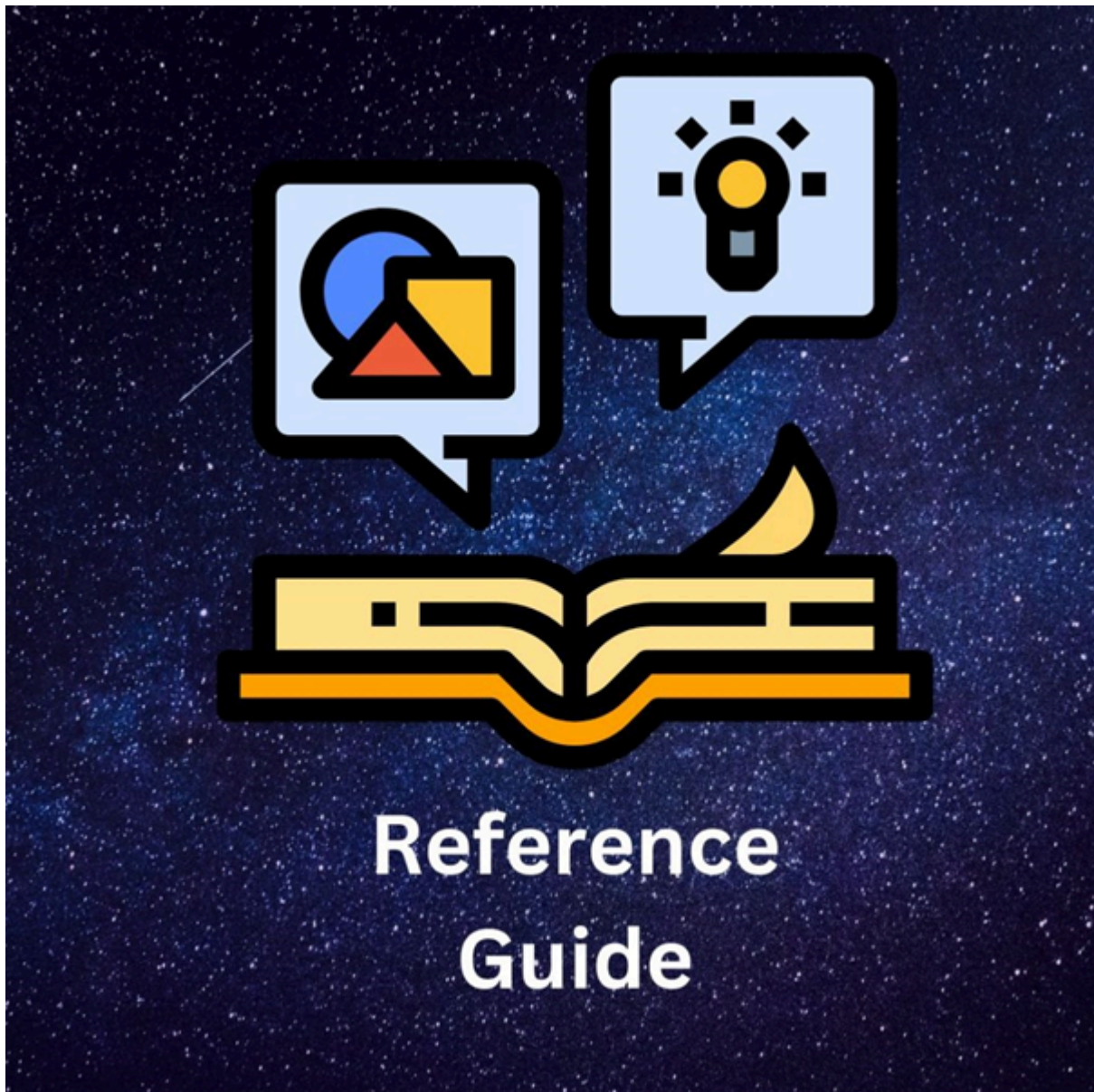


## The Branch Officers Report (BOR)





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## Branch Officers Report Reference Guide

### BOR Purpose

*AAUW National maintains a separate member database, the Community Hub. Branch presidents annually update the national and state records.*

AAUW California maintains a list of branch officers in the Branch Officers Report (BOR). Branch presidents update the BOR annually.

The information produces:

- **Job-specific email distribution groups** used to send important email messages from the state organization to branch officers.
- **Annual directory** of branch leaders. The list of officers appears on the state website. Please note that the directory does not list all branch leadership positions.

### 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. AAUW California requests you 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, 2024.**

Direct questions to [office@aauw-ca.org](mailto:office@aauw-ca.org).

### Things to Know

- Have your BOR login and password available. We sent the details to you via email. If you cannot locate it, contact us at [webteam@aauw-ca.org](mailto:webteam@aauw-ca.org).
- If you need to delegate the task of updating the BOR to someone else, contact the AAUW California webteam 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 information into 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 data by clicking on (x) before the name.





## Branch Officers Report Reference Guide

### BOR Login for First-Time Users

#### Purpose

BOR users must establish their login and password to access the system. Current year branch presidents or delegates receive an email with 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.

AAUW of California

YOU ARE HERE: HOME / LOGIN TO THE BOR SYSTEM

Home

AAUW of California

Log In to the BOR System

This is the login page for the BOR.

Username

Password

Log In

Remember Me

Lost your password?

Share this:

Facebook LinkedIn Email Print More

AAUW California Office  
PO BOX 160067  
Sacramento, CA 95816-0067

AAUW California. All rights reserved.  
Connect with the AAUW California Webteam at  
webteam@aauw-ca.org

office@ac  
Phone: 916

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

Forgot your Password

Enter username or email

Enter your email address here.

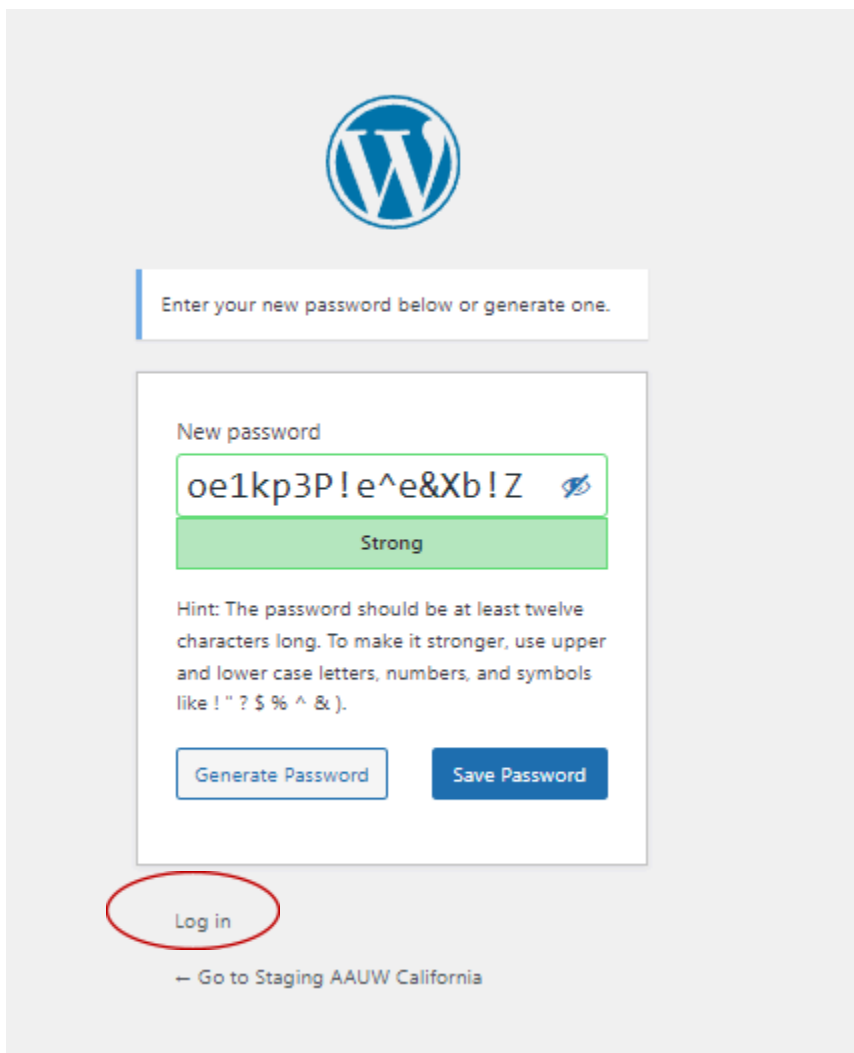
Get New Password Cancel

Click on New Password link. You will receive a an email with a password link

Share this:

Facebook LinkedIn Email Print More


- 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.



WordPress logo

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](#)

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

Username	<input type="text"/>
Password	<input type="password"/>
<a href="#">Log In</a>	<p><i>If you are returning to this site and already have a password, click on the "Log In"</i></p> <p><input type="checkbox"/> Remember Me</p> <p><a href="#">Lost your password?</a></p>

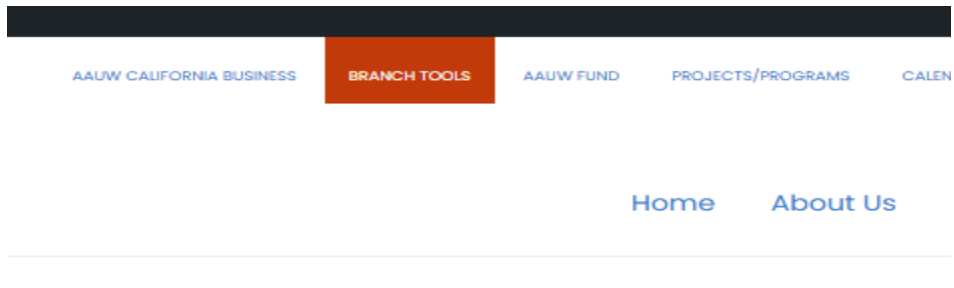
## Entry into the BOR

### Purpose

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

### Steps

1. On the website, click on the Branch Tools menu item.



Note: Several graphics appear.

2. Click on the Branch Officer Report graphic or the title below the image.



**Branch Officer Report**

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 Report System**.

### Entry into the BOR, continued

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

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

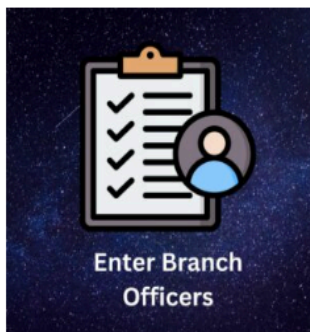
#### **Welcome to the Branch Officers Report (BOR) system for AAUW California**

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 operations..

- 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.



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 to search by branch name and view the list of branch officers. In the image below, the current year's list of officers are listed on the screen. Note: no new entries for the upcoming year, in the Service Year column, appear.

Last Name		Branch		Branch Position		Service Year		
		turlock		Select		2025 2024		
DISPLAY NAME	FIRST NAME	LAST NAME	STREET ADDRESS	PHONE	EMAIL	BRANCH	POSITION	SERVICE YEAR
						Turlock	Finance	2024
						Turlock	College University	2024
						Turlock	College University	2024
						Turlock	President	2024
						Turlock	College University	2024
						Turlock	Program	2024
						Turlock	College University	2024

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

Last Name

Branch

Service Year

Smith

turlock

2025 2024

DISPLAY NAME	FIRST NAME	LAST NAME
Jane Smith	Jane	Smith

BRANCH	POSITION	SERVICE YEAR



## Update Branch Officer Details

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

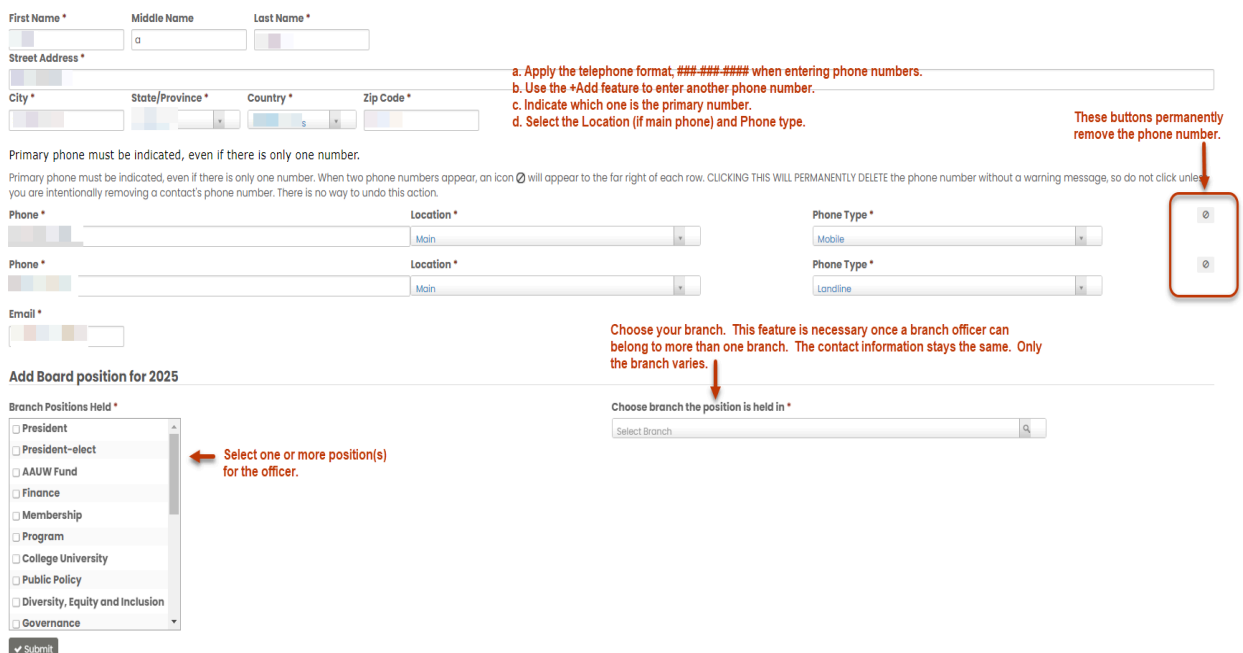
### Purpose

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.

Please confirm contact information for this officer:



The screenshot shows the 'Branch Officer Details' form. It includes fields for First Name, Middle Name, Last Name, Street Address, City, State/Province, Country, and Zip Code. There are two rows for phone numbers, each with a 'Phone' field, a 'Location' dropdown (Main), and a 'Phone Type' dropdown (Mobile/Landline). An 'Email' field is also present. Below the contact information is a section titled 'Add Board position for 2025' which contains a 'Branch Positions Held' list with checkboxes for various roles (President, President-elect, AAUW Fund, Finance, Membership, Program, College University, Public Policy, Diversity, Equity and Inclusion, Governance) and a 'Submit' button. To the right of this list is a 'Choose branch the position is held in' dropdown. Annotations include: 'a. Apply the telephone format, ###-###-#### when entering phone numbers.', 'b. Use the +Add feature to enter another phone number.', 'c. Indicate which one is the primary number.', 'd. Select the Location (if main phone) and Phone type.', 'These buttons permanently remove the phone number.' (pointing to delete icons), and 'Choose your branch. This feature is necessary once a branch officer can belong to more than one branch. The contact information stays the same. Only the branch varies.' (pointing to the branch dropdown).

The **Branch Officer Submission Complete** screen appears.



The screenshot shows the 'Branch Officer Submission Complete' screen. It features a header bar with four buttons: 'BOR Home', 'Enter Branch Officers', 'Correct Branch Officer Listing Error', and 'Verify 2025 Branch Leaders'. Below the header bar is a message: 'Thank you for assigning the Branch Officer.'



## Branch Officers Report Reference Guide

### Branch Officer Submission Complete

#### Purpose

This screen confirms the details you entered and updated.

Branch Officer Submission Complete

[BOR Home](#)

[Enter Branch Officers](#)

[Correct Branch Officer Listing Error](#)

[Verify 2025 Branch Leaders](#)

Thank you for assigning the Branch Officer.

#### 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 2025 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.

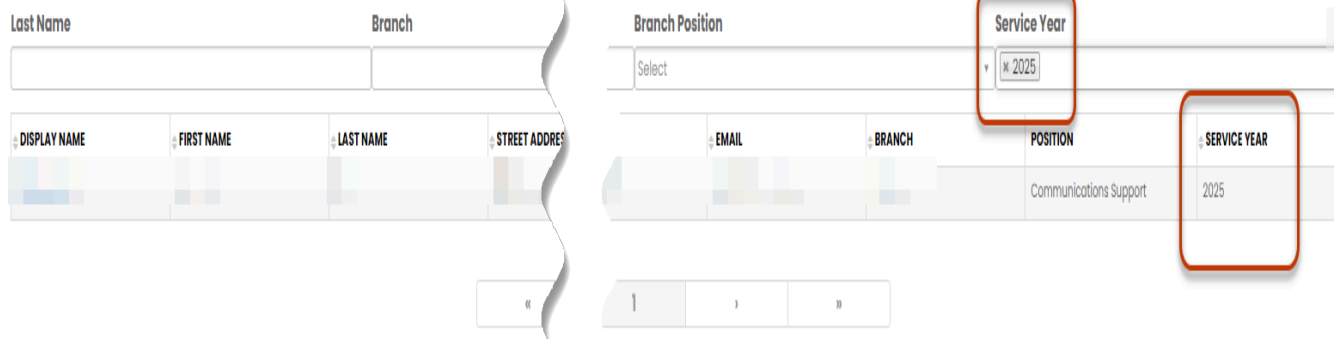
### Steps

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 2025 Branch Leaders**.

#### How do I verify if my list is accurate?

- Review your list of officers using the **Verify 2025 Branch Leaders** function from the menu above.



The screenshot shows the 'Enter Branch Officers' screen. At the top, there are input fields for 'Last Name' and 'Branch'. Below these is a table of officers with columns: DISPLAY NAME, FIRST NAME, LAST NAME, STREET ADDRESS, EMAIL, BRANCH, POSITION, and SERVICE YEAR. The 'SERVICE YEAR' column is highlighted with a red box, and the value '2025' is also highlighted with a red box. The 'POSITION' column shows 'Communications Support'.

DISPLAY NAME	FIRST NAME	LAST NAME	STREET ADDRESS	EMAIL	BRANCH	POSITION	SERVICE YEAR
						Communications Support	2025

## Correct Branch Officer Listing Error

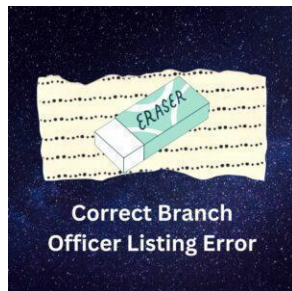
### Purpose

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

1. 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](mailto:webteam@aauw-ca.org) to report changes.

From the **BOR Home** page:



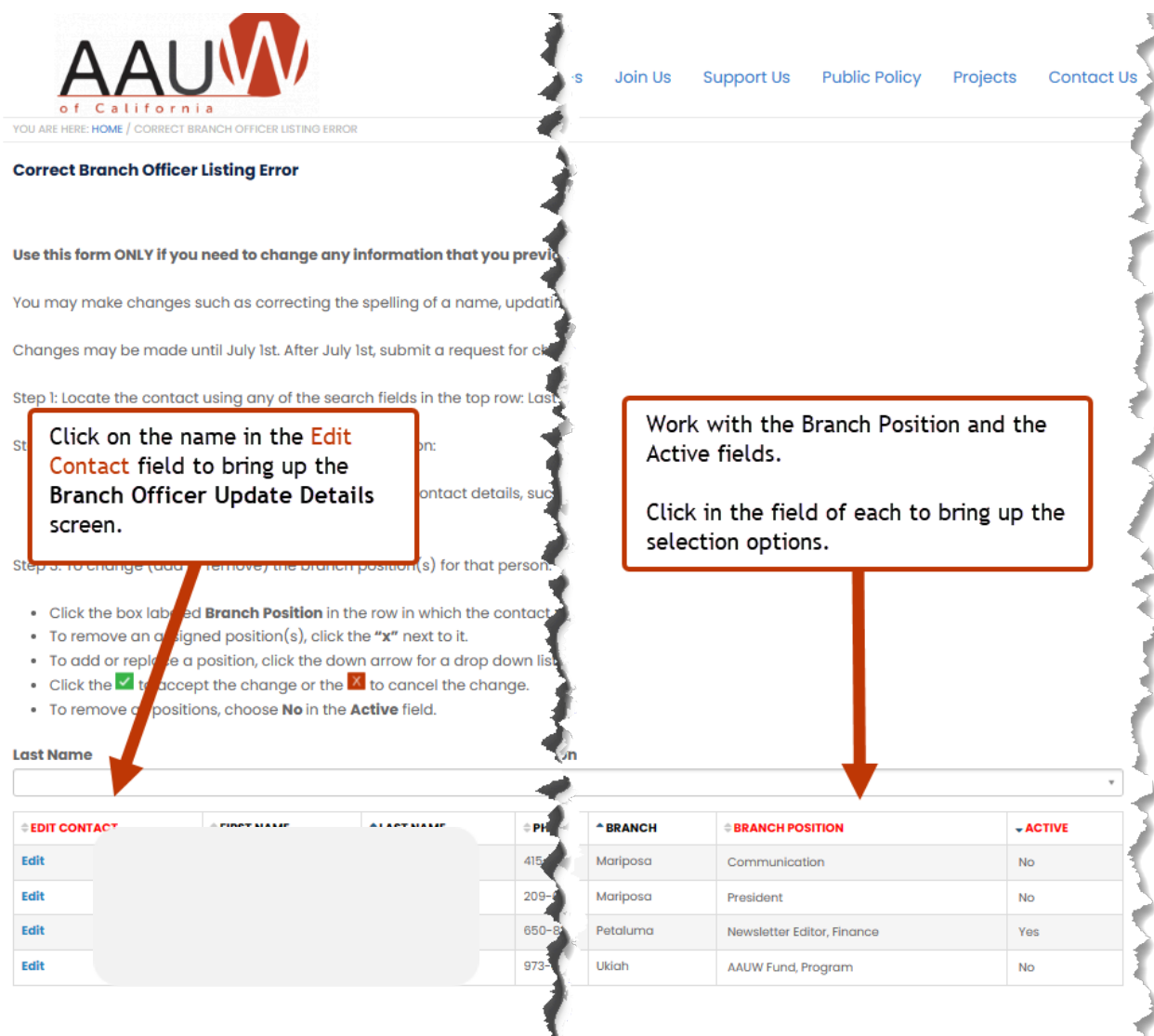
From the link on the BOR screens. For example:



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

- 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**

Use this form **ONLY** if you need to change any information that you previously entered.

You may make changes such as correcting the spelling of a name, updating contact information, etc.

Changes may be made until July 1st. After July 1st, submit a request for clarification.

Step 1: Locate the contact using any of the search fields in the top row. Last Name

Step 2: Click on the name in the **Edit Contact** field to bring up the Branch Officer Update Details screen.

Step 3: To change (add or remove) the branch position(s) for that person:

- Click the box labeled **Branch Position** in the row in which the contact is listed.
- To remove an assigned position(s), click the "x" next to it.
- To add or replace a position, click the down arrow for a drop down list.
- Click the ☒ to accept the change or the ☐ to cancel the change.
- To remove all positions, choose **No** in the **Active** field.

Work with the Branch Position and the Active fields.

Click in the field of each to bring up the selection options.

EDIT CONTACT	FIRST NAME	LAST NAME	PHONE	BRANCH	BRANCH POSITION	ACTIVE
<a href="#">Edit</a>			415-	Mariposa	Communication	No
<a href="#">Edit</a>			209-	Mariposa	President	No
<a href="#">Edit</a>			650-8	Petaluma	Newsletter Editor, Finance	Yes
<a href="#">Edit</a>			973-	Ukiah	AAUW Fund, Program	No

### Correct Branch Officer Listing Error, Continued

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

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.

Make no changes and exit the field by clicking on the red box “x.”

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.

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

BRANCH POSITION	ACTIVE
AAUW Fund, Program	No
AAUW Fund, Program	No
<div> <div> <div>x Newsletter Editor</div> <div>x Finance</div> </div> <div> <div>✓</div> <div>x</div> </div> </div>	Yes
	Yes

x Newsletter Editor

x Finance

President

President Elect

AAUW Fund

Membership

Program

College University

Public Policy

Diversity, Equity and Inclusion

x College University

x President

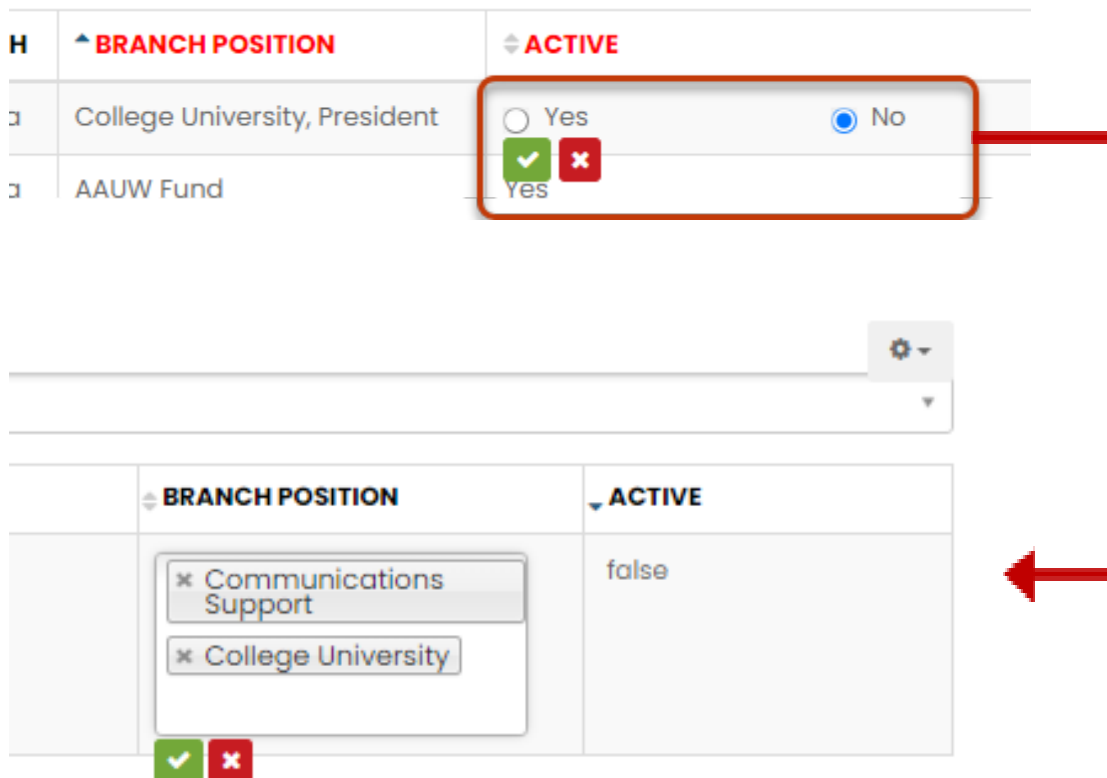
✓

x

### 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. To modify the “Active” field, do the following:

- Click on the **Yes** button to have the entry active on the **Branch Officer List**.
- Click on the **No** button to not have the entry appear on the list.
- Then, click on the green square with the check mark to confirm or the “x” to cancel your entry.



H	BRANCH POSITION	ACTIVE
3	College University, President	<input type="radio"/> Yes <input checked="" type="radio"/> No
3	AAUW Fund	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

BRANCH POSITION	ACTIVE
<div> <input checked="" type="checkbox"/> Communications Support           <input checked="" type="checkbox"/> College University         </div>	false

☒ ☐



## 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](mailto:webteam@aauw-ca.org) to have it corrected. When you enter 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:

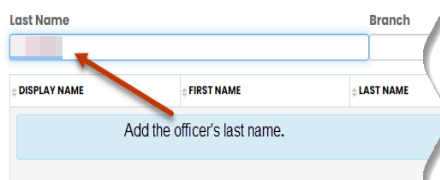
1. Remove the **Service Year(s)** to search the entire database by clicking the “x” in front of the year(s)
2. Enter the last name in the **Last Name** field. If not found, the list will be blank.
3. If there is a match, one or more names will appear.
4. Review the list of names until you find the correct 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 update the contact information, add the position(s) and designate the branch.

#### What if the person is not listed?

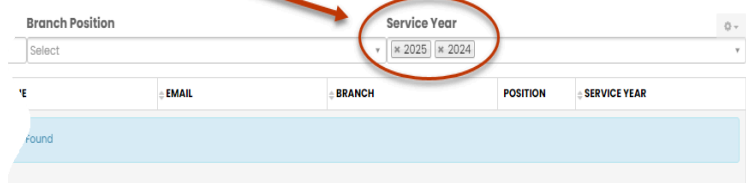
- They may have served in a previous year or in a different branch. Do a thorough search by:
  - Clear the **Service Year** field by clicking the “x” next to both 2024 and 2025.
  - Remove the branch name in the **Branch** field.
  - Search by **Last Name**.
  - Follow the instructions above to update the contact for your roster.
  - If you don't see the contact on the list, click [HERE](#) to add a new contact.

#### How do I verify if my list is accurate?

- Review your list of officers using the **Verify 2025 Branch Leaders** function.



Delete the **Service Year** by clicking on the “x” next to the year. This removes limitations on the search.



## Add a New Officer

### Purpose

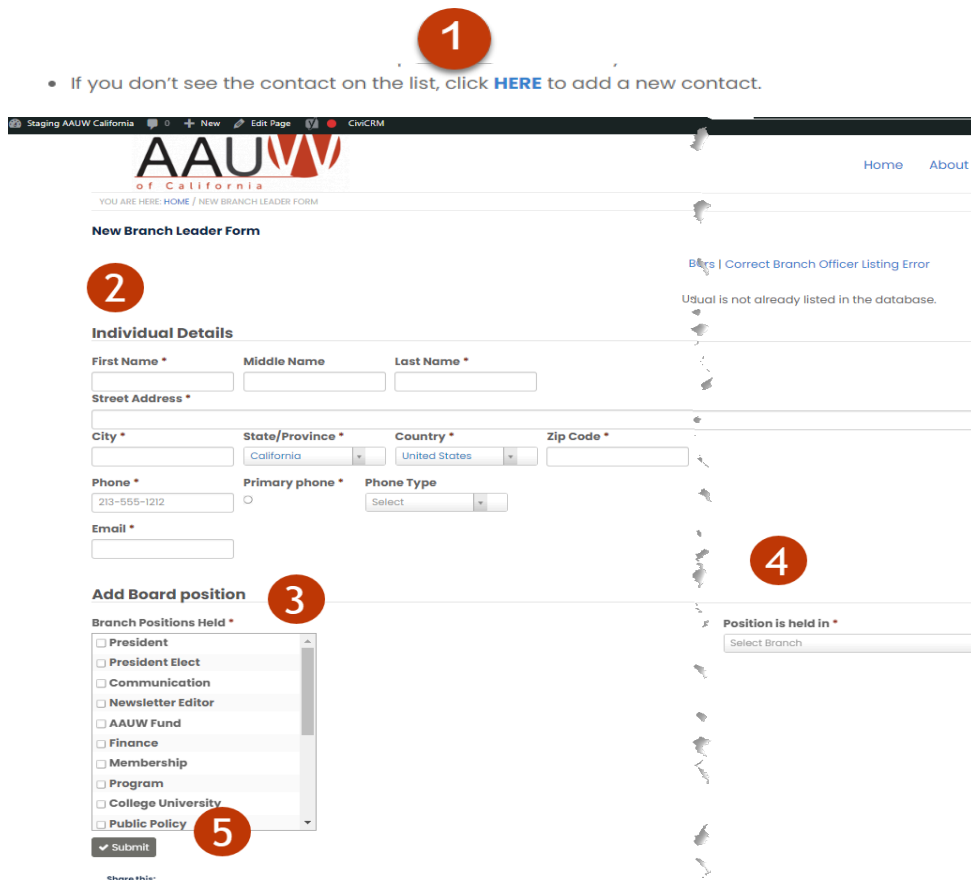
If you cannot find the person you are looking for and have done a thorough search, you can add an officer to the BOR database. Use this option only if you are sure that the person is not in the database. Duplicate entries make future searches and selections less efficient and accurate.

### 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 for that position.
5. Click the **Submit** button.

• If you don't see the contact on the list, click [HERE](#) to add a new contact.



The screenshot shows the 'New Branch Leader Form' on the AAUW of California website. The form is titled 'New Branch Leader Form' and includes a breadcrumb trail: 'YOU ARE HERE: HOME / NEW BRANCH LEADER FORM'. The form is divided into several sections:

- Individual Details:** This section contains fields for 'First Name \*', 'Middle Name', 'Last Name \*', 'Street Address \*', 'City \*', 'State/Province \*' (with a dropdown menu showing 'California'), 'Country \*' (with a dropdown menu showing 'United States'), 'Zip Code \*', 'Phone \*' (with a dropdown menu showing '213-555-1212'), 'Primary phone \*' (with a radio button), and 'Phone Type' (with a dropdown menu showing 'Select').
- Add Board position:** This section contains a list of 'Branch Positions Held \*' with checkboxes: 'President', 'President Elect', 'Communication', 'Newsletter Editor', 'AAUW Fund', 'Finance', 'Membership', 'Program', 'College University', and 'Public Policy'. A 'Submit' button is located at the bottom of this section.
- Position is held in \*:** This section contains a dropdown menu labeled 'Select Branch'.

Numbered callouts are placed over the form:

- 1: Points to the 'What if the person is not listed?' paragraph and the 'HERE' link.
- 2: Points to the 'Individual Details' section.
- 3: Points to the 'Add Board position' section.
- 4: Points to the 'Position is held in \*' dropdown menu.
- 5: Points to 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.

• Review your list of officers using the **Verify 2025 Branch Leaders** function from the Branch Officers Report page.

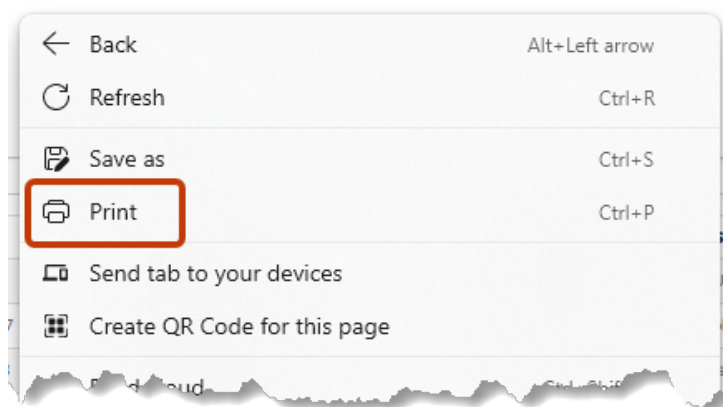
Last Name  
  

Branch  
Turlock

Service Year  
2025

DISPLAY NAME	FIRST NAME	LAST NAME	BRANCH	POSITION	SERVICE YEAR
			Turlock	Communications Support	2025

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.

**Print** ?

Total: 3 sheets of paper

**Printer**

HP06FFB2 (HP OfficeJet Pro 8... ▼

Snagit 2023  
Ready

OneNote (Desktop)  
Ready

**Microsoft Print to PDF**  
Ready

HP06FFB2 (HP OfficeJet Pro 8720)  
Ready

**Print** ?

Total: 3 sheets of paper

**Printer**

Adobe PDF ▼

**Copies**

1

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