The Branch Officers Report (BOR)
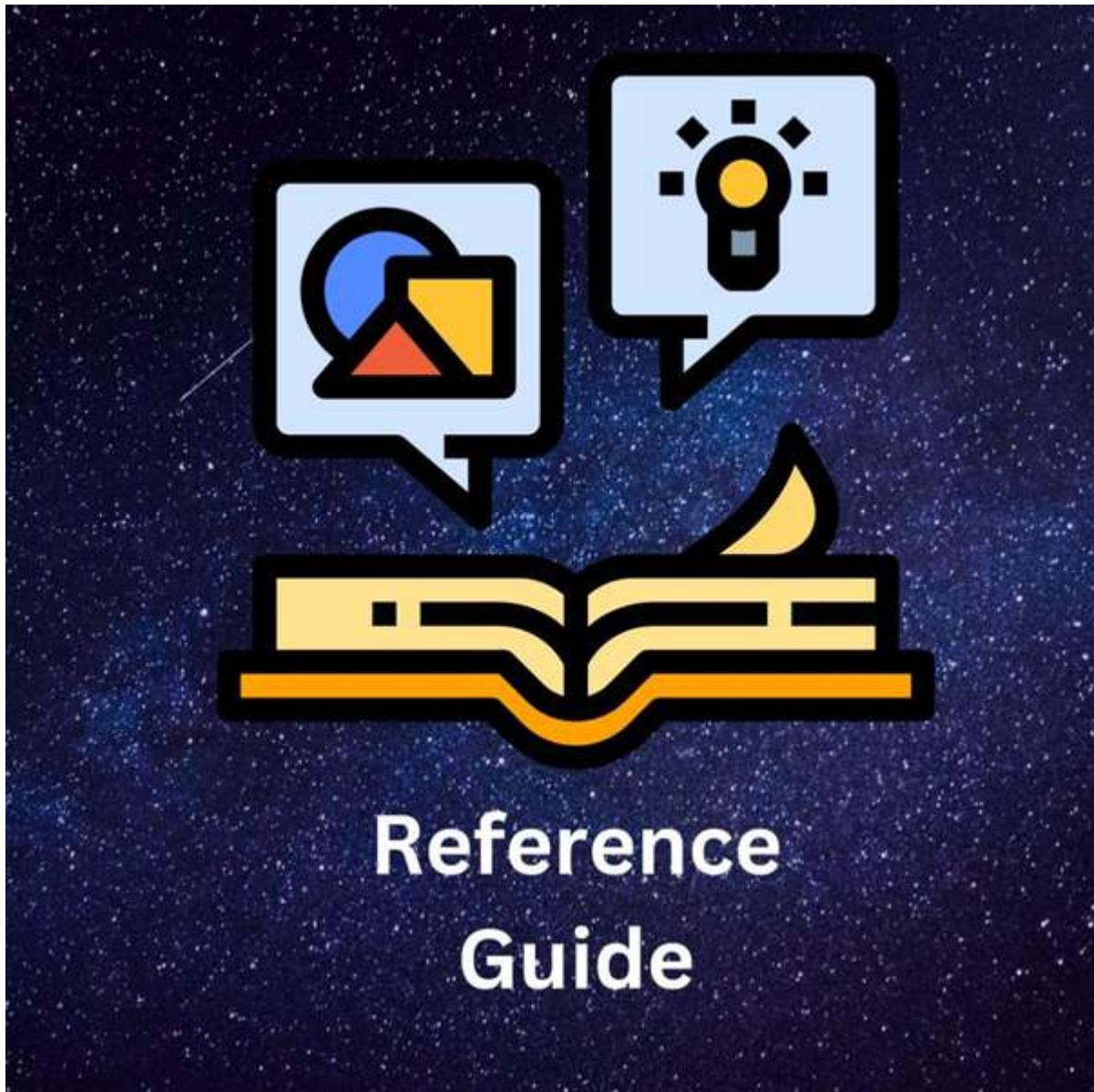

Reference Guide

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BOR Purpose

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

AAUW California maintains a list of branch officers. The list is updated annually.

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 directory** of branch leaders. The list of officers is available on the state website. Please note that not all branch leadership positions are listed in the directory.

Your Role

Outgoing Branch presidents and/or delegates must update the BOR annually in June to ensure that we have the correct contact information from each branch. You are requested to:

- Update your officer listing for the new year.
- Confirm that the officer's contact information is correct and up to date.
- Correct information as necessary.

The deadline for completing the AAUW California BOR is July 1, 2023.

Direct questions to **office@aauw-ca.org**.

Things to Know

- Have your BOR login and password available. It was sent to you via email. If you cannot locate it, contact us at webteam@aauw-ca.org.
- If you need to delegate the task of updating the BOR to someone else, contact the AAUW California office so they can create a user id and password for that individual. Each screen includes directions on how to complete tasks.
- Each screen includes the same search fields and navigational features. You may:
  - Use part or all the names in a search field to bring up a list of matches.
  - Enter more than one filter in the search fields to narrow the list, e.g. Position plus Service Year.
- Remove filters to broaden the list.
- Delete some data by clicking on (x) before the name.

BOR Login for First Time Users

Purpose

BOR users must establish their own login and password to access the system. Current year branch presidents or delegates receive an email that includes a description, instructions, and a link to begin the BOR process. Do not share your user ID and password.

Steps

1. Click on the link in the email. The BOR login screen appears. Note: your email address is your User ID. Click on the "Lost your password?' link.
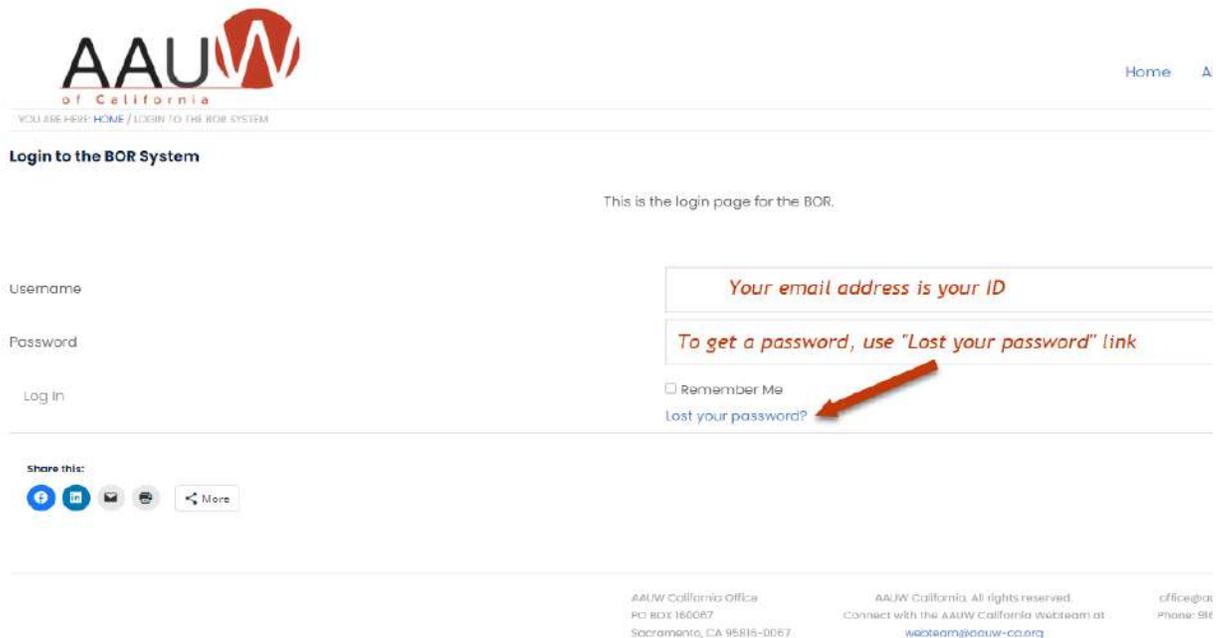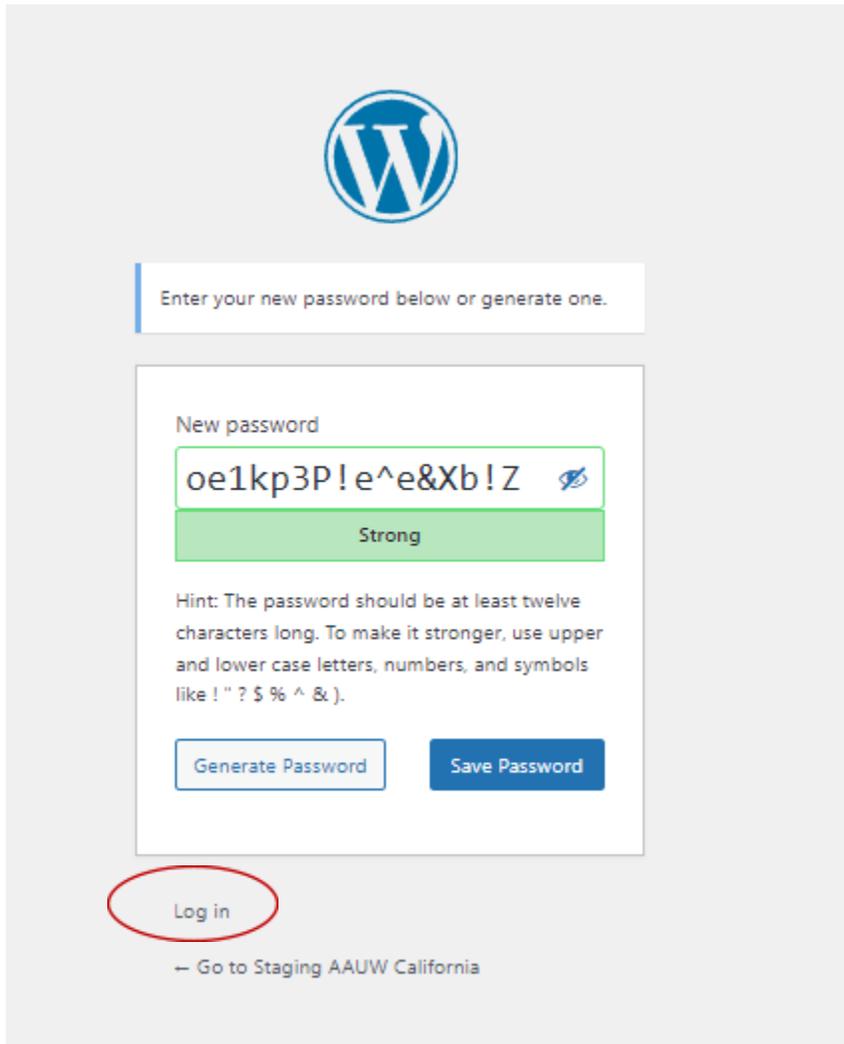

2. The prompt to get a new password appears. Enter your email address and click on the link that appears in your email inbox.

BOR Login for First Time Users, continued

3. Once you click on the email link, you can accept the new password or remove it (highlight the password text and click on the delete button) and enter your own password.

Enter your new password below or generate one.

New password

oe1kp3P!e^e&Xb!Z

Strong

Hint: The password should be at least twelve characters long. To make it stronger, use upper and lower case letters, numbers, and symbols like ! " ? $ % ^ &).

Generate Password   Save Password

Log in

← Go to Staging AAUW California

4. Click the Log in link. Continue logging in to enter the BOR.

Username		Your email address
Password		Your password
Log In	*If you are returning to this site and already have a password, click on the "Log In"*	☐ Remember Me Lost your password?

Entry into the BOR

Purpose

After your log-in you can begin the process of updating your officers' list in the Branch Officer Reporting System.

Steps

1. On the website, click on the Branch Tools menu item and then the Branch Officer Reporting System. This action takes you to the BOR landing page where you can select the **Enter Branch Officers** icon.

   Note: Unless you logged out of the BOR, you will re-enter using the link, **Branch Officer Reporting System.**
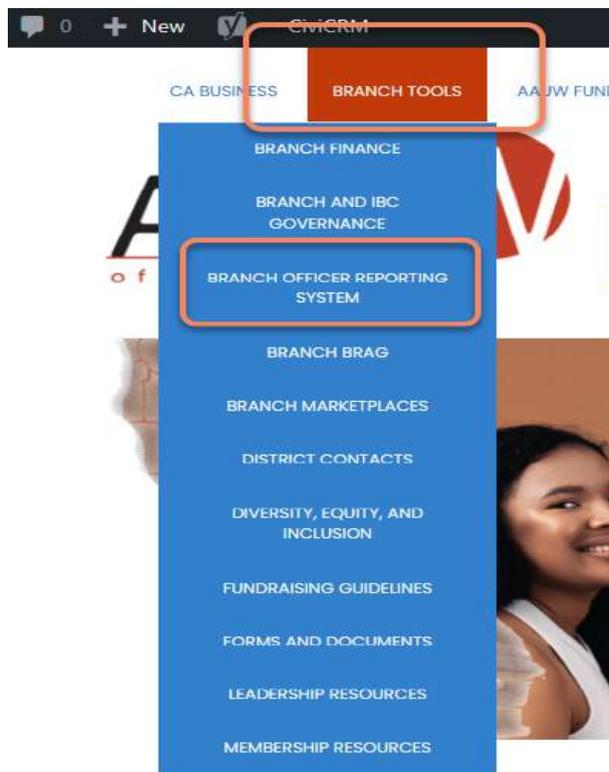
Entry into the BOR, continued

From the **Welcome to the Branch Officers Report (BOR) system for AAUW California,** continue with the following step.

2. Next, click on the icon, **Enter Branch Officers**, to get to the main screen.

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

AAUW California maintains a database of California branch leaders and state committee members. This is critical for facilitating communication between the state board and branch leaders.

The Branch Officer Report (BOR) information is used to produce email distribution groups for sending important messages to branches and an online directory of state and branch leaders.

BOR Requirements and Functions

You can perform three functions with the BOR system. Click on the appropriate box to enter the correct screen(s).
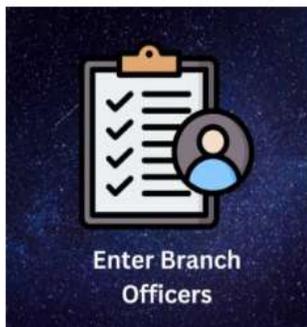
Enter Branch Officers

REQUIRED ANNUALLY FOR OUTGOING BRANCH PRESIDENTS

- Update the BOR with the new officers and leaders for the coming year.
- Deadline: July 1st.

Enter Branch Officers

Purpose

The **Enter Branch Officers** screen is the entry point to begin several options.

- Search for officers within the database regardless of branch affiliation or year of service.
- Search for specific branches, officers by position or last name, and service years, i.e., current, and new year.
- Make updates to the branch officers' position(s) and contact information.
- Add new branch officers not in the BOR database.
- Additionally, the menu bar, at the top of the screen, permits you to return to the Home page, correct entries or view your upcoming year's directory.

BOR Home	Correct Branch Officer Listing Error	Verify 2024 Branch Leaders

Outgoing presidents are responsible for entering the list of incoming officers and leaders with their contact information and position(s) by July 1st.

Steps

1. Follow instructions on the screen on how to search by branch name and view the list of branch officers. In the image below, the current year's list of officers is displayed on the screen. Note: No new entries for the upcoming year, in the Service Year column, have been entered yet.

2. From the Display Name column, find the officer, click on the name, and begin updating or confirming the officer's details.

Update Branch Officer Details

After selecting the branch officer from the **Display Name** listing, the **Branch Officer Details** screen appears.

Purpose

From this screen, you can confirm or update the branch officer's contact information and add one or more branch positions, followed by the Branch for this officer.

Steps

1. Confirm or correct contact information.
2. Click on one or more board positions.
3. Choose the branch.
4. Then, click the Submit button. The **Branch Officer Submission Complete** screen appears.

Branch Officer Submission Complete

Purpose

This screen confirms the details you entered and updated.

Steps

1. From the submission complete screen, click on the **Enter Branch Officers** link to return to the main screen.
2. Continue entering the next officer(s).
3. When done with your updates, click on the **Verify 2024 Branch Leaders** to confirm your directory of new officers or return to the **Enter Branch Officers** screen to review the list for the upcoming year.
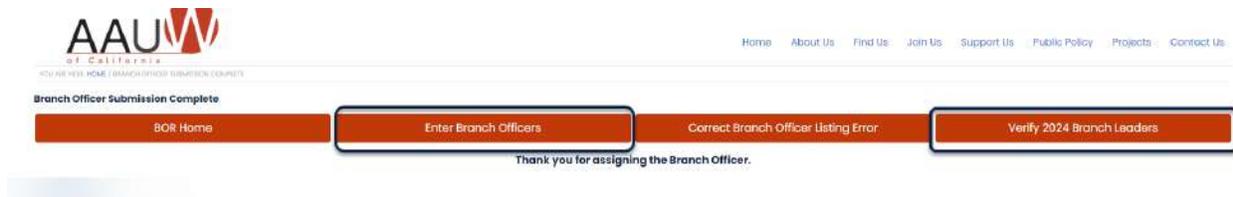
Confirm the New Board List

Purpose

To be sure that the branch officers receive communication from the AAUW California State Leadership Team and the *Board2Board* monthly newsletter, and that your branch officers appear correctly in the state directory, it is important to review for accuracy. The confirmation of the new year's branch officer list is the final phase in the annual BOR process.

Steps

From the **Enter Branch Officers** screen, do the following:

1. Enter the branch name in the **Branch** field.
2. In the **Service Year**, remove the current year by clicking on the "x" next to it.
3. If the upcoming service year does not appear, click in the **Service Year** field, and select the new year.
4. Review the list of officers that display and evaluate the list's accuracy.
5. Note: If you wish to see how your list appears in the directory, click on the top menu bar link, **Verify 2024 Branch Leaders.**

Correct Branch Officer Listing Error

Purpose

After reviewing your list for the new year, you may need to make changes, e.g., the board positions for an officer are wrong or incomplete, an officer's contact information needs updating, or an officer will not serve next year. To ensure accuracy, you need the option to make corrections.

Steps

a. Click on the **Correct Branch Officer Listing Error** option from the BOR Home page or from the link within the BOR, as shown below. You can use this option any time during the BOR process but the window of opportunity for the branch president or delegate to do this is during June when entries and changes are possible. After July 1st, please contact the web team at webteam@aauw-ca.org to report changes.

From the **BOR Home** page:

Correct Branch Officer Listing Error

From the link on the BOR screens. For example:

BOR Home	Correct Branch Officer Listing Error	Verify 2024 Branch Leaders

Outgoing presidents are responsible for entering the list of incoming officers and leaders with their contact information and position(s) by July 1st.

Correct Branch Officer Listing Error, continued

b. Follow the screen instructions to change (add or remove) the branch position(s) or to edit contact information. The column name in red text allows you to edit detail. Note that the displayed list shows the new year's branch officers. The assumption is that, at this point in the process, these are the officers you need to modify.

Correct Branch Officer Listing Error, Continued

3. When you click on the Branch Position field, the options are:

   a. Remove a position for the officer by clicking on the "x" next to the position and then click on the green box with the check mark to confirm.
   b. Make no changes and exit the field by clicking on the red box "x."
   c. Add more by clicking within the **Branch Position** field and opening a drop-down list of positions. Add positions by clicking on one or more in the list.

4. Click on the green box with the check mark to confirm.

Correct Branch Officer Listing Error, continued

Once you have selected the changes, you can ensure that the corrections appear in the directory or not. The **Active** field determines if the officer will appear on the Branch Officer List directory.

1. Click on the **Yes** button to have the entry active on the **Branch Officer List**.

2. Click on the **No** button to not have the entry appear on the list.

3. Then, click on the green square with the check mark to confirm or the "x" to cancel your entry.

Searching for Officers not Visible on the Branch Listing

Purpose

Doing a thorough search is important to avoid creating duplicate entries. If you inadvertently create a duplicate record, you must contact webteam@aauw-ca.org to have it corrected. When you are entering branch officers, some will not appear on the list from the current year. There are several reasons for this.

● The officer did not serve on the branch board in the current year.
● The branch officer served in previous years but not recently.
● The branch officer was active in another branch.
● The officer is not in the database.

Steps

To conduct a thorough search to find an officer not visible on your current list, start on the **Enter Branch Officers** screen and do the following:

1. Remove the **Service Year(s)** to search the entire database by clicking the "x" in front of the year(s)
2. Enter the last name in the **Last Name** field. If not found, the list will be blank.
3. If there is a match, one or more names will appear.
4. Review the list of names until you find the correct name. Hint: Check the address and phone number to help with finding the correct one.
5. Click on the display name. The **Branch Officer Update Details** screen appears to confirm or to make changes to the contact information, add the position(s) and designate the branch.
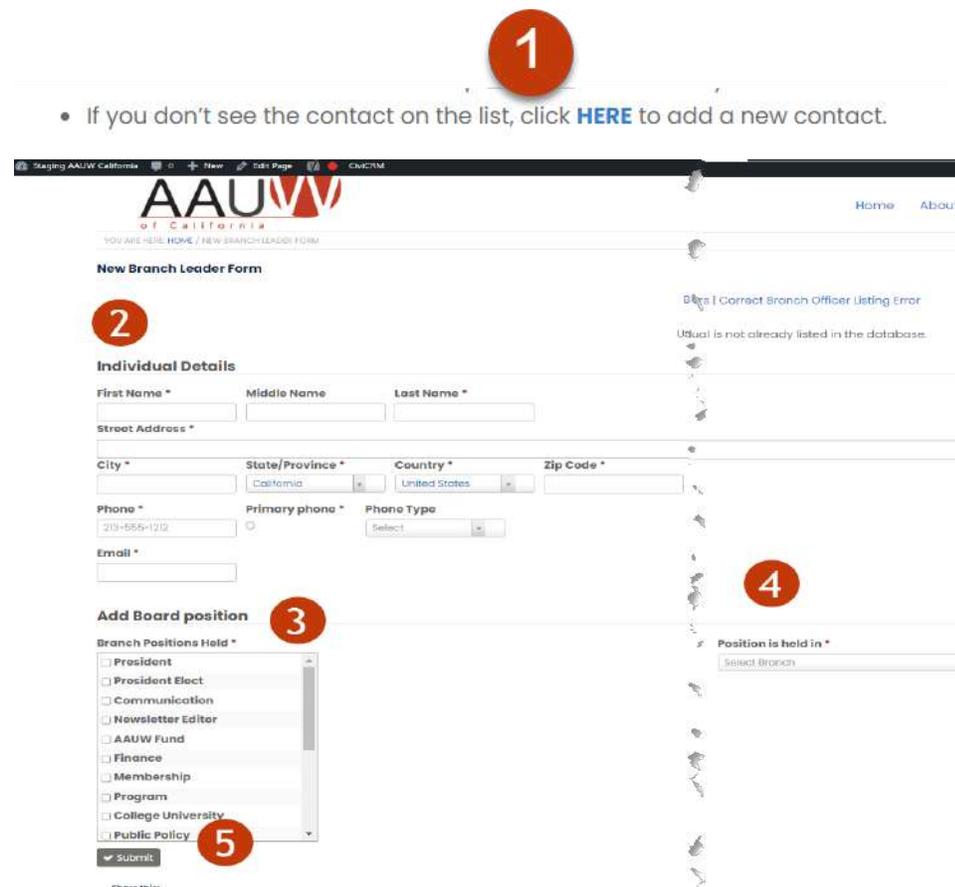
Add a New Officer

Purpose

If you cannot find the person you are looking for and have done a thorough search, you can add an officer to the BOR database. This option should only be used if you are sure that the person is not in the database. Duplicate entries make future searches and selections less efficient and accurate.

Steps

After following the preceding search instructions and confirming that the officer is not listed, add the officer from the **Enter Branch Officers** screen**.**

1. In the "**What if the person is not listed?"** paragraph, use the link HERE or at the bottom of the screen to add a new contract. The **New Officer Form** appears.
2. Add the **Individual Details**. Note that an asterisk (*) identifies required fields.
3. Add the **Board Position**(s).
4. Select the branch in which the Position is held.
5. Click the **Submit** button.
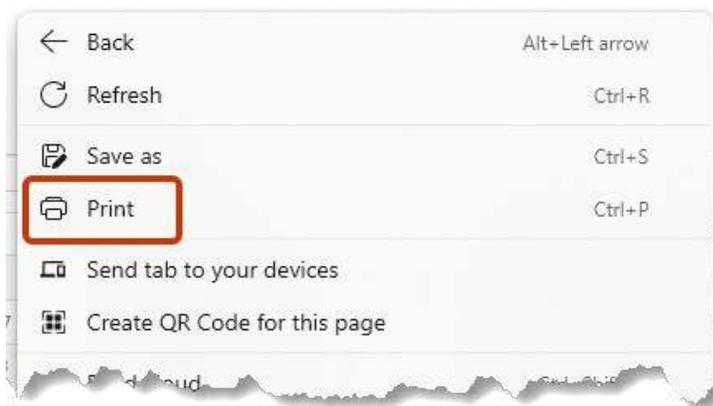
Print the Branch Directory

Purpose

Although the branch directory is visible on the AAUW California website, branch officers may wish to have a printed copy. The following steps will show you how to print a copy of your branch officers.

Steps

1. From the **Enter Branch Officers** page, filter search to the branch and upcoming service year.
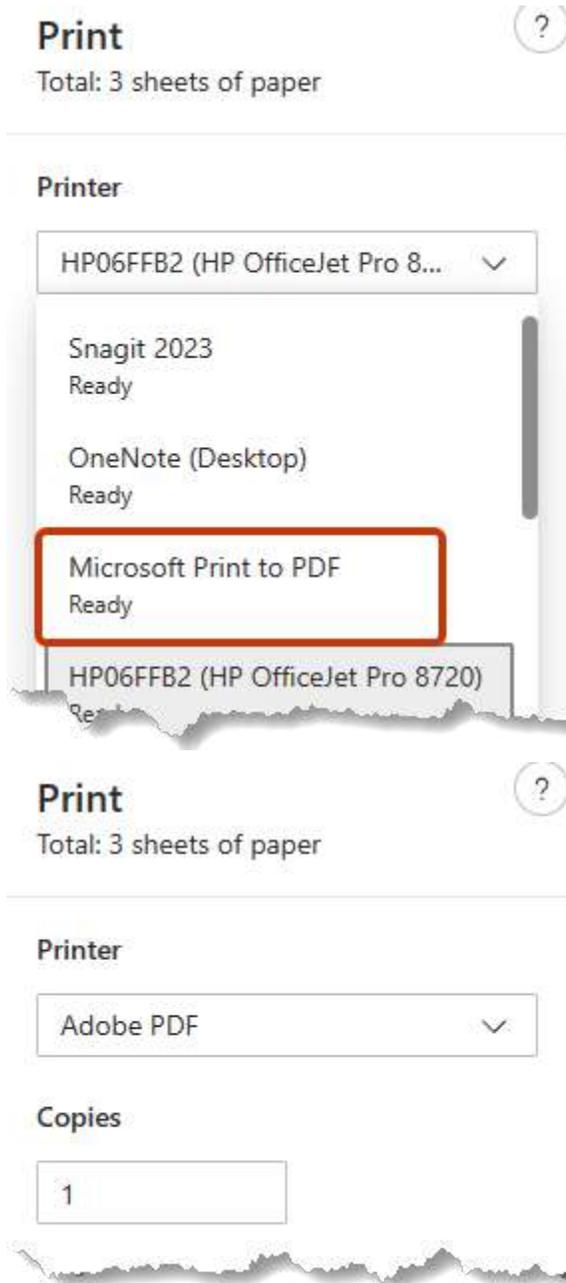

2. With your mouse, right click on the web page and select "print."

Print the Branch Directory, continued

3. In the printer options, select one of the following options.

4. Click "**Print**" to save to a folder. You can then print the document from that location.