digital Inspector submits the completed form to the State Inspector. The State Inspector routes the form through the Department-approved electronic signature platform. The Digital Inspector and inspected Commander complete the required signatures promptly upon receipt. The inspected Commander remains the required organizational signer even when the Senior Vice Commander or Junior Vice Commander attended the Electronic Meeting. The State Inspector follows up on outstanding signatures and distributes the fully signed Post/Ship inspection to the Post/Ship Commander, District Commander, District Inspector, and Department-designated inspection records repository.

Department-controlled delays

An inspected party will not receive an adverse status solely because of access provisioning delays, SharePoint service problems, Digital Inspector availability, Department review, electronic-signature routing, or another Department-controlled step after the party has completed the action reasonably within its control.

If You Disagree With an Inspection Question or Finding

The Commander and Digital Inspector should first try to resolve questions about evidence, requirements, readiness, or findings directly. If the issue cannot be resolved, request State Inspector review. If the dispute concerns a decision made personally by the State Inspector or a policy matter beyond that office's authority, the matter may be elevated to the Department Commander or designee. A timely good-faith dispute will not, by itself, create an adverse status while Department review is pending.

If the Inspection Has Deficiencies

The initial formal inspection is complete when the Electronic Meeting concludes, even when one or more deficiencies remain for correction.

- The existence of a deficiency on the initial formal inspection does not, by itself, constitute grounds for disciplinary action.
- The District Inspector becomes responsible for assisting the Post/Ship with deficiency correction after the formal inspection.
- Correction efforts begin promptly.
- Upload corrected documentary evidence into the same applicable Upload Folder unless the State Inspector directs otherwise.
- The District Inspector maintains contact and updates the State Inspector on correction status.
- For FY 2026–2027, proof sufficient to demonstrate correction must be provided to the State Inspector no later than 30 June 2027.

- Final closure is reserved to the State Inspector.

If Technology Prevents Digital Inspection

A selected Post or Ship may be converted to Physical Inspection when technical limitations, inability to complete the access/upload process, lack of workable equipment or connectivity, or another unforeseen practical issue prevents reasonable completion of the Digital Inspection.

- Contact inspector@vfwca.org as soon as the barrier is known.
- The State Inspector decides conversion after consultation with the Digital Inspector and Commander.
- Conversion to Physical Inspection is not a disciplinary action and is not, by itself, an inspection deficiency.

Security and Access Reminders

- Use only the email identity authorized for your inspection access.
- Do not forward inspection documents or SharePoint access to unauthorized persons.
- Download, print, or copy inspection evidence only when reasonably necessary for an official inspection duty. Do not retain unnecessary local copies.
- If your authorized email is compromised, or you suspect wrong-user access, accidental disclosure, or another security problem, report it immediately to inspector@vfwca.org.

Security incident subject

SECURITY INCIDENT – Post/Ship #####

Quick Reference

Need	What to Do
Open Digital Inspection	VFWCA.org → Resources → Inspection Resources → Digital Inspection Site → VFWCA SharePoint
Participant work area	Inspection Items → 01 - Document Upload Folders
Inspector navigation area	02 - Inspection Binder — view only; do not edit
Know what to upload	Open 00 - READ ME.pdf inside each Upload Folder; the READ ME controls the folder-specific upload instructions.
General help	inspector@vfwca.org Digital Inspection Assistance – Post/Ship #####
Request coordinator access	Commander emails inspector@vfwca.org Digital Inspection Access Request – Post/Ship #####
Tell Department you are ready	inspector@vfwca.org Digital Inspection Ready – Post/Ship #####
Report security concern	inspector@vfwca.org SECURITY INCIDENT – Post/Ship #####

VFW DEPARTMENT OF CALIFORNIA — DIGITAL INSPECTION PROGRAM

Need	What to Do
Formal Electronic Meeting	Commander, Senior Vice Commander, or Junior Vice Commander required; Quartermaster and Adjutant highly recommended regardless of which command officer attends

Remember

The 00 - READ ME.pdf inside each Upload Folder is the controlling participant instruction for that folder. The SOP controls Department policy. This Preparation Guide explains the participant workflow and provides a compact Quick Reference; when this summary and a folder-specific READ ME differ, follow the READ ME.

Upload Folder Quick Reference — Current 26-Folder Structure

Use this section to gather and organize records. Before uploading, open the 00 - READ ME.pdf inside the applicable SharePoint Upload Folder and follow the complete instructions. This table is a summary only; the folder-specific 00 - READ ME.pdf remains the controlling participant instruction.

Upload Folder	What to provide	Organization / key note
01 - Bylaws	National and Department Bylaws are pre-populated. Upload the current District Bylaws and current Post Bylaws showing Commander-in-Chief review/approval.	District and Post Bylaws should be separate PDFs when practical. Do not alter the pre-populated National or Department Bylaws.
02 - Articles of Incorporation	Upload the current Articles. They should show National Commander-in-Chief, Department Commander, and California Secretary of State approval/signatures. If incomplete, also upload documentation showing corrective action in progress.	One organized PDF is acceptable: Articles first, then supporting corrective-action documents in chronological order.
03 - Election Reports	Upload the current Post Election Report, National Convention Delegate Report (OMS confirmation email is acceptable), and Department Convention Delegate Report.	The Post EIN is verified from the Post Election Report. Do not create a separate EIN upload. The three items may be separate or combined clearly.
04 - Member Applications	Upload all membership applications processed since the Post's last completed inspection. Applications should be completed properly, including required Membership Committee and Quartermaster signatures.	Individual PDFs or one combined PDF are acceptable. If combined, keep applications in a logical, easy-to-find order and redact unnecessary PII.
05 - Meeting Minutes and Approved Budget	Upload one PDF for each set of accepted/approved regular or special meeting minutes since the last inspection. Upload the current approved budget, if applicable.	Keep each meeting's minutes as a separate PDF. Do not combine multiple meetings/months into one file.
06 - Correspondence	Upload official Post correspondence maintained for the inspection period.	Correspondence may be combined into one organized PDF, arranged chronologically or by subject.
07 - Officer Proof of Eligibility	Upload Proof of Eligibility for applicable Post officers.	Officer records may be combined into one properly redacted PDF. Never upload an unredacted DD Form 214.
08 - Proof of Auxiliary Cooperation	Upload evidence of cooperation with the Auxiliary as required by the Manual of Procedure, OR a signed coordination memorandum.	Use the simplest document that clearly demonstrates the required coordination. A memorandum template is available under Inspection Resources.
09 - Membership Committee Memorandum	Upload a signed Membership Committee Memorandum for the current inspection cycle.	One current signed PDF is sufficient. A template is available under Inspection Resources.
10 - Recruitment Plan	Upload the Post's current Membership Recruitment Plan.	One current PDF is sufficient.
11 - Monthly Quartermaster Reports	Upload monthly Quartermaster Reports covering the period since the Post's last completed inspection.	Reports may be combined into one PDF in chronological order. Trustee monthly review must be supportable. Department guidance on whether Trustee signatures are specifically required is pending; do not recreate reports or add signatures solely for upload unless directed.
12 - Quarterly Trustee Reports of Audit	Upload all completed Quarterly Trustee Reports of Audit covering the period since the Post's last completed inspection.	Quarterly reports may be combined into one PDF in chronological order. Keep required dates, signatures, balances, and explanations visible.
13 - Bank Statements	Upload complete bank statements for every Post financial account covering the inspection period.	Create one PDF per account, with statements chronological inside that account. Do not combine different accounts into the same PDF.
14 - Ledgers	Upload complete ledger/accounting records for the inspection period, including all Post accounts and the Relief Fund.	Organize ledgers by month, not by account. Monthly ledger reports may be combined into one PDF in chronological order.
15 - Bonding Order or Certificates	Upload the current 2026–2027 Bond Certificate OR a PDF of the Department "Received" email confirming the bond order. Include current certificates for other separately bonded accountable officers when applicable.	If using the Department email, use Print to PDF directly from the email application or browser. Do not print it to paper and rescan it.
16 - Dues Processing Confirmations	Upload OMS dues-processing confirmation emails covering the inspection period.	Confirmations may be combined into one PDF. Use Print to PDF directly from the email application or browser.
17 - Annual Filing Requirements	Upload the most recently required filing and evidence of submission/acceptance for each applicable filing: IRS 990-N/990-EZ/990; 990-T if required; FTB 199/199N; RRF-1; applicable Federal 990 attachment or CT-TR-1; and SI-100.	Forms may be separate or combined clearly. Keep filing/submission dates visible because the inspection requires those dates.
18 - Receipts and Proof of Expenditures	Upload receipts, invoices, reimbursement forms, contracts, or other support needed to substantiate Post expenditures during the inspection period.	Related records may be consolidated where practical. Organize combined records chronologically, by month, or by transaction so individual expenditures are easy to locate.
19 - Blank Check Verification	Provide evidence of the first unused check from each active checkbook/account. Signature lines must remain visible and unsigned.	Do not scan the whole checkbook. Cover the routing number and all but the last four account digits; leave the check number visible. Multiple checks may appear in one clear photo or combined PDF.

VFW DEPARTMENT OF CALIFORNIA — DIGITAL INSPECTION PROGRAM

20 - Proof of Real Property	If the Post owns real property, upload documents sufficient to establish ownership/interest and support value, monthly payment, amount owed, and title holder. If the Post owns none, a brief Commander-signed N/A memorandum is recommended and should state whether the Post rents its facility.	A property-tax bill may support ownership/assessment, but add a deed/title record when title is not clear. If financed, include payment and amount owed.
21 - Proof of Insurance	Upload current proof of all insurance applicable to the Post, including general liability and liquor liability where applicable, and Workers' Compensation when the Post has paid employees.	Applicable liability documentation must show Veterans of Foreign Wars of the United States (National) and Veterans of Foreign Wars, Department of California as additional insureds. Multiple insurance documents may be combined.
22 - Canteen and Licensed Operations	If applicable, upload Bingo/Lotto separation evidence; ABC Type 52 Veterans Club License; health permit; ABC Type 58 Catering Permit/License when catering; current CDTFA sales-tax evidence; club manager identification; and RBS certificates. If no licensed operation applies, a Commander-signed N/A memorandum is recommended.	Do not duplicate bonding, insurance, bank statements, or ledgers already provided in their designated folders.
23 - Employee and Payroll Compliance	If the Post has paid employees, upload I-9 and W-4 for each employee; current DE 9 and DE 9C; Federal 940 and 941; and required sexual-harassment training evidence when the five-employee threshold applies. If there are no paid employees, a Commander-signed N/A memorandum is recommended.	Redact sensitive employee PII. Workers' Compensation proof belongs in Folder 21 and does not need to be duplicated here.
24 - Document Retention Policy	No Post upload is required. The Department-approved Document Retention Policy is pre-populated.	Do not delete, rename, replace, or move the pre-populated document.
25 - Orders and Circulars	No Post upload is required for Department-provided Orders and Circulars. Applicable documents are pre-populated.	Do not delete, rename, replace, or move the pre-populated documents.
26 - Program Reports	Do not upload Program Reports.	The Digital Inspector verifies the Post's submitted activity/program reports directly through the VFWCA Reports Submitted page. No duplicate PDF or spreadsheet export is required.

N/A reminders: Folders 20 - Proof of Real Property, 22 - Canteen and Licensed Operations, and 23 - Employee and Payroll Compliance recommend a brief Commander-signed Not Applicable memorandum when the category truly does not apply. Follow the applicable READ ME rather than deleting or renaming the folder.

Redaction reminder: This Quick Reference does not repeat every privacy rule. Review the actual 00 - READ ME.pdf before every sensitive upload. Never upload an unredacted DD Form 214.

END OF FINAL GUIDE - REVISED 24 AUGUST 2026