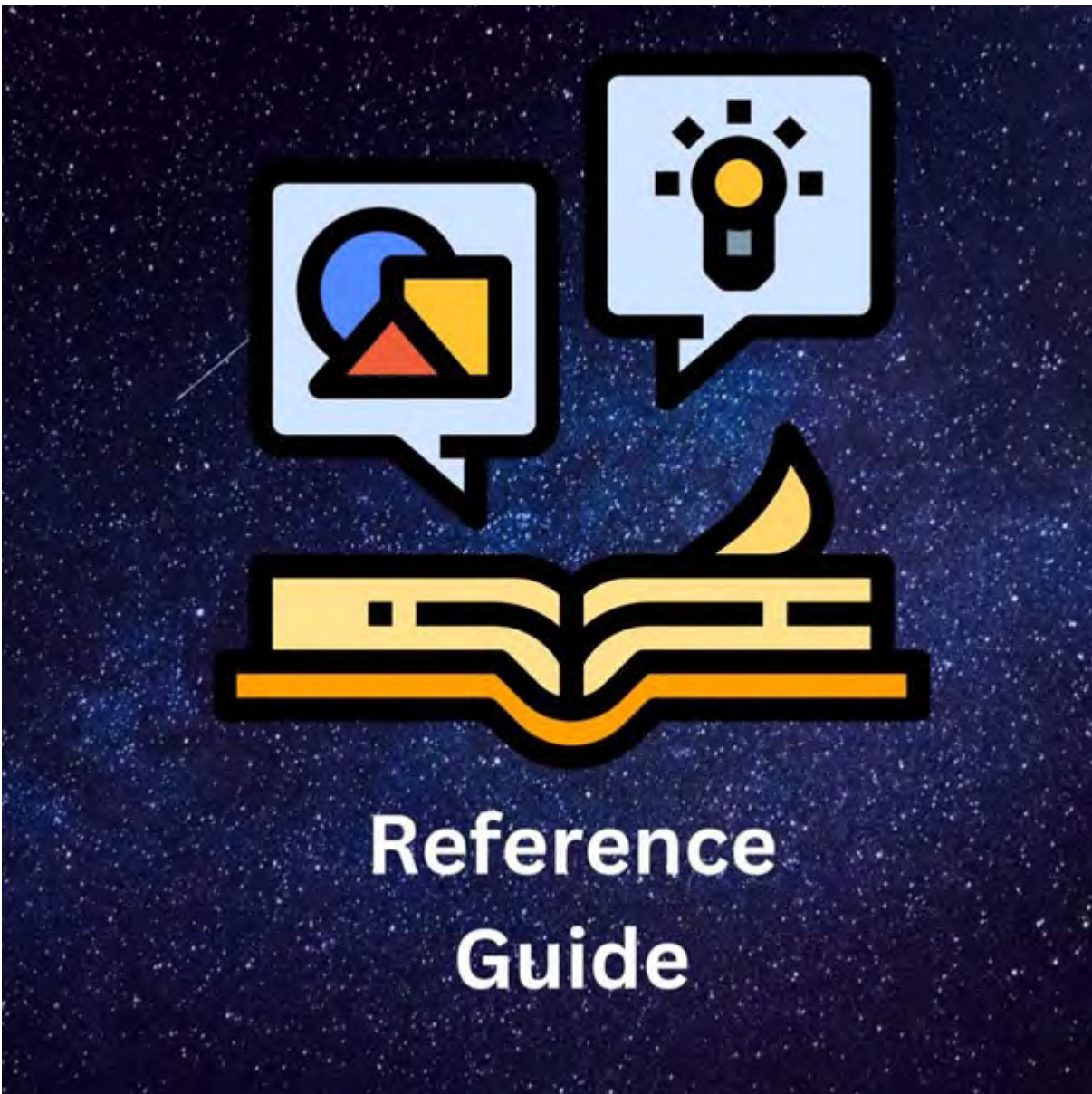


# The Branch Officers Report (BOR)



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## 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.



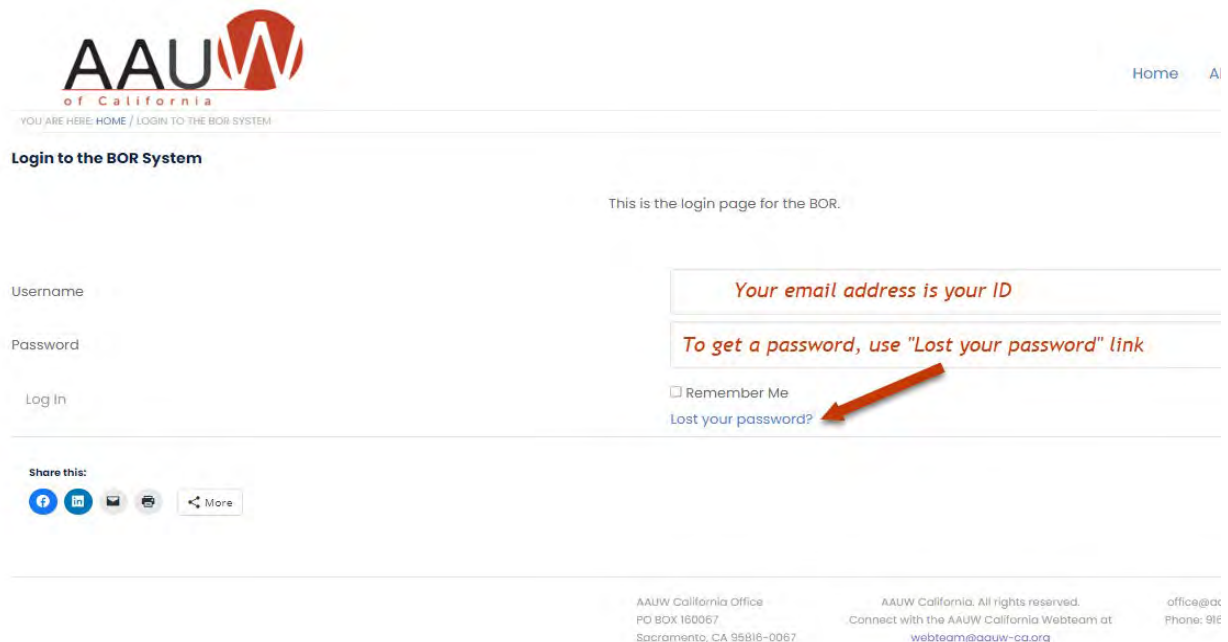
## BOR Login for First-Time Users

### 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

Login to the BOR System

This is the login page for the BOR.

Username

Password

Log In

*Your email address is your ID*

*To get a password, use "Lost your password" link*

☐ Remember Me

[Lost your password?](#)

Share this:

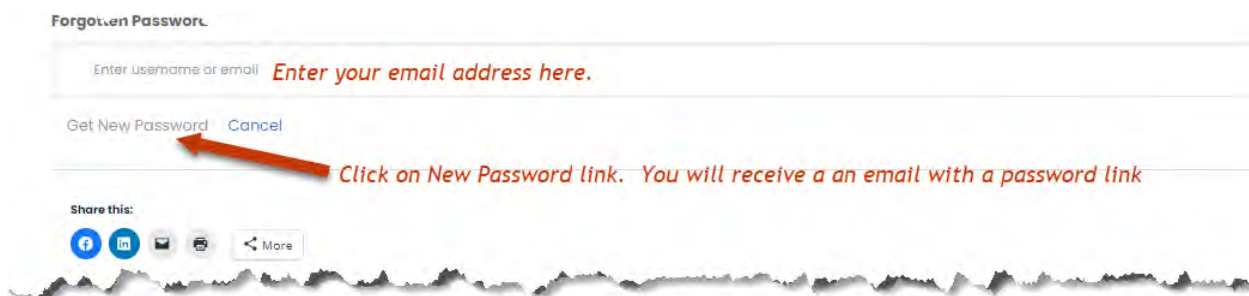
Facebook LinkedIn Email Print More

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Sacramento, CA 95816-0067

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Connect with the AAUW California Webteam at  
[webteam@aauw-ca.org](mailto:webteam@aauw-ca.org)

office@dc  
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.



Forgotten 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

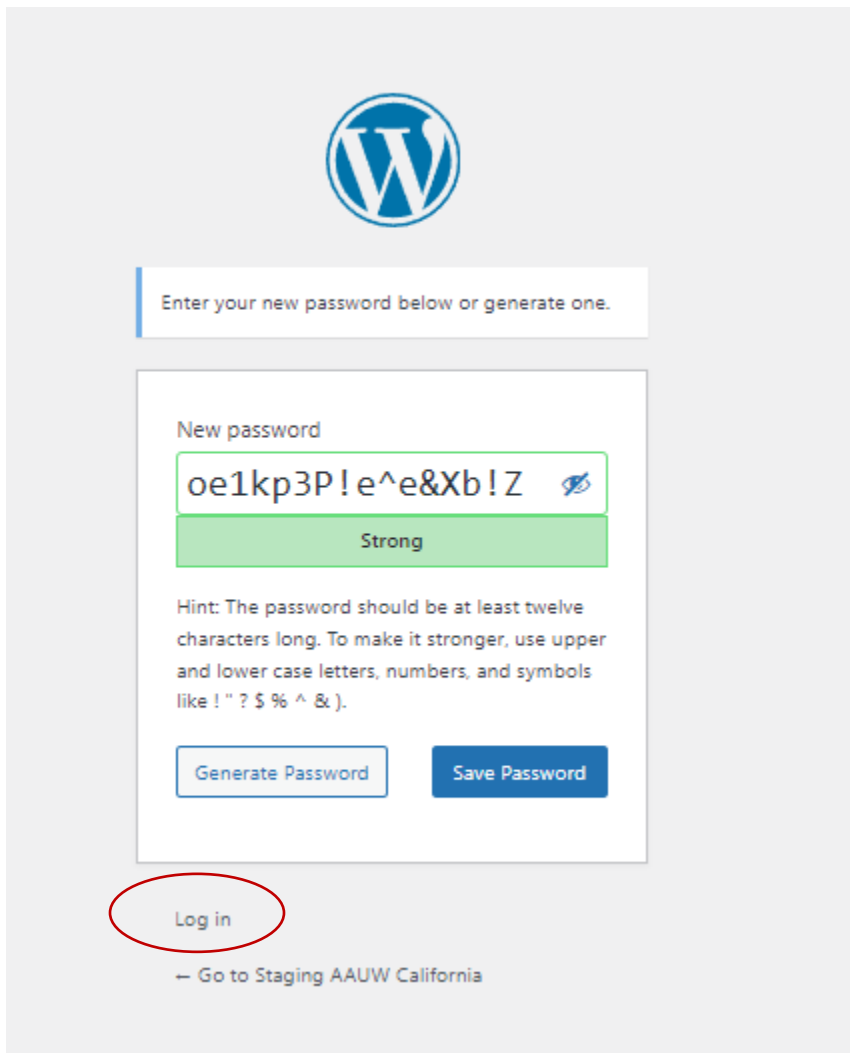
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Connect with the AAUW California Webteam at  
[webteam@aauw-ca.org](mailto:webteam@aauw-ca.org)

office@dc  
Phone: 916

## BOR Login for First Time Users, continued

3. 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.



The image shows the WordPress password reset interface. At the top is the WordPress logo. Below it is a text box with the instruction "Enter your new password below or generate one." Underneath is a "New password" section containing a text input field with the password "oe1kp3P!e^e&Xb!Z", a strength indicator showing "Strong" in a green box, and a hint: "Hint: The password should be at least twelve characters long. To make it stronger, use upper and lower case letters, numbers, and symbols like ! " ? \$ % ^ & )." At the bottom of this section are two buttons: "Generate Password" and "Save Password". Below the password section is a "Log in" link, which is circled in red. At the very bottom is a link that says "← Go to Staging AAUW California".

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



The image shows the WordPress login screen. It has two input fields on the left: "Username" and "Password". To the right of these fields is a large red watermark that says "If you are returning to this site and already have a password, click on the 'Log In'". On the right side of the screen, there are two input fields: "Your email address" and "Your password". Below these fields are two links: "Remember Me" (with a checkbox) and "Lost your password?". At the bottom left, there is a "Log In" button, which is circled in red.

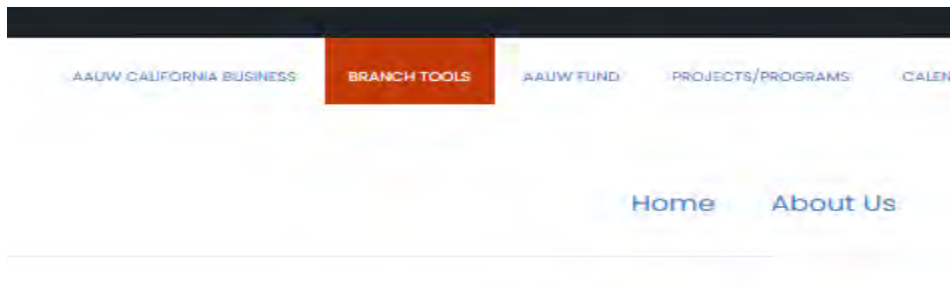
## Entry into the BOR

### 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..

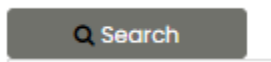
- Search for officers within the database regardless of branch affiliation or year of service.
- Search for specific branches, officers by position or last name, and service years, i.e., current, and new year.
- Make updates to the branch officers' position(s) and contact information.
- Add new branch 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.



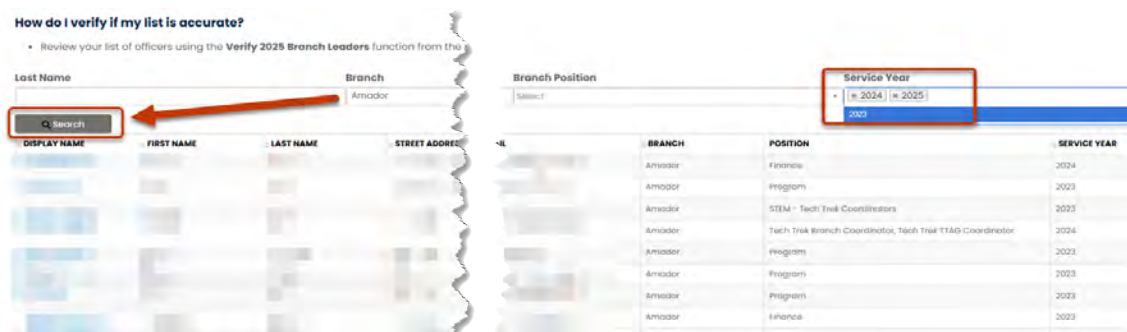
Outgoing presidents are responsible for entering the list of incoming officers and leaders with their contact information and position(s) by July 1st.

### Steps

1. Follow instructions on the screen to search by branch name and view the list of branch officers. Use the Search button to bring up your entry for the Last Name, Branch, or Branch Position.



2. In the image below, after entering the branch name in the Branch field and clicking on the Search button, the current year's list of officers appear. The only names that appear below are the ones for 2023 and 2024. After entering and updating branch officers for 2025, 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

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. At the top, there are fields for First Name, Middle Name, and Last Name. Below these is the Street Address field. Then, there are dropdown menus for City, State/Province, Country, and Zip Code. A note states: '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.' Below this are two rows of phone number fields, each with a Location dropdown and a Phone Type dropdown. To the right of the Phone Type dropdowns are two circular icons with an 'X' inside, with a note: 'These buttons permanently remove the phone number.' Below the phone fields is an Email field. Further down is the 'Add Board position for 2025' section, which includes a list of positions: President, President-elect, AAUW Fund, Finance, Membership, Program, College University, Public Policy, Diversity, Equity and Inclusion, and Governance. A note 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. A note 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. At the top, there is 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 Officer Submission Complete

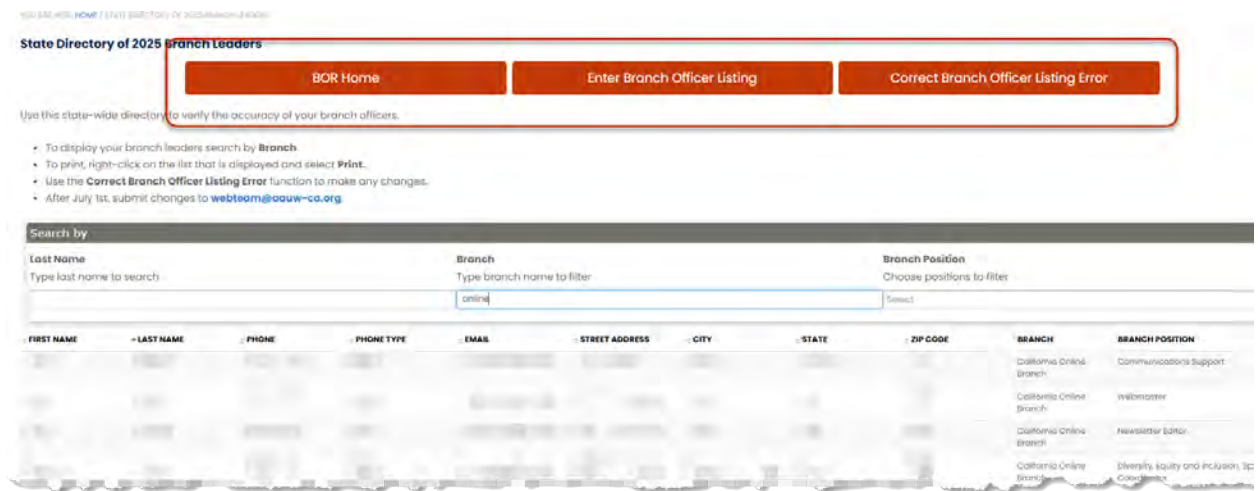
### Purpose

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 done with your updates, click on the **Verify 2025 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.



## 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

Click on the **Verify 2025 Branch Leaders**, and do the following:



#### Verify 2025 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 that display and evaluate the list's accuracy.

Search by

Last Name Type last name to search	Branch Type branch name
<input type="text"/>	<input type="text" value="online"/>

FIRST NAME	LAST NAME	PHONE	PHONE TYPE	EMAIL

Branch Position  
Choose positions to filter

ZIP CODE	BRANCH	BRANCH POSITION
93277	California Online Branch	Communications Support
97223	California Online Branch	Webmaster

3. Make corrections as needed.

## Correct Branch Officer Listing Error

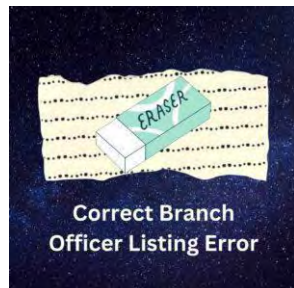
### Purpose

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 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

- a. 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.

**AAUW of California**

YOU ARE HERE: [HOME](#) / [CORRECT BRANCH OFFICER LISTING ERROR](#)

### 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, or changing branch positions.

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, or Phone Number.

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.

Last Name:

First 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>			415-...	Mariposa	Communication	No
<a href="#">Edit</a>			209-...	Mariposa	President	No
<a href="#">Edit</a>			550-...	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.

The screenshot shows a table with a header row: **BRANCH POSITION** and **ACTIVE**. Below the header are three rows. The first two rows have "AAUW Fund, Program" in the first column and "No" in the second. The third row has a dropdown menu in the first column and "Yes" in the second. The dropdown menu is open, showing a list of positions: "Newsletter Editor", "Finance", "President", "President Elect", "AAUW Fund", "Membership", "Program", "College University", "Public Policy", and "Diversity, Equity and Inclusion". A red circle labeled "3a" is around the "x" icon next to "Newsletter Editor". A red arrow points to the green checkmark icon at the bottom of the dropdown. A red circle labeled "3c" is around the "President" option. A red circle labeled "4" is around the "College University" option. A red circle labeled "4" is also around the "x" icon next to "College University".

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

✕ Newsletter Editor ✕  
✕ Finance  
President  
President Elect  
AAUW Fund  
Membership  
Program  
College University  
Public Policy  
Diversity, Equity and Inclusion

✕ College University ✕  
✕ President ✕



## 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
1	College University, President	<div><input type="radio"/> Yes <input checked="" type="radio"/> No</div>
2	AAUW Fund	<div><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</div>

BRANCH POSITION	ACTIVE
<div><div>* Communications Support</div><div>* College University</div></div>	false



## 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.

1

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

Staging AAUW California New Edit Page CiviCRM

**AAUW**  
of California  
YOU ARE HERE: HOME / NEW BRANCH LEADER FORM

Home About Us

**New Branch Leader Form**

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

5

Submit

Share this:

4

Position is held in \*

Select Branch:

Back | Correct Branch Officer Listing Error

Usual is not already listed in the database.

## 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 dropdown menu.

Last Name  Branch  Service Year

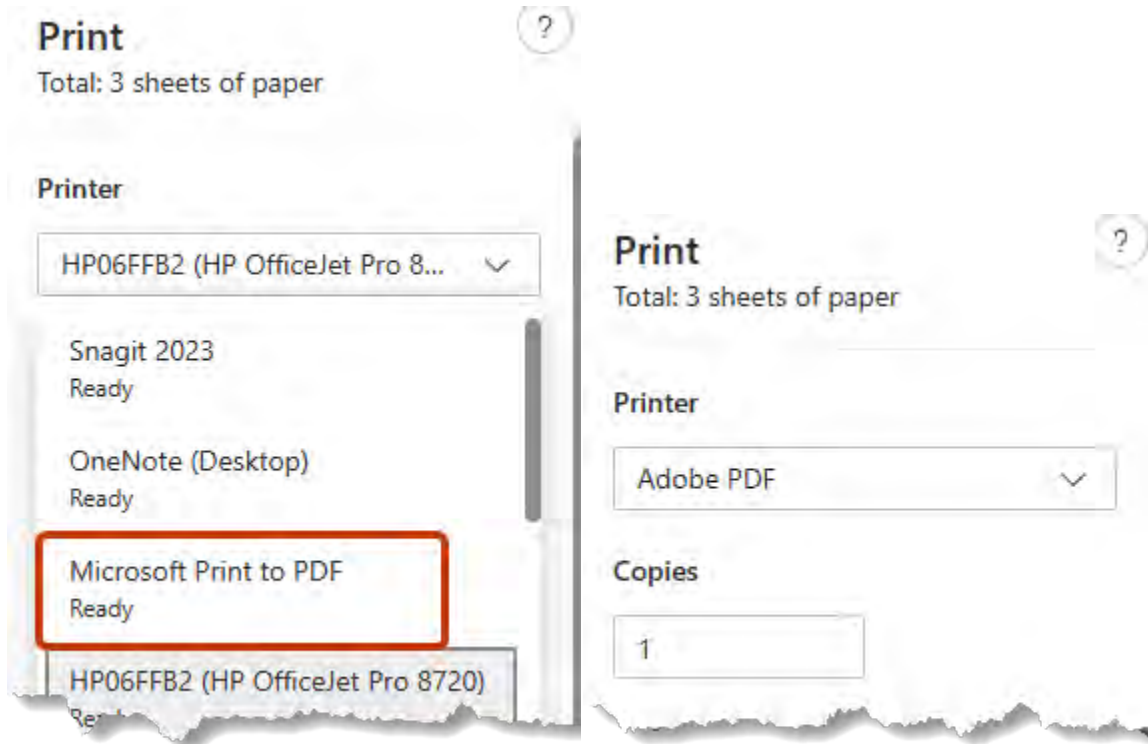
DISPLAY NAME	FIRST NAME	LAST NAME	BRANCH	POSITION	SERVICE YEAR
			Turlock	Communications Support	2025

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.