



## 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 the AAUW state board and branch boards. 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 print and online directory** of state and branch leaders. The directory is distributed annually to branch presidents and state committee members and 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 Services Database (MSD). Both the national and state records need to be updated annually.

### **Your role**

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

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

**The deadline for completing the AAUW CA BOR is July 1, 2019.**

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 916-448- 7795 or via 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 number available.



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

### Login to Your Branch Officer Report

You can access the BOR in three ways.

1. Click [here](#).

2. Type

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

3. into your internet browser address bar

4. Access it on the AAUW California [website](#) on the CA Business page.

Enter your user ID and password.

- Branch presidents and presidents-elect 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 916-448-7795 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 user name and password that were at the bottom of the email you received about completing the BOR.

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

This is the place to login and submit a Branch Officers Report (BOR) telling AAUW Ca

**Please note that a separate report is requested by National AAUW. We do not share**

- Usernames and passwords were sent in an email to all 2018-19 branch presidents and presi
- Each person has a **unique username and password**. You should find it at the very botto
- Please choose **one person** in your branch to enter the information.
- **Check all addresses and phone numbers** to assure that they are correct.

**The deadline for completion is July 1<sup>st</sup> 2019.** Click [here](#) if you need to downloa

As you work on your branch leader list, selecting names to give them new jobs or ac updated. Please scroll down the list to see all names.

You can continue to modify the information in the BOR until the deadline of **July 1<sup>st</sup>**

Do not attempt to remove any names from the recent leader list. You will not be able to do so. E

The BOR system can be used to print or save a branch leadership roster for the curr

**Note: You may experience difficulties if you are running a browser version more than three years old.**

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

### Choose Your Branch

If prompted,

**1**

Choose your branch from the dropdown list.

**2**

Press Enter



### Branch Officers Report

Greetings, Julika



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

In order to update your branch listing, 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.**

1. Select individuals who have previously served as an officer.
  - Remember to review and update their contact information.
  - Start by clicking the "allnames" button before you begin. This will expand the list of Leaders to show everyone
  - Only add someone who is not already on this list.
2. Add new names as needed if the person has not previously served as an officer.

You can return to edit your branch officer list as many times as you need to, however, the deadline for completion is **July**. **You will not be able to remove any names from the Leader List.** If you are aware of anyone who has moved away please contact the office.

If you need help, contact the office at 916.448.7795 or email [office@aauw-ca.org](mailto:office@aauw-ca.org)



Select a branch to continue:

Los Altos-Mountain View  
 Los Gatos-Saratoga  
 Madera  
 Marin  
 Mariposa  
 Marysville-Yuba City  
 Merced  
 Mid Peninsula

Enter

**2**

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

### Update Your Branch Officer Listing

1

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 report.



#### Branch Officers Report

##### Recent Branch Leaders

show **last 2 years** all names (15)

Maddie Brown
Trish Darcey
Bernadette Falany-Davis
Sandra Gabe
Cindy Harp
Dawn Johnson
Dina Lambert
test last
Rebecca Mock
Kim Monson
Cathy Owens
Jill Rowney
Barbara Silva
Rebecca Swisher
Molly Wilson

#### Branch 3 Mariposa

[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.

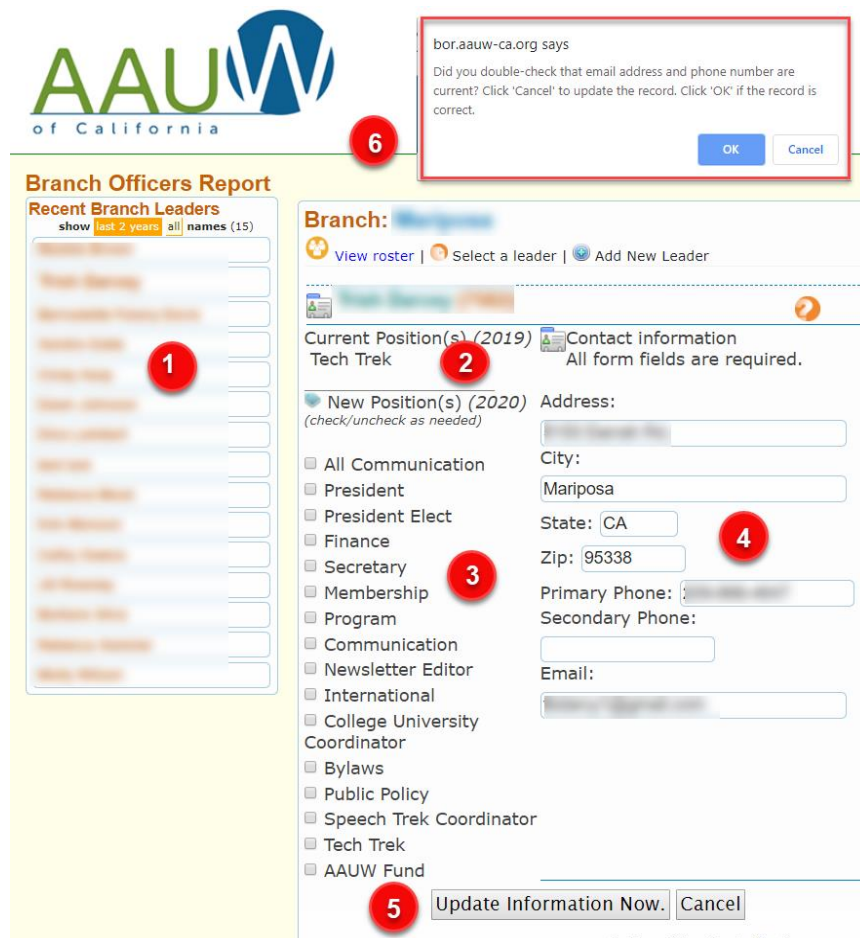
Click on **Add New Leader**. In the blank display add the person's contact information and assign position(s) for the next year.



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

### 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 (BOR) interface. It includes a sidebar with a list of recent branch leaders (callout 1), a main area for selecting a leader (callout 2), and a form for updating contact information (callout 4). A list of positions to choose from is also present (callout 3). A pop-up window at the top right (callout 6) asks for confirmation to update the record. At the bottom, there is an 'Update Information Now' button (callout 5) and a 'Cancel' button.

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

### Add a New Leader

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



#### Branch Officers Report

##### Recent Branch Leaders

show **last 2 years** all names (15)

Maddie Brown

Trish Darcey

Bernadette Falany-Davis

Sandra Gabe

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Dawn Johnson

Dina Lambert

test last

Rebecca Mock

Kim Monson

Cathy Owens

Jill Rowney

Barbara Silva

Rebecca Swisher

Molly Wilson

#### Branch: Mariposa



[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.



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

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

### View and Confirm the Roster of Officers

1

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



#### Branch Officers Report

##### Recent Branch Leaders

show **last 2 years** all names (15)

Maddie Brown

Trish Darcey

Bernadette Falany-Davis

Sandra Gabe

Cindy Harp

Dawn Johnson

Dina Lambert

test last

Rebecca Mock

Kim Monson

Cathy Owens




Jill Rowney

Barbara Silva

Rebecca Swisher

Molly Wilson

#### Branch 1 Mariposa

 [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.





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

### 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

##### Recent Branch Leaders

show **last 2 years** all names (15)

- Maddie Brown
- Trish Darcey
- Bernadette Falany-Davis
- Sandra Gabe
- Cindy Harp
- Dawn Johnson
- Dina Lambert
- test last

1

Branch: **Mariposa**

[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 her contact information and assign position(s) for the next year.

OR



#### Branch **2** Mariposa 2019 - 2020

[2020](#) [2019](#)

##### All Communication

## Print Roster of Officers by Fiscal Year

1

Choose the year that you would like to print.

Year 2019 = 2018-2019

Year 2020 = 2019-2020

(Upcoming fiscal year)

2

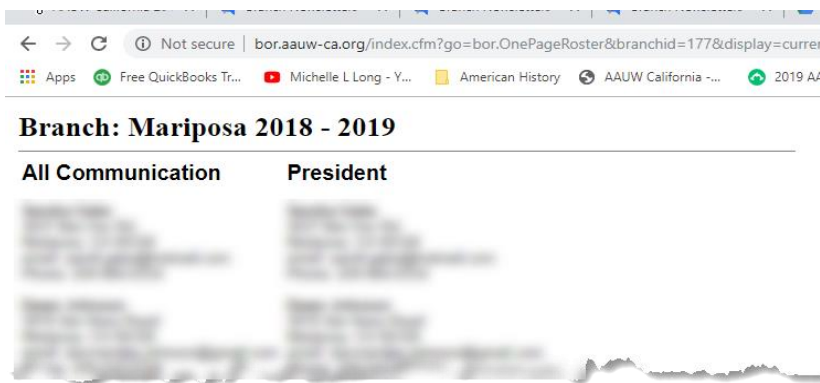
Select the **Print** icon to print the screen information or the **PDF Document** to save, view or print.



## 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**.



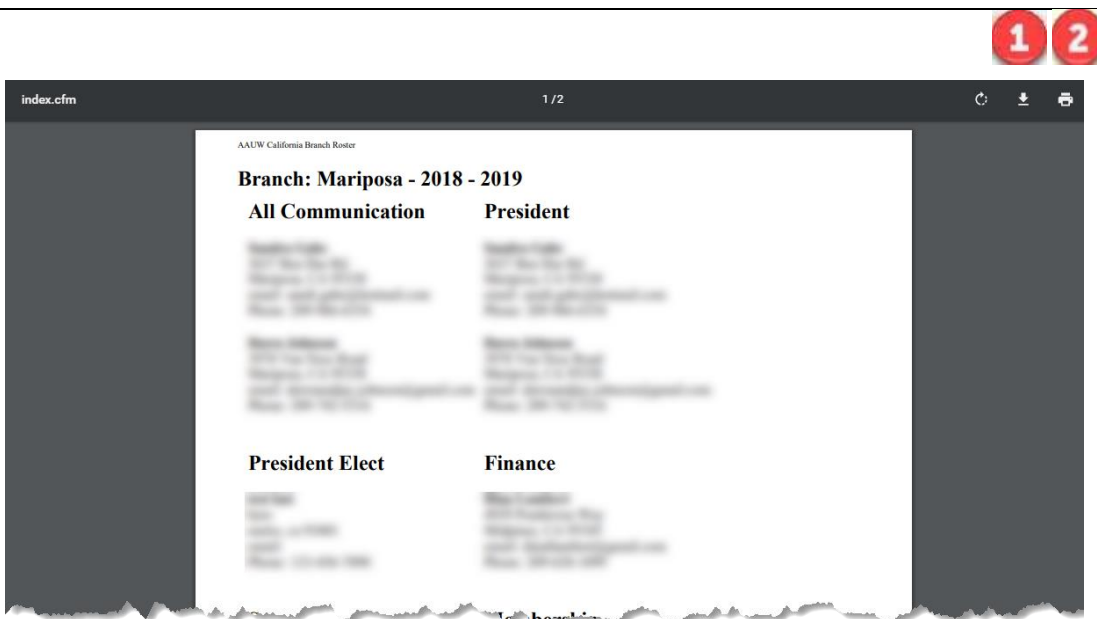
What you'll see if you choose **PDF**.

**1**

Download the file.

**2**

Print the file.



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

### Answers to Frequently Asked Questions

<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 from a previous year?</b></p>	<p>The BOR process is only concerned with positions for the incoming year. You cannot change previous year 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 leadership 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 CA 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 and <a href="mailto:office@aauw-ca.org">mailto:office@aauw-ca.org</a> <i>You must include which Branch the leader is associated with 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 list of positions to choose from. The list contains the positions with which AAUW CA most frequently communicates.</p>



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

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

<b>Our branch does not have anyone holding one of the positions you ask about. Should I leave the position unassigned?</b>	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 Program, please assign the position to the person who will be receiving communications from AAUW CA 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> .
<b>Why does my branch roster not show all the positions?</b>	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.
<b>Someone else started to complete the BOR for my branch. Can I finish the job?</b>	You certainly can. The BOR for a branch does not have to be completed by one person or all at one time.
<b>How many times can I update the BOR?</b>	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.
<b>When is the BOR data transmitted to AAUW CA?</b>	Any information you enter through the BOR system immediately updates the AAUW CA 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.
<b>I have a question that isn't answered here. How do I get an answer?</b>	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.