

The Branch Officers Report (BOR)

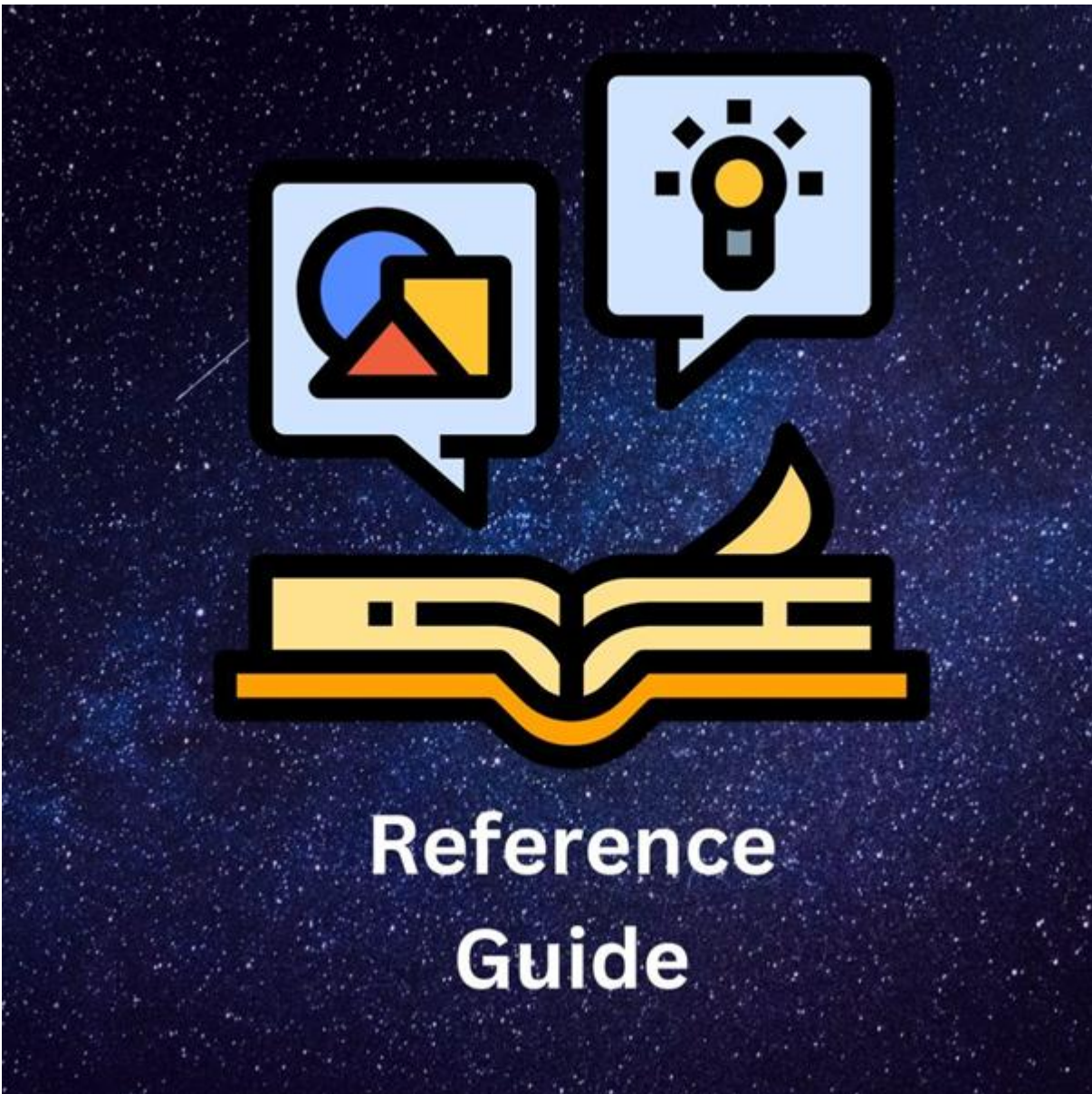




Table of Contents

BOR Purpose	3
BOR Login for First-Time Users	4
Entry into the BOR	6
Enter Branch Officers	8
Update Branch Officer Details	9
Branch Officer Submission Complete	10
Confirm the New Board List	11
Correct Branch Officer Listing Error	12
Searching for Officers not Visible on the Branch Listing	16
Add a New Officer	17
Print the Branch Directory	18

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 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 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 before July 1, 2025.

Direct questions to 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.
- 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 of the names in a search field to bring up 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 (x) 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.

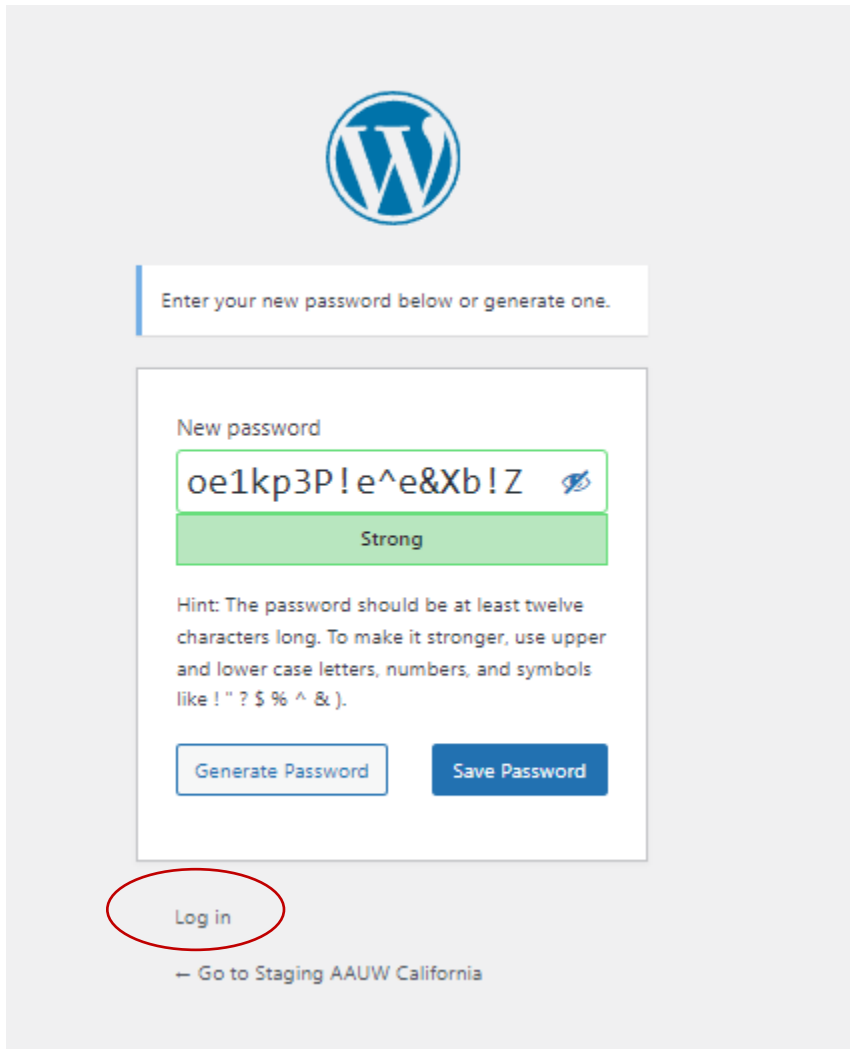
Steps

1. Click on the link in the email. The BOR login screen appears. Note: your email address is your User ID. 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 in your inbox.

BOR Login for First Time Users, continued

- 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.



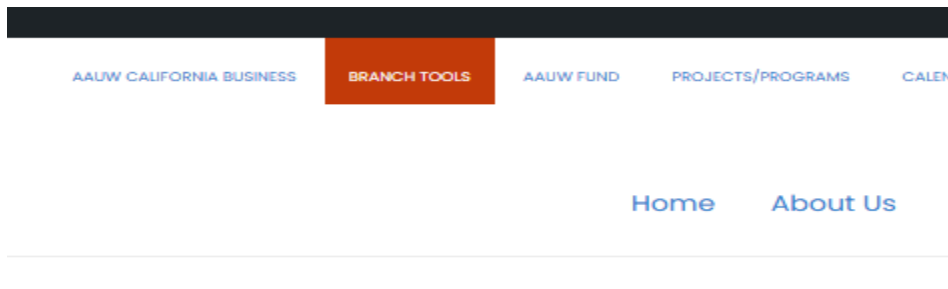
Entry into the BOR

Purpose

After logging in, you can update your officers' list in the Branch 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**.



Branch Officers Report Reference Guide

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.

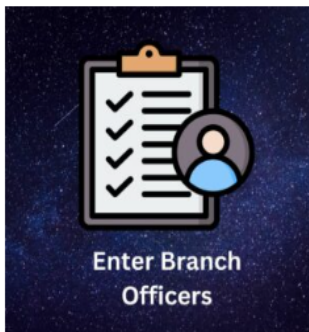
Welcome to the Branch Officers Report (BOR) system for AAUW California

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

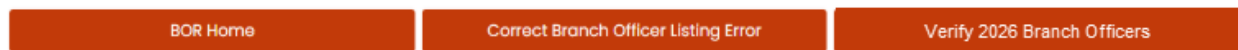
- Update the BOR with the new officers and leaders for the coming year.
- Deadline: July 1st.

Enter Branch Officers

Purpose

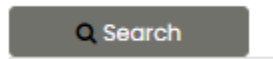
The **Enter Branch Officers** screen is the entry point to begin several operations. For example, you can:

- 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, permits you to return to the Home page, correct entries, or view your upcoming year's directory.



Steps

1. Follow the instructions on the screen 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 2025 and 2026. Once you enter and update the branch officers for 2026, their names will appear as well.



3. To continue adding/updating officers, click on names in the Display Name column and update or confirm the officer's details.

Update Branch Officer Details

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

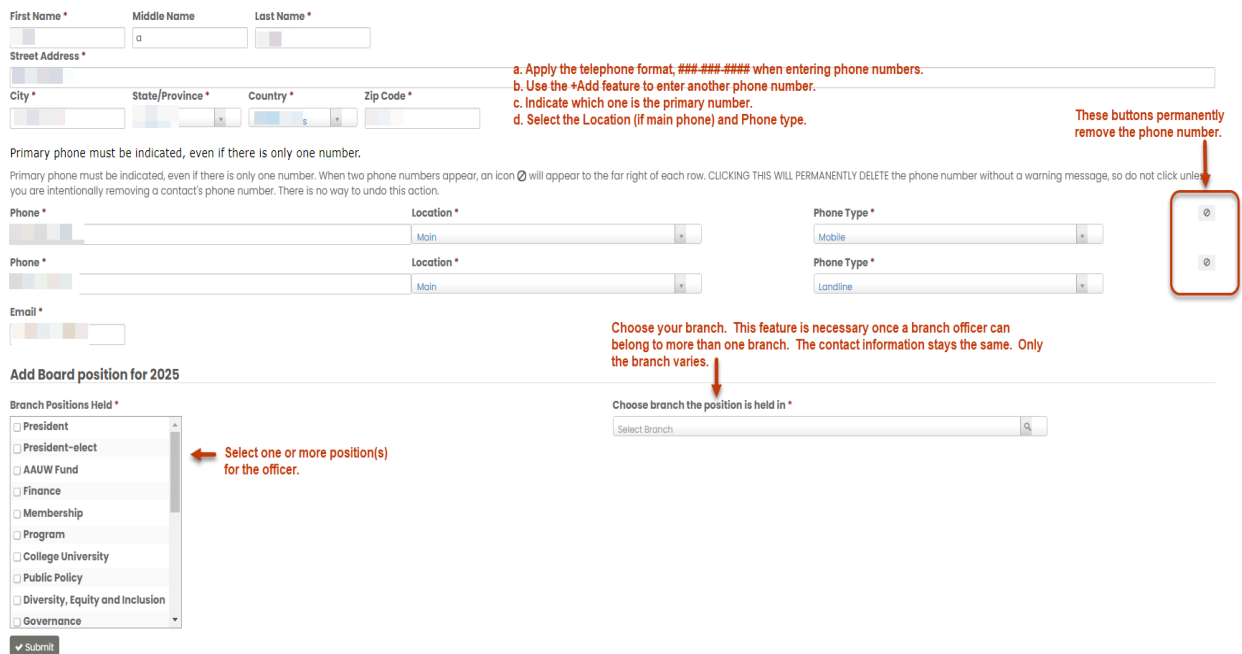
Purpose

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 '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). Each phone number field has a delete icon (a circle with an 'X'). An annotation points to these icons: 'These buttons permanently remove the phone number.' Below the phone fields is an 'Email' field. To the right of the phone fields, there are instructions: '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.' Below the form is a section titled 'Add Board position for 2025'. It contains a list of positions: President, President-elect, AAUW Fund, Finance, Membership, Program, College University, Public Policy, Diversity, Equity and Inclusion, and Governance. An annotation points to this list: 'Select one or more position(s) for the officer.' To the right of the list is a 'Choose branch the position is held in' dropdown menu. An annotation points to this dropdown: '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.' At the bottom left of the form is a 'Submit' button.

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



The screenshot shows the 'Branch Officer Submission Complete' screen. It has a header 'Branch Officer Submission Complete' and a navigation bar with four buttons: 'BOR Home', 'Enter Branch Officers', 'Correct Branch Officer Listing Error', and 'Verify 2026 Branch Leaders'. Below the navigation bar is a message: 'Thank you for assigning the Branch Officer.'



Branch Officer Submission Complete

Purpose

This screen confirms the details you entered and updated.

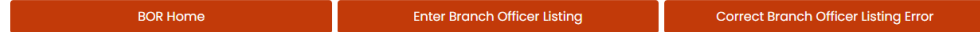


Steps

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're done with your updates, click Verify 2026 Branch Leaders to confirm your directory of new officers. From this screen, you can also return to the **Enter Branch Officers** screen to continue updates or to the **Correct Branch Officer Listing Error** to change information.

YOU ARE HERE: [HOME](#) / [STATE DIRECTORY OF 2025 BRANCH LEADERS](#)

State Directory of 2025 Branch Leaders



Use this state-wide directory to verify the accuracy of your branch officers.

- To display your branch leaders search by **Branch**.
- To print, right-click on the list that is displayed and select **Print**.
- Use the **Correct Branch Officer Listing Error** function to make any changes.
- After July 1st, submit changes to webteam@aauw-ca.org.

Search by										
Last Name			Branch			Branch Position				
Type last name to search			Type branch name to filter			Choose positions to filter				
<input type="text"/>			<input type="text" value="online"/>			<input type="text" value="Select"/>				
FIRST NAME	LAST NAME	PHONE	PHONE TYPE	EMAIL	STREET ADDRESS	CITY	STATE	ZIP CODE	BRANCH	BRANCH POSITION
									California Online Branch	Communications Support
									California Online Branch	Webmaster
									California Online Branch	Newsletter Editor
									California Online Branch	Diversity, Equity and Inclusion, Sp Coordinator

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. 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.

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

Search by							
Last Name	Branch				Branch Position		
Type last name to search	Type branch name				Choose positions to filter		
<input type="text"/>	<input type="text" value="online"/>				<input type="text" value="Select"/>		
FIRST NAME	LAST NAME	PHONE	PHONE TYPE	EMAIL	ZIP CODE	BRANCH	BRANCH POSITION
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	93277	California Online Branch	Communications Support
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	97223	California Online Branch	Webmaster

3. Make corrections as needed.

Correct Branch Officer Listing Error

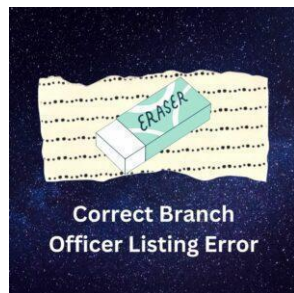
Purpose

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 are possible. After July 1st, please contact the web team at webteam@aauw-ca.org to report changes.

From the **BOR Home** page:



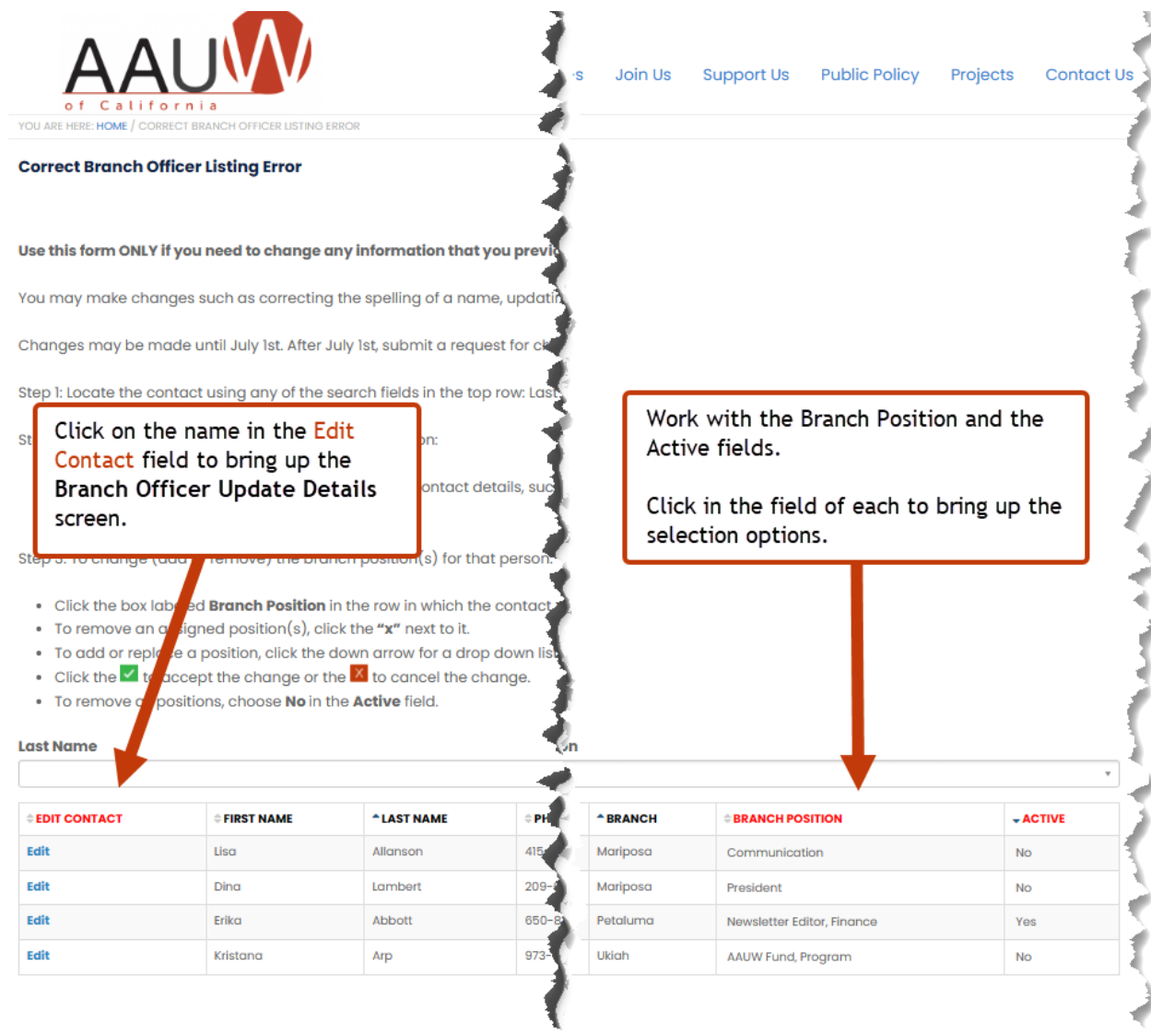
From the link on the BOR screens. For example:



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 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

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.

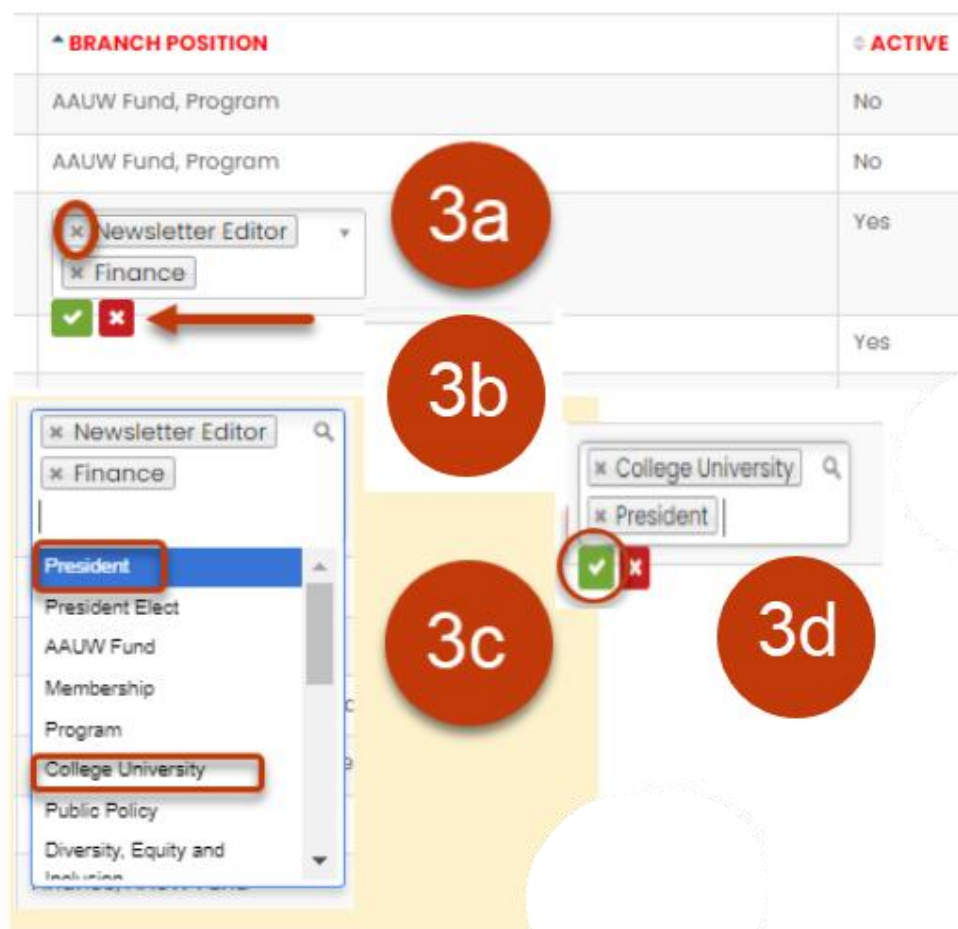
Last Name

EDIT CONTACT	FIRST NAME	LAST NAME	PHONE	BRANCH	BRANCH POSITION	ACTIVE
Edit	Lisa	Allanson	415-...	Mariposa	Communication	No
Edit	Dina	Lambert	209-...	Mariposa	President	No
Edit	Erika	Abbott	650-...	Petaluma	Newsletter Editor, Finance	Yes
Edit	Kristana	Arp	973-...	Ukiah	AAUW Fund, Program	No

Correct Branch Officer Listing Error, Continued

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



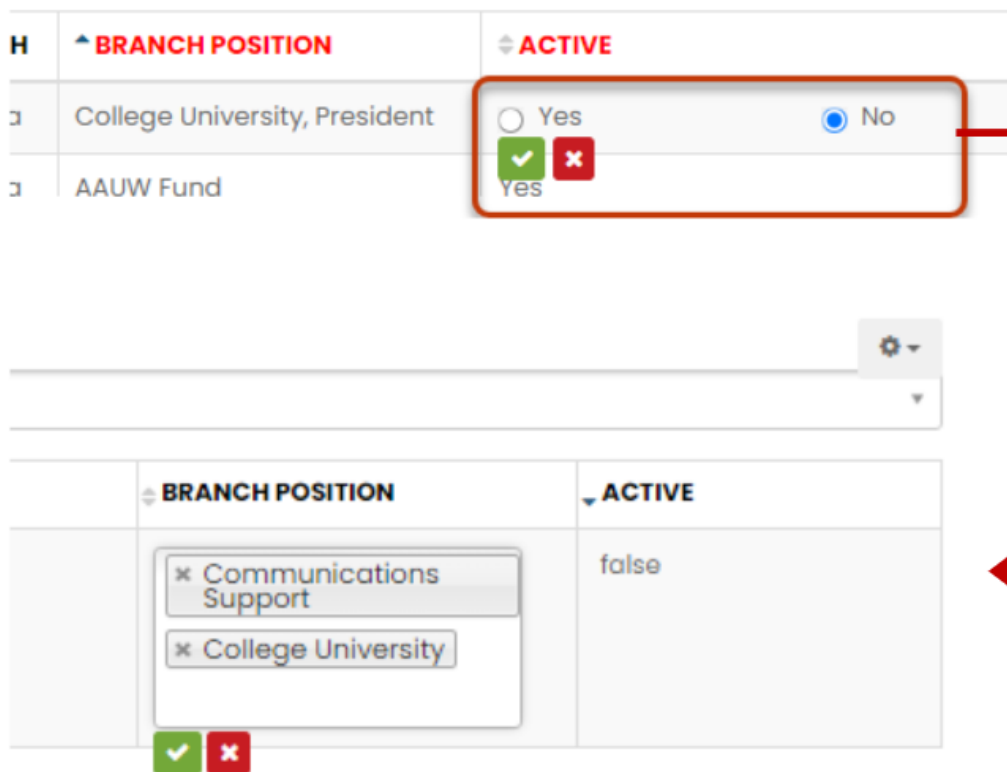
The screenshot shows a table with a 'BRANCH POSITION' column and an 'ACTIVE' column. The 'BRANCH POSITION' column contains a list of positions: 'AAUW Fund, Program', 'AAUW Fund, Program', 'Newsletter Editor', and 'Finance'. The 'ACTIVE' column contains 'No', 'No', 'Yes', and 'Yes' respectively. Annotations 3a, 3b, 3c, and 3d are overlaid on the image. 3a points to the 'x' next to 'Newsletter Editor'. 3b points to the green checkmark box. 3c points to the drop-down list of positions. 3d points to the green checkmark box next to the 'College University' position in the drop-down list.

BRANCH POSITION	ACTIVE
AAUW Fund, Program	No
AAUW Fund, Program	No
<div> <div>x Newsletter Editor</div> <div>x Finance</div> <div> <input checked="" type="checkbox"/> <input type="checkbox"/> </div> </div>	Yes
<div> <div>x Newsletter Editor</div> <div>x Finance</div> <div> <div>President</div> <div>President Elect</div> <div>AAUW Fund</div> <div>Membership</div> <div>Program</div> <div>College University</div> <div>Public Policy</div> <div>Diversity, Equity and</div> <div>Inclusion</div> </div> </div>	Yes

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:

- Click the **Yes** button to activate the entry on the **Branch Officer List**.
- Click the **No** button to avoid the entry appearing on the list.
- Then, click 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
× Communications Support × College University	false

☒ ☐

Searching for Officers Not Visible on the Branch Listing

Purpose

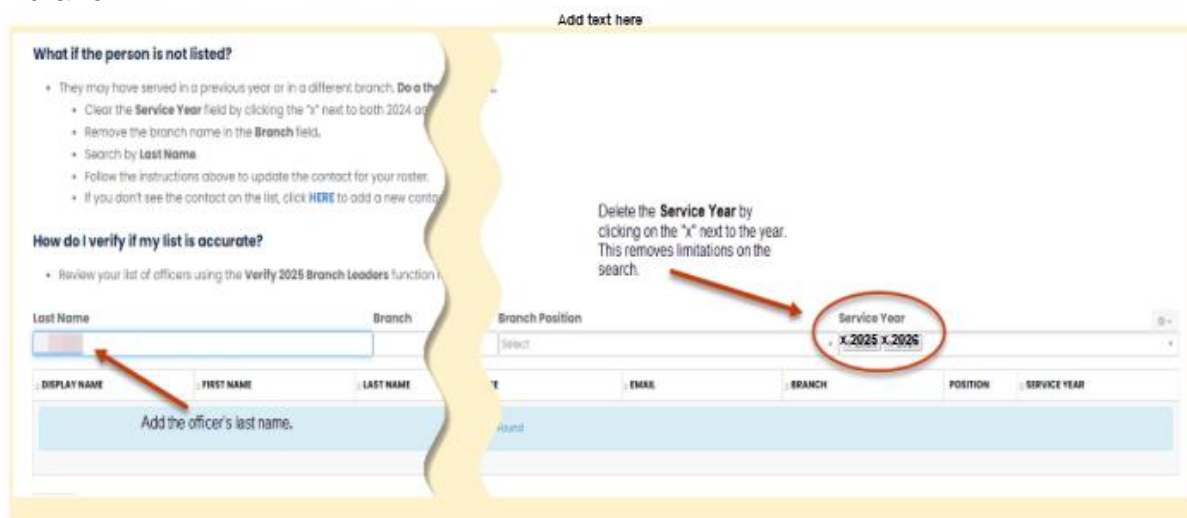
It is important to do a thorough search to avoid creating duplicate entries. If you inadvertently create a duplicate record, you must contact webteam@aauw-ca.org to have it corrected. When you enter branch officers, some will not appear on the list from the current year. There are several reasons for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



The screenshot shows a web interface for searching branch officers. It includes a sidebar with instructions and a main search form. The sidebar text reads: "What if the person is not listed?" followed by bullet points: "They may have served in a previous year or in a different branch. Do a thorough search by..." and "How do I verify if my list is accurate?" followed by "Review your list of officers using the Verify 2025 Branch Leaders function". The main form has fields for "Last Name", "Branch", "Branch Position", and "Service Year". The "Service Year" field is highlighted with a red circle and an arrow pointing to it from the text: "Delete the Service Year by clicking on the 'x' next to the year. This removes limitations on the search." The "Service Year" field currently shows "x.2025 x.2026". Below the form is a table with columns: "DISPLAY NAME", "FIRST NAME", "LAST NAME", "EMAIL", "BRANCH", "POSITION", and "SERVICE YEAR". The table is currently empty, and a red arrow points to the "Last Name" field with the text "Add the officer's last name."

Add a New Officer

Purpose

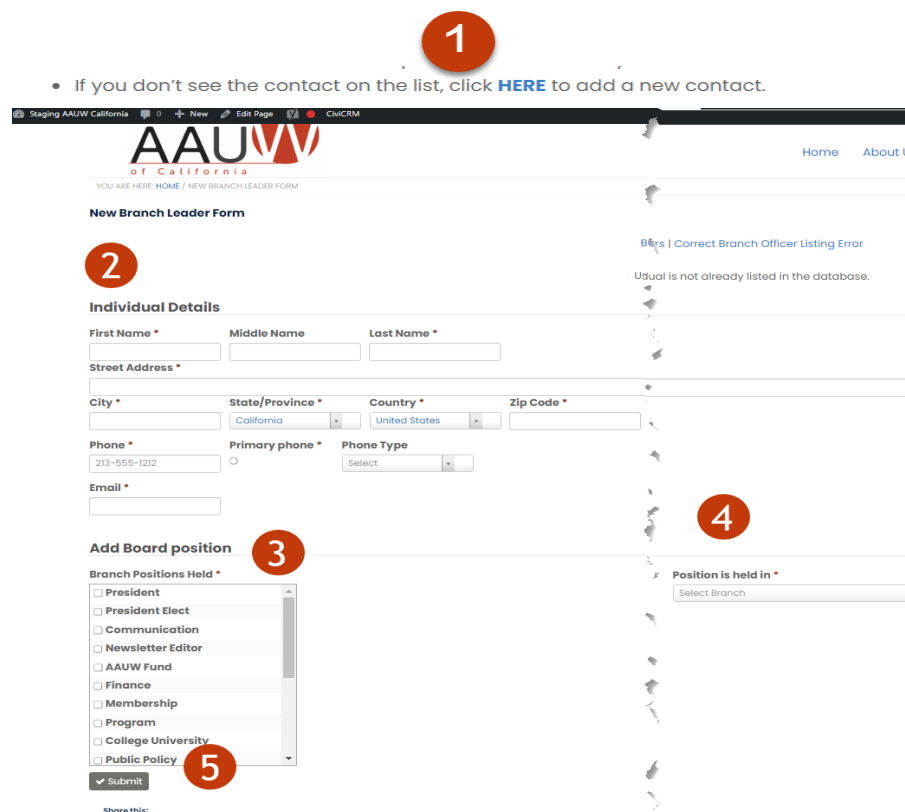
If you cannot find the person you are looking for and have done a thorough search, you can add an officer to the BOR database. Use this option only if you are confident that the person is not in the database. Duplicate entries make future searches and selections less efficient and accurate.

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 of California website. 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 * (dropdown menu), Country * (dropdown menu), Zip Code *, Phone *, Primary phone *, and Phone Type (dropdown menu). There is also an Email * field.
- Add Board position:** This section contains a list of branch positions held, each with a checkbox: President, President Elect, Communication, Newsletter Editor, AAUW Fund, Finance, Membership, Program, College University, and Public Policy. Below this list is a 'Submit' button.
- Position is held in:** This section contains a dropdown menu labeled 'Select Branch'.

Numbered callouts are placed on the form to indicate the steps:

- 1:** Points to the 'HERE' link in the text above the form.
- 2:** Points to the 'Individual Details' section header.
- 3:** Points to the 'Add Board position' section header.
- 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.

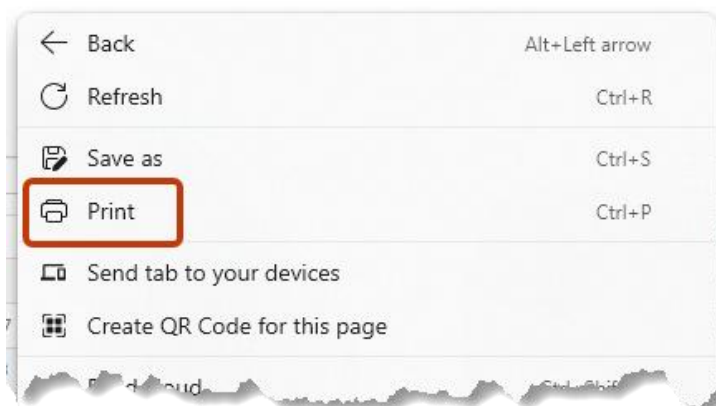
Steps

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



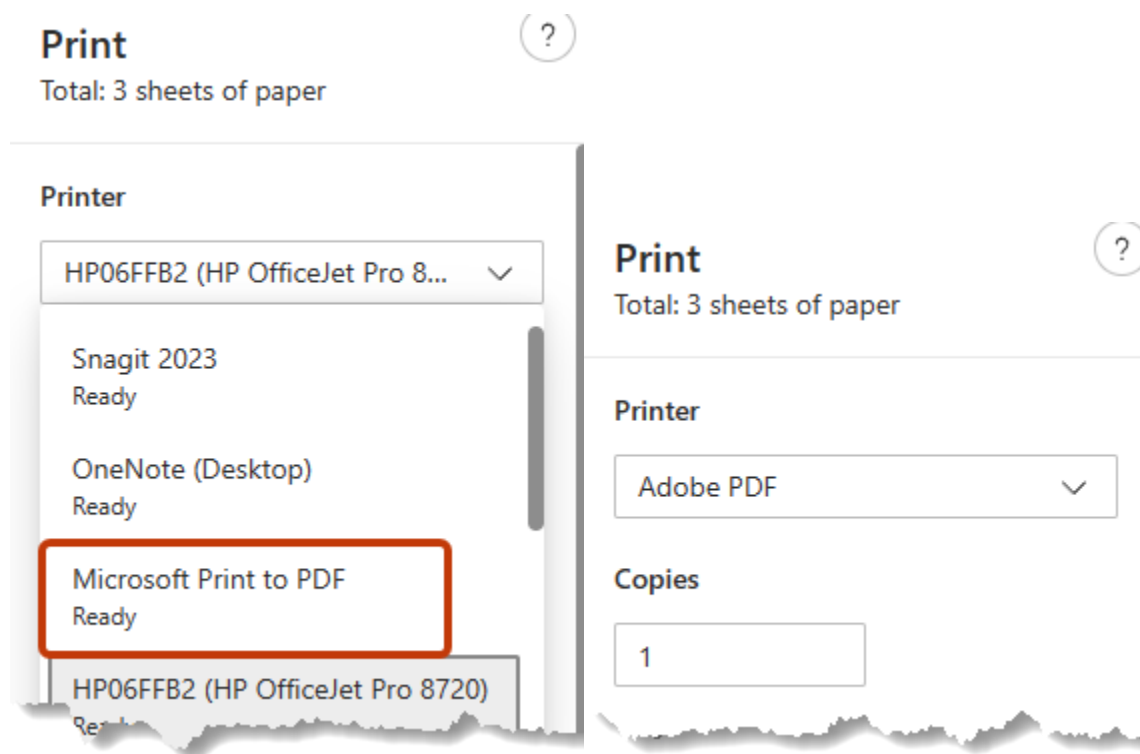
DISPLAY NAME	FIRST NAME	LAST NAME	BRANCH	POSITION	SERVICE YEAR
			Turlock	Communications Support	2025

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.



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