



## Branch Officers Report (BOR) Branch Instructions & FAQ

### **Purpose**

AAUW California maintains a database of California branch leaders and state committee members to facilitate communication between AAUW California state and branch officers. The information is used to produce:

- **Job-specific email distribution groups** which are used to send important email messages from the state organization to branch officers.
- **Annual state and branch directory** of state and branch leaders. The directory is available on the state website. Please note that not all branch leadership positions are listed in the directory.

AAUW National maintains a separate member database, the Community Hub. The national and state records need to be updated annually and separately.

### **Your role**

Branch presidents and/or delegate must update the BOR annually by **July 1<sup>st</sup>** to ensure that we have the correct contact information for each branch. You are requested to:

- Update your officer listing.
- Confirm that officer contact information is correct and update as necessary.

**The deadline for completing the AAUW California BOR is July 1, 2022.**

Questions can be directed to [office@aauw-ca.org](mailto:office@aauw-ca.org).

### **Before you begin**

- Have your BOR login and Password available. It was sent to you via email. If you cannot locate it, contact the office at 916-389-0220 or through email at [office@aauw-ca.org](mailto:office@aauw-ca.org).
- Have a list of your current officers including their mailing address, email address, position(s), and phone numbers available.



## Branch Officers Report (BOR) Branch Instructions & FAQ

### Login to Your Branch Officer Report

You can access the BOR in two ways.

1. Click [here](#).

2. Type

<http://bor.aauw-ca.org/index.cfm?go=bor.home>

into your Internet browser address bar.

Enter your user ID and password.

- Branch presidents were sent an email containing their individual username and password to log into the BOR system. This login information was randomly generated and is located at the bottom of the email.
- The president may choose to delegate this responsibility. The username and password can be given to another branch member, which will allow that person to enter the data.

If you do not have access to the login information, contact Julika Barrett, at 916-389-0220 or via email at: [office@aauw-ca.org](mailto:office@aauw-ca.org)



### Branch Officers Report

Please login with your username and password or contact the webmaster ([office@aauw-ca.org](mailto:office@aauw-ca.org)) if you need help.

Username:	<input type="text" value="JBarrett"/>
Password:	<input type="password" value="*****"/>
<input type="button" value=" &lt;&lt; go &gt;&gt;"/>	

Enter the username and password that were at the bottom of the email you received about completing the BOR

**Welcome to the Branch Officer Report (BOR) system for AAUW California.**

This is the place to submit your list of officers for the upcoming year.

**How to log in:**

## Choose Your Branch

If prompted,



Choose your branch from the dropdown list.



Press Enter.



bor.aauw-ca.org

### Branch Officers Report

Greetings, office

**Welcome to the Branch Officers Report (BOR) system for AAUW California.**

Please have your list of officers, including their contact information available.

**Choose your branch below to begin updating the list of officers for your branch.**

- Start by clicking the "allnames" button before you begin. This will expand the list of leaders to show the names of those who have been a branch officer in the past.
  - If your officer has been a leader in the past, click on their name and update the information on the right side of the screen.
  - If your officer has NOT been a leader in your branch, you don't see them on the list. Click on the Add New Leader button to add them.

You can return to edit your branch officer list as many times as you need to, however, the deadline for completion is **July 1st**.

**You will not be able to remove any names from the leader list.** If you are aware of anyone who has moved away from AAUW California or is deceased, please contact the office.

If you need help, contact the office at 916-389-0220 or email [office@aauw-ca.org](mailto:office@aauw-ca.org)

Select a branch to continue:

Alameda  
 Alhambra-San Gabriel  
 Amador  
Antelope Valley 1  
 Atascadero  
 Auburn  
 Bakersfield

Enter 2

## Update Your Branch Officer Listing

1

After selecting your branch, choose an officer from the list (either the last 2 years or all names).

2

To add a new leader to the list, click **Add New Leader**.

3

View the roster to verify your entries.



bor.aauw-ca.org

### Branch Officers Report

#### Recent Branch Leaders

show **last 2 years** all names (7)


### Branch: California Online

[View roster](#) | [Select a leader](#) | [Add New Leader](#)

#### Update the branch's leadership information for the coming year

1. Assign a position to a person who appears on the branch's leadership list.

Select a name on the left and click on it. The person's information will be displayed. You may update the contact information and assign position(s) for the next year. You can view either the last 2 years or all previous branch leaders by clicking the button at the top of the list.  
OR

2. Assign a position to a person who does not appear on the branch's leadership list.

Click on **Add New Leader**. In the blank display add the person's contact information and assign position(s) for the next year.

## Use an Existing Record to Select a Leader

1

Choose the leader from the list on the left.

2

The existing position (record) displays.

3

Choose the new position(s). **Checking the “All Communication” box means the leader receives any message sent from the State Board. You may choose several positions.**

4

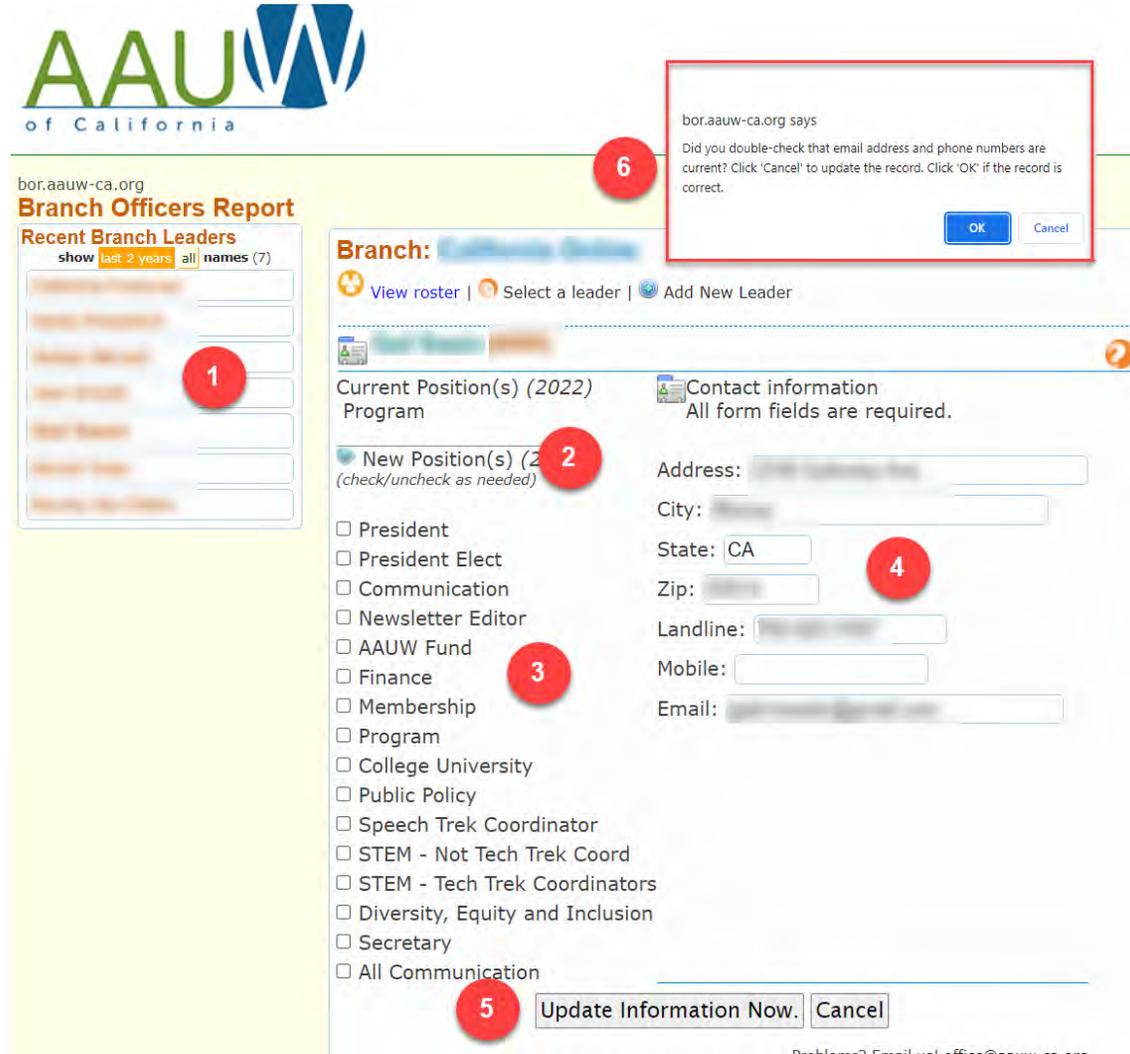
Update contact information.

5

Click **Update Information Now** link.

6

In the pop-up window, click **OK** to accept or **Cancel** to continue making corrections.



The screenshot shows the AAUW of California Branch Officers Report interface. It includes a sidebar with a list of recent branch leaders (callout 1), a main form for selecting a leader and updating their information (callout 2), a list of positions to select (callout 3), a contact information form (callout 4), and an 'Update Information Now' button (callout 5). A pop-up window at the top right (callout 6) asks for confirmation to update the record.

## Add a New Leader

If you do not see the individual, click on **Add a New Leader**.



bor.aauw-ca.org

### Branch Officers Report

#### Recent Branch Leaders

show **last 2 years** all names (7)

NAME	

Branch: [dropdown menu]

 View roster | 
  Select a leader | 
  **Add New Leader**

#### Update the branch's leadership information for the coming year

##### 1. Assign a position to a person who appears on the branch's leadership list.

Select a name on the left and click on it. The person's information will be displayed. You may update the contact information and assign position(s) for the next year. **You can view either the last 2 years or all previous branch leaders by clicking the button at the top of the list.**  
OR

##### 2. Assign a position to a person who does not appear on the branch's leadership list.

Click on **Add New Leader**. In the blank display add the person's contact information and assign position(s) for the next year.

## Add a New Leader's Contact Information

1

Enter contact information.

2

Choose the leadership position(s).

3

**Add Now** to save the record.

4

Click on the **Return to Branch Leadership List** for more entries.



Branch: Mariposa

Add a New Leader's Contact Information

1

All \* marked form fields are required

First Name:\*

Last Name:\*

Address:\*

City:\*

State:\*

Zip\*

Primary Phone:\*

Secondary Phone:

Email:\*

New Position(s) (2020)  
*(check/uncheck as needed)*

- All Communication
- President
- President Elect
- Finance
- Secretary
- Membership
- Program
- Communication
- Newsletter Editor
- International
- College University Coordinator
- Bylaws
- Public Policy
- Speech Trek Coordinator
- Tech Trek
- AAUW Fund

2

Add Now

3

4

[Return to Branch Leadership List](#)

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## View and Confirm the Roster of Officers

Choose **View roster** to verify and confirm your report for the current or next year.



bor.aauw-ca.org

### Branch Officers Report

#### Recent Branch Leaders

show **last 2 years** all names (7)

NAME	POSITION

#### Branch:

**View roster** | Select a leader | Add New Leader

#### Update the branch's leadership information for the coming year

##### 1. Assign a position to a person who appears on the branch's leadership list.

Select a name on the left and click on it. The person's information will be displayed. You may update the contact information and assign position(s) for the next year. **You can view either the last 2 years or all previous branch leaders by clicking the button at the top of the list.**

**OR**

##### 2. Assign a position to a person who does not appear on the branch's leadership list.

Click on **Add New Leader**. In the blank display add the person's contact information and assign position(s) for the next year.

## Display or Print a Branch Roster

Clicking on the **Update Information Now** takes you back to the main screen of **Recent Branch Leaders**.

1

Click on **View roster** to print or view the branch officers' list.

2

The branch officers' view screen appears. Choose the fiscal year you wish to print.

Click on the print icon or the .pdf document to print.







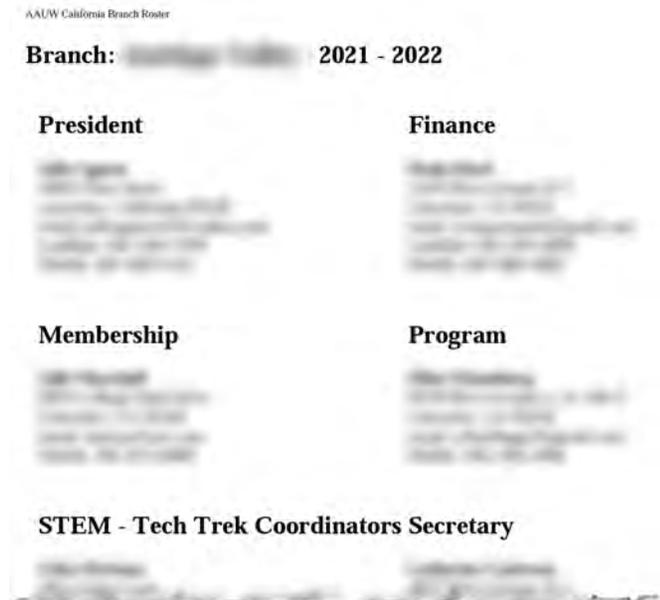
## Branch Officers Report (BOR) Branch Instructions & FAQ

### What You See If You Print or Download the Roster

What you will see if you choose to **Print**.



What you'll see if you choose **PDF**.  
Download or print the file.





## Branch Officers Report (BOR) Branch Instructions & FAQ

<b>Answers to Frequently Asked Questions</b>	
<p><b>What if I assign a job to a person in error?</b></p> <p>Each person’s information can be updated repeatedly.</p> <p>To “un-assign” a job for a leader, follow these steps.</p>	<p><b>Steps:</b></p> <ol style="list-style-type: none"> <li>1. Click on the member’s name to open the entry.</li> <li>2. Click on the checked position title to uncheck it</li> <li>3. Then click on <b>Update Information Now</b>.</li> <li>4. To verify, from the instruction page display, click on <b>Click here to...</b> view the positions assigned for the coming year.</li> </ol>
<p><b>How do I remove a person from a previous position and/or previous year?</b></p>	<p>The BOR process is only concerned with positions for the incoming year. You cannot change previous years of history through this process.</p>
<p><b>How do I delete a person from the branch leadership list?</b></p>	<p>You cannot delete a person from the branch leadership list. The list includes all members who have held a leadership position in the branch since the 2008-09 year and they remain in our database. They will only be part of the branch’s roster if you assign them a position.</p>
<p><b>How do I correct the spelling of a name?</b></p>	<p>Once a person is in the AAUW California database, the name cannot be changed through the BOR process. If a name is spelled incorrectly, please email the correct spelling and information to identify the erroneous record to <a href="mailto:office@aauw-ca.org">office@aauw-ca.org</a>. <i>You must include the leader’s branch to have the name corrected.</i></p>
<p><b>What if a person shows on the branch leadership list multiple times?</b></p>	<p>If a person’s name is listed multiple times in the branch leadership list, select one with the correct spelling of the name. Please make sure that ALL the contact information is correct when you complete the update. After the BOR deadline has passed, administrators will merge all the other records for the person into the one you have updated.</p>
<p><b>Our board has a position that is not listed. How do I tell you about it?</b></p>	<p>You may have more positions on your board than are shown on the BOR list. The list contains the positions with which AAUW California most frequently communicates.</p>



## Branch Officers Report (BOR) Branch Instructions & FAQ

### Answers to Frequently Asked Questions, *continued*

<p><b>Our branch does not have anyone holding one of the positions you ask about. Should I leave the position unassigned?</b></p>	<p>It depends on what it is. If it is for an optional responsibility, such as Speech Trek, then do not assign anyone. However, if you have no one assigned to an essential task, such as finance or president, please assign the position to the person who will be receiving communications from AAUW California about those responsibilities. If you later find a person to take over the position, send the new person's information to <a href="mailto:office@aauw-ca.org">office@aauw-ca.org</a>.</p>
<p><b>Why does my branch roster not show all the positions?</b></p>	<p>The branch leadership roster that you see when you "Click here to verify..." only shows the positions that you have filled for the specified year. Unfilled positions are not listed.</p>
<p><b>Someone else started to complete the BOR for my branch. Can I finish the job?</b></p>	<p>You certainly can. The BOR for a branch does not have to be completed by one person or all at one time.</p>
<p><b>How many times can I update the BOR?</b></p>	<p>The BOR system may be entered as many times as necessary before the July 1st completion deadline. Information may be added or corrected each time.</p>
<p><b>When is the BOR data transmitted to AAUW California?</b></p>	<p>Any information you enter through the BOR system immediately updates the AAUW California leadership database. After the deadline, administrators will process the BORs and assign email groups to the new officers. Until that time, the current year officers will receive the email broadcasts.</p>
<p><b>I have a question that isn't answered here. How do I get an answer?</b></p>	<p>If your question is not answered by these instructions, please contact <a href="mailto:office@aauw-ca.org">office@aauw-ca.org</a> so this document can be updated. If you have the question, others probably do too.</p>