



OF WASHINGTON
STATE

Making the New Community Hub Work For You

for AAUW Washington State

Branch Members & State and Branch Presidents/Administrators,
Finance Officers & Membership Officers

Barbara Sando

AAUW-WA Director-at-large

AAUW Seattle Branch Finance Officer

AAUW Highline Branch Member

No need to take notes; a copy of this presentation will be made available for your later use

From the Member Services Database to the Community Hub

- Referring to the impending revisions to the Member Services Database (MSD) as a 'system update' was an understatement – and certainly didn't prepare us for the magnitude of changes we'd experience
- The first hint of this 'switcheroo' was that a different login on a different site was required when the system became available again in mid-February
- Virtually nothing is the same, including the name of the system itself
 - Rolling out the Community Hub was more like removing the radiator cap on your old, but reliable, Chevy and towing an untested prototype vehicle underneath the cap in its place
 - Although never stated, AAUW obviously worked with the vendor of the new system, requesting minimal tailoring of an off-the-shelf system that was apparently designed for a more traditional non-profit company
 - The terminology used in the Community Hub is mostly *not* AAUW terminology, making the system less than intuitive

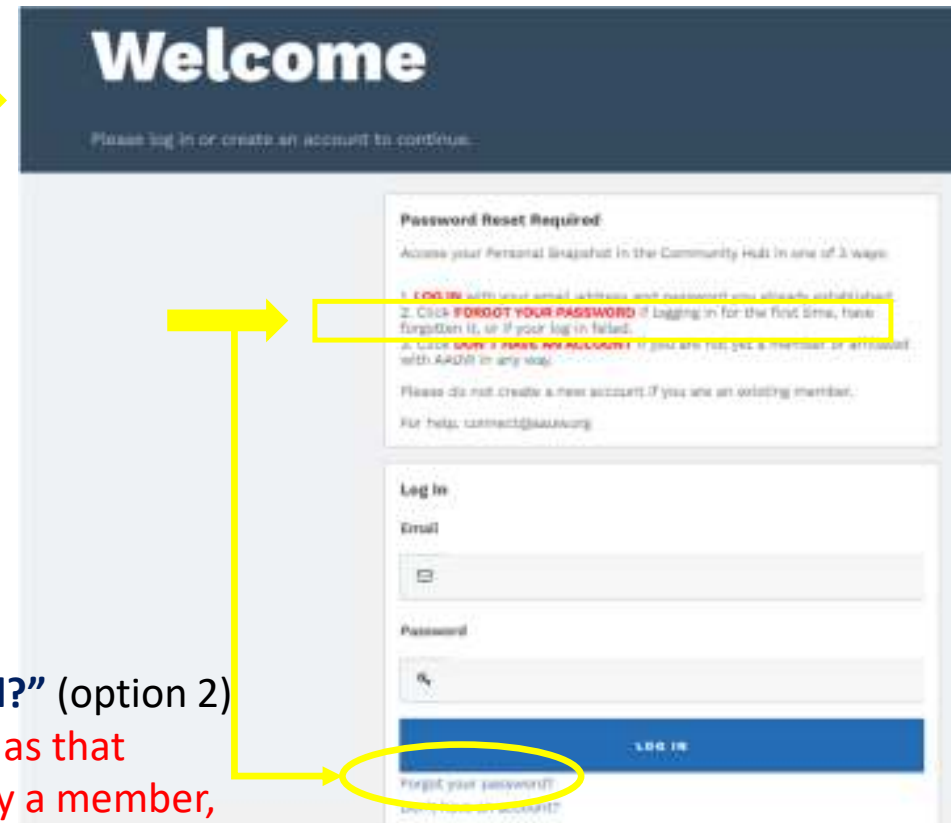
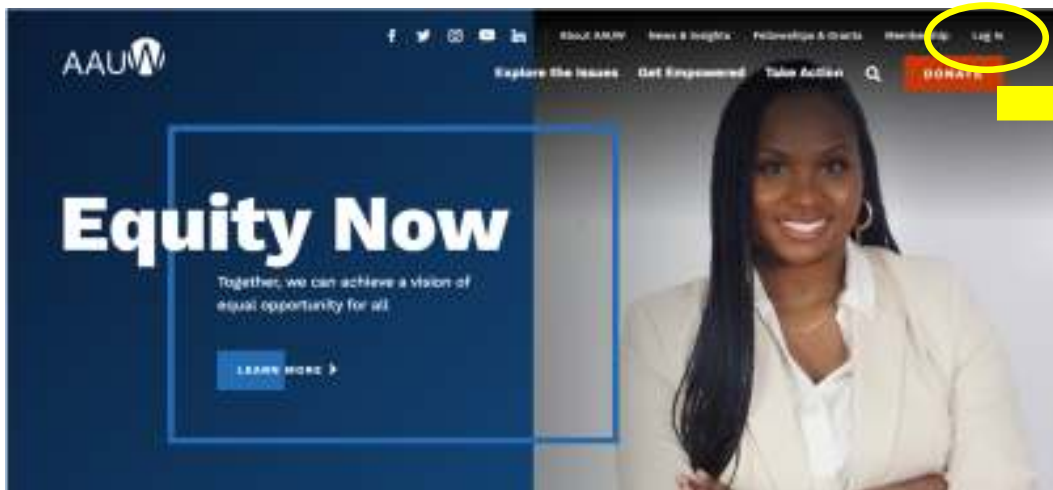
From the Member Services Database to the Community Hub

- After rollout, AAUW reported that this was the first major overhaul of AAUW's systems in 20 years:
 - The Community Hub completely **replaced numerous legacy systems** that had been 'cobbled together' with a new integrated software system that is supposed to do everything
 - A key design driver was addressing **privacy laws and privacy concerns** (eg, branch officers can no longer see member donations to AAUW)
 - Another key design driver was **better mobile accessibility**. If you've logged in, you've seen that many of the displays are narrow, making them easier to read on a smartphone; no app is required
 - As implied by its name, the Community Hub is **intended to be used by all members to manage their own affiliations with AAUW**

Making the New Community Hub Work For You

- Many members have struggled with the Hub; some haven't even yet been able to log in
- There is no single written user's guide on the new system, however there are some resources online
 - "Community Hub FAQ" may be found at: <https://www.aauw.org/membership/new-systems-update/community-hub-faq/>
 - "Community Hub Tools & Resources" may be found at: <https://www.aauw.org/membership/new-systems-update/>; (FAQ can also be accessed from here)
 - This includes some video tutorials for all members, as well as some instructions on for officers on "How to Add/Join Members" and "How to Handle Renewals & Donations"
- Everyone learns differently; if you're like me, you want written instructions that can be referenced as you navigate your way through various transactions in the system
- In this presentation & later break-out session, I'm going to share the step-by-step instructions that I've put together myself -- primarily by trying things out in the system, benefitting from lessons learned shared by others, and talking to Angela Cooper at AAUW

Getting Started with the Community Hub: Logging In to the Hub for the first time



1. Go to the AAUW Home Page, <https://www.aauw.org/>
2. Click in “Log In” at the upper right
3. On the “Welcome” page, click on “Forgot your password?” (option 2)
[WARNING: Do NOT click on “Don’t have an account?”, as that creates a second profile that doesn’t know you’re already a member, so will assign you a second member ID; only AAUW can fix this.]

Getting Started with the Community Hub: Logging In to the Hub for the first time

The screenshot shows the AAUW Community Hub login page. At the top, a dark blue banner says 'Welcome' and 'Please log in or create an account to continue.' Below this, there are two main sections. The first section is titled 'Password Reset Required' and contains instructions on how to access the Personal Snapshot. The second section is titled 'Reset Your Password' and contains a form for entering an email address. The 'Email' input field in the 'Reset Your Password' section is circled in yellow. Below the input field is a blue button labeled 'RESET YOUR PASSWORD'. At the bottom of the form, there is a link that says 'Nevermind, I've remembered my password.'

Welcome
Please log in or create an account to continue.

Password Reset Required
Access your Personal Snapshot in the Community Hub in one of 3 ways:
1. **LOG IN** with your email address and password you already established.
2. Click **FORGOT YOUR PASSWORD** if logging in for the first time, have forgotten it, or if your log in failed.
3. Click **DON'T HAVE AN ACCOUNT** if you are not yet a member or affiliated with AAUW in any way.
Please do not create a new account if you are an existing member.
For help, connect@aauw.org

Reset Your Password
Enter your email address, then click RESET YOUR PASSWORD. If the email you entered is on file, we'll send instructions to reset your password.

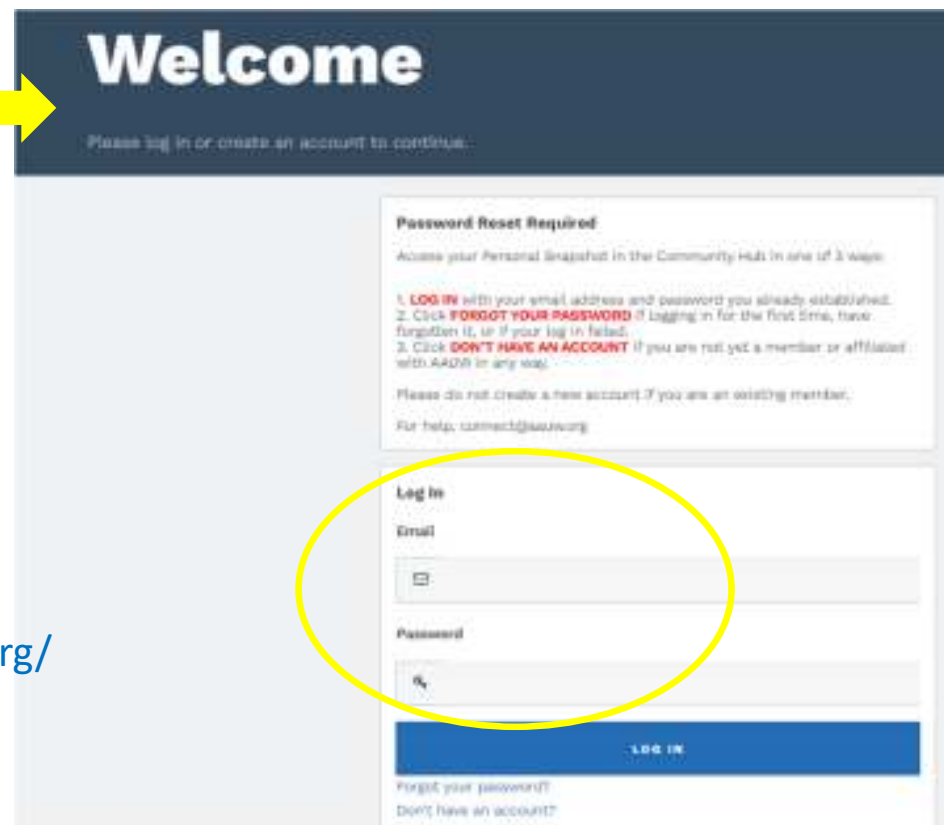
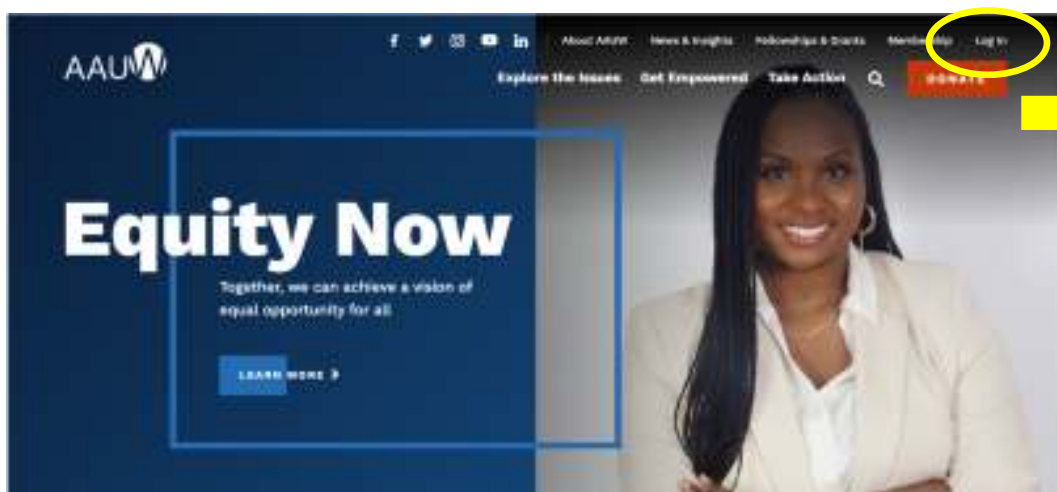
Email

RESET YOUR PASSWORD

[Nevermind, I've remembered my password.](#)

4. When the **“Password Reset Required”** screen comes up, enter the e-mail address that AAUW has on file for you in the **“Reset Your Password”** section, then click on the **“Reset Your Password”** bar.
5. You should quickly receive an e-mail from AAUW (infosf@aauw.org) that will allow you to reset your password and establish your log in to the correct account. Check your promo, spam, and junk folders if you don't see the e-mail right away, because it could have gone there.
6. If you receive the e-mail, do what it tells you to do. **If you do NOT receive an e-mail, please let me know. I am compiling a list of AAUW-WA members with this issue to provide to Angela Cooper; she will merge the profiles and get the e-mails sent to affected members (MANY people have had this issue!!!)**

Getting Started with the Community Hub: Logging In to the Hub for the first time



Once you've reset your password:

6. Go back to the AAUW Home Page, <https://www.aauw.org/>
7. Click in “**Log In**” at the upper right
8. On the “**Welcome**” page, enter your e-mail address and the password you’ve just set up

Occasional Log-in error that is *not* specific to you

If you get the below error message when attempting to log in, it's a system issue – not you. Try again later or try using a different browser

I've also gotten this error when already logged in and trying to take an action. Again, it's not you; try again later

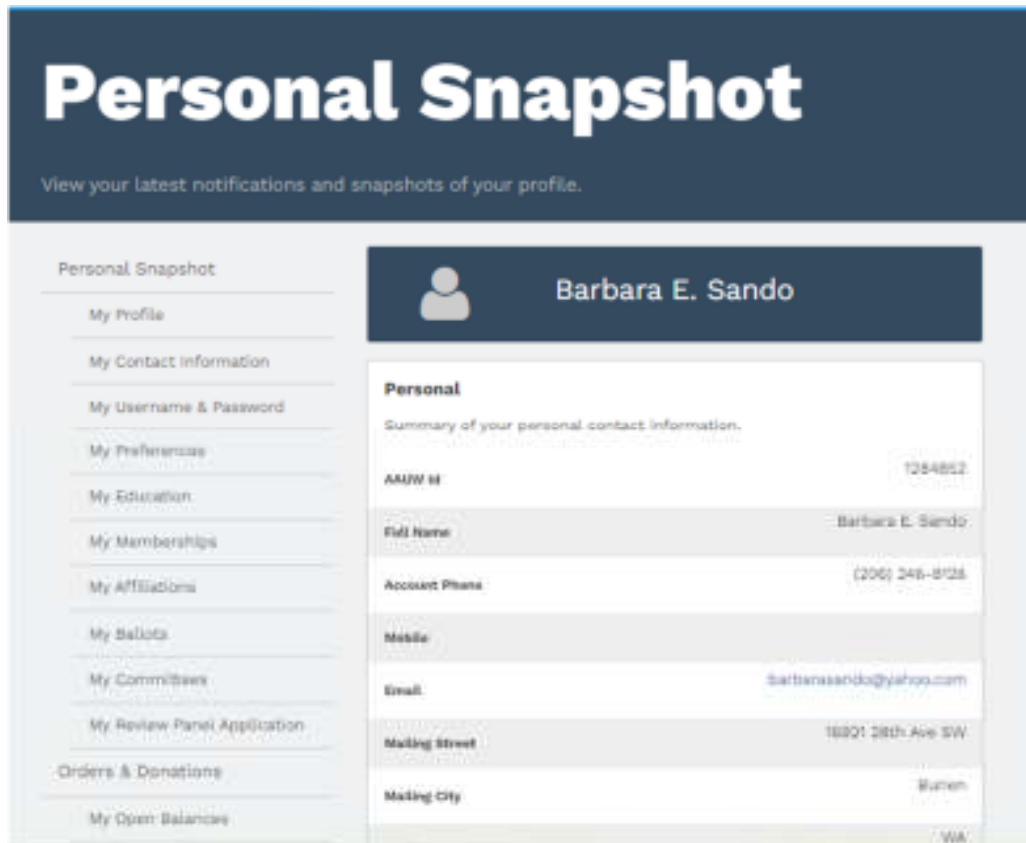
A screenshot of a red error message box from Salesforce. The text inside the box reads: "Error occurred while loading a Visualforce page. The page you submitted was invalid for your session. Please refresh your page and try again. (NC)". The box has a light red background and a thin border.

Error occurred while loading a Visualforce page. The page you submitted was invalid for your session. Please refresh your page and try again. (NC)

Making the New Community Hub Work For You


Managing Your Own Membership for all AAUW members

Getting started in the Hub as a member - “Personal Snapshot”



1. After logging in, the first page you'll see is your **“Personal Snapshot”**
2. You'll have to scroll down to see the entire snapshot, which is in two parts: **“Personal”** and **“Membership”**

Getting started in the Hub as a member - “Personal Snapshot”

 **Barbara E. Sando**

Personal
Summary of your personal contact information.

AM/W Id

1284852

Full Name

Barbara E. Sando

Account Phone

(206) 246-8126

Mobile

Email

barbarasando@yahoo.com

Mailing Street

18821 28th Ave SW

Mailing City

Burien

Mailing State/Province

WA

Mailing Zip/Postal Code

98166

Mailing Country

United States

Membership
Summary of your current membership.

Member

Yes

Member Type

National


Join On

3/1/1981

Member Thru

6/30/2023

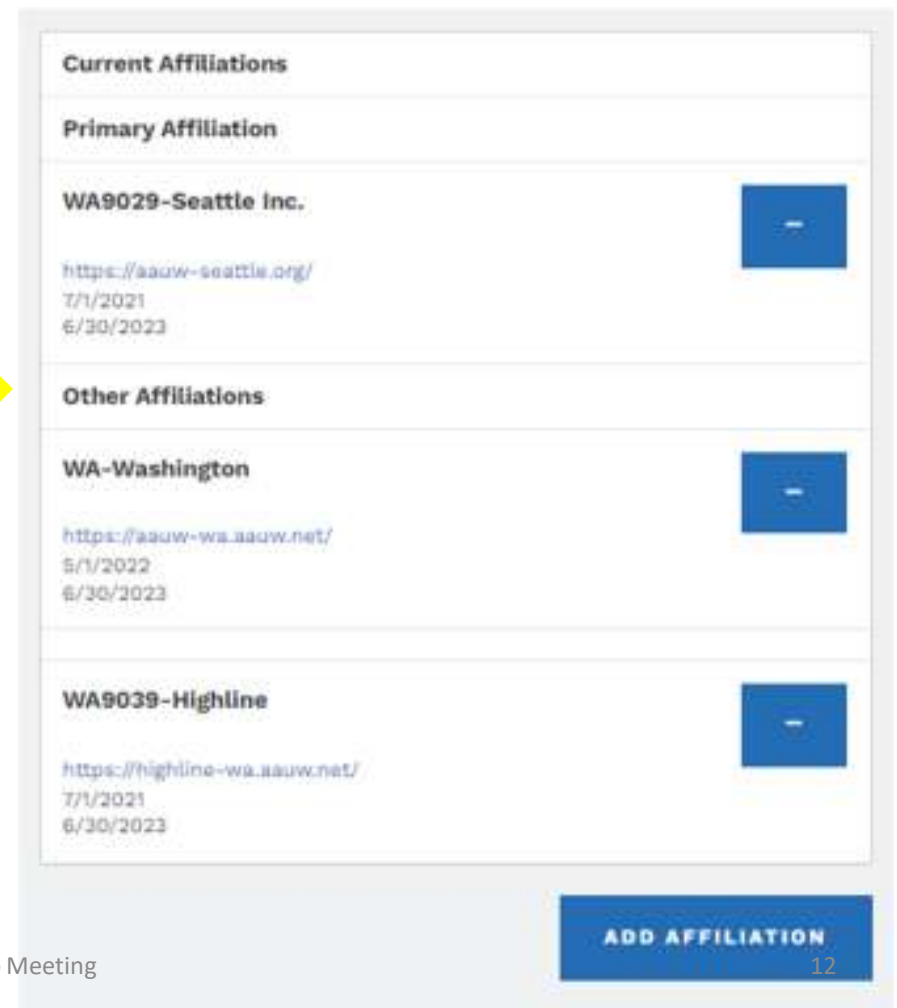
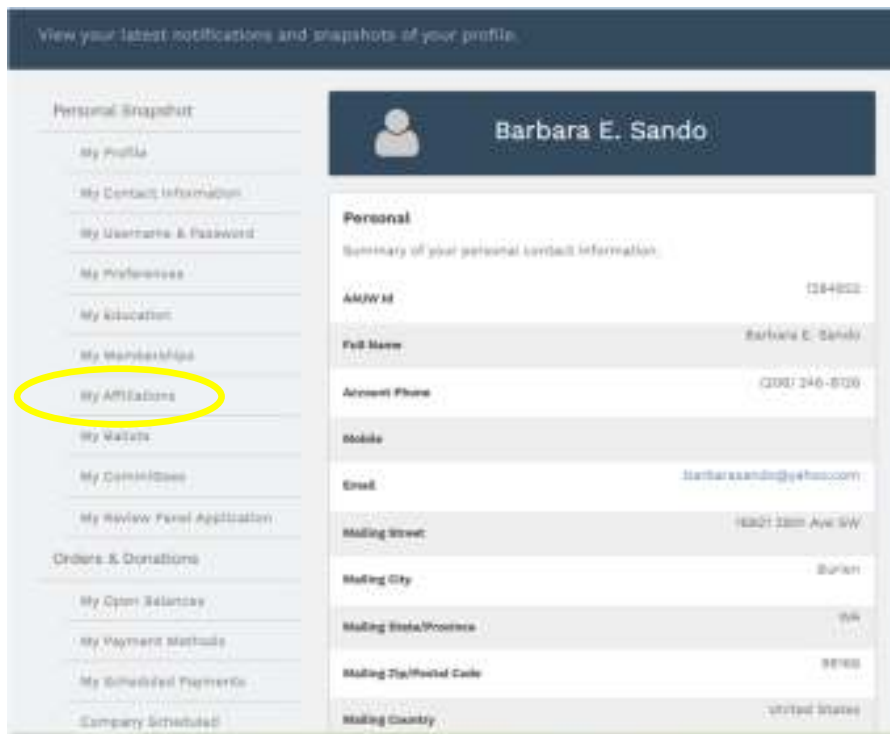
RENEW

My Badges


Branch and State Memberships

Parent Account Name	Start Date	End Date
WA-Washington	5/1/2022	6/30/2023
WA9029-Seattle HRC	7/1/2021	6/30/2023
WA9029-Highline	7/1/2021	6/30/2023

Reviewing your Affiliations



1. On your **“Personal Snapshot”** menu, click on **“My Affiliations”**
2. You’ll then see all of your current AAUW Affiliations; **[Do NOT use “Add Affiliation”]**

8/13/2022

Summer Leadership Meeting

Reviewing your Affiliations

The image displays two screenshots of a web interface for reviewing affiliations. The left screenshot shows a 'Primary Affiliation' (WA9029-Seattle Inc.) and 'Other Affiliations' (WA-Washington, WA9039-Highline). A yellow box highlights a menu for the primary affiliation with options: COMPANY PROFILE, EDIT COMPANY, REMOVE, EXPORT BRANCH ROSTER, MANAGE ROSTER, and TAX INFORMATION. The right screenshot shows the same interface but with the 'Other Affiliations' section highlighted. A yellow box highlights a menu for the 'WA9039-Highline' affiliation with options: REMOVE, EXPORT BRANCH ROSTER, and SET AS PRIMARY. A yellow arrow points from the 'Primary Affiliation' section to the 'Other Affiliations' section.

- You will see your **“Primary Affiliation”** as well as any **“Other Affiliations”** you have
- Click on the ellipsis (dots) in the blue box to the right to see what data you can access for each affiliation
- All members have the ability to **“Remove”** an affiliation or **“Export Branch Roster”** (but *not* State Roster)
- All members may change an **“Other Affiliation”** to be their primary by using **“Set as primary”**
- Pres/Admins, Membership, and Finance officers have access to everything in the yellow box shown above

Reviewing your Affiliations

More about **“Export Branch Roster”** for all members:

- This item was recently added only to Branch menus for all members; it’s not on WA-Washington menus
- If you click on **“Export Branch Roster”**, you’ll see a message from your system something like this:



- If you select **“Open”** or **“Save As”**, an excel file will open up which contains your branch roster
 - File ‘Opens’ as .csv, but you can ‘Save as’ an excel worksheet to edit

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Member_ID	Member_Type	First_Name	Last_Name	Email	Account_Pt	ADDR1	City	State	ZIP	Join_Date	Exp_Date	Branch	Primary	Branch
2	1234567	National	Jane	Doe	jdoe@gma	(206) 555-	123 Main S	Seattle	WA	98111	7/1/1990	6/30/2023	WA9029-S	Primary	
3	4567890	Lifetime	Betty	Frank	frankb@ya	(425) 777-	456 Branch	Seattle	WA	98012	1/20/2020	6/30/2023	WA9029-Seattle Inc.		

- Unfortunately, the file is in an indeterminate / ‘random’ order, however if you’re excel-literate, you can make it more easily usable

Other Member Information

View your latest notifications and snapshots of your profile.

Personal Snapshot

My Profile

My Contact Information

My Username & Password

My Preferences

My Education

My Memberships

My Affiliations

My Ballots

My Committees

My Review Panel Application


Orders & Donations

My Open Balances

My Payment Methods

My Scheduled Payments

Company Scheduled

 **Barbara E. Sando**

Personal

Summary of your personal contact information.

AAUW Id

T284832

Full Name

Barbara E. Sando

Account Phone

(206) 242-8126

Mobile

Email

barbarasando@yahoo.com

Mailing Street

16821 28th Ave SW

Mailing City

Burien

Mailing State/Province

WA

Mailing Zip/Postal Code

98146

Mailing Country

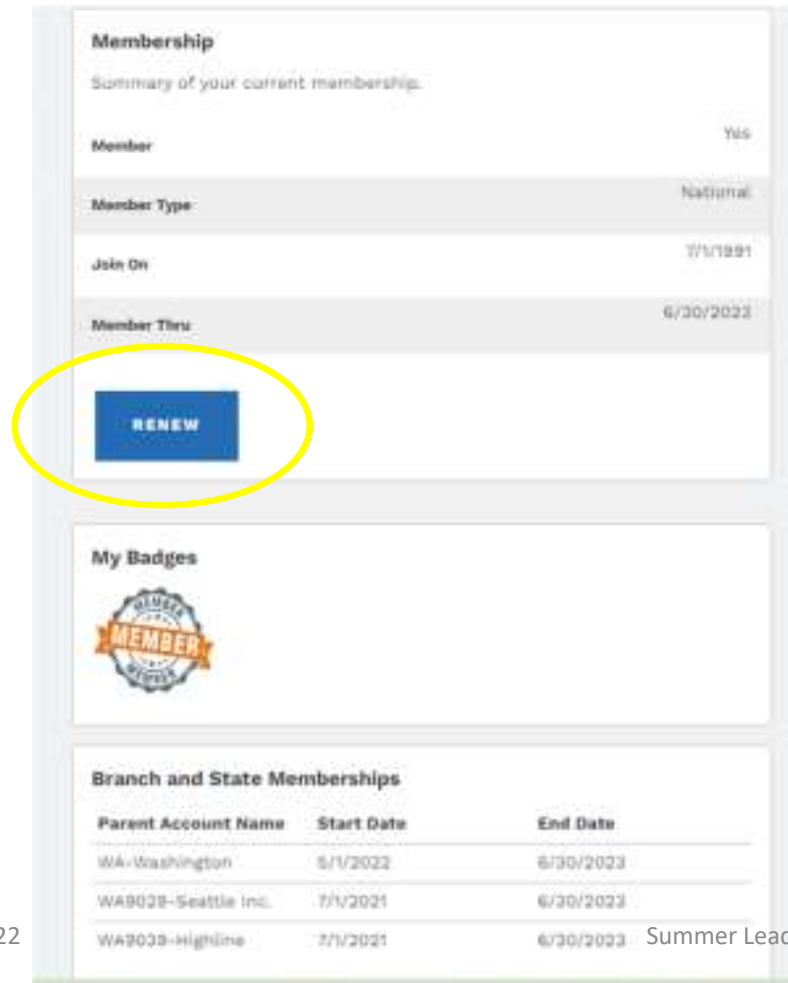
United States

From your **“Personal Snapshot” menu**, you may also review and edit your Profile, Contact Information, Username & Password, Preferences (for receiving various e-mails), Education, Memberships, Ballots, Committees (aka board assignments), and Review Panel Application (whatever those are...)

Note that for Education:

- The system requires the month, day and year of each degree, even if it was decades ago. If you graduated in the spring, I’d just put in 6/1/yyyy – and call it good enough.
- If your college / university name doesn’t exactly match what’s in the Hub, the system will ‘throw away’ the name of your school, but it will save the rest of your degree information. Type slowly until possible matches come up to select.

Renewing your own membership




Membership
Summary of your current membership:

Member	Yes
Member Type	National
Join On	7/1/2021
Member Thru	6/30/2023

RENEW

My Badges



Branch and State Memberships

Parent Account Name	Start Date	End Date
WA-Washington	6/1/2022	6/30/2023
WA9028-Seattle Inc.	7/1/2021	6/30/2023
WA9038-Highline	7/1/2021	6/30/2023

- At the bottom of your **“Personal Snapshot”**, you should see a **“Renew”** button. [If you instead see a **“Pay Balance”** button, then you have an **“Open Balance”** either for yourself or for your branch, if you’re processing renewals. We’ve been told that join / renewal payments not paid within 4 days will be deleted automatically; I’ve found no way to delete them myself.]
- Click on **“Renew”**
- Note that if you wish to join additional branches online, you can do this during your renewal process. [As previously mentioned, do NOT use **“Add Affiliation”** at the bottom of the **“My Affiliations”** page to join a new branch]

Renewing your own membership

Personal Snapshot College/University Directory Exhibitors & Sponsors Directory Event Calendar

Membership Management

Personal Snapshot

- My Profile
- My Contact Information
- My Username & Password
- My Preferences
- My Education
- My Memberships
- My Affiliations
- My Ballots
- My Committees
- My Review Panel Application

Orders & Donations

- My Open Balances
- My Payment Methods

8/13/2022

Online Membership Management

Verify or update your information below.

First Name
Barbara

Last Name
Sando

Email Address
barbarasando@yahoo.com

Phone Number

Mailing Street
16921 28th Ave SW

Mailing City
Burien

Mailing Zip/Postal Code

Summer Leadership Meeting

- Once you click **“Renew”**, you will see your **“Membership Management”** page
- From there, verify or input the requested information, then click **“Next”**. at the bottom
- You will then verify or input your educational info, then click **“Next”**.
- You will then click the appropriate circle to indicate if you’re a **“Lifetime”** member or a **“National”** member (aka, a member who pays National dues each year)

Select Membership Type

☒ Lifetime

☐ National

Renewing your own membership

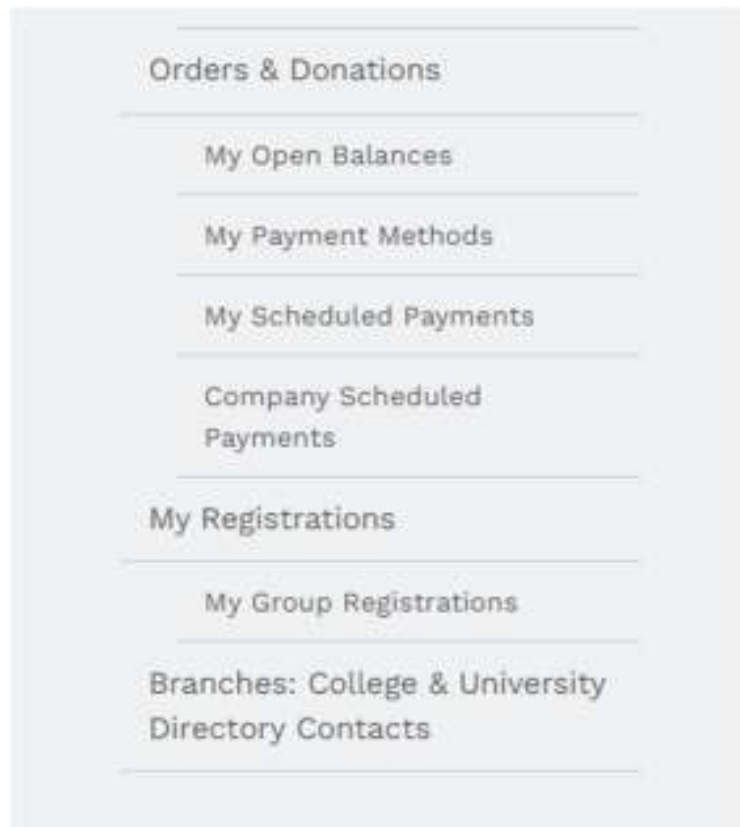
- You will then be asked **“Would you like to add Branch or State memberships?”** Answer **“Yes.”**
- You’ll then select your branch, or branches, which are listed in alphabetical order by state. Click on each / all branches you wish to renew. [All Washington State branches will be waaaaay down at the bottom of the list...] Click **“Next”**.
- You’ll then be prompted to select State memberships. Those state organizations that correspond to each of your branches should already be checked, however verify/edit, as required. Click **“Next”**.
- You will then be asked **“Would you like to include a donation to the Greatest Need Fund?”** If you click **“Yes”**, you’ll be prompted to enter the donation amount. Otherwise, click **“No.”** Click **“Next”**.
- Finally, you will be redirected to **“Checkout”** page. There, you will verify that your selections are reflected correctly and proceed down the page to **“My Payment Methods”** where you can enter your credit card information. From there, follow the prompts and you’ll be done! You should receive an e-mail confirmation of your ‘order’ (aka renewal).

Renewing your own membership

Limitations & Quirks

- The Community Hub does NOT support the old Membership Payment Program (MPP) feature that those renewing online loved and used: sending out e-mail invoices that included a personalized link to renew your membership
 - In the Hub, a person must login with their password to renew their membership and/or to make a donation; my branch has received many more checks than usual and still has many members who haven't yet renewed
 - Not only does this seem like a decision AAUW may live (or die...) to regret, but it puts a larger burden on members and on Finance officers
- If you're a member of multiple branches, and you don't renew them all when you renew your primary branch membership for the year, you can only renew (or join) other branches via check
 - The system allows only one "Renew" transaction per member per year
- The system doesn't automatically convert 50-year members to Honorary Lifetime members; there is an application form that the branch must fill out and submit to AAUW, then AAUW will recode the member
- The system doesn't give Honorary Lifetime members the option to pay state and branch dues, so they have to renew via check since the Branch can process those transactions

And, just a few more items at the bottom of the menu on the left side of your “Personal Snapshot”



“Orders & Donations”:

- **“My Open Balances”** and **“My Payment Methods”** are pretty straightforward; Payment Methods gives you the option to save your credit card information
- No idea what **“My Scheduled Payments”** or **“Company Scheduled Payments”** is used for. **Ignore.**

“My Registrations”:

- No idea what this section is used for. **Ignore.**

“Branches: College & University Directory Contacts”:

- Exactly what it says it is; Search by State, then by institution, to get contact info for C/U Partners

Making the New Community Hub Work For You

Fulfilling your Official Duties
in the Hub for State and Branch
Presidents/Administrators, Finance Officers
& Membership Officers

Getting to work in the Community Hub – “Personal Snapshot”

Personal Snapshot

View your latest notifications and snapshots of your profile.

Personal Snapshot

- My Profile
- My Contact Information
- My Username & Password
- My Preferences
- My Education
- My Memberships
- My Affiliations
- My Galleries
- My Committees
- My Review Panel Application
- Orders & Donations
- My Open Balances

Barbara E. Sando

Personal

Summary of your personal contact information.

AAUW ID 1284852

Full Name Barbara E. Sando

Account Phone (206) 246-8126

Mobile

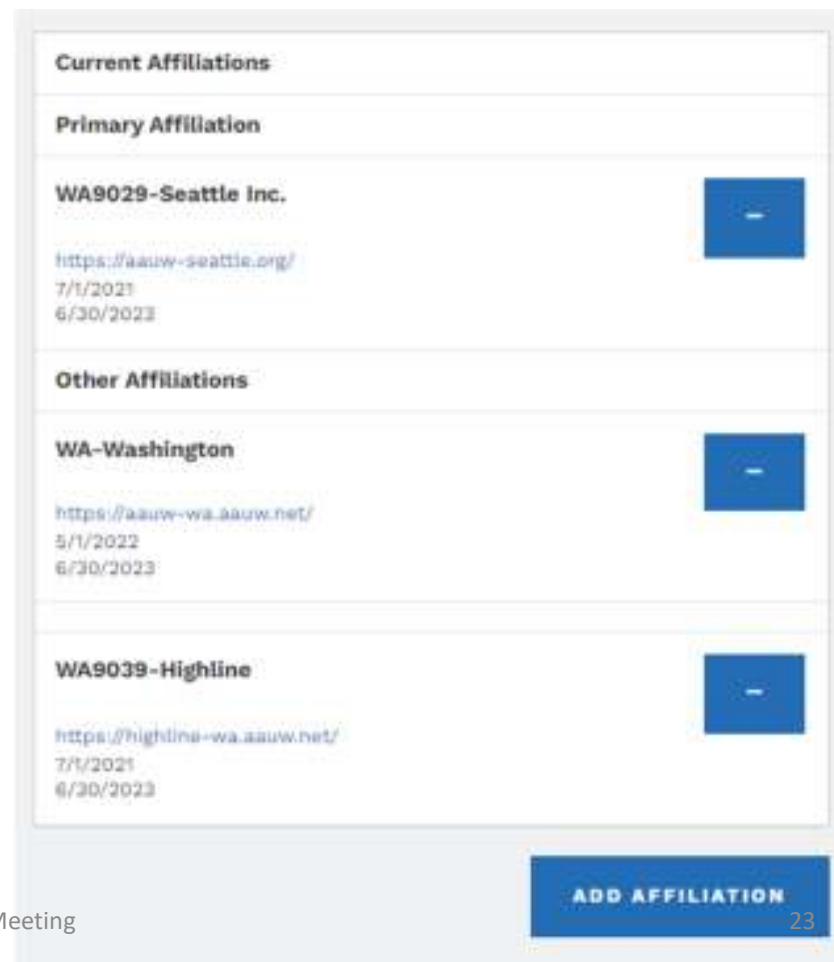
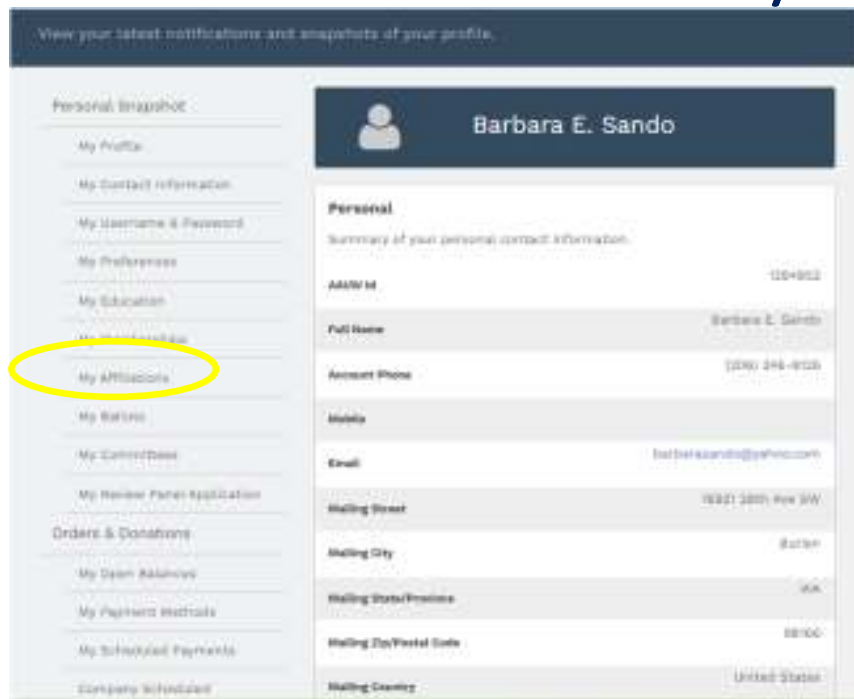
Email barbarasando@yahoo.com

Mailing Street 36821 28th Ave SW

Mailing City Burien, WA

1. After logging in, the first page you'll see is your **“Personal Snapshot”**; Note this is the same for officers as it for all other members – everyone gets started the same way
2. You'll have to scroll down to see the entire snapshot, which is in two parts [**“Personal”** and **“Membership”**] and has a **“Personal Snapshot” menu** down the left-hand side

Getting to work in the Community Hub – “My Affiliations”

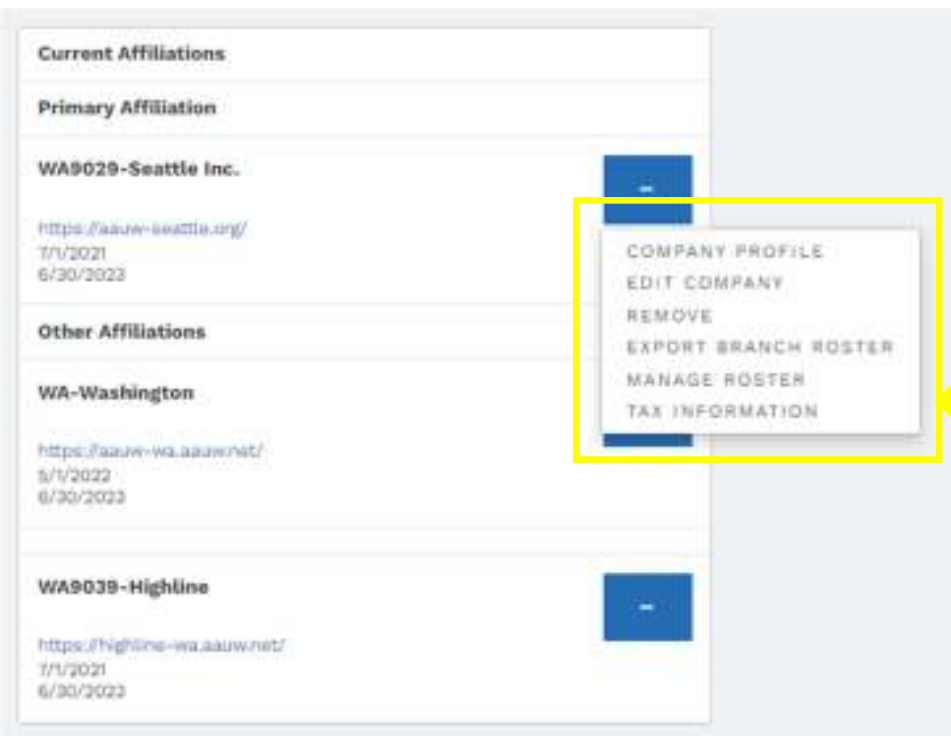


1. On your “**Personal Snapshot**” menu, click on “**My Affiliations**”
2. You’ll then see all of your “**Current Affiliations**” [Do NOT use “**Add Affiliation**”]

8/13/2022

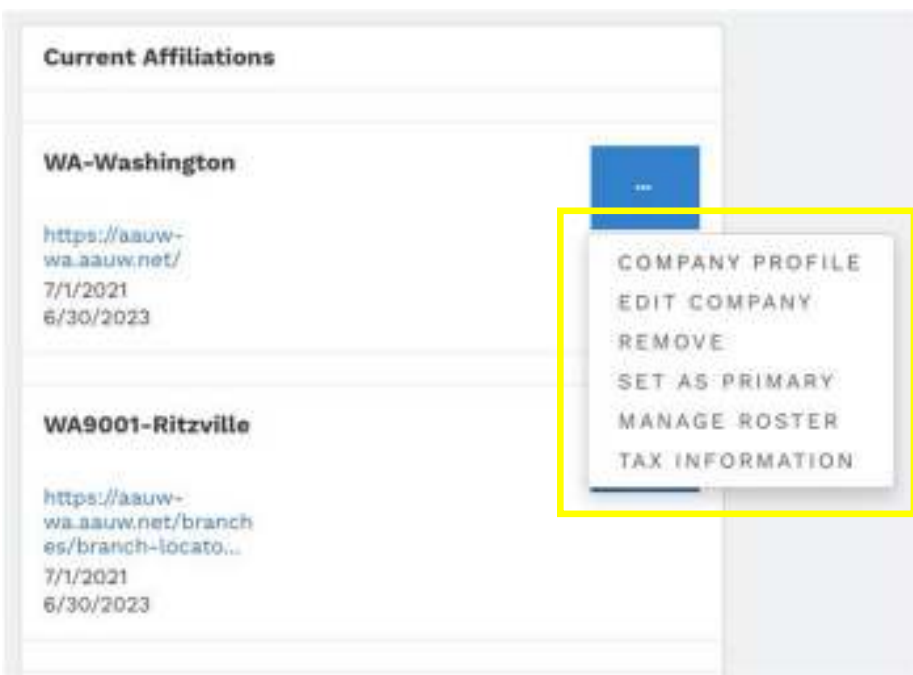
Summer Leadership Meeting

Getting to work in the Community Hub – “Current Affiliations” – Branch officers



1. On your “**Current Affiliations**” page, click on the ellipsis (dots) in the blue box for the branch for which you’re a President/Admin, Finance or Membership officer
2. You should then see all of the menu items displayed in the yellow box.
 - If you don’t see this menu, and see a shorter one instead, you are likely not coded correctly in your branch’s “Committee Management” list; we’ll talk later about how to fix that

Getting to work in the Community Hub – “Current Affiliations” – State officers

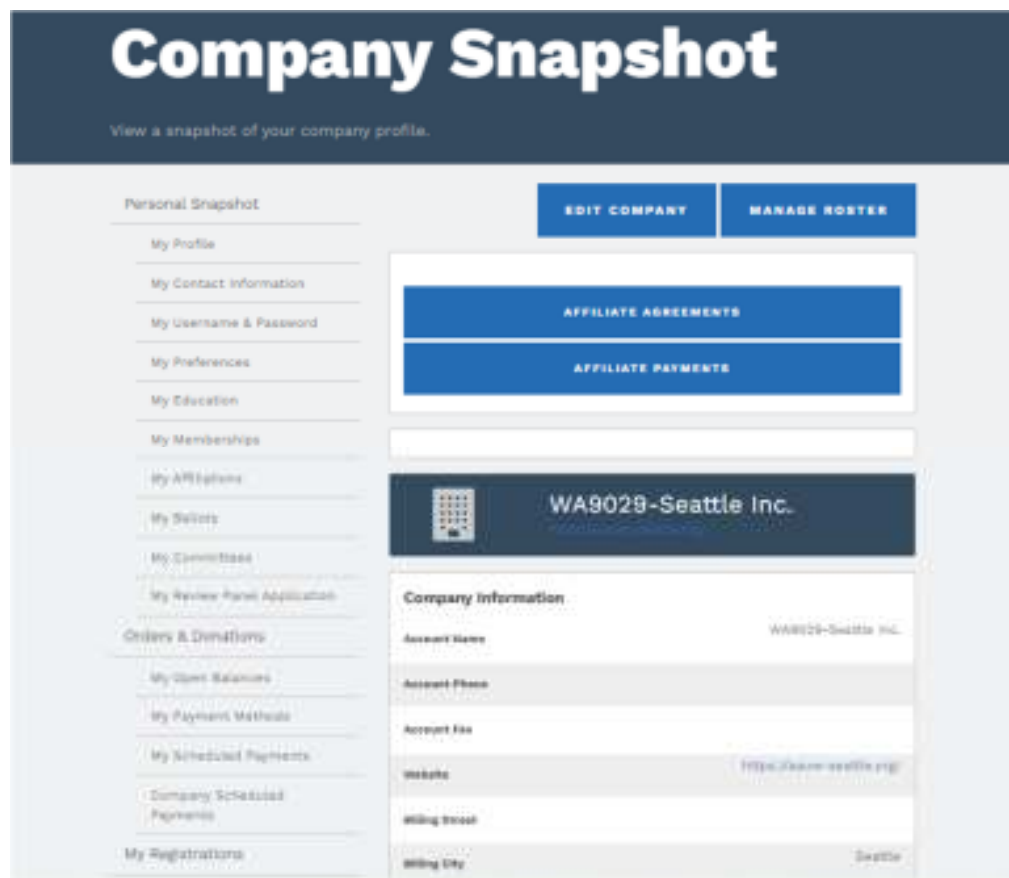


1. On your “**Current Affiliations**” page, click on the ellipsis (dots) in the blue box for WA-Washington
2. You should then see all of the menu items displayed in the yellow box; this menu is the same as it is for Branch officers, minus listing “Export Roster” directly
3. Note that AAUW has recently added AAUW-WA Pres/Admin, Finance and Membership officers to ALL branch rosters in Washington State
 - This is so they can help the branches with the Hub
 - Branches do not need to code State officers in their “Committee Management” (list of officers) in order to obtain this help

I’m going to walk through each menu item, saving “**Manage Roster**” for last, as it’s most involved

- Sub-items under each main item may differ slightly or be N/A for State officers managing the State org, however all Branch sub-items are still applicable for State officers helping a Branch

Using the Community Hub to manage your branch – “Company Profile”



If you click on **“Company Profile”**, you’ll see your **“Company Snapshot”** page

- Click on **“Edit Company”** to update the “company information” (eg, address, website link) and/or to upload documents
- **“Manage Roster”** will be addressed later (this is a second way to get to that)
- Click on **“Affiliate Agreements”** to see Affiliate Agreements and Bylaws. You can upload them from here, too
- Click on **“Affiliate Payments”** to see a list of direct deposits AAUW has made to your branch accounts. [There is an item for each ‘order’, but with no names and each item is listed for the total of all ‘orders’ in the deposit; you will later receive an e-mailed pdf by-name disbursement report of all dues payments made in Washington State]

Using the Community Hub to manage your branch – “Edit Company”

The screenshot shows a web interface for editing company information. At the top, a dark blue header contains the text 'Edit Company' in large white font, and below it, in smaller white font, 'View and update your company information.' Below the header is a light blue sidebar with a 'Personal Snapshot' section containing links: My Profile, My Contact Information, My Username & Password, My Preferences, My Location, My Memberships, My Affiliations, My Balances, My Committees, and My Review Panel Application. Below these are 'Orders & Donations' links: My Open Balances, My Payment Methods, My Scheduled Payments, and Company Scheduled. The main content area has a dark blue header with a building icon, the text 'WA9029-Seattle Inc.', and the URL 'https://aauw-seattle.org/'. Below this is a 'Company Information' section with three rows: 'Account Phone' with an empty text box, 'Account Fax' with an empty text box, and 'Website' with a text box containing 'https://aauw-seattle.org/'. Below that is a 'Shipping Address' section with two rows: 'Shipping Country Code' with a dropdown menu showing 'United States', and 'Shipping Street' with an empty text box.

If you click on **“Edit Company”** you’ll see your **“Edit Company”** page again – the exact same page you can get to from the **“Company Snapshot”** → **“Edit Company item”** – described on the prior slide.

Using the Community Hub to manage your branch – “Remove”

End Affiliation

Deactivate an affiliation.

Remove Individual or Location

Are you sure you want to remove this individual or location from the roster?
If so, please select a reason for the removal.

Removal Reason *

--None--

--None--
Retired
Other
No longer with the company
Incorrect listing
Deceased

CANCEL

If you click on “**Remove**” you’ll see the “**End Affiliation**” page

- Not sure when/why we’d use this page, as there are other ways to remove a member from your branch roster, and not sure how “location” even applies.
- **Do NOT use this page.**

Using the Community Hub to manage your branch – “Export Branch Roster”

Note: This item was recently added only to Branch menus for all members; it’s not on WA-Washington menus

- As detailed on chart 14, there’s good news and bad news with new **“Export Branch Roster”** item:
 - Good news: All members can now see a branch roster for each branch they belong to
 - Bad news: The branch roster you’ll see is in indeterminate order and will require some excel skills to make it more useful
- **As a Pres/Admin, Finance or Membership officer, do NOT use this option.** In your roles, you can download a branch roster in alphabetical order by last name – to be discussed later.

Using the Community Hub to manage your branch – “Tax Information”

Affiliate Tax Information

View and add affiliate tax information to request AAUW to submit taxes on the affiliate's behalf.

- If you click on “**Tax Information**” you’ll see your “**Affiliate Tax Information**” page
- If your branch files its own Form 990 tax return, there isn’t anything you need to do here.

Personal Snapshot

- My Profile
- My Contact Information
- My Username & Password
- My Preferences
- My Education
- My Memberships
- My Affiliations
- My Salaries
- My Committees

Affiliate Tax Information

View and add affiliate tax information to request AAUW to submit taxes on the affiliate's behalf.

Annual Tax Permission Information

All AAUW Affiliates are required to file an annual tax return. AAUW National can file your 990-N if your average annual receipts are \$50,000 or less. To have AAUW National file your 990-N, please check YES. We will file for you and send a receipt of filing to the email address provided.

Requests are accepted beginning the day after personal taxes are due (April 15th). However, we must have your request submitted no later than October 15th. The IRS filing deadline is November 15th (unless this date falls on a weekend or is a holiday, in which case the next business day applies).

If the EIN is incorrect or blank, please email connect@aauw.org with the correct information.

Tax Filing Information

- Click on “Add New Tax Details” if you want AAUW to file your Form 990-N on your branch’s behalf.
- This is the ‘opt in’ process and from the “**Annual Tax Permission Information**” page, you’ll be prompted for the information AAUW needs to prepare your Form 990-N filing.

Using the Community Hub to manage your branch – “Manage Roster”

Company Roster

Manage your company roster of individuals and locations.

Personal Snapshot

- My Profile
- My Contact Information
- My Username & Password
- My Preferences
- My Education
- My Memberships
- My Affiliations
- My Salutes
- My Committees

Viewing And Searching Within: WA9029-Seattle Inc.

ACTIONS +

JOIN INDIVIDUALS

RENEWALS AND DONATIONS

EXPORT BRANCH ROSTER

COMMITTEE MANAGEMENT

Search by first name, last name, company, etc.



If you click on “**Manage Roster**” and you’ll see the “**Company Roster**” page

- Click on “**Actions**” to see two choices:



- If a member joins online, they will automatically be added to the Branch roster and you should receive an e-mail notification; only members joining by check need to be added by the branch
- “**Add Individual**” is used to add a person to your branch roster; this person may or may not be a current AAUW member
- “**Join Individual**” is then used to process membership for a person you’ve already “Added” to your branch roster
- Do NOT use “**Add Location**”; no idea how it relates to AAUW branches.

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Using the Community Hub “Manager Roster” → “Add Individual”

Add Individual

Search for an individual profile to add to your company roster or create a new individual profile.

Personal Snapshot

- My Profile
- My Contact Information
- My Username & Password
- My Preferences
- My Education
- My Memberships
- My Affiliations
- My Balances
- My Committees
- My Renewal Panel Application

Orders & Donations

- My Open Balances
- My Payment Methods

Creating Individual Affiliation For: WA9029-Seattle Inc.

Search For Individuals

Search to see if the individual already has a profile.

Last Name *

First Name

Email

SEARCH

CREATE NEW INDIVIDUAL

If you click on **“Add Individual”**, you’ll see two options:

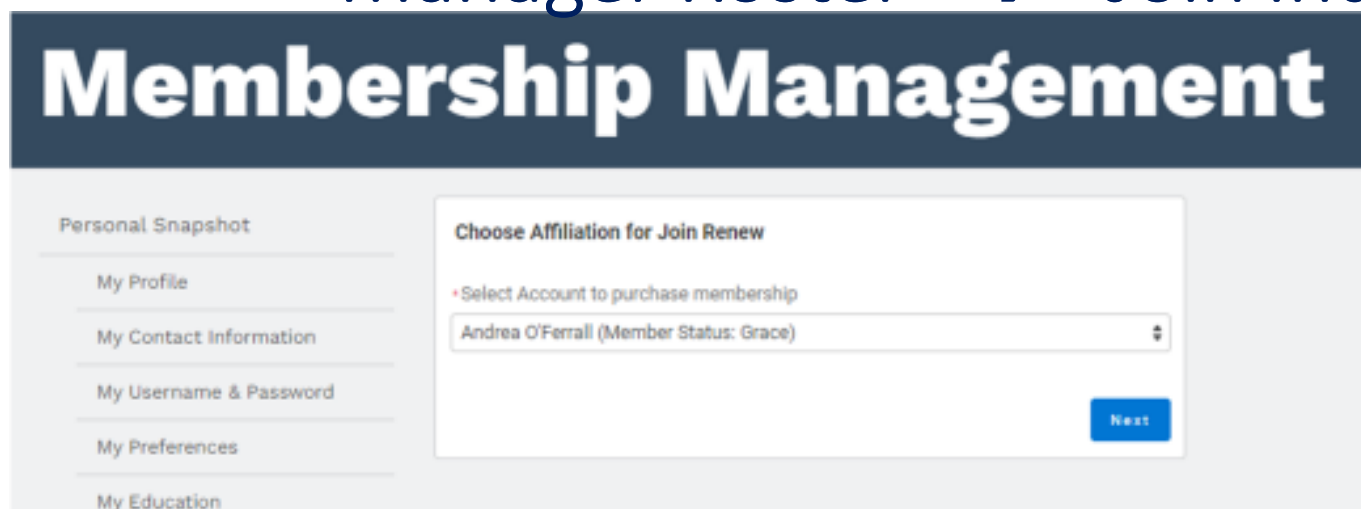
- **“Search for Individuals”** if you know or think they may have some affiliation with AAUW. I always try this option first. It’s a pain to get a duplicate profile deleted, so it’s best to see if the person is already in AAUW’s database (as a member, donor,) I usually leave e-mail blank so that it will find anyone with that name; some may be in the database, but with an old address.
- If the Search brings up the person you’re looking for, click on **“Add Individual”** to the right of their name.
- If the Search does not bring up the person you’re looking for, click **“Create New Individual”** and follow the prompts to enter their information.

Using the Community Hub “Manager Roster” → “Add Individual”

The image shows a two-step process in a web application. On the left is the 'Search For Individuals' form, which has fields for 'Last Name' (containing 'Sander'), 'First Name' (containing 'Barbara'), and 'Email'. A blue 'SEARCH' button is at the bottom right. A large yellow arrow points from this form to the right, where the 'Search Results' page is displayed. The results page shows a list of five entries for 'Barbara Sander'. Each entry includes a name, a phone number, and an email address, followed by a blue 'ADD INDIVIDUAL' button. A 'CREATE NEW INDIVIDUAL' button is at the bottom of the results list. A blue callout box in the top right of the results page contains text: 'You cannot add this person with the company because it is either already added with the company or the email/phone number does not match the company's email domain.'

- **“Search”** will not let you add a person who’s already on your roster
- Sometimes you will see multiple profiles for the same name and you can’t tell which one, if any, might be correct. You can’t look at a person’s contact information from Search, but if you **“Add Individual”** to your roster, you can then view their details and **“Remove”** the ‘wrong’ individual(s), using **“incorrect listing”** as the reason for removal.

Using the Community Hub “Manager Roster” → “Join Individuals”



For more help on
“How to Add/Join Members”
check out the online instructions
referenced on chart 4

*Note that new members have a
rolling 12-month membership year,
so will not renew by 6/30 like
existing members; also true for
existing members who renew after
9/30 end of ‘grace period’ – see FAQ*

If you click on **“Join Individuals”**, you’ll see your **“Membership Management”** page

- Using the **“Choose Affiliation for Join Renew”**, click on the arrows in the box and locate the **“Account”** (aka person) you’ve just added to your branch roster. [Note that in this pick-list, individuals who are not current / paid-up members are listed in alphabetical order by first name.... You do not use this option to renew a member] Click **“Next”**.
- Verify or update the contact information listed for the individual. Click **“Next”**.
- Verify or update the education information listed. Click **“Next”**.
- You will then be prompted to select their membership type (National or Lifetime), and to add Branch and State memberships (just like you selected for your own renewal – refer to chart 17)

Using the Community Hub “Manager Roster” → “Join Individuals”

After you’ve completed entering all of the applicable information, you’ll be redirected to process the payment

- You’ll see a summary of the person’s dues
- If a member is joining under the **“Shape the Future”** campaign you will need to enter **ShapeTheFuture2023** in the **“Code”** field, then hit **“Apply”**
- Either way, you’ll then be prompted to add the payment information, much like you’ve done to renew your own or other’s memberships
- Note that if a new member joins online, they can still use **“Shape the Future”**; they’ll just need to enter the above Coupon Code before they process their own payment.

The Shape the Future membership campaign is a tool that branches can use to recruit and retain members. With this campaign, branches can offer 50% off national dues when prospective members join AAUW at an event or meeting. Branches also earn one free national membership for every two new members they recruit, with a maximum of three free memberships annually.

Membership for	
7/1/2022 - 6/30/2023	
EDIT	
REMOVE	
Total Price	
National Membership Dues	\$67.00
WA-Washington State Dues	\$10.00
WA9029-Seattle Inc. Branch Dues	\$13.00

Coupon Code	
Limit one per order	
Code	
APPLY	

Using the Community Hub “Manager Roster” → “Renewals & Donations”

Branch Management

WA9029-Seattle Inc.
Renewals And Donations

Instructions:
Use this entry screen to process existing members of your branch and/or their donations. Renew/Dual/Transfer member type transactions are processed outside of this form.

To renew each member:

1. Click the pencil icon in the Renew column and click the checkbox to renew a member.
2. Click the pencil icon in the donation amount column to open and enter a general donation to AAUW Greatest Needs.
3. Once all selections are made, click **Renewals and Donations Worksheet** to download a copy of your selection for your review.
4. Once transactions have been reviewed for accuracy, click **Generate Orders** and **YES** to confirm or **NO** to return to this entry screen.
5. Orders should be generated momentarily and be available on the **My Orders and Donations** page to be paid.
6. Click the **Proceed to Checkout** button.
7. It will take orders a few moments to generate. If you do not find the expected orders, please refresh the page.

Tips for larger branches:
Use the **Numbers of records on page** dropdown to view more listings on page. For **SEARCH**, once done, click **CLEAR SEARCH** to return to the full list.
The National rate taxable amount of \$1 and State Dues will be reflected once orders are generated.

Name: Member Type:

Order Type: --None--

End Date From: End Date To:

For more help on
“How to Handle Renewals and Donations”
check out the online instructions
referenced on chart 4

*Note: There is no longer an option for
branches to send a completed form and
single check for all members' national and
state dues to AAUW; if the branch cannot
use the Hub, they will have to contact AAUW
to make special arrangements*

If you click on **“Renewals and Donations”**, you'll see your **“Branch Management”** page –
this is a wide page in small font, and you'll have to scroll down to see the whole thing

Using the Community Hub “Manager Roster” → “Renewals & Donations”

When you scroll down your **“Branch Management”** page, you’ll see

- A **“Search”** function (which I haven’t used)
- A list of everyone on your branch roster, in alphabetical order by last name; the list might be several pages, which you can navigate using **“Previous”** and **“Next”** buttons

This National non-taxable amount of \$2 and State dues will be reflected once orders are generated.

Number of records on page:

Page 1 of 9 Number of records: 111

	Name	Membership Type	Status	Start Date	End Date	Renew	Donation Amount	Individual Total
1	Adams, Lela	National	Current	Jun 30, 2022	Jun 30, 2023		\$	\$
2	Allen, Ruth	National	Current	Jun 30, 2022	Jun 30, 2023		\$	\$
3	Anderson, Cindy	National	Current	Jun 30, 2022	Jun 30, 2023		\$	\$
4	Armstrong, Gay	National	Current	Jun 30, 2022	Jun 30, 2023		\$	\$
5	Armstrong, June	National	Current	Jun 30, 2022	Jun 30, 2023		\$	\$
6	Baker, Suzanne	National	Stale	Jun 30, 2021	Jun 30, 2022		\$	\$
7	Bergan, Penny G.	National	Stale	Jun 30, 2021	Jun 30, 2022		\$	\$
8	Bjork, Leanne	National	Stale	Jun 30, 2021	Jun 30, 2022		\$	\$
9	Bradburn, Pamela	National	Current	Jun 30, 2022	Jun 30, 2023		\$	\$
10	Byington, Bobbi	National	Current	Jun 30, 2022	Jun 30, 2023		\$	\$
11	Chandler, Peggy B.	National	Stale	Jun 30, 2021	Jun 30, 2022		\$	\$

You may renew and/or process a donation for one member or for many members in a single session. Follow the instructions to the right for each member

<input type="checkbox"/> Renew	Donation Amount	Individual Total
<input type="checkbox"/> Renew		
<input checked="" type="checkbox"/>	\$27.00	\$27.00

The National non-taxable amount of \$3 and State Dues will be reflected once orders are generated.

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To renew a member:

- Find the member in the list and click on the pencil icon at the right side of the **“Renew”** column in their row
- When the **“Renew”** box comes up, click on the box so that a checkmark appears in it AND then click **“Tab”** to save the input; you’ll then see a checkmark and yellow shading on their row in the renewal column

To process a donation:

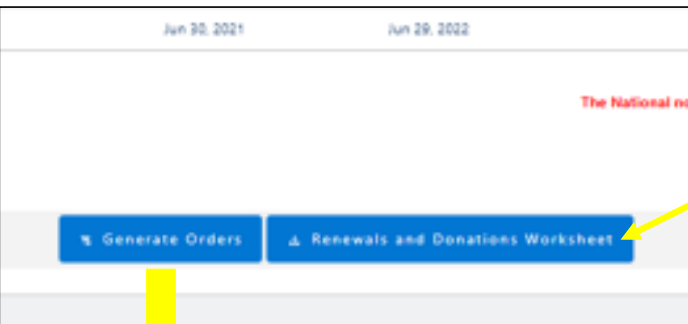
- Find the member in the list and click on the pencil icon at the right side of the **“Donate Amount”** column in their row
- When the **“Amount”** box comes up, click on the box and enter the donation amount AND then click **“Tab”** to save the input; you’ll then see the donation amount and yellow shading on their row in the donation column
- At the bottom of the screen, you’ll see a running total for **“renewals”** and **“donations”**

✓					\$64.00
✓		\$27.00			\$27.00

The National non-taxable amount of \$3 and State Dues will be reflected once orders are renewed.

Renewal Count: 2
 Renewal Amount: \$64.00
 Donation Count: 1
 Donation Amount: \$27.00

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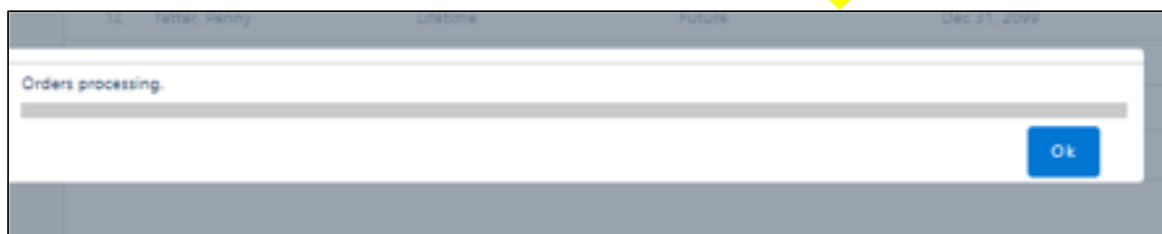
When you're finished making your entries for this session

- Click on **"Renewals and Donations Worksheet"** to review / save a record of your entries (example later), then
- Click on **"Generate Orders"** at the bottom of the page



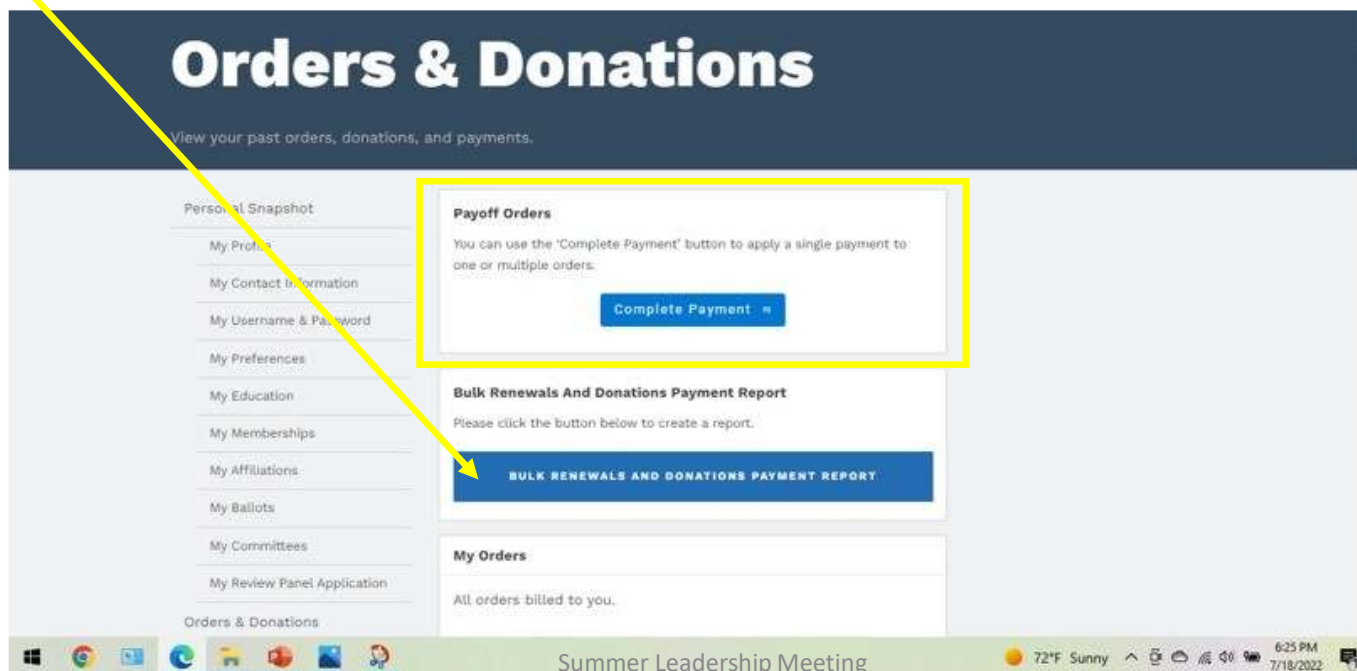
When the **"Order Confirmation"** page comes up

- Click on **"Yes"** to confirm your order
- Click **"OK"** to acknowledge that you know your orders are processing (which takes some time)
- After a couple of minutes (to make sure all of your orders are processed), click on **"Proceed to Order Selection Wizard and Checkout"**



After you've selected **"Proceed to Order Selection Wizard and Checkout"**, you will be redirected to your **"Orders & Donations"** page

- Click on **"Bulk Renewals and Donations Payment Report"** to review / save a record of payments to be made (example later), then
- Click on **"Complete Payment"** in the **"Payoff Orders"** section; you'll then see a list of your orders so that you can select those you wish to pay – one or many
- Note that you can pay for orders at a later date than you enter them, however AAUW will delete unpaid/open orders after 4 days, so don't wait too long or you'll have to start over



Make Payment
Select the order(s) you would like to apply payment to.

Unpaid Orders (2)

Add (2) to Selection

List of orders with a balance.

	Order Id	Account Name	Transaction Date	Balance
1	Order 0033092	Barbara Sando	Jul 18, 2022	\$77.00
2	Order 0033093	Barbara Sando	Jul 18, 2022	\$37.00

Cancel Proceed to Payment

- On the **“Make Payment”** screen (to the left), click the box for each order you wish to pay, then click **“Add to Selection”**, and you’ll see a display like the one below
- If the orders are correctly listed, click on **“Proceed to Payment”** where you will be prompted for your credit card information, similarly to when you renew your own membership

Make Payment
Select the order(s) you would like to apply payment to.

Selected Orders (2)

List of orders you are paying for.

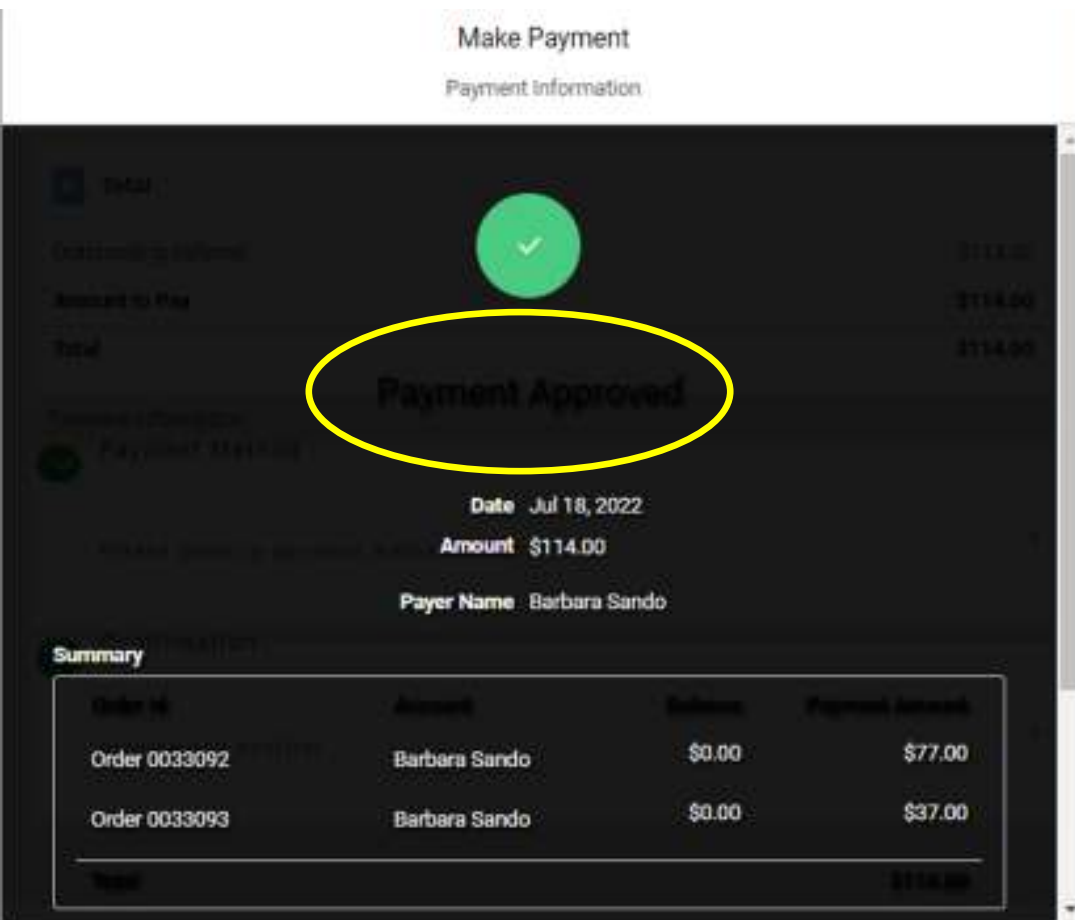
	Order Id	Account Name	Balance	Amount to Pay
1	<input type="checkbox"/> Order 0033092	Barbara Sando	\$77.00	\$77.00
2	<input type="checkbox"/> Order 0033093	Barbara Sando	\$37.00	\$37.00

Outstanding Balance \$114.00

Amount to Pay \$114.00

Total \$114.00

Cancel **Proceed to Payment**

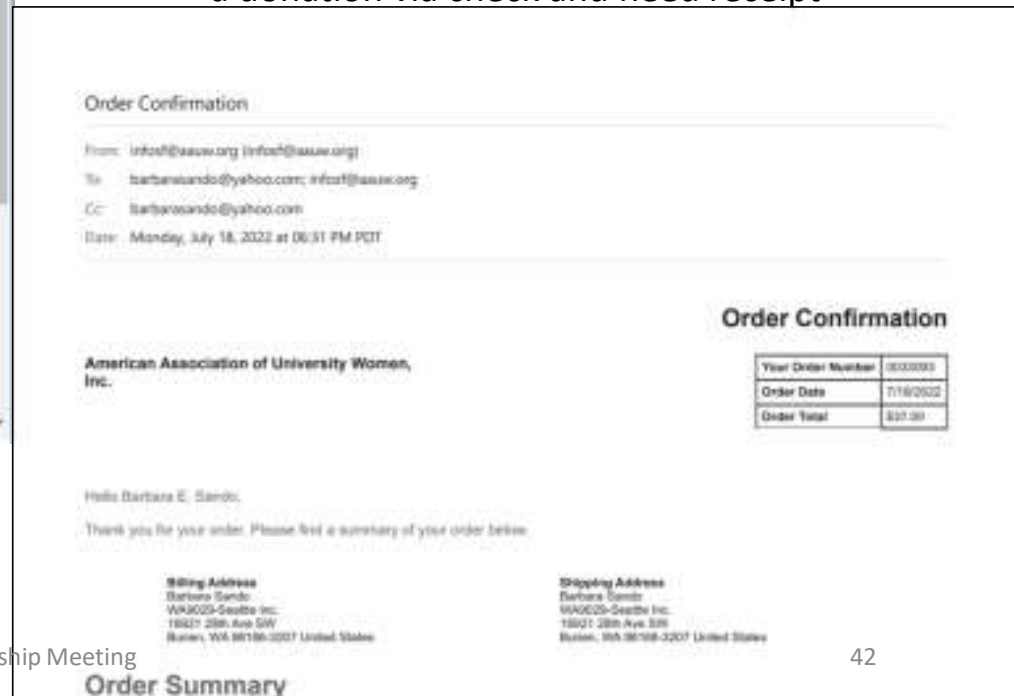


“Payment Approved” notation (in yellow oval)
is in black font on a black background,
so difficult to see

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- Once you’ve entered your credit card information, you’ll see a **“Payment Approved”** screen.
- Note that even if you pay for multiple orders in one credit card transaction, you will still receive a separate e-mail confirmation for each order included – like the one below; Note:
 - Officer contact info will be shown, even though branch debit/credit card was used
 - E-mail must be forwarded to those who made a donation via check and need receipt



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Example of Worksheet & Report data & Savings for your Records (separately or together)

AutoSave On Renewals and Donations Worksheet • Last Modified: July 12

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number

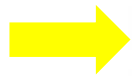
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	A	B	C	D	E	F	G	H	I	J	K
1	AAUWid	Name	MembershipType	Status	StartDate	EndDate	Renew	DonationAmount	IndividualTotal	7/12/2022	
2	4111281	Bentson, Barbara	National	Grace	7/1/2021	6/30/2022	TRUE		\$77.00		
3	4111280	Burnett, Clara	National	Grace	7/1/2021	6/30/2022	TRUE		\$77.00		
4	5354467	Lunceford, Kate	National	Grace	7/1/2021	6/30/2022	TRUE		\$77.00		
5	3807264	Pettersson, Karine	National	Grace	7/1/2021	6/30/2022	TRUE		\$77.00		
6											
7	AAUW id	Name	Membership Type	Status	Member Thru Date	Renew	Donatic	Individual Total	Order		
8	4111280	Burnett, Clara	National	Grace	6/30/2023	TRUE			77 Order 0031053		
9	4111281	Bentson, Barbara	National	Grace	6/30/2023	TRUE			77 Order 0031054		
10	5354467	Lunceford, Kate	National	Grace	6/30/2023	TRUE			77 Order 0031055		
11	3807264	Pettersson, Karine	National	Grace	6/30/2023	TRUE			77 Order 0031056		
12											
13											

- “Renewals and Donations Worksheet” data:



- “Bulk Renewals and Donations Payment Report” data:



Using the Community Hub

“Manager Roster” → “Renewals & Donations”

There are some limitations in the system that could impact renewing others & getting accurate status:

- If you have a dual member whose primary branch is in another State, and who has sent you a check for Branch + WA State dues, the Hub has no way to process their renewal
 - You must call AAUW to report that the member has renewed (or joined) – AND –
 - You must send a check directly to the AAUW-WA VP Finance for that person’s State Dues
- If you are processing a member (new or renewing) who has received a free **“Shape the Future”** national membership, and who has sent you a check for Branch and State dues, the Hub can’t process that either
 - You must e-mail your completed “SHAPE THE FUTURE CAMPAIGN FREE MEMBERSHIP REDEMPTION FORM” to connect@AAUW.org – AND –
 - You must send a check directly to the AAUW-WA VP Finance for that person’s State Dues
- If a primary or dual branch member renews only their own National membership online, or if a dual branch member renews only their primary branch, but not your branch, their “Exp Date” will be updated on your Branch Roster; you won’t know until you get the by-name report if a person has actually paid your branch dues

[illegible][illegible]

- State dues** are disbursed for members who joined or renewed their own memberships online and for members who joined or renewed by sending a check to their Branch, then the Branch processed online
- Not included: State dues for any member who joined/renewed by sending a check to their Branch, then the Branch sent State dues directly to the State (eg, “Shape the Future” redemptions)
- Branch dues** are disbursed for members who joined or renewed their own memberships online and for members who joined by sending a check to their Branch, then the Branch processed online using “Join Individual”

Using the Community Hub

“Manager Roster” → “Export Branch Roster”

To download a branch roster in a useful format, click on **“Export Branch Roster”** and you’ll see a message from your system something like this:



- I usually click on **“Open”** so that I can save the file as an Excel Worksheet; If you click **“Save as”**, your system may not let you vary from the .csv format
- Either way, you’ll then see an excel file with the header shown below, followed by your branch roster in alphabetical order by last name

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Member_ID	Member_T	First_Name	Last_Name	Email	Account Pr.	ADDR1	City	State	ZIP	Join_Date	Exp_Date	Branch	Primary Branch	
2	1234567	National	Jane	Doe	jdoe@gma	(206) 555-	123 Main S	Seattle	WA	98111	7/1/1990	6/30/2023	WA9029-S	Primary	
3	4567890	Lifetime	Betty	Frank	frankb@ya	(425) 777-	456 Branch	Seattle	WA	98012	1/20/2020	6/30/2023	WA9029-	Seattle Inc.	

If “Primary Branch” cell is blank, member is ‘dual’ for your branch

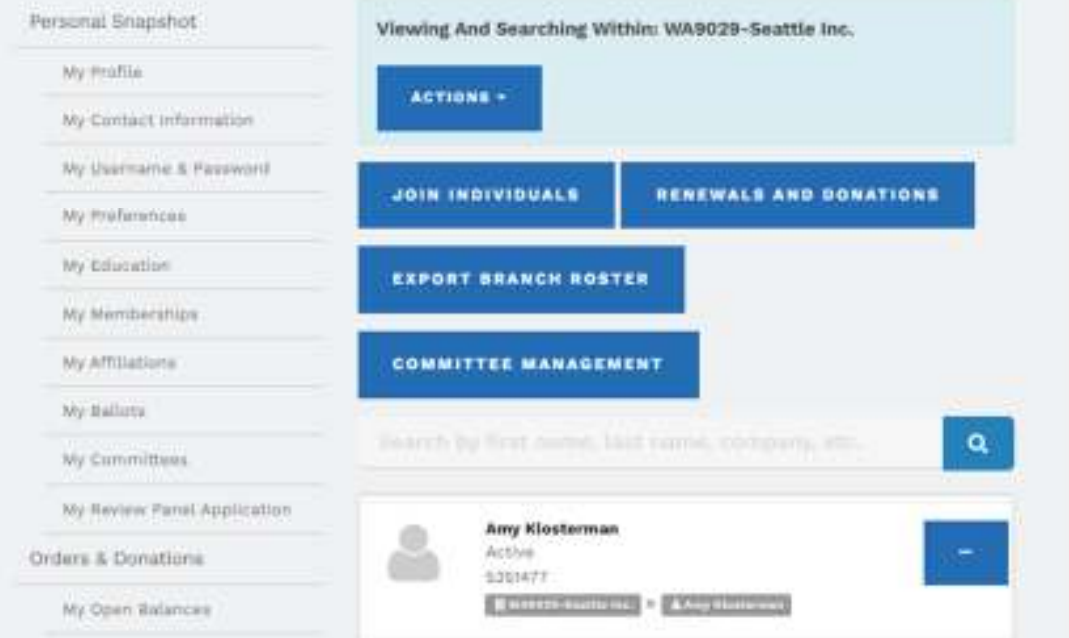
- You may see duplicate or incorrect entries on your roster, or discover new members
 - Duplicate entries for a single person can only be removed by AAUW
 - Incorrect entries can be edited or removed by you; go back to your **“Company Roster”** page

“Exp_Date” has many options



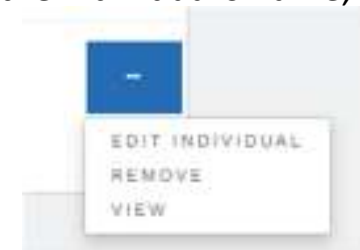
Company Roster

Manage your company roster of individuals and locations.



There are two ways to edit contact information or remove an incorrect entry from your Branch Roster

- Type in the individual's name in the Search box -- or --
- Scroll through the list of individuals you'll see below the Search box, listed in alphabetical order by first name, to find the individual whose entry needs to be changed
- Either way, you'll then need to click on the ellipsis to the right of the individual's name, then you will see this menu:



- Edit allows you to update contact info
- Remove allows you to remove them from your roster and gives you a pick-list of reasons for the action (eg, incorrect listing, deceased)
- View allows you to see contact info that you can edit, as well as some membership info that you can't edit

Using the Community Hub “Manager Roster” → “Committee Management”

Committee Management

Personal Snapshot

My Profile

My Contact Information

My Username & Password

My Preferences

My Education

My Memberships

My Affiliations

My Ballots

My Committees

My Review Panel Application

Orders & Donations

Use **EDIT** for leaders continuing in the same role. Extend the End Date to (06/30/XXXX) of next year or term year end.
Use **ADD NEW** for new leaders/leadership roles. Enter Start Date (7/1/XXXX) of this year and End Date to (6/30/XXXX) of next year or term year end.

Need help, email connect@aauw.org

Committee Management

Account	Committee Position	Start Date	End Date	
Tonna Kubnet	Communications	7/1/2021	6/30/2023	EDIT
Nella Kwan	Communications	7/1/2021	6/30/2023	EDIT
Gay Armisten	President/Administrator	7/1/2021	6/30/2023	EDIT

If you click on **“Committee Management”**, you’ll see your **“Committee Management”** page (aka list of officers)

Instructions for editing and adding new officers is at the top of the page; note you do not need to remove officers whose terms are naturally coming to an end; they will automatically be removed by AAUW

Click **“Edit”** to the right of an officer’s name to update their information.

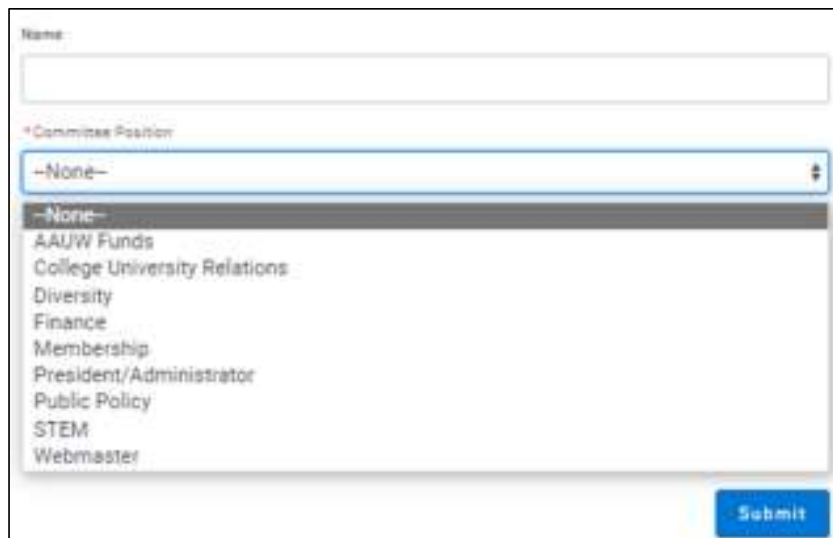
Using the Community Hub “Manager Roster” → “Committee Management”



A navigation bar with buttons labeled "First", "Previous", "1", "2", "Next", and "Last". The button "2" is highlighted in blue. Below the navigation bar is a blue button labeled "ADD NEW".

Click **“Add New”** at the bottom of the list of Committee members list to add a new officer

Note that AAUW has eliminated several positions that were in the MSD. Angela Cooper explained that the Committee Positions now include only those officers with whom AAUW (national) communicates directly – eg, “Secretary” and “Other” are no longer listed



A form with a "Name:" label and a text input field. Below it is a "Committee Position" label and a dropdown menu. The dropdown menu is open, showing a list of options: "--None--", "AAUW Funds", "College University Relations", "Diversity", "Finance", "Membership", "President/Administrator", "Public Policy", "STEM", and "Webmaster". A blue "Submit" button is at the bottom right.

Also, if a Pres/Admin, Finance or Membership officer does not see the expanded menu under **“Affiliations”**, it’s probably because they are not coded correctly in the **“Committee Management”** section.

- In your **“Personal Snapshot”**, under **“My Committees”**, you can check to see if your position is listed correctly; if not, Pres/Admin, Finance, Membership or, AAUW can correct

If you need help using the Community Hub:

- Refer to FAQ, tutorials and instructions at aauw.org (see chart 4 for links)
- Reach out to your branch's 'expert' in the Community Hub
- Reach out to me (Barbara Sando) at finance@aauw-seattle.org; I'll help you if I can, or refer you to AAUW if I can't
- Reach out to the AAUW-WA Pres/Admin, Finance or Membership officers for assistance
- Check out the presentations that can be downloaded from AAUW-CA: <https://www.aauw-ca.org/aauw-community-hub-webinars/>
- Contact AAUW for help via connect@aauw.org or via phone

Good luck!

