

The Branch Officers Report (BOR)

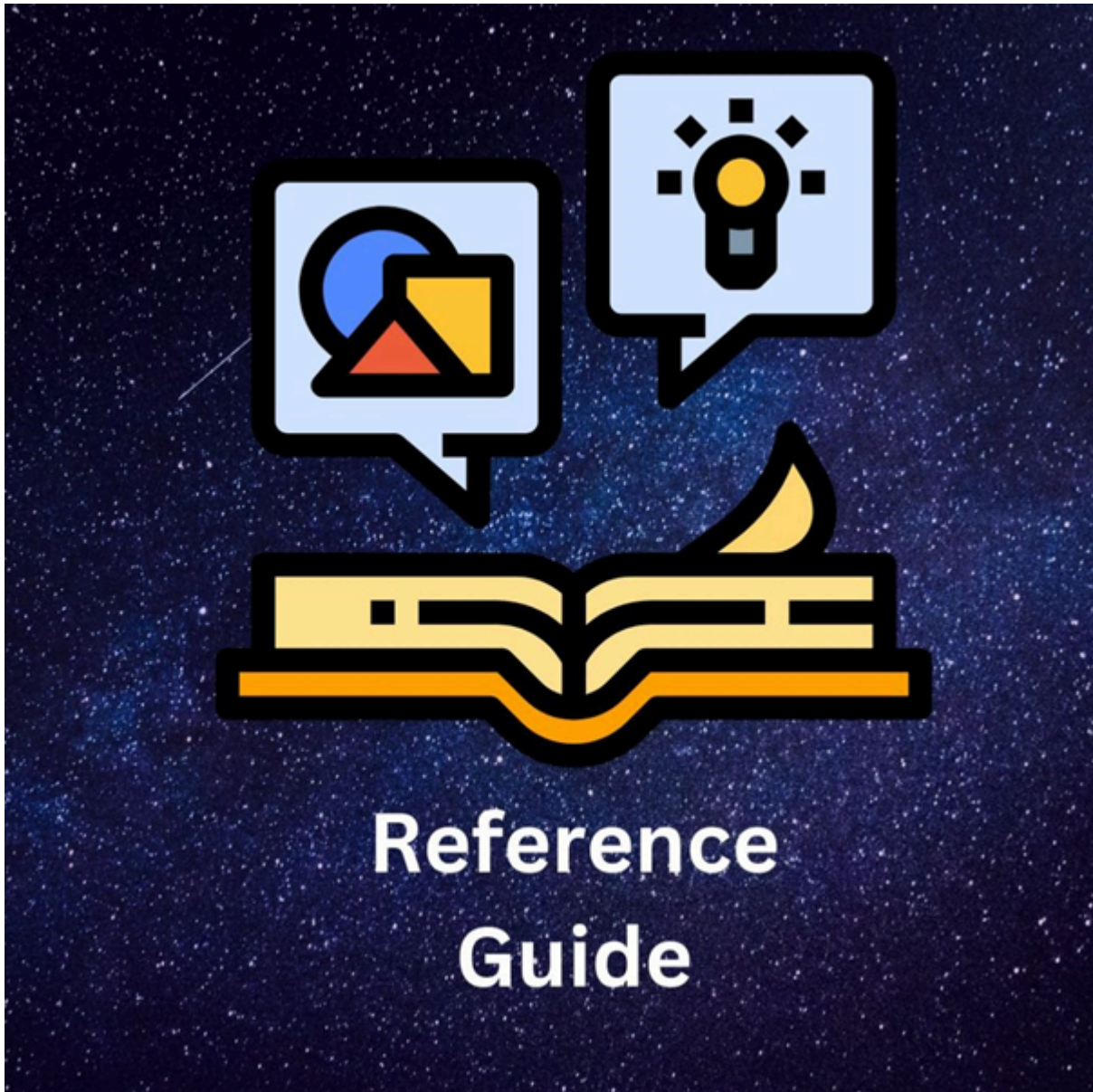




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BOR Purpose

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** 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:

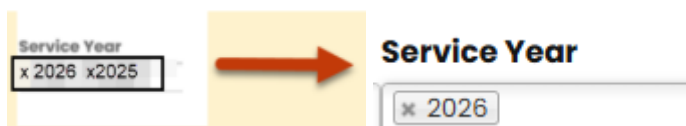
- Update your officer listing for the new year.
- Confirm that the officer's contact information is correct and up to date.
- Correct information, as necessary.

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

Direct questions to office@aauw-ca.org.

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 for completing tasks.
- Each screen includes the same search fields and navigational features. You may
 - o Use part or all of the names in the search field to display a list of matches.
 - o 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.



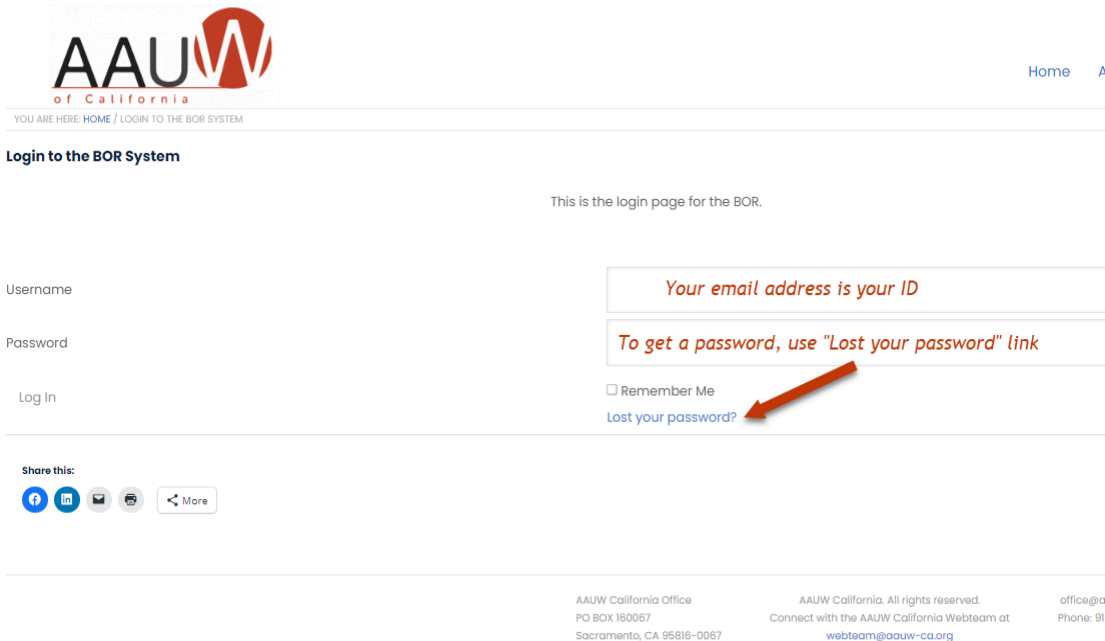
BOR Login for First-Time Users

Purpose

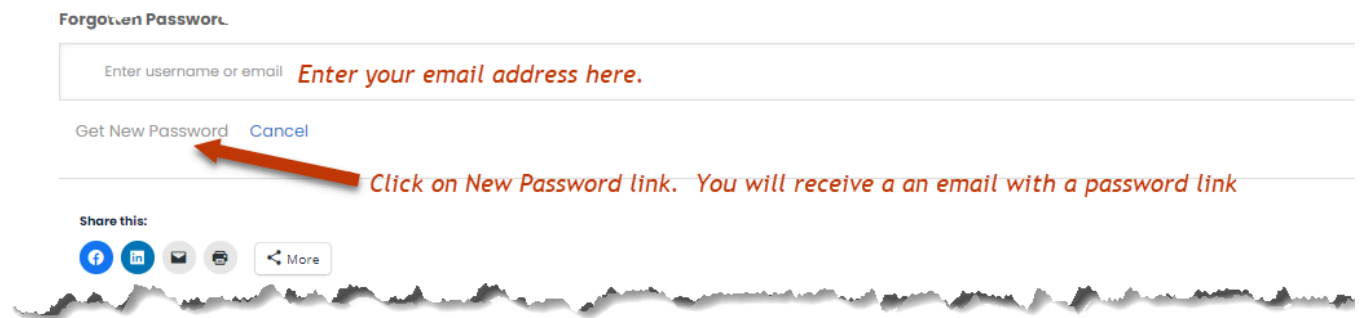
BOR users must establish their login and password to access the system. Current year branch presidents or delegates receive an email with a description, instructions, and a link to begin the BOR process. Do not share your user ID and password.

Steps

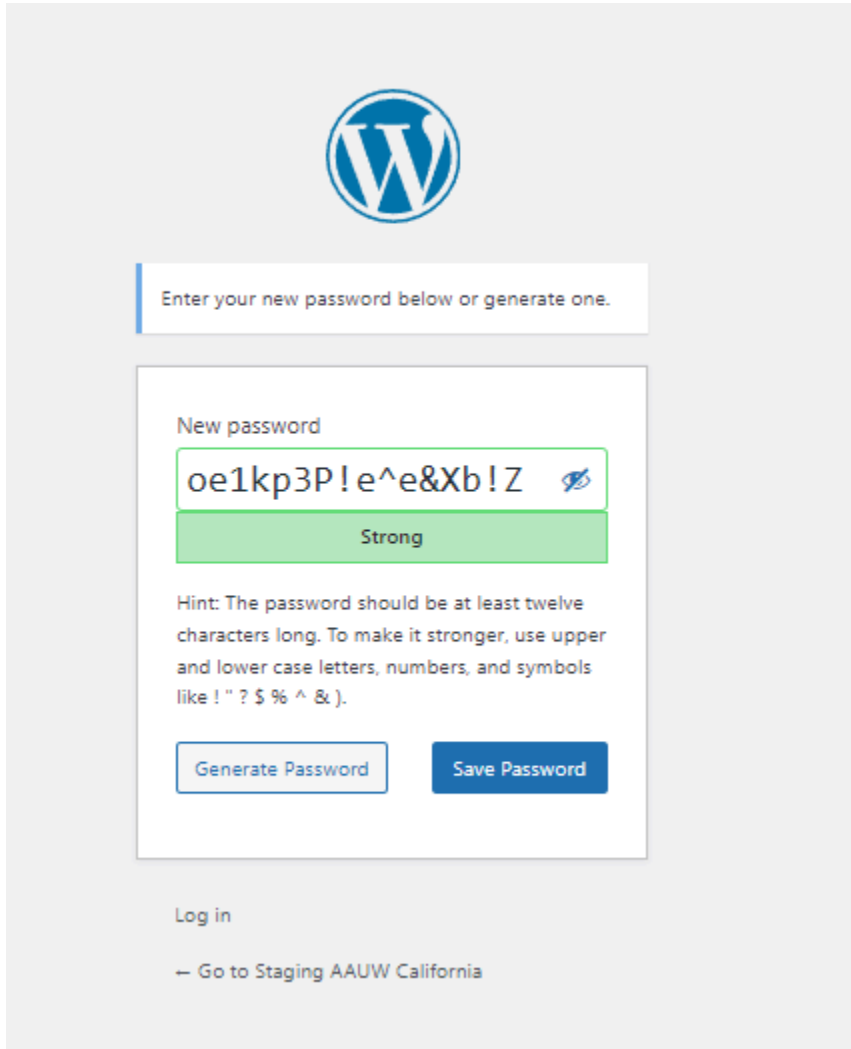
1. Click on the link in the email. The BOR login screen appears. Note: your email address is your User ID.
2. Click “Lost your password?” to see the prompt to reset your password.



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.



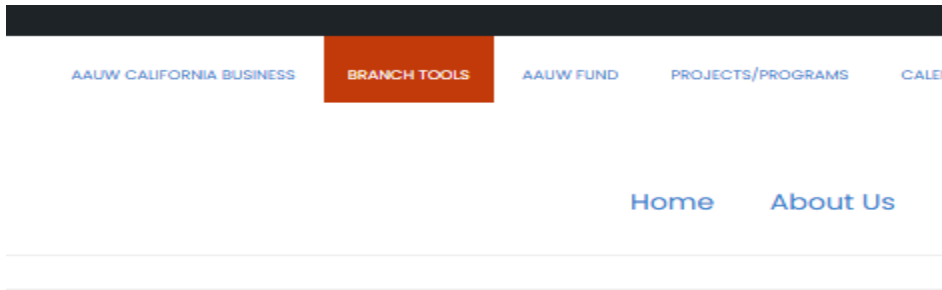
Entry into the BOR

Purpose

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

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.

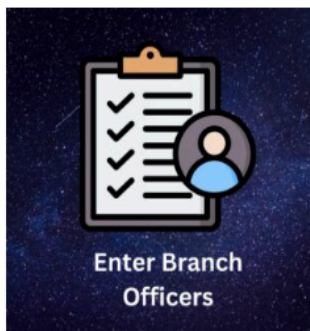
Welcome to the Branch Officers Report (BOR) system for AAUW California

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

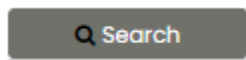
The **Enter Branch Officers** screen is the entry point to begin several operations. For example, you can:

- 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:

First Name * Middle Name Last Name *

Street Address *

City * State/Province * Country * Zip Code *

Primary phone must be indicated, even if there is only one number.
 Primary phone must be indicated, even if there is only one number. When two phone numbers appear, an icon  will appear to the far right of each row. CLICKING THIS WILL PERMANENTLY DELETE the phone number without a warning message, so do not click unless you are intentionally removing a contact's phone number. There is no way to undo this action.

Phone * Location * Phone Type *

Phone * Location * Phone Type *

Email *

Add Board position for 2025

Branch Positions Held *

- President
- President-elect
- AAUW Fund
- Finance
- Membership
- Program
- College University
- Public Policy
- Diversity, Equity and Inclusion
- Governance

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.

Choose branch the position is held in *

Select Branch

Annotations:

- 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.
- 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.

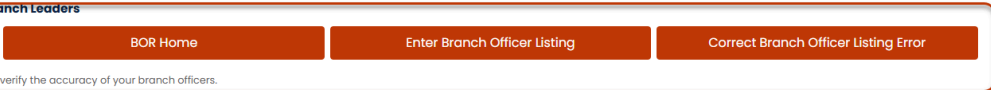


Steps

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.

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@aauc-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 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.

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

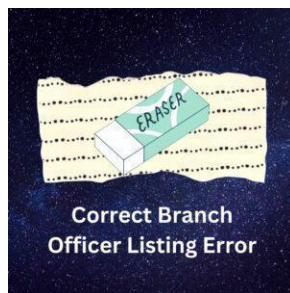
Purpose

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 to report changes.

From the **BOR Home** page:



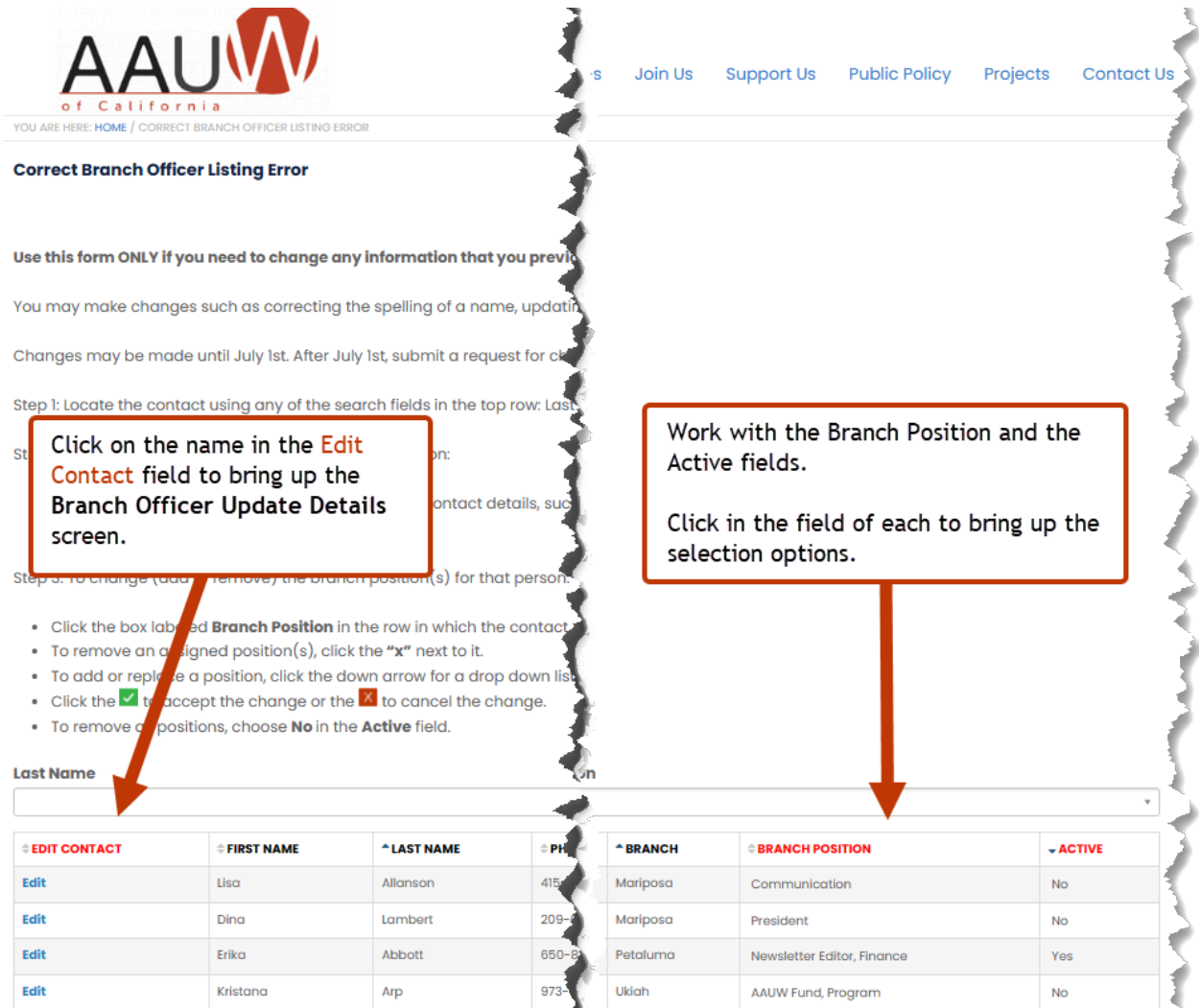
From the link on the BOR screens. For example:



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: _____

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, 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.

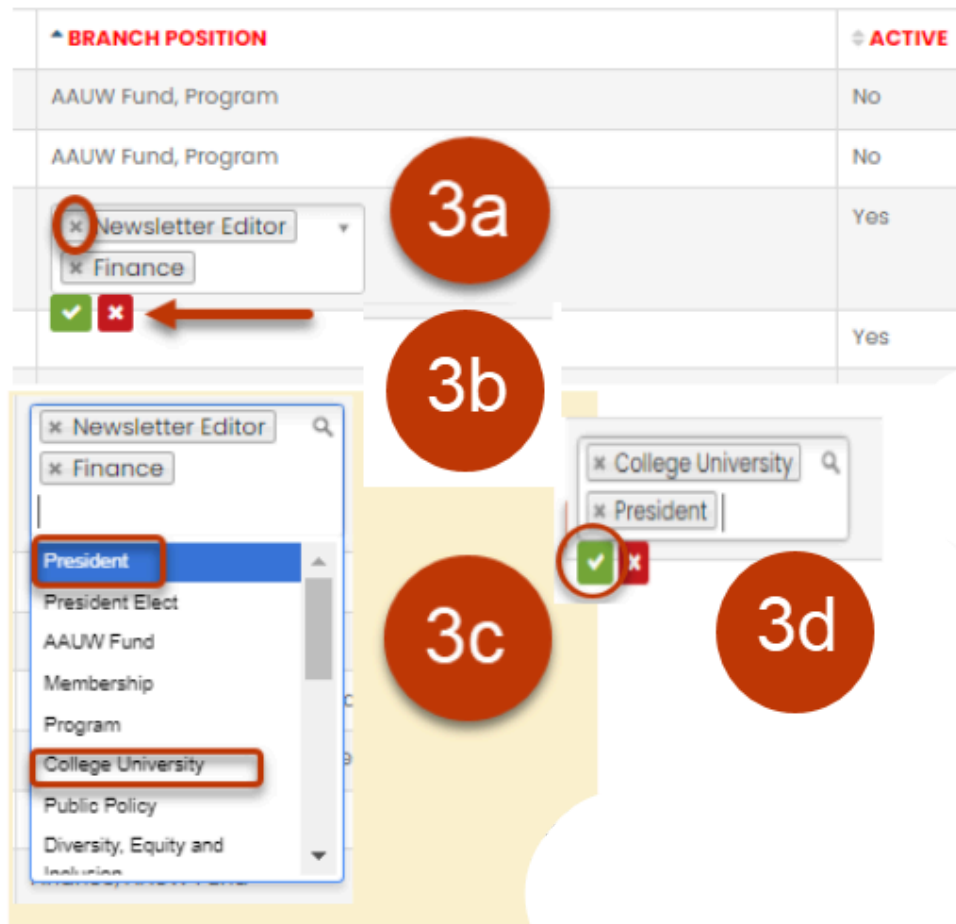
Work with the Branch Position and the Active fields. Click in the field of each to bring up the selection options.

EDIT CONTACT	FIRST NAME	LAST NAME	PHONE	BRANCH	BRANCH POSITION	ACTIVE
Edit	Lisa	Allanson	415-...	Mariposa	Communication	No
Edit	Dina	Lambert	209-...	Mariposa	President	No
Edit	Erika	Abbott	650-8...	Petaluma	Newsletter Editor, Finance	Yes
Edit	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.

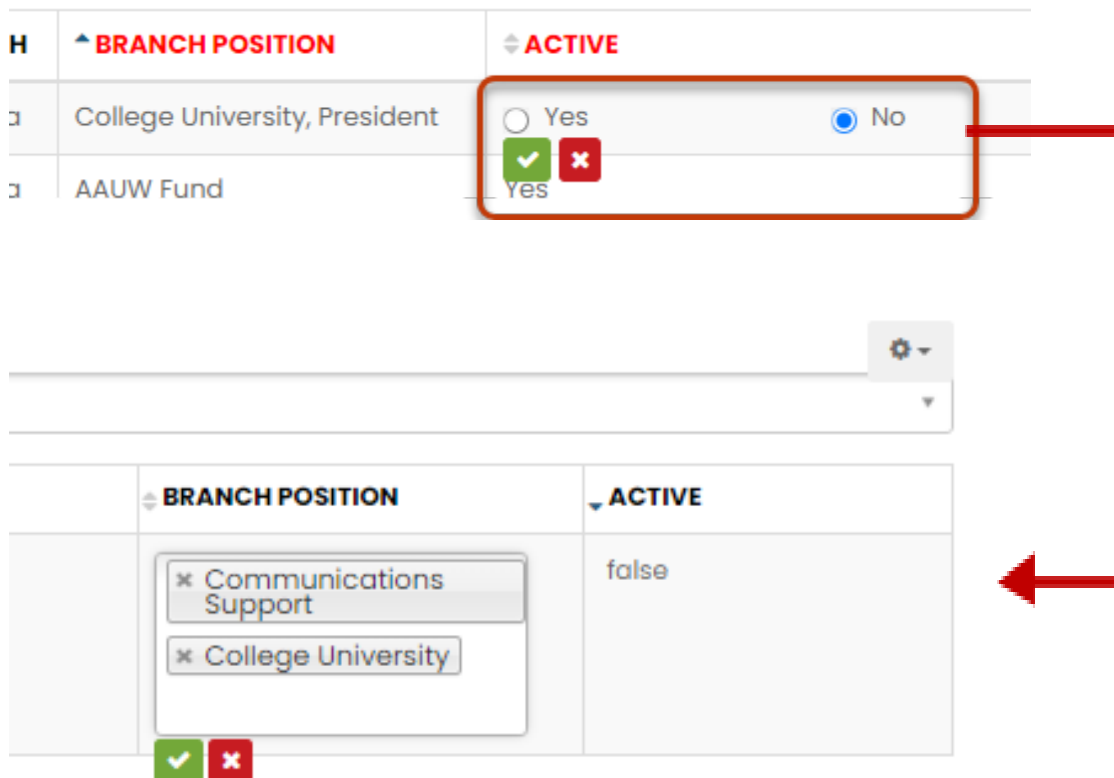


BRANCH POSITION	ACTIVE
AAUW Fund, Program	No
AAUW Fund, Program	No
<div style="border: 1px solid gray; padding: 2px;"> x Newsletter Editor x Finance </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> ✓ ✕ </div>	Yes
<div style="border: 1px solid gray; padding: 2px;"> x College University x President </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> ✓ ✕ </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:

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.



The screenshot shows a table with columns for 'BRANCH POSITION' and 'ACTIVE'. The 'ACTIVE' field for 'College University, President' is highlighted with a red box, showing radio buttons for 'Yes' and 'No', with 'No' selected. Below this, a dropdown menu for 'BRANCH POSITION' is open, showing options like 'Communications Support' and 'College University'. A red arrow points from the 'ACTIVE' field to the dropdown menu.

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
<input checked="" type="checkbox"/> Communications Support <input checked="" type="checkbox"/> College University	false

Searching for Officers Not Visible on the Branch Listing

Purpose

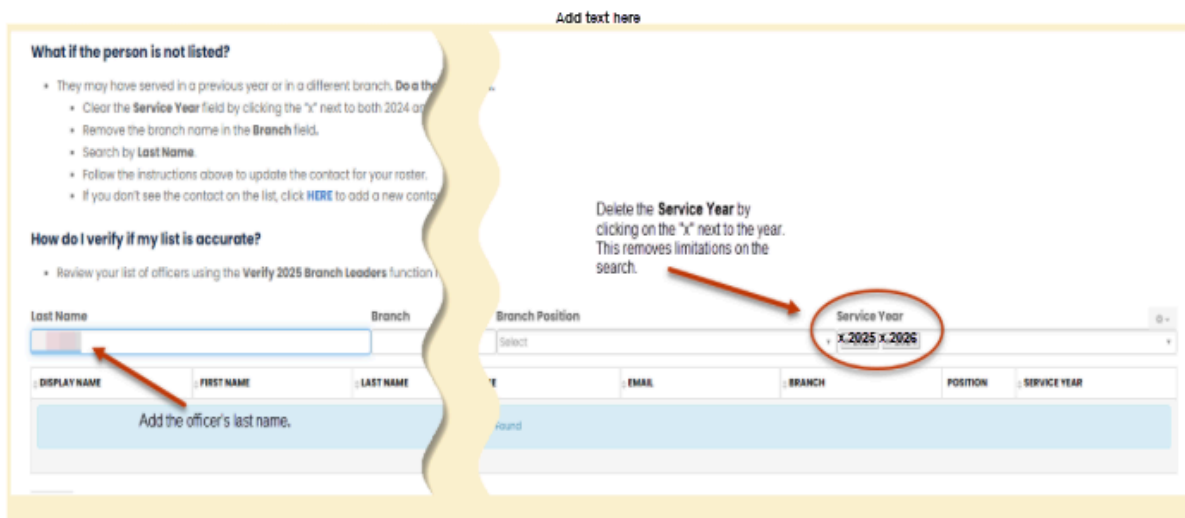
It is important to do a thorough search to avoid creating duplicate entries. If you inadvertently create a duplicate record, you must contact webteam@aauw-ca.org to have it corrected. When you enter branch officers, some will not appear on the list from the current year. There are several reasons for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

- The officer did not serve on the branch board 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.

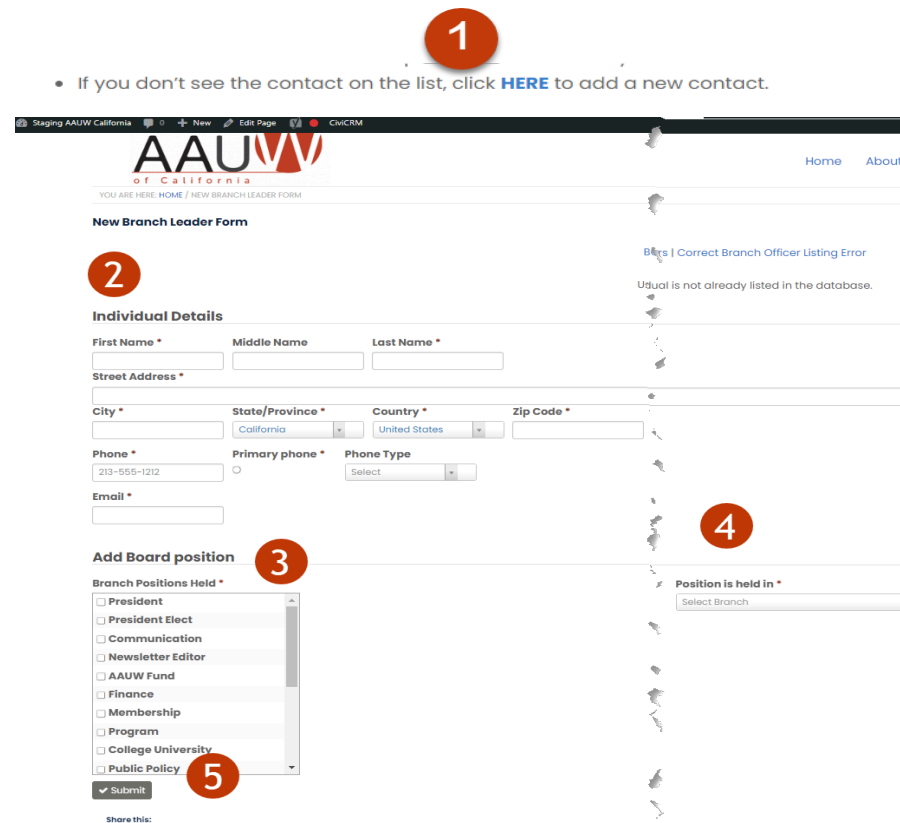
Steps

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.

1

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



2

Individual Details

First Name * Middle Name Last Name *

Street Address *

City * State/Province * Country * Zip Code *

Phone * Primary phone * Phone Type

Email *

3

Add Board position

Branch Positions Held *

- President
- President Elect
- Communication
- Newsletter Editor
- AAUW Fund
- Finance
- Membership
- Program
- College University
- Public Policy

4

Position is held in *

Select Branch

5

Submit

Print the Branch Directory

Purpose

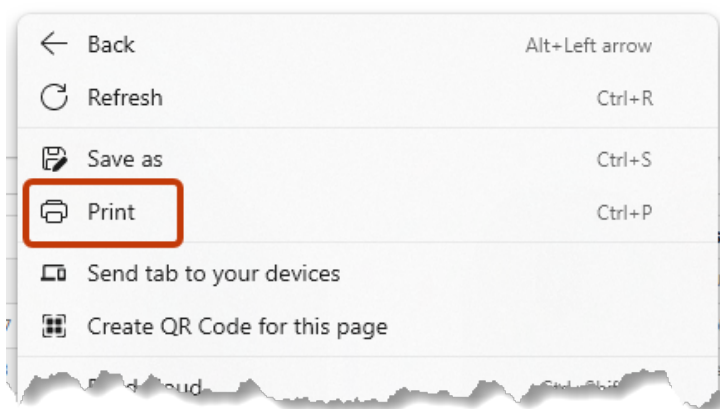
Although the branch directory is visible on the AAUW California website, branch officers may wish to have a printed copy. The following steps will show you how to print a copy of your branch officers.

Steps

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

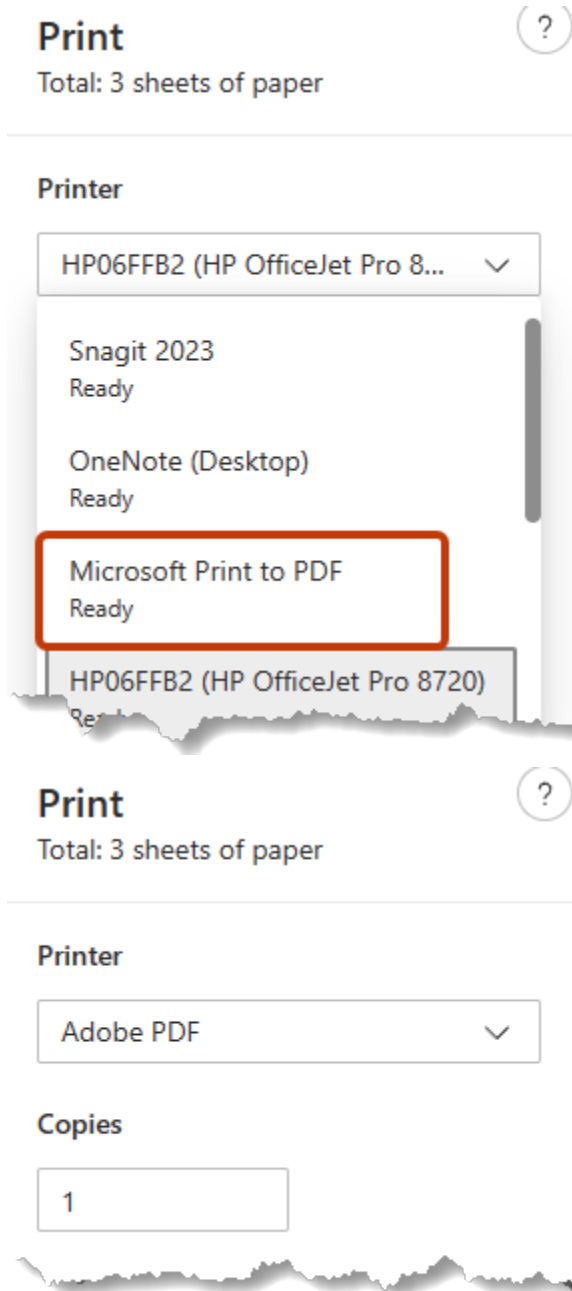


2. With your mouse, right-click on the web page and select "print."



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.