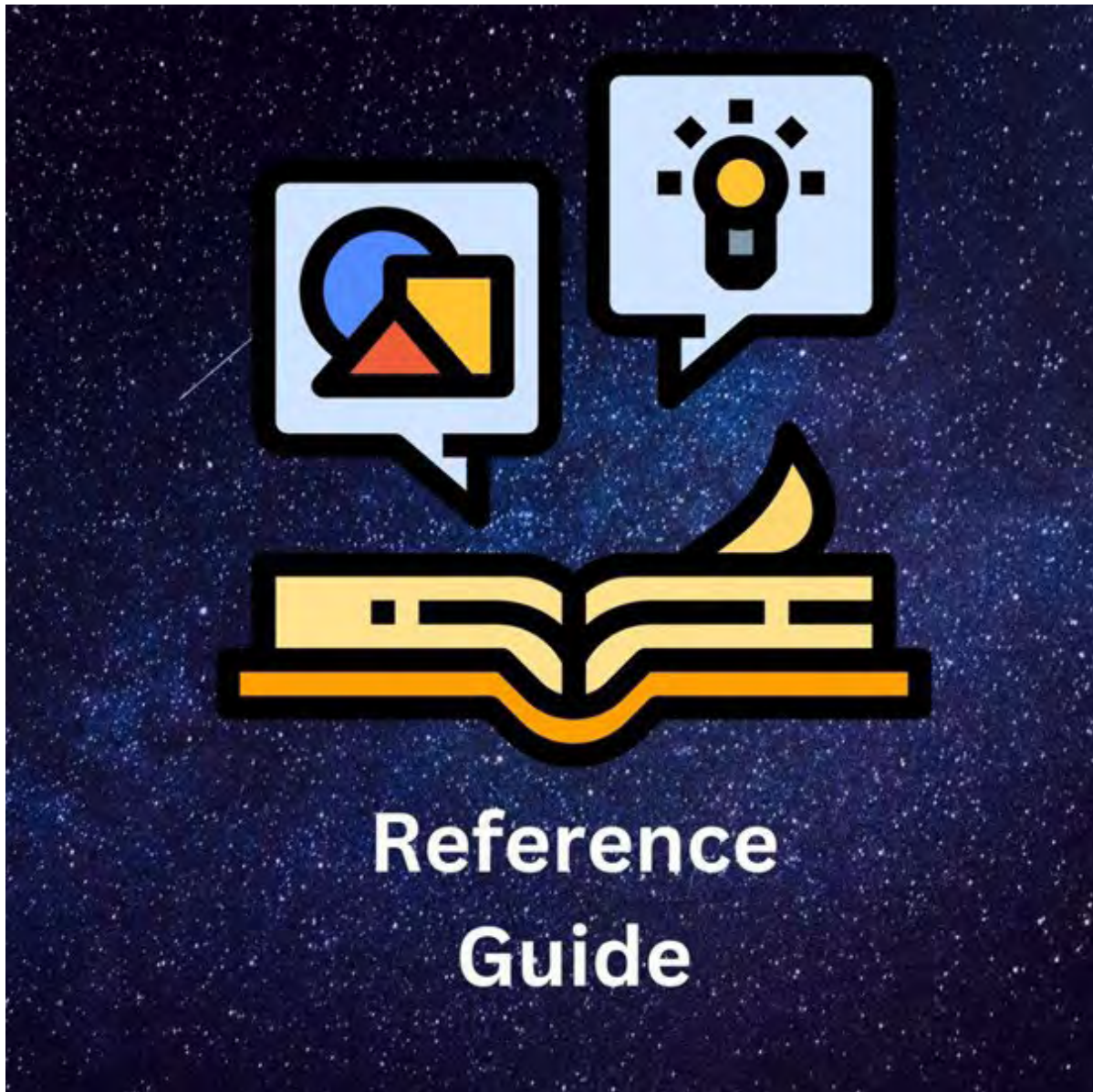


# The Branch Officers Report (BOR)





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## Branch Officers Report Reference Guide

### BOR Purpose

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

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

The information produces:

**Job-specific email distribution groups** are used to send important 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 in June each year to ensure we have the correct contact information for each branch. AAUW California requests that you:

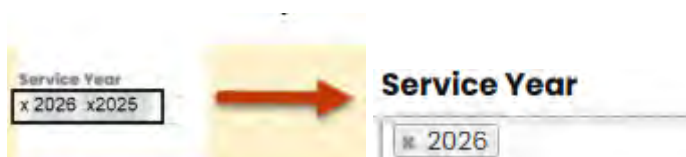
- Update your officer listing for the new year.
- Confirm that the officer's contact information is correct and up to date.
- Correct information, as necessary.

**The deadline for completing the AAUW California BOR is July 1, 2026.**

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 the AAUW California webteam 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 for completing tasks.
- Each screen includes the same search fields and navigational features. You may
  - Use part or all of the names in the search field to display a list of matches.
  - In the search fields, enter information into multiple filters to narrow the list, e.g., Position plus Service Year.
- Remove filters to broaden the list.
- Remove data from your search by clicking the (x) icon before the name.





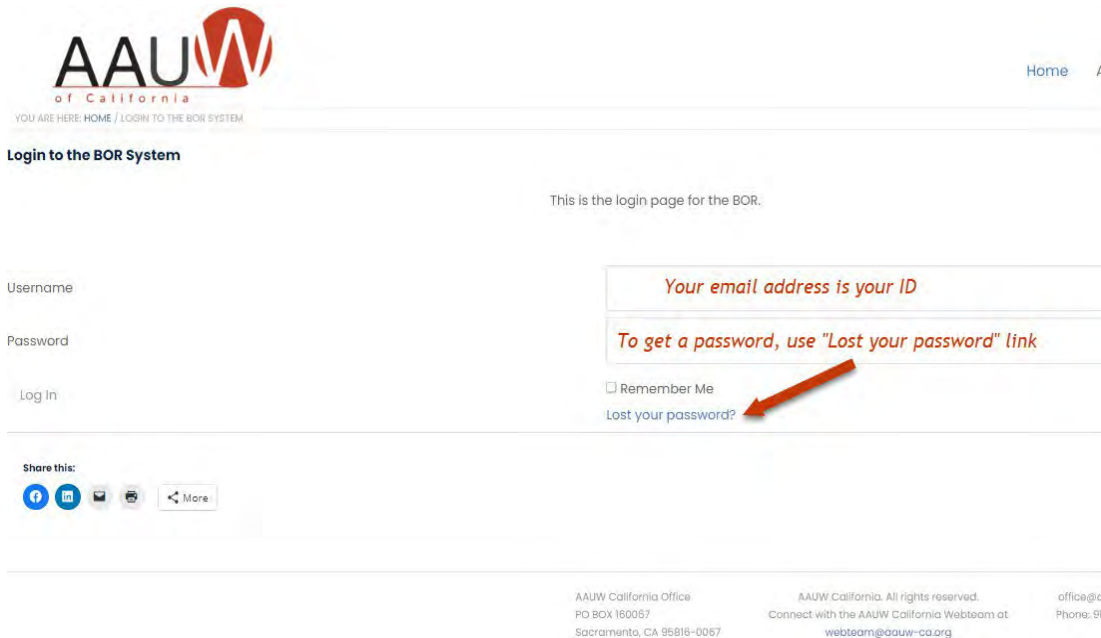
## BOR Login for First-Time Users

### Purpose

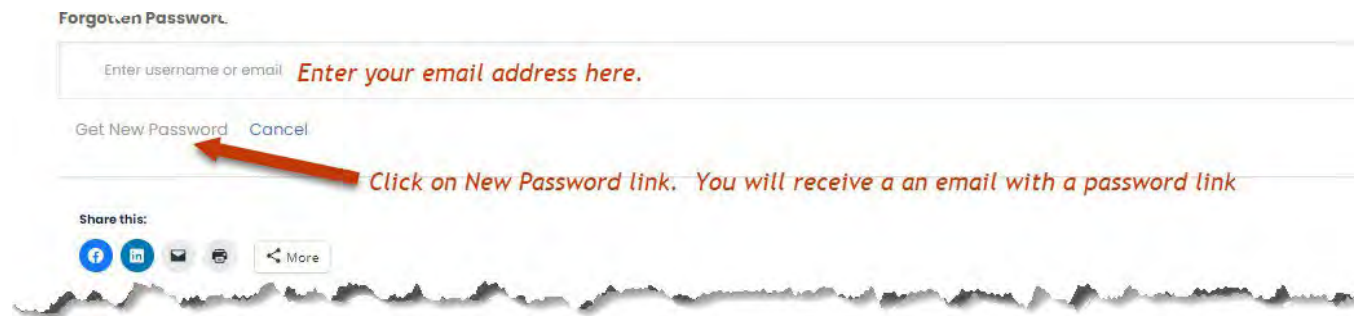
BOR users must establish their login and password to access the system. Current year branch presidents or delegates receive an email with a description, instructions, and a link to begin the BOR process. Do not share your user ID and password.

### Steps

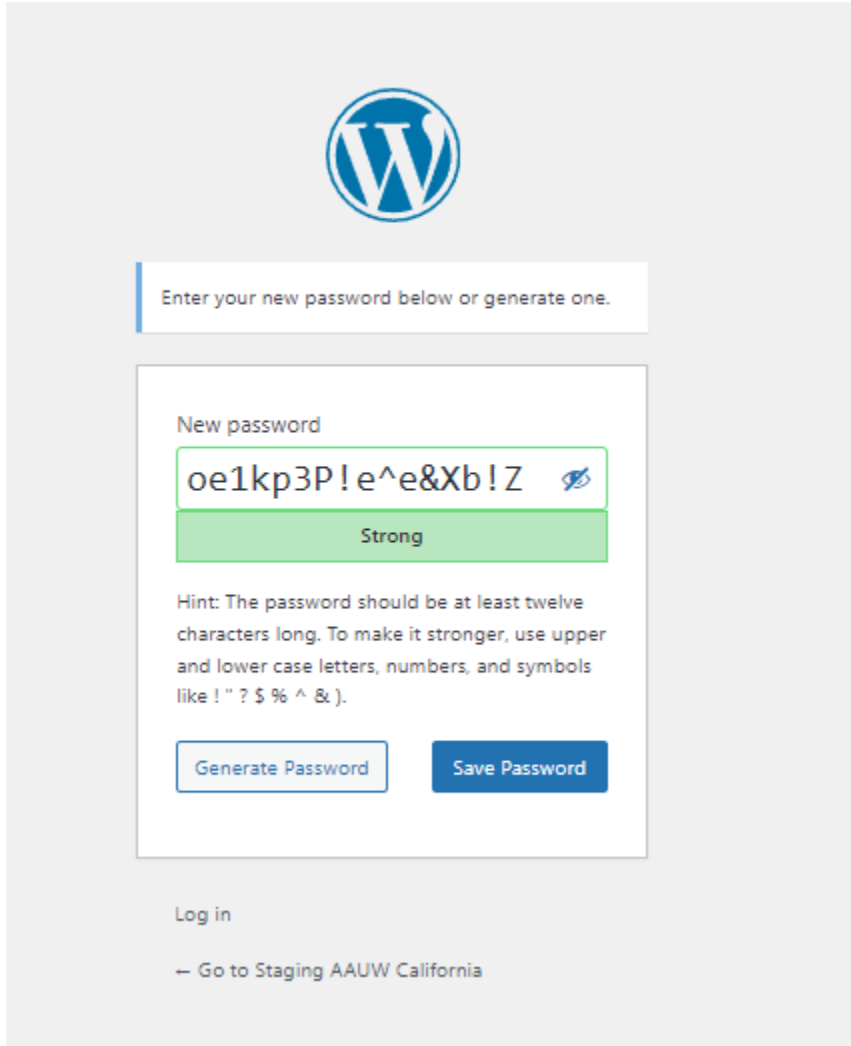
1. Click on the link in the email. The BOR login screen appears. Note: your email address is your User ID.
2. Click “Lost your password?” to see the prompt to reset your password.



3. Enter your email address and click on the link in your inbox.



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



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



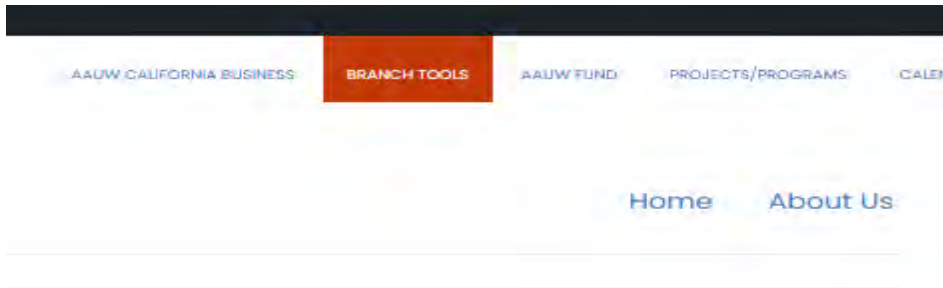
## Entry into the BOR

### Purpose

After logging in, you can update your officers' list in the Branch Officers Report system.

### Steps

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



Note: Several graphics appear.

2. Click on the Branch Officers 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 Officers Report** system.

### Entry into the BOR, continued.

Continue with the following step from the Welcome to the Branch Officers Report (BOR) system for AAUW California.

3. Click the Enter Branch Officers icon to reach the main screen.

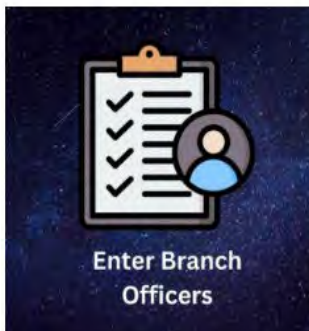
#### **Welcome to the Branch Officers Report (BOR) system for AAUW California**

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

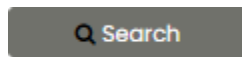
The **Enter Branch Officers** screen is the entry point to begin several operations. For example, you can:

- Search for officers within the database regardless of branch affiliation or year of service.
- Search for specific branches and officers by position, last name, and/or service years, i.e., current and new year.
- Update 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 allows you to return to the Home page, correct entries, or view your upcoming year's directory.



### Steps

1. Follow the on-screen instructions to search by branch name and view the list of branch officers. Use the Search button to show the Last Name, Branch, or Branch Position entries.



2. In the image below, after entering the branch name in the Branch field and clicking the Search button, the current year's list of officers appears. The only names that appear below are the ones for the current year (e.g., 2025-2026) and the upcoming year (2026-2027). Once you enter and update the branch officers' names, they will display.



## Update Branch Officer Details

The **Branch Officer Details** screen appears after selecting the branch officer from the Display Name listing.

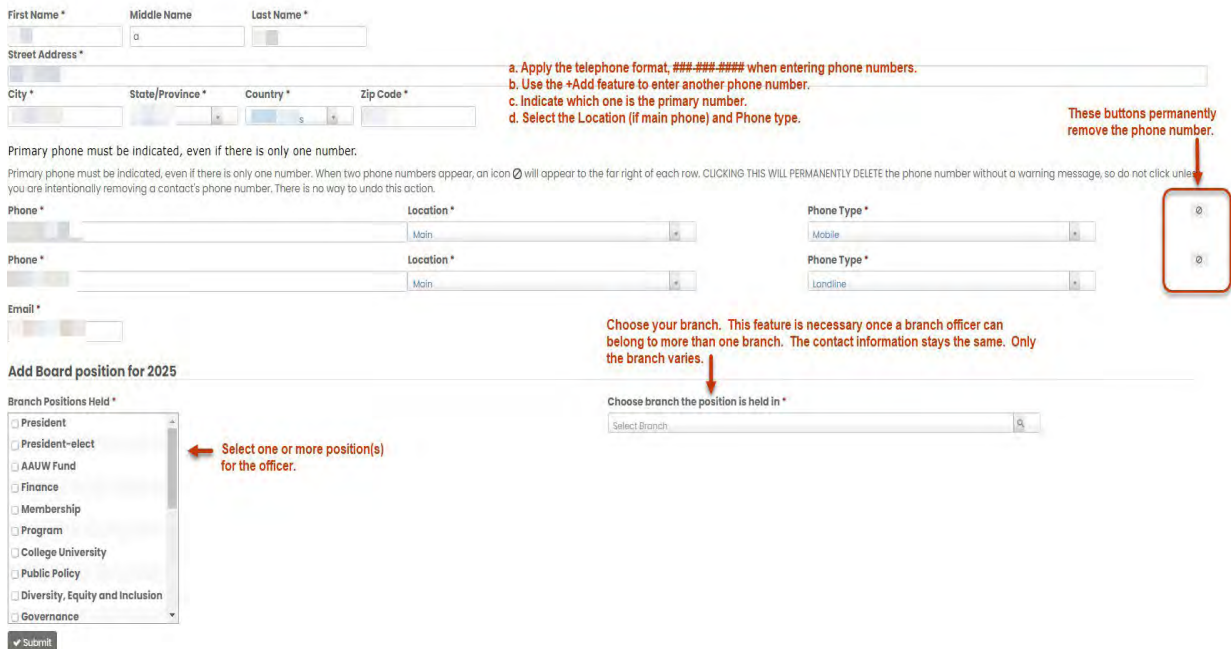
### Purpose

You can confirm or update the branch officer's contact information from this screen 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 'Update Branch Officer Details' form. It includes fields for personal information (First Name, Middle Name, Last Name, Street Address, City, State/Province, Country, Zip Code), contact information (Primary phone, multiple phone entries with location and type dropdowns), and email. Below the contact information is a section for 'Add Board position for 2025' with a list of positions and a 'Submit' button. A 'Choose branch' dropdown is also present. 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). A red arrow points to the position list with the text 'Select one or more position(s) for the officer.'

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





# Branch Officers Report Reference Guide

## Branch Officer Submission Complete

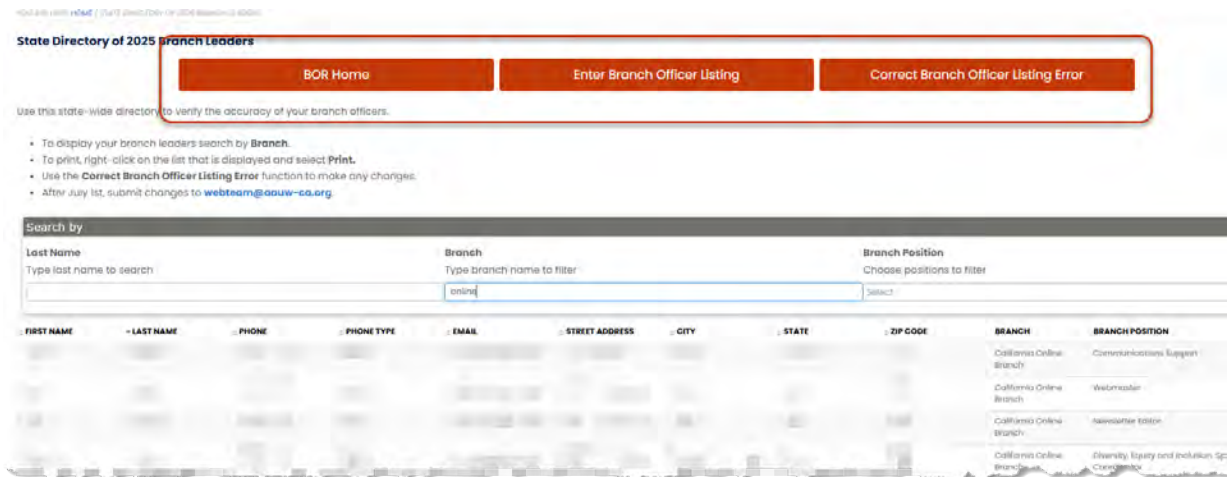
### Purpose

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 you are finished with your updates, click **Verify 2026 Branch Leaders** to confirm your new officer directory. From this screen, you can also return to the **Enter Branch Officers** screen to continue making updates or go to **Correct Branch Officer Listing Error** to change information.



### Confirm the New Board List

#### Purpose

To ensure that the branch officers receive communications from the AAUW California State Leadership Team and the *Board2Board* (B2B) monthly newsletter, and that your branch officers appear correctly in the state directory, it is important to review for accuracy. Confirming the new year's branch officer list is the final phase in the annual BOR process.

#### Steps

Click on the **Verify 2026 Branch Leaders**, and do the following:



#### Verify 2026 Branch Leaders

- Review your list for accuracy.
- Use the **Correct Branch Officer Listing Error** function to make any changes.
- After July 1st, submit changes to [webteam@aauw-ca.org](mailto:webteam@aauw-ca.org).

1. Enter the branch name in the **Branch** field.
2. Review the list of officers to display and evaluate the list's accuracy.
3. Make corrections as needed.

## Correct Branch Officer Listing Error

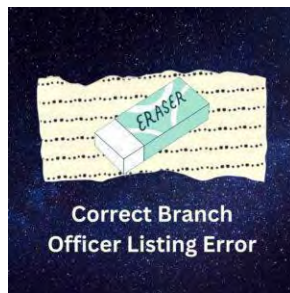
### Purpose

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 the link within the BOR, as shown below. You can use this option any time during the BOR process, but the branch president or delegate has a window of opportunity during June, when entries and changes can be made. 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:



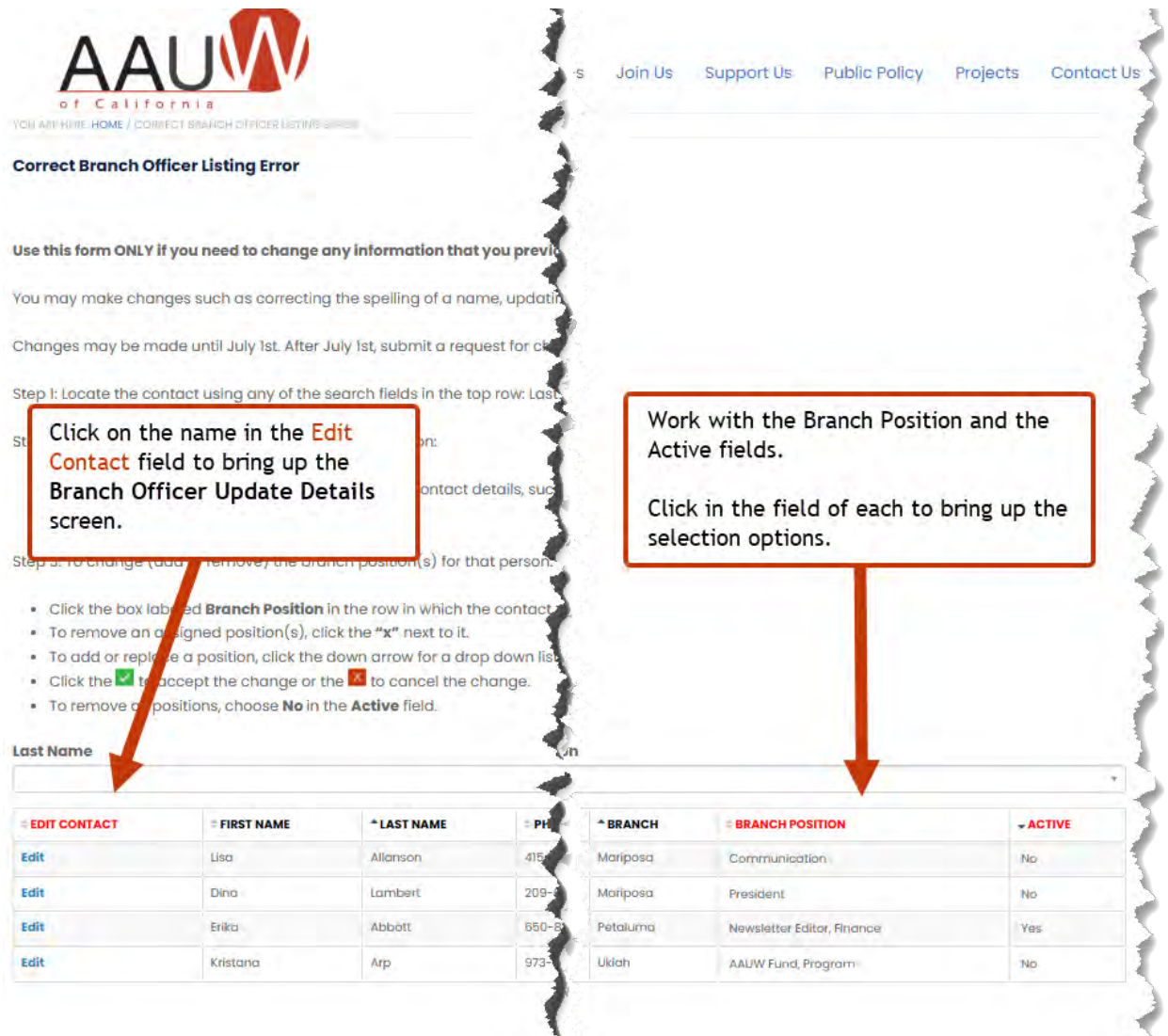
From the link on the BOR screens. For example:



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 names displayed in red text allow you to edit details. Note that the displayed list shows the new year's branch officers. The assumption is that these are the officers you need to modify or correct.



**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 change.

Step 1: Locate the contact using any of the search fields in the top row: Last Name, First Name, Phone Number, Email Address, or Branch.

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.

**Last Name**

<b>EDIT CONTACT</b>	<b>FIRST NAME</b>	<b>LAST NAME</b>	<b>PHONE</b>	<b>BRANCH</b>	<b>BRANCH POSITION</b>	<b>ACTIVE</b>
<a href="#">Edit</a>	Lisa	Allanson	415-...	Mariposa	Communication	No
<a href="#">Edit</a>	Dina	Lambert	209-...	Mariposa	President	No
<a href="#">Edit</a>	Erika	Abbott	850-...	Petaluma	Newsletter Editor, Finance	Yes
<a href="#">Edit</a>	Kristana	Arp	973-...	Ukiah	AAUW Fund, Program	No

## Correct Branch Officer Listing Error, Continued

In 3a: “To change (add or remove) the branch position(s) for that person,” click on the Branch Position field. Your options are:

1. Remove a position for the officer by clicking the “x” next to the position, then click the green box with the check mark to confirm.
2. Make no changes and exit the field by clicking on the red box “x.”
3. 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.



The screenshot shows a table with columns for 'BRANCH POSITION' and 'ACTIVE'. The third row is highlighted in yellow and contains 'Newsletter Editor' and 'Finance' in the 'BRANCH POSITION' column, and 'Yes' in the 'ACTIVE' column. Annotations 3a, 3b, 3c, and 3d are overlaid on the interface to illustrate the steps for editing the branch position.

BRANCH POSITION	ACTIVE
AAUW Fund, Program	No
AAUW Fund, Program	No
<input type="checkbox"/> Newsletter Editor <input type="checkbox"/> Finance <input checked="" type="checkbox"/> <input type="checkbox"/>	Yes
	Yes

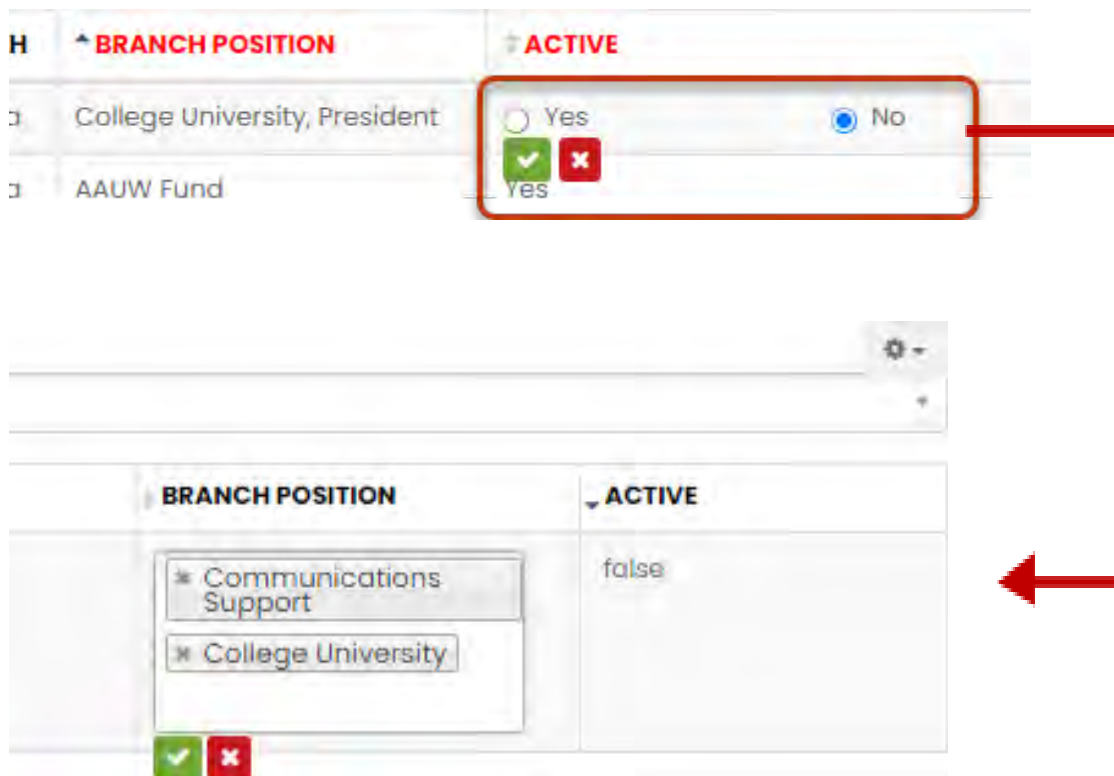
Annotations:

- 3a:** A red circle highlights the 'x' icon next to 'Newsletter Editor' in the Branch Position field.
- 3b:** A red circle highlights the green checkmark icon and the red 'x' icon at the bottom of the Branch Position field.
- 3c:** A red circle highlights the 'President' option in the drop-down list of positions.
- 3d:** A red circle highlights the green checkmark icon and the red 'x' icon at the bottom of the drop-down list.

## Correct Branch Officer Listing Error, continued.

Once you select the changes, you can ensure the corrections appear in the directory. The **Active** field determines if the officer will appear on the Branch Officer List directory. To modify the “Active” field, do the following:

1. Click the **Yes** button to activate the entry on the **Branch Officer List**.
2. Click the **No** button to avoid the entry appearing on the list.
3. Then, click the green square with the check mark to confirm or the “x” to cancel your entry.



## Search for Officers Not Visible on the Branch Listing

### Purpose

It is important to do a thorough search 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 this 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)** by clicking the “x” in front of the year(s) to search the entire database
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 find 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.



## Add a New Officer

### Purpose

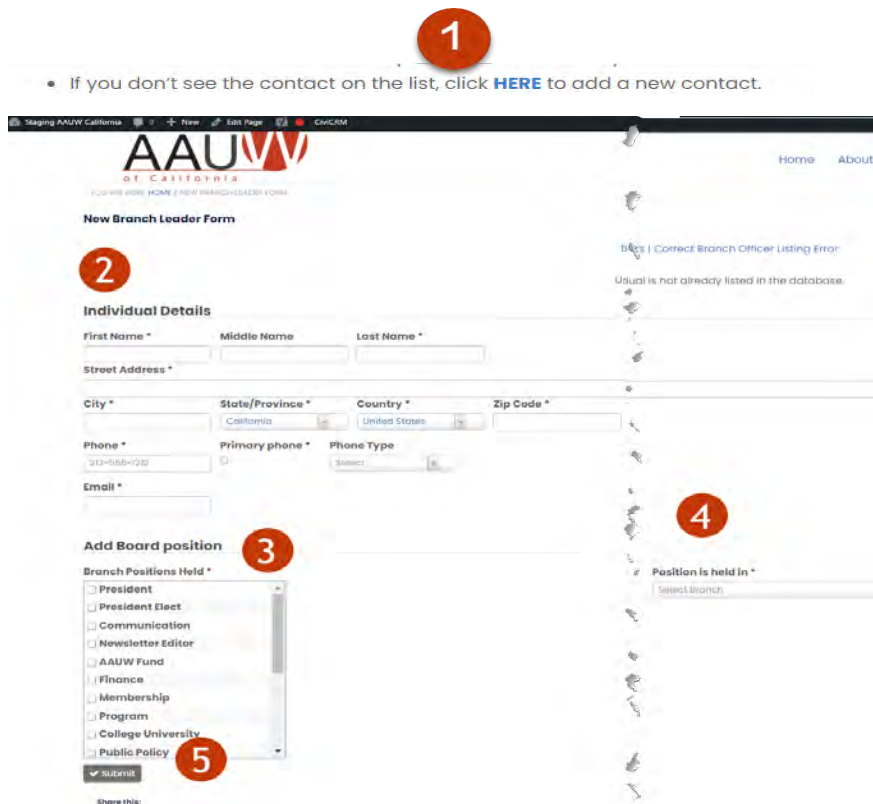
If you cannot find the person you are looking for and have done a thorough search, you can add an officer to the BOR database. Use this option only if you are confident that the person is not in the database. Duplicate entries make future searches and selections less efficient and accurate.

### 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 contact. 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 website. A red circle with the number '1' points to the text 'If you don't see the contact on the list, click [HERE](#) to add a new contact.' Below this is the form itself. A red circle with '2' points to the 'Individual Details' section, which includes fields for First Name, Middle Name, Last Name, Street Address, City, State/Province, Country, Zip Code, Phone, Primary phone, Phone Type, and Email. A red circle with '3' points to the 'Add Board position' section, which has a list of checkboxes for various roles like President, Communication, Newsletter Editor, etc. A red circle with '4' points to the 'Position is held in' dropdown menu. A red circle with '5' points to the 'Submit' button at the bottom of the form.

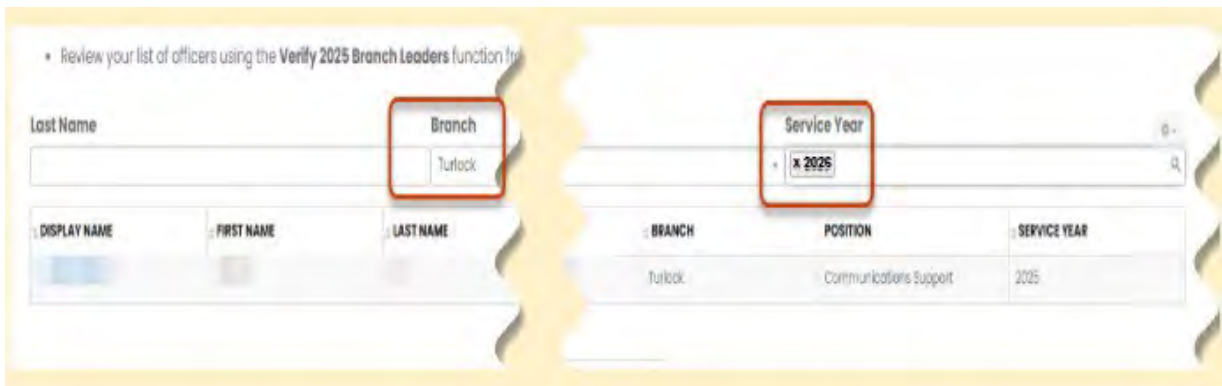
## Print the Branch Directory

### Purpose

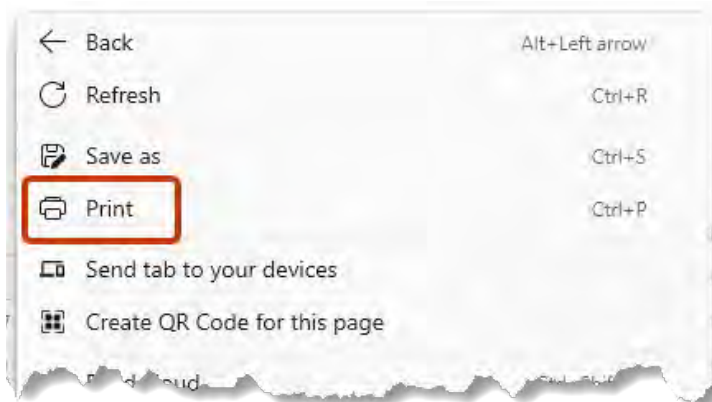
Although the branch directory is visible on the AAUW California website, branch officers may wish to have a printed copy. The following steps will show you how to print a copy of your branch officers.

### Steps

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

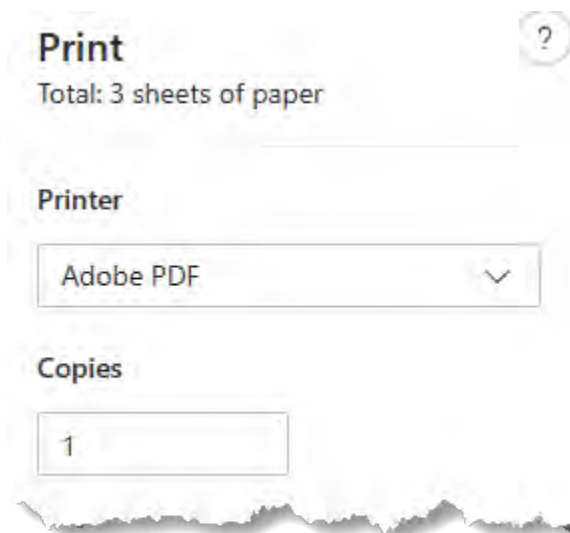
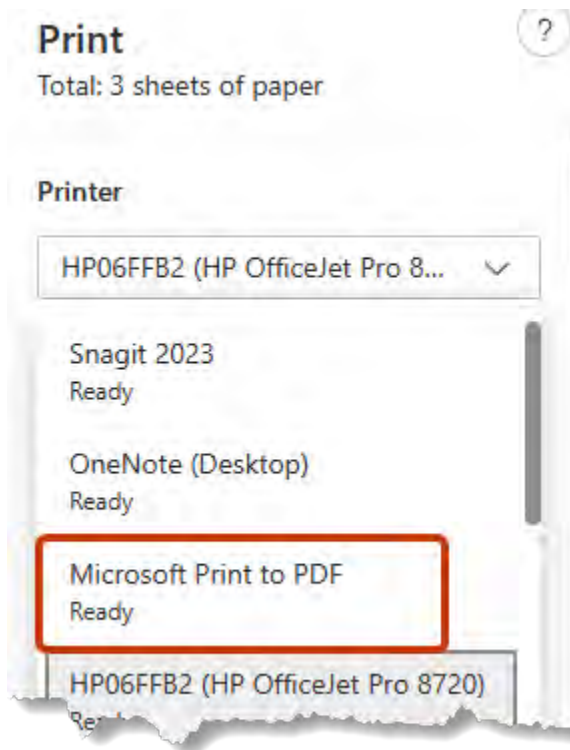


2. With your mouse, right-click on the web page and select “print.”



**Print the Branch Directory**, continued.

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



4. In the printer options, select the appropriate destination (e.g., your physical printer or 'Save as PDF').



## Branch Officers Report Reference Guide

5. Click **Print** or **Save** to complete the action. If you save to a folder, you can then print the document from that location.