



Navigating the Community Hub: A Tutorial For Presidents/Administrators, Membership Officers & Finance Officers

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AAUW Seattle Branch Finance Officer

AAUW Highline Branch Member

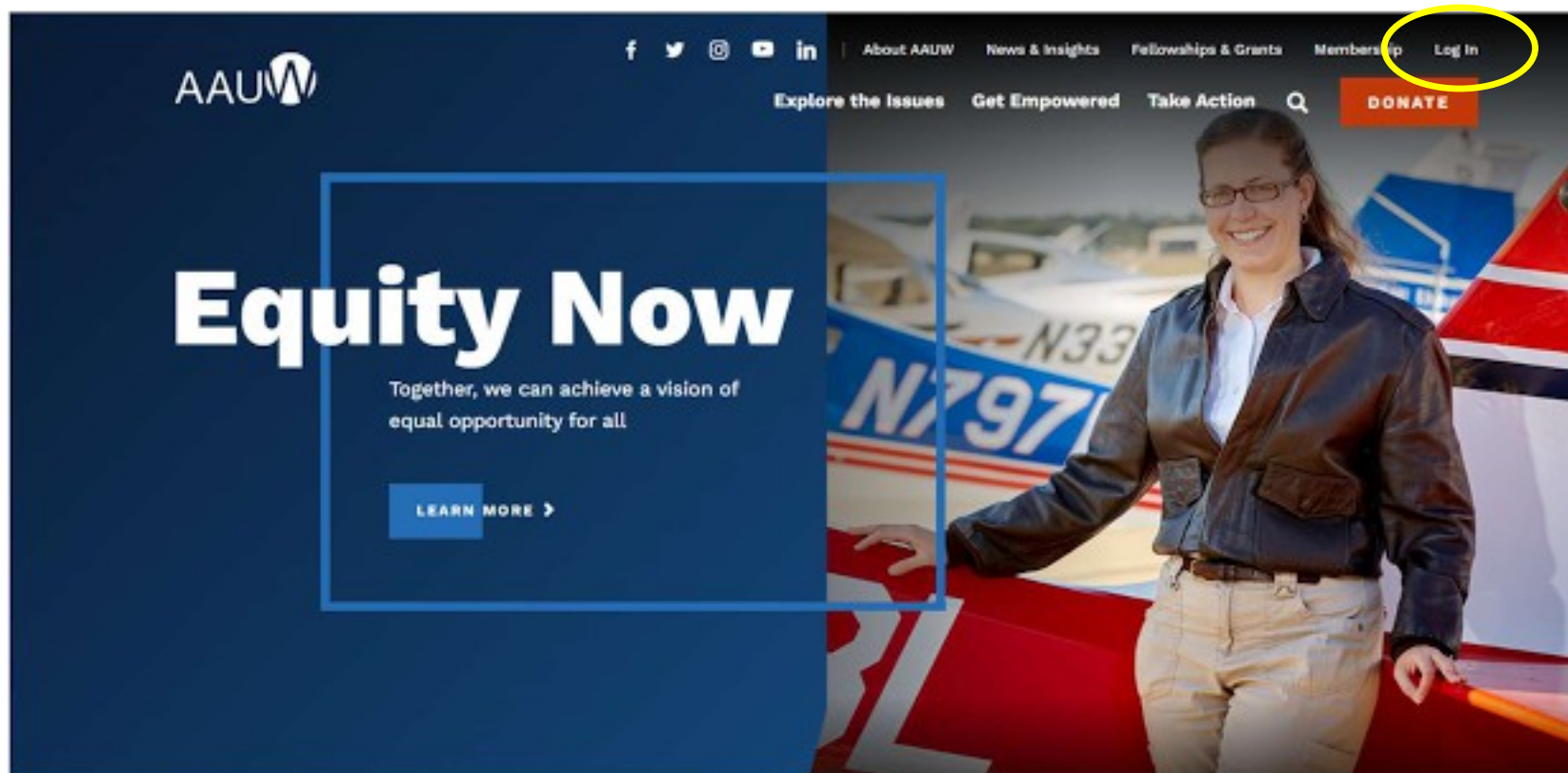
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Situation & Purpose of Tutorial

- Like the Member Services Database (MSD), the Community Hub is a role-based access system; there are only two levels of access in the Hub:
 - Branch / State Presidents/Administrators, Membership Officers and Finance Officers have identical access to manage and transact the Affiliate's business in the Hub
 - Any one of these officers can back up the other two
 - All members have access to their own membership information – period
- Otherwise, the Community Hub operates almost completely differently than the MSD, uses different terminology, and is not very intuitive – It's been a rocky road for these past 18 months
- This tutorial is intended to guide Officers through execution of the various actions required of them in the Hub, with the goal of avoiding potholes along the way



Getting Started: Log In to the Community Hub
at <https://www.aauw.org/>



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Getting Started

“Personal Snapshot”

Personal Snapshot

View your latest notifications and snapshots of your profile.

Personal Snapshot

- My Profile
- My Contact Information
- My Preferences
- My Affiliations
- My Education
- My Memberships
- My Ballots
- My Committees
- My Review Panel Application
- My Awards
- Orders & Donations
- My Open Balances
- My Payment Methods

Barbara E. Sando

Personal
Summary of your personal contact information.

AAUW Id

Full Name

Account Phone

Mobile

Email

Mailing Street

Mailing City

Mailing State/Province WA

Personal info blanked out here

- On successful Log In, the page that will come up is your **“Personal Snapshot”** [Note this is the same for all members – everyone gets started the same way]
- You’ll have to scroll down to see the entire snapshot, which is in two parts:
 - **“Personal”** shows your contact information – top of page
 - **“Membership”** shows your current membership status – bottom of page
- You’ll also see various menu bars down the left-hand side of the page

Familiarizing Yourself - Personal Sections of “Personal Snapshot”

The screenshot shows the 'Personal Snapshot' page for Barbara E. Sando. The left sidebar contains a menu with items: My Profile, My Contact Information, My Preferences, My Affiliations, My Education, My Memberships, My Ballots, My Committees, My Review Panel Application, and My Awards. The main content area is titled 'Personal' and includes a summary of personal contact information with fields for AAUW ID, Full Name, Account Phone, Mobile, Email, and Mailing Street. To the right, there is a section for 'Orders & Donations' with links to My Open Balances, My Payment Methods, My Scheduled Payments, and Company Scheduled Payments. Below this, there is a link to My Registrations, which further links to My Group Registrations. At the bottom, there is a link to My Username & Password. A blue arrow points from the 'My Registrations' link in the sidebar to a callout box that says 'Menu continues down page; but shown to right here'. Another blue arrow points from this callout box to the 'My Registrations' link in the main content area.

Personal Snapshot
View your latest notifications and snapshots of your profile.

Personal Snapshot

My Profile
My Contact Information
My Preferences
My Affiliations
My Education
My Memberships
My Ballots
My Committees
My Review Panel Application
My Awards

Barbara E. Sando

Personal
Summary of your personal contact information.

AAUW ID
Full Name
Account Phone
Mobile
Email
Mailing Street

Orders & Donations

My Open Balances
My Payment Methods
My Scheduled Payments
Company Scheduled Payments

My Registrations
My Group Registrations

Branches: College & University
Directory Contacts

My Username & Password

Menu continues down page;
but shown to right here

- The highlighted items in the **“Personal Snapshot”** are all about you as an AAUW member
- This is where you can view and (usually) edit your own personal information
- To familiarize yourself with the Community Hub, it’s a good idea to click through each item on your **“Personal Snapshot”** to see what’s there – validate or update, as required
- One AAUW member can never see another AAUW member’s **“Personal Snapshot”**, however as a Pres/Admin, Membership or Finance officer, there are ways to see / update some of a member’s information

Familiarizing Yourself - Officer & Hybrid Sections of “Personal Snapshot”

Personal Snapshot

View your latest notifications and snapshots of your profile.

Personal Snapshot

My Profile

My Contact Information

My Preferences

My Affiliations

My Education

My Memberships

My Ballots

My Committees

My Review Panel Application

My Awards

Barbara E. Sando

Personal

Summary of your personal contact information.

AAUW ID

Full Name

Account Phone

Mobile

Email

Mailing Street

Orders & Donations

My Open Balances

My Payment Methods

My Scheduled Payments

Company Scheduled Payments

My Registrations

My Group Registrations

Branches: College & University Directory Contacts

My Username & Password

Menu continues down page;
but shown to right here

- The highlighted items in the **“Personal Snapshot”** pertain to you as an AAUW member *AND* to your duties as a Pres/Admin, Membership or Finance officer
 - **“My Affiliations”** is where you’ll do most of your work – many details following...
 - **“Orders & Donations”** is where you can include your own personal payment methods *AND* where you’ll input your branch’s payment methods if you’re processing members joining, renewing, or making donations via check
 - **“Orders”** = **“Dues Payments”** for AAUW; Hub lacks tailoring for AAUW terminology in many places
 - **“Branches: College & University Directory Contacts”** is a resource which may be useful as a member or as an officer; unfortunately, only Pres/Admin, Membership & Finance officers can see the entire list; others can search by ZIP code

The Gateway to Managing & Transacting for your Affiliate

“My Affiliations”

Personal Snapshot
View your latest notifications and snapshots of your profile.

Personal Snapshot

- My Profile
- My Contact Information
- My Preferences
- My Affiliations**
- My Education
- My Memberships
- My Ballets
- My Committees
- My Review Panel Application
- My Awards

Orders & Donations

- My Open Balances
- My Payment Methods

Barbara E. Sando

Personal
Summary of your personal contact information.

AAUW

Full Name

Account Phone

Mobile

Email

Mailing Street

Mailing City

Mailing State/Province WA



Personal info
blanked out here

Current Affiliations

Primary Affiliation

WA9029-Seattle Inc.

<https://aauw-seattle.org/>
7/1/2021
6/30/2023

Other Affiliations

WA-Washington

<https://aauw-wa.aauw.net/>
5/1/2022
6/30/2023

WA9039-Highline

<https://highline-wa.aauw.net/>
7/1/2021
6/30/2023

CAUTION Do NOT use “Add Affiliation” > (that’s not how to add a membership)

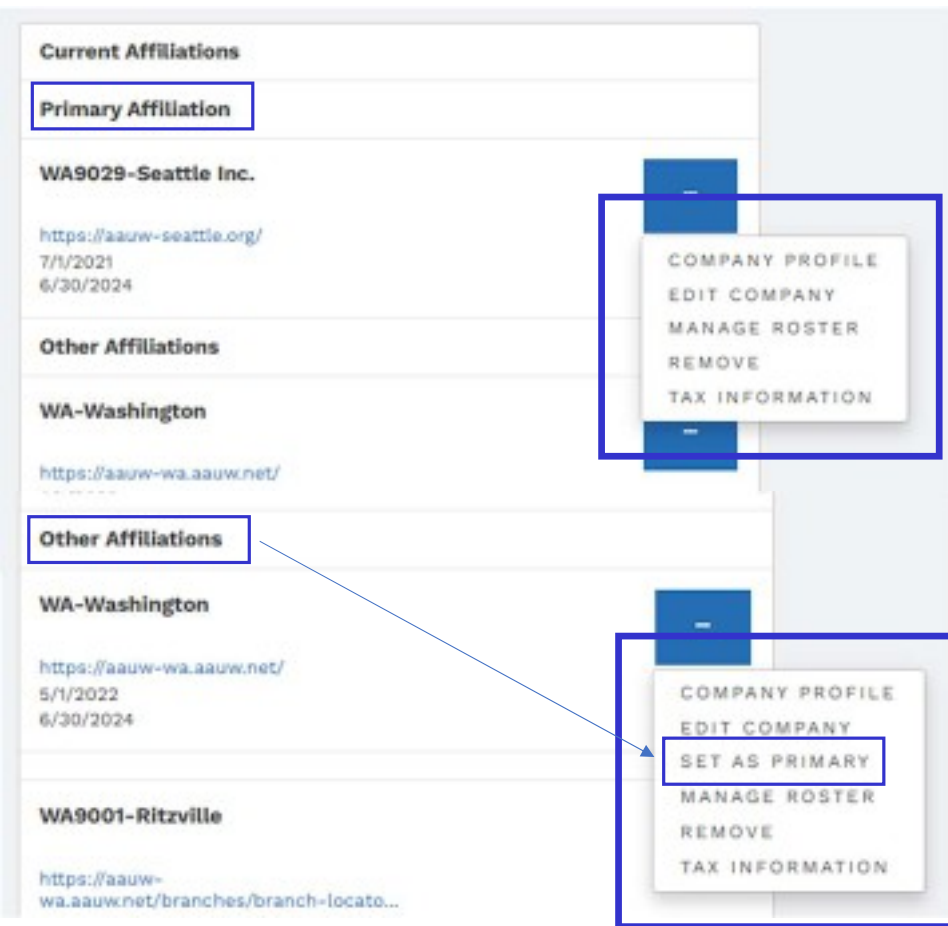
ADD AFFILIATION

1. On your “**Personal Snapshot**” menu, click on “**My Affiliations**”
2. You’ll then see all of your “**Current Affiliations**”

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Familiarizing Yourself: Primary & Other

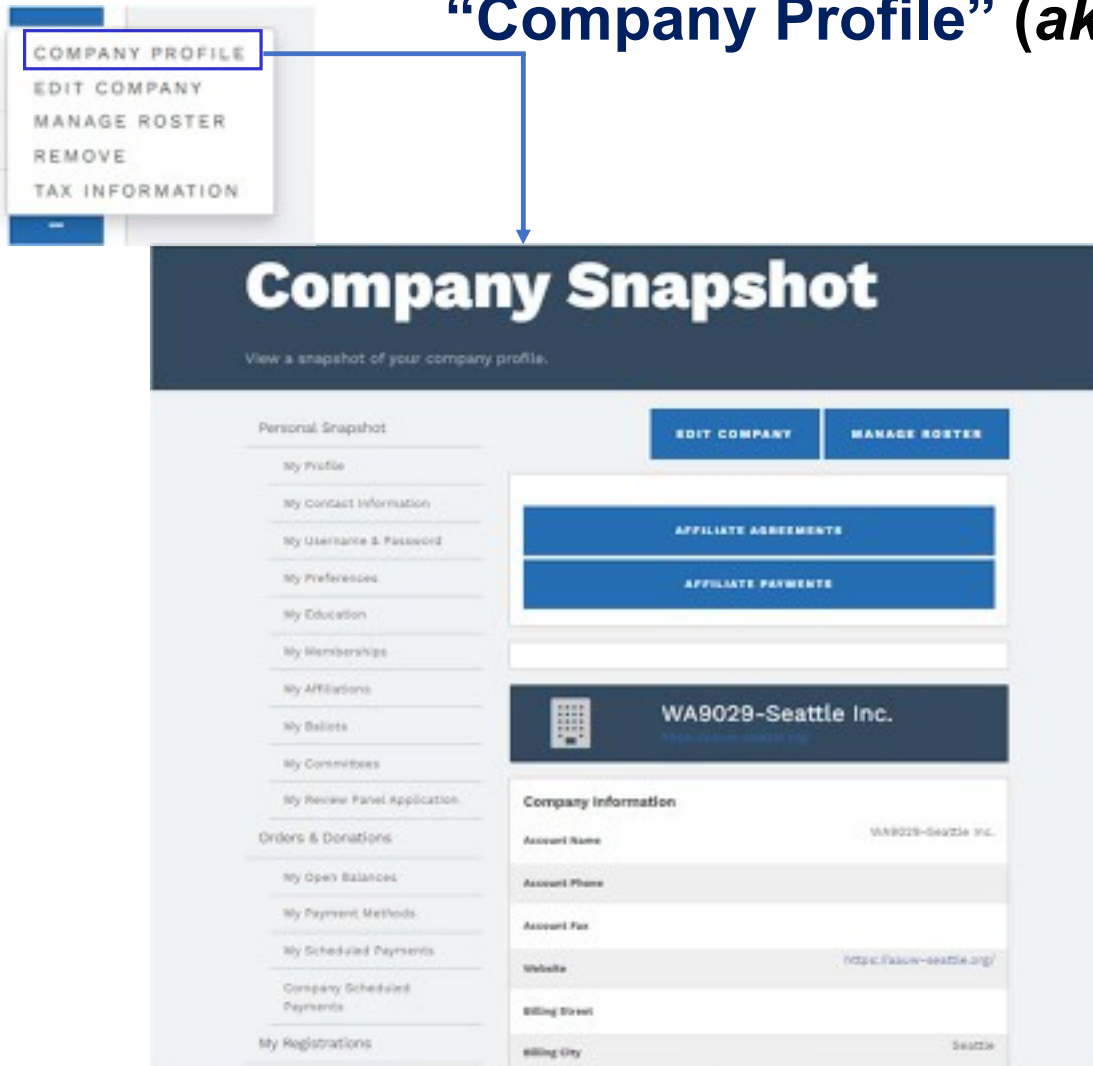
“My Affiliations”



- On your “**Current Affiliations**” page, click on the ellipsis (dots) in the blue box for the affiliate(s) for which you’re a President/Admin, Finance or Membership officer
- You should then see the menus displayed in the blue boxes
 - If you see a shorter menu, you’re not coded correctly in the affiliate’s “Committee Management” list – this can be fixed
 - The only difference between the menus for officers will be that “Set as Primary” shows only on your “Other Affiliations”
- **Note** that State Pres/Admin, Finance and Membership officers appear on ALL Washington State branch rosters
 - This enables officers to help branches with the Hub
 - Branches do not need to code State officers in their “Committee Management” and should not remove officers from their Branch Rosters

Validation / Updating your Affiliate Information

“Company Profile” (aka *Affiliate Profile*)

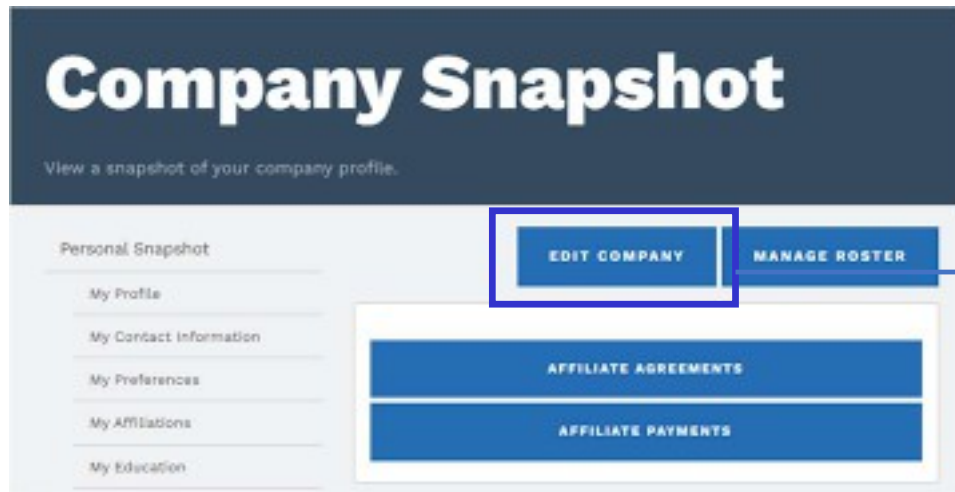


Click on **“Company Profile”** to see your **“Company Snapshot”** page

- 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 an indirect way to get to that menu)
 - Click on **“Affiliate Agreements”** to see Affiliate Agreements and Bylaws. You can upload them here, too
 - Click on **“Affiliate Payments”** to see a list of direct deposits AAUW has made to your branch accounts [This format is not as useful as the monthly Disbursement Report of all dues payments made in Washington State, sent via e-mail]
- **“Company” = “Affiliate” for AAUW; one more place the Hub lacks tailoring for AAUW**

Validation / Updating your Affiliate Information

“Company Profile” > “Edit Company”



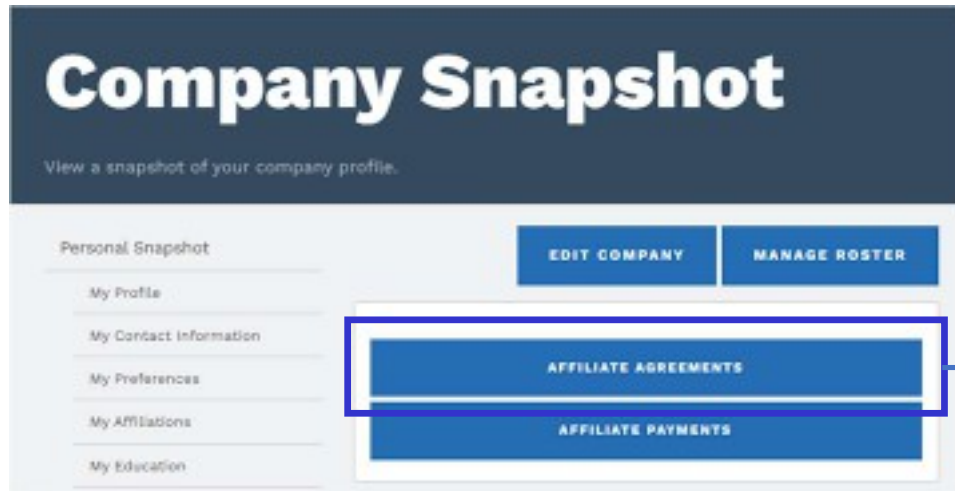
Click on “**Edit Company**” to see / update Affiliate Information (addresses, website link, etc.)

- **There is nothing here that you also can't do by selecting “Edit Company” directly from the main menu**
- *Redundancy can be good in critical systems, but can also add to confusion*

The screenshot shows the 'Edit Company' form for 'WA9029-Seattle Inc.' with the URL <https://aaauw-seattle.org/>. The form is divided into two sections: 'Company Information' and 'Shipping Address'. The 'Company Information' section has fields for 'Account Phone', 'Account Fax', and 'Website' (which is pre-filled with <https://aaauw-seattle.org/>). The 'Shipping Address' section has fields for 'Shipping Country Code' (pre-filled with 'United States'), 'Shipping Street', and 'Shipping City' (pre-filled with 'Seattle').

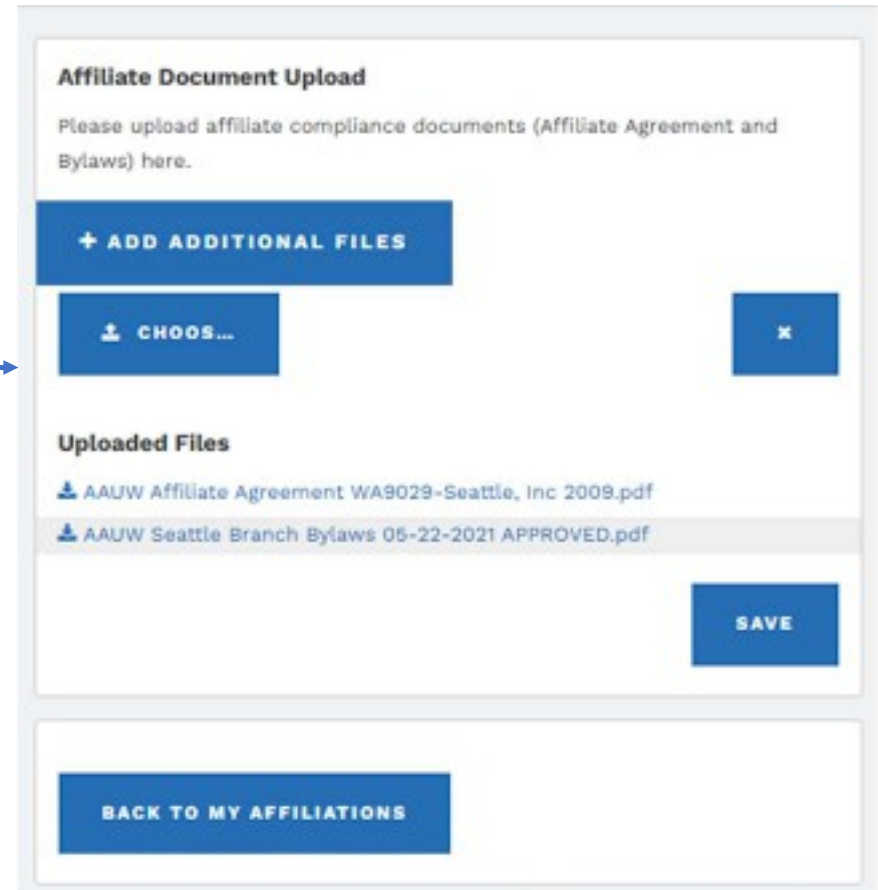
Uploading Affiliate Agreements & Bylaws

“Company Profile” > “Affiliate Agreements”



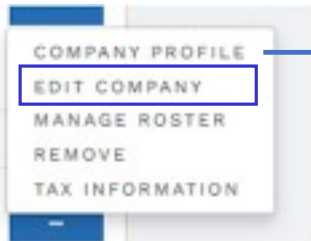
Click on **“Affiliate Agreements”** to see / update Affiliate Agreements and Bylaws

- Those that were posted in the MSD ‘fell out’ during the Hub Transition
- Use “Add additional files” to re-upload / post most current documents. (Old versions can not be deleted from this menu)



Validation / Updating your Affiliate Information

“Edit Company”



Click on **“Edit Company”** to see your **“Edit Company”** page

- This is the more direct way to update information and upload Affiliate documents for your affiliate – slightly different format / same capabilities

Edit Company
View and update your company information.

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

Company Information

WA9029-Seattle Inc.
<https://kluwer-seattle.org/>

Account Phone:

Account Fax:

Website:

Shipping Address

Shipping Country Code:

Shipping Street:

Affiliate Document Upload

Please upload affiliate compliance documents (Affiliate Agreement and Bylaws) here.

+ ADD ADDITIONAL FILES

CHOOSE...

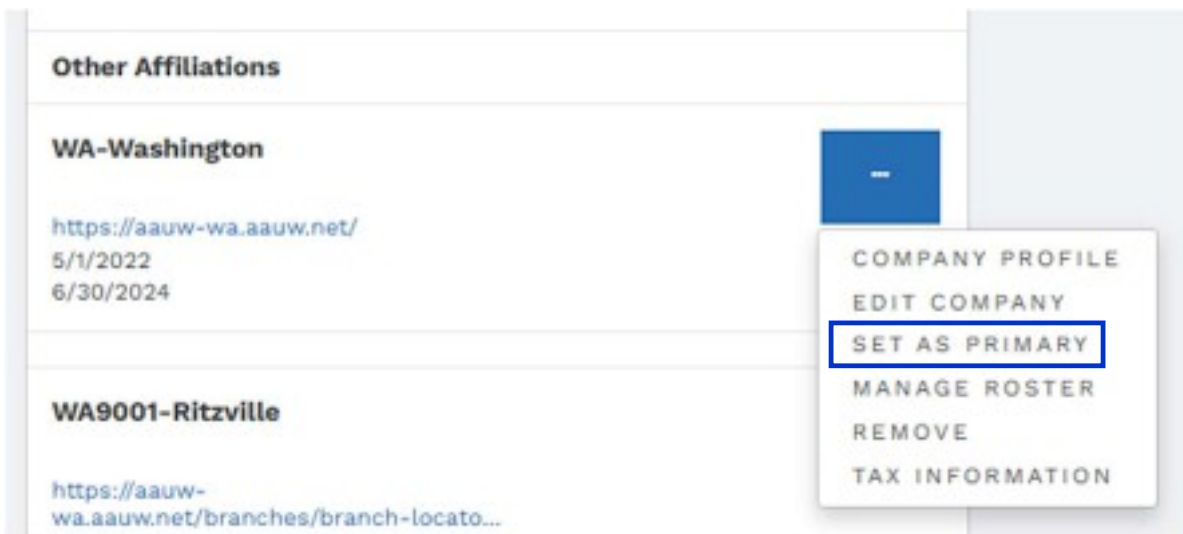
Uploaded Files

- AAUW Affiliate Agreement WA9029-Seattle, Inc 2009.pdf
- AAUW Seattle Branch bylaws 05-22-2021 APPROVED.pdf

SAVE

- Documents uploaded on the “Company Profile” are NOT also reflected here / must be uploaded again
- Older versions can be removed here using the “x” box

Changing Your Primary Affiliation (*on purpose or by accident*) “Set as Primary”

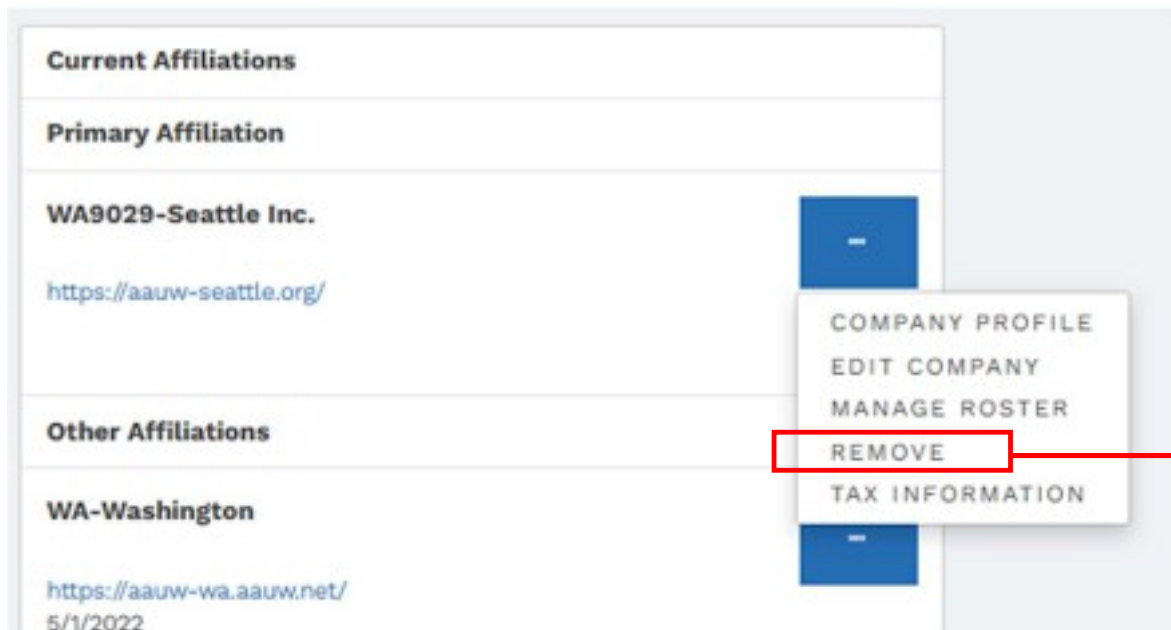


- Clicking on “**Set as Primary**” will immediately make the change – no confirmation requested
- If you do this in error, you can go to your now “other” / formerly primary affiliation and change it back

Note: This menu option is available to ALL members, not just officers; also, officers can NOT change another member’s Primary affiliation

Sabotaging Yourself in One Simple Step

“Remove”



**Do NOT click on
“REMOVE”!!!**

- It will remove your affiliation from your own branch immediately **WITHOUT** asking for confirmation
- Only AAUW can fix this

Beware: This menu option is available to ALL members, not just officers

Updating Affiliate Tax Information & Preferences

“Tax Information”

The screenshot shows a sidebar menu on the left with the following options: COMPANY PROFILE, EDIT COMPANY, MANAGE ROSTER, REMOVE, and TAX INFORMATION. The TAX INFORMATION option is highlighted with a blue box, and a blue arrow points from it to the main content area. The main content area has two blue buttons at the top: BACK TO MY AFFILIATIONS and ADD NEW TAX DETAILS. Below these buttons is a section titled 'Tax Records' which contains a table with the following information:

WA902B-Seattle Inc.	
EIN Number	910675303
Are Gross Receipts less than \$50K?	No
Do you want AAUW to file your 990-N?	No
Has the business been terminated?	No
Branch Terminated Date	
Principal Officer	Barbara Sando
Address	
Website	https://aauw-seattle.org/
Tax Year	2022
Submitter	Barbara Sando

Click on “**Tax Information**” to see details for your affiliate

- Even though affiliates are tax-exempt, annual tax returns must be filed with the IRS
- This is information that your affiliate has provided to AAUW and must be updated / validated annually by the Affiliate using “**Add New Tax Details**” page
- Per June 2023 “Membership Matters”:

Finance Officers Must Respond — Don’t Lose Your Tax-Exempt Status
All AAUW-affiliated entities must file a tax return each year. The simplest option for non-profits is to use Form 990-N, which AAUW can file on your behalf if your annual gross receipts are \$50K or less.
To complete the group exemption form in the [Community Hub](#) by October 15, go to MY AFFILIATIONS and click the blue button next to your affiliate name. Choose TAX INFORMATION, then ADD NEW TAX DETAILS to complete the form for the tax period ending June 30, 2023. The form will ask for the principal officer, which is generally the finance officer. Please verify your Employer Identification Number (EIN) to avoid filing rejects. If you do not qualify to file the 990-N, AAUW cannot file your return. Please explore other applicable forms (e.g., Form 990, 990EZ or 990PF).

Updating Affiliate Tax Information & Preferences

“Tax Information” > “Add New Tax Details”

The screenshot shows a web interface with two buttons at the top: 'BACK TO MY AFFILIATIONS' and 'ADD NEW TAX DETAILS'. The 'ADD NEW TAX DETAILS' button is highlighted with a blue border and a blue arrow pointing down to the 'Annual Tax Permission Information' form below. The form contains the following sections:

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 16th). 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

EIN for WA9029-Seattle Inc.: 910675303

* Are Gross Receipts less than \$50k?
-None-

* Has the business been terminated?
-None-

* Principal Officer
[Text Field]

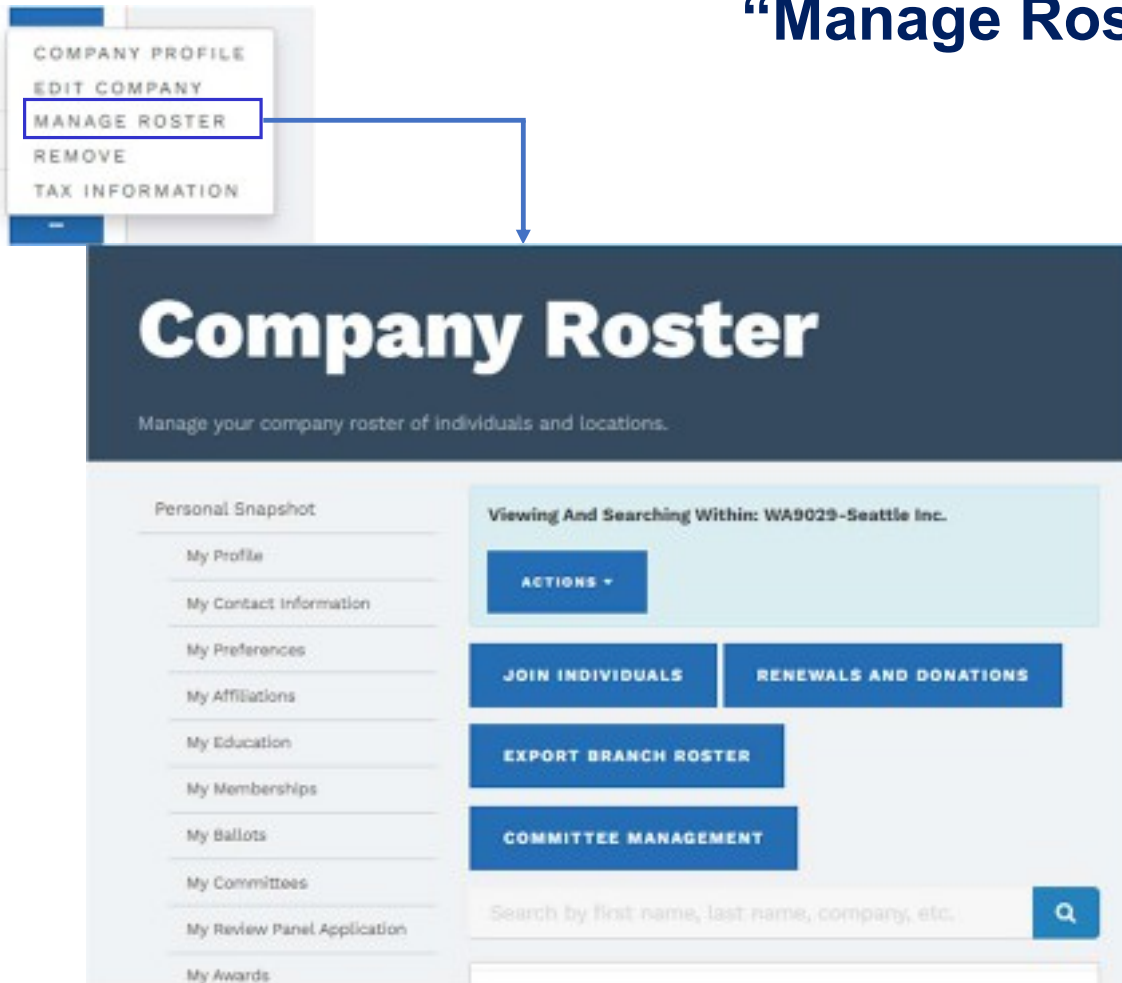
* Email
you@example.com

Click on “**Add New Tax Details**” begin filling out the annual questionnaire about your Affiliates tax situation and Opt-in or Opt-out of having National file on your behalf

- AAUW will e-mail Affiliate officers when it’s time to do this; action must be completed by October 15th since tax returns need to be filed by November 15th
- If an affiliate’s gross receipts are \$50K or less, the affiliate *may* opt to have AAUW National file the Form 990-N on their behalf
 - Or, they *may* opt to prepare and submit their own tax return
- If an affiliate’s gross receipts are over \$50K, they must still complete this questionnaire AND they must prepare / submit their own tax return.

Managing Your Affiliate Board & Membership

“Manage Roster”



Click on **“Manage Roster”** to see your **“Company Roster”** page

- Note this is the exact same page you will be directed to if you click **“Manage Roster”** on the **“Company Snapshot”** page
- There are numerous transactions that originate from the **“Company Roster”** page
- Before we step through them all, it's important to understand the intent and design of the Community Hub, as those drive various 'special cases' you may encounter and have to process outside of the Community Hub

The Community Hub and its single “Happy Path”: Why There are Potholes and How to Steer Around Them

- Although branch and state officers can process many transactions through the Community Hub, the system was designed and intended to be used by all members to manage their own affiliations with AAUW:
- On an annual basis, in a single online transaction, a member may renew (or not renew) all existing memberships and add additional memberships. Whoo-hoo! That was not possible with the MSD.
- *This new feature would be really ‘slick’ IF AND ONLY IF new and renewing members did EXACTLY what AAUW and the Hub want them to do -- except (thanks to good old human nature) THEY DON’T!!!*
 - The Community Hub has no contingency paths; it does NOT support multiple membership transactions for the same member in the same year. If a member themselves, or their branch, goes into the system to add an additional membership (eg, new dual member), the Hub will charge them for National and State dues all over again and add a year to their membership expiration date. Do NOT do this – because only AAUW can fix this!
- Once a member’s National dues have been renewed, either by the member themselves, or by an officer in the member’s primary branch, ALL OTHER MEMBERSHIP TRANSACTIONS FOR THE YEAR MUST BE PROCESSED MANUALLY, OUTSIDE THE HUB!



Step 1 – Make Sure You’ve Got Access “Manage Roster” > “Committee Management”

It's critical that President/Admin, Membership and Finance Officers be designated as such in the Hub. If they're not, they cannot perform the required functions to manage the Affiliate


The screenshot shows the AAUW Hub interface. On the left is a 'Personal Snapshot' sidebar with links: My Profile, My Contact Information, My username & Password, My Preferences, My Education, My Memberships, My Affiliations, My Ballots, My Committees, and My Review Panel Application. The main content area is titled 'Viewing And Searching Within WA0023-Beadie Inc.' and contains buttons for 'ACTIVATE', 'JOIN INDIVIDUALS', 'RENEWALS AND DONATIONS', 'EXPORT BRANCH ROSTER', and 'COMMITTEE MANAGEMENT'. A blue box highlights the 'COMMITTEE MANAGEMENT' button, with a blue arrow pointing down to a large dark blue banner that reads 'Committee Management'. Below the banner, the 'Committee Management' section is visible, including instructions on using 'EDIT' and 'ADD NEW' and a table of current officers.

Account	Committee Position	Start Date	End Date	
Tonna Kutner	Communications	7/1/2021	6/30/2024	EDIT
Gay Arnsden	President/Administrator	7/1/2021	6/30/2025	EDIT

- Click on **“Committee Management”**, to see your **“Committee Management”** page [aka list of (some) current officers]
- Must be updated for each fiscal year
- 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.

Adding / Updating Board Members

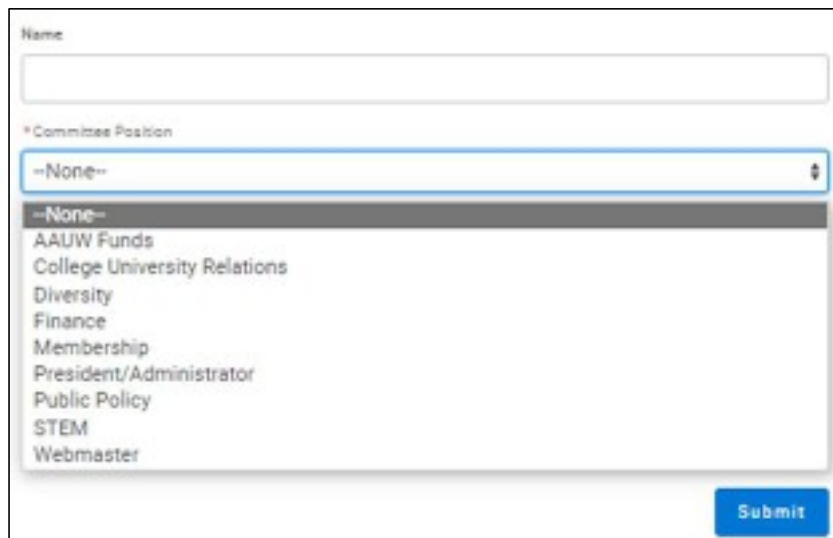
“Manage Roster” > “Committee Management”



A navigation bar with buttons labeled 'First', 'Previous', '1', '2', 'Next', and 'Last'. The '2' button is highlighted with a blue background. 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. Committee Positions now include only those officers with whom AAUW (national) communicates directly – eg, “Secretary” and “Other” are no longer listed



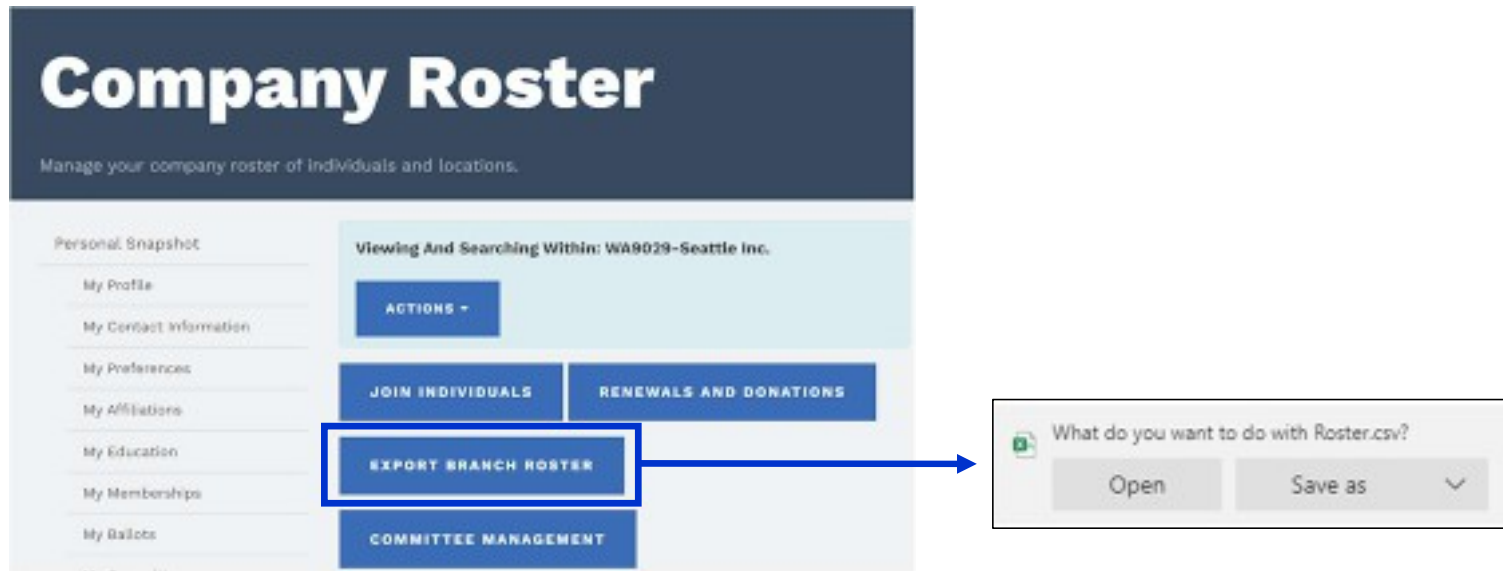
A form with a 'Name' input field at the top. Below it is a dropdown menu labeled 'Committee Position'. The dropdown is open, showing a list of options: '--None--', 'AAUW Funds', 'College University Relations', 'Diversity', 'Finance', 'Membership', 'President/Administrator', 'Public Policy', 'STEM', and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

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, your Branch / State Pres/Admin, Finance, or Membership officer can correct this

Step 2 – Knowing Who's in Your Branch

“Manager Roster” → “Export Branch Roster”



- To view or download the Branch Roster, click on **“Export Branch Roster”**
- When the **“What do want to do....”** comes up, 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 a header followed by your branch roster in alphabetical order by last name

Step 2 – Knowing Who's in Your Branch

“Manager Roster” → “Export Branch Roster”

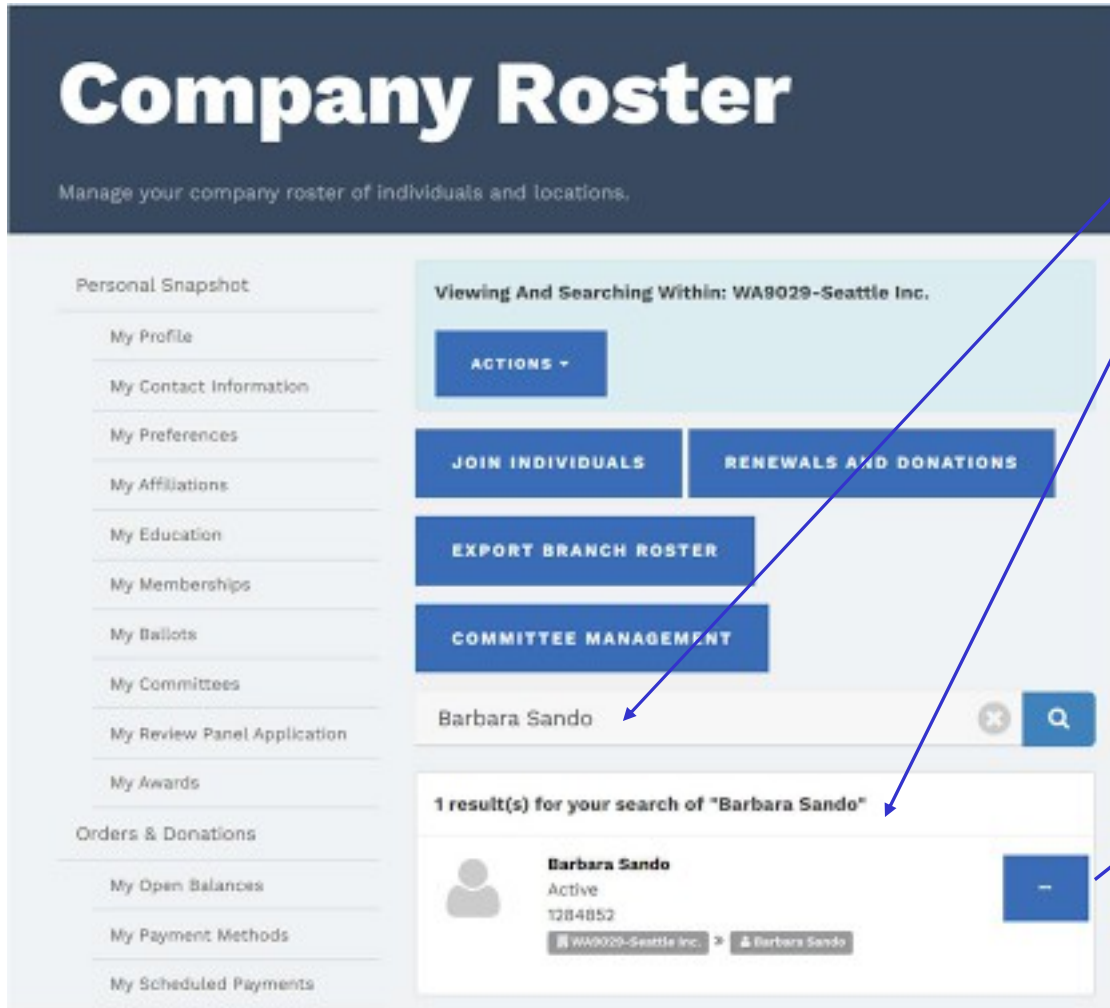
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Member_ID	Member_Type	First_Name	Last_Name	Email	Account #	PI ADDR1	City	State	ZIP	Join_Date	Exp_Date	Account Name	Branch	Primary Branch	Is State Manager	
2	123456	National	Sally	Smith	X@gmail.co	(206) 755-1250	1 You	Seattle	WA	98133	7/1/1974	6/30/2023	Grace	WA9029-Seattle Inc.	Primary	FALSE	
3	987654	Lifetime	Linda	Jones	Y@yahoo.co	(425) 773-150	Vine St	Des Moines	WA	98043	1/20/2020	12/31/2101	Future	WA9029-Seattle Inc.		FALSE	
4	125643	National	Cathy	Watkins	Z@comcast	(425) 239-987	5th Av	Seattle	WA	98203	4/1/2019	6/30/2024	Current	WA9029-Seattle Inc.	Primary	TRUE	
5	5033510	Honorary	Lina	Wong	GW@gmail.	(206) 123-345	89th	Seattle	WA	98155	11/15/2006	4/30/2248	Future	WA9029-Seattle Inc.	Primary	FALSE	

“Exp_Date” has coded years for lifetime membership types; Lifetime members are always shown as ‘future’, even if they haven’t paid branch/state dues

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

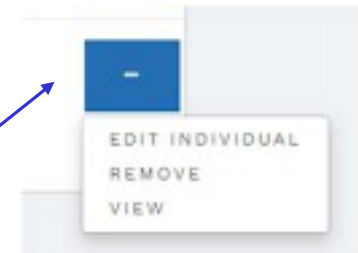
If “State Manager” cell is TRUE, member is State Pres/Admin, Membership or Finance

- 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; this can happen when a member ‘renews’ online by joining as another instantiation of themselves
 - Incorrect entries can be edited or removed by you; go back to your **“Company Roster”** page



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

Processing New Members Who've Paid by Check

“Company Roster” > “Actions”

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 Ballots
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.



Processing a new member is a two-step process:

Step 1: Click on “Actions” to get started:



- Select **“Add Individual”** to add a person to your branch roster; this person may or may not be a current AAUW member; they may be a donor, former member, former student member, grant recipient – or anyone
- **Do NOT use “Add Location”**; it doesn't apply to AAUW

Note - if a member joins online, they will automatically be added to your Branch roster and you will receive an e-mail notification; only members joining by check need to be added by the branch

Processing New Members Who've Paid by Check

“Actions” > “Add Individual” to Branch Roster

The screenshot shows a web interface for adding a new individual. At the top, a dark blue header contains the text 'Add Individual' in large white font, followed by a smaller subtitle: 'Search for an Individual profile to add to your company roster or create a new Individual profile.' Below this, the page is divided into two main sections. On the left is a vertical sidebar menu with categories: 'Personal Snapshot' (containing links like My Profile, My Contact Information, My Username & Password, My Preferences, My Education, My Memberships, My Affiliations, My Ballots, My Committees, My Review Panel Application) and 'Orders & Donations' (containing links like My Open Balances, My Payment Methods). The main content area on the right is titled 'Creating Individual Affiliation For: WA9029-Seattle Inc.' and contains a 'Search For Individuals' section with the instruction 'Search to see if the individual already has a profile.' This section has three input fields: 'Last Name *', 'First Name', and 'Email', each followed by a text input box. A blue 'SEARCH' button is positioned to the right of the 'Email' field. At the bottom of the main content area is a large blue button labeled 'CREATE NEW INDIVIDUAL'.

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

- First, **“Search for Individuals”** to see if your new member has any existing association with AAUW. This minimizes the possibility of creating a duplicate profile, which can only be removed by AAUW. I leave e-mail blank so that it will find anyone with that name; some may be in the database, but with an old e-mail 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 brings up multiple viable options, you’ll need to sort this out, then try again
- Second, 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
 - Make sure you have ALL of the info (eg, degree info) before you start; you can NOT change any of it later

Processing New Members Who've Paid by Check: “Actions” > “Add Individual” to Branch Roster

Search For Individuals
Search to see if the individual already has a profile.

Last Name *

First Name

Email

SEARCH



Search Results

Barbara E. Sando

You cannot affiliate this account with the company because it is either already affiliated with the company or the specified email address does not match the company's email domain.

Barbara Sando

ADD INDIVIDUAL

Barbara C. Sandoval

ADD INDIVIDUAL

Barbara Sandoval

ADD INDIVIDUAL

Barbara Sandoval

ADD INDIVIDUAL

Barbara Sandoval

ADD INDIVIDUAL

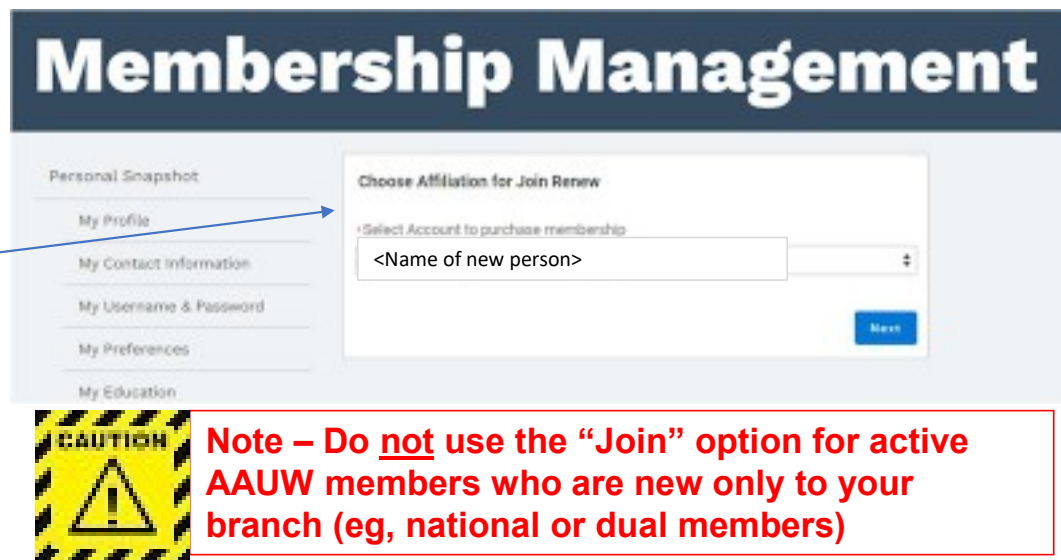
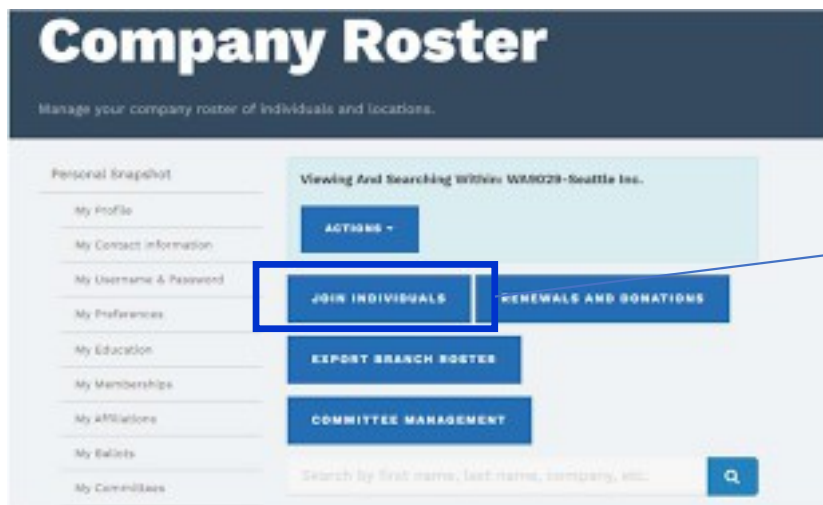
CREATE NEW INDIVIDUAL

- “**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 – or, you can call AAUW to resolve / identify if any are ‘your’ new member

Note – some personal info (e-mail and/or phone) is normally shown below each person’s name; blanked out here for privacy

Processing Brand New AAUW Members Who've Paid by Check

“Actions” > “Join Individual”



Step 2: Click on “Join Individuals” to continue:

- 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. [Only 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

Processing Brand New AAUW Members Who've Paid by Check

“Actions” > “Join Individual”

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 **ShapeTheFutureFY24** 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.

	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	

Processing Brand New AAUW Members Who've Paid by Check Notes & Special Cases (*aka potholes to avoid*)

Notes:

- In this scenario, National, State and Branch dues will be forwarded to AAUW; AAUW will later disburse branch dues back to the branch, as they do for members who join or renew online
- New members have a rolling 12-month membership year, so will not renew by 6/30 like many existing members (unless they join in June); Existing members who renew *after* the end of their 3-month 'grace period' will also be assigned a revised renewal date correlating to when they actually paid [This is also true for members who join online]



Special Case 1:

- If you are processing a new member who has received a free “**Shape the Future**” national membership to join, and who has sent you a check for Branch and State dues, their membership must be processed manually outside of the Community Hub. You must:
 - E-mail your completed “SHAPE THE FUTURE CAMPAIGN FREE MEMBERSHIP REDEMPTION FORM” to connect@AAUW.org – AND –
 - Send the State dues directly to the AAUW-WA VP Finance, including the contact information for the new member

Processing New Branch (only) Members Who've Paid by Check Special Cases & Summary



Special Case 2:

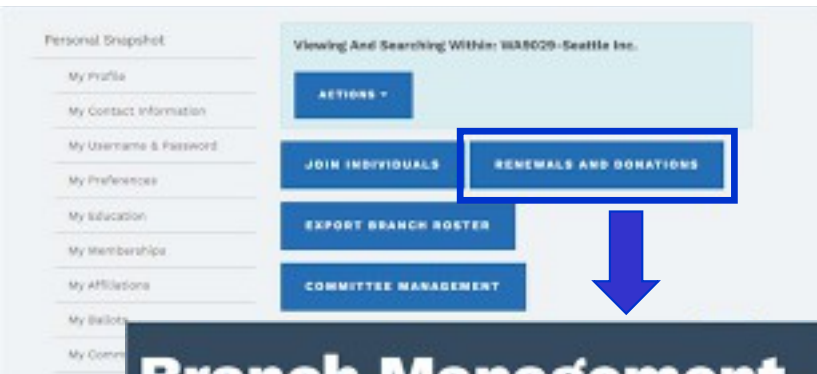
- If an active AAUW National member – or -- an active primary member of another branch is joining your branch, neither you *or* the member themselves can process their membership through the Hub, their membership must be processed manually outside of the Community Hub. You must:
 - Send the State dues directly to the AAUW-WA VP Finance, including the contact information for the new member (applies to National members and new dual members whose primary branch is out of state)
 - Notify AAUW National (by e-mail or phone) that the new member has joined your branch (and WA State, if applicable) so that National can activate them accordingly in the system. These members will retain their current renewal date in the system, even if they'll be a part of your branch for less than their first full year.

Summary for Processing New Members:

- All potential new members can be added to the Branch Roster, but that does not mean they actually *are* a branch member
- Brand new AAUW members who are paying national, state and branch dues can be “Joined” through the Hub; all others must be processed manually and activated as a branch/state member by National

Processing Renewals or Donations Made by Check

“Manager Roster” → “Renewals & Donations”



- Click on **“Renewals and Donations”** to 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

Branch Management

WA9029-Seattle Inc.
Renewals And Donations

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

To process 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 Greater/Needs.
3. Once all entries 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.

Tip 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 non-usable amount of \$5 and State Dues will be reflected once orders are generated.

Name Member Type Member Status

Enter Name: [Text Box] [Dropdown] [Dropdown]

End Date From: [Text Box] Start Date To: [Text Box]

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

Processing Renewals or Donations Made by Check

“Manager Roster” → “Renewals & Donations”

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

- A “**Search**” function and –
- 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

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

Name: Member Type: Member Status:

End Date From: End Date To:

Number of records on page:

[First](#) [Previous](#) Page 1 of 8 Number of records: 113 [Next](#) [Last](#)

	Name	Membership Type	Status	Start Date	End Date	Renew	Donation Amount	Individual Total
1	Adams, Laila	National	Current	Jun 30, 2022	Jun 29, 2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Allen, Ruth	National	Current	Jun 30, 2022	Jun 29, 2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Anderson, Cathy	National	Current	Jun 30, 2022	Jun 29, 2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Armstrong, Skip	National	Current	Jun 30, 2022	Jun 29, 2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Arnold, June	National	Current	Jun 30, 2022	Jun 29, 2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Baker, Suzanne	National	Grace	Jun 30, 2021	Jun 29, 2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Bergen, Penny L.	National	Grace	Jun 30, 2021	Jun 29, 2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Bj, Leanne	National	Grace	Jun 30, 2021	Jun 29, 2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	Bradburn, Pamela	National	Current	Jun 30, 2022	Jun 29, 2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	Byington, Beth	National	Current	Jun 30, 2022	Jun 29, 2023	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11	Carruth, Carol A.	National	Grace	Jun 30, 2021	Jun 29, 2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Summer Leadership Meeting 2023

Renewals - continued

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	<input type="checkbox"/>	Individual Total	<input type="checkbox"/>
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
	/		/		
<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.

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 generated.

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

Renewals - continued

Pay Now Renewals and Donations Worksheet

When you're finished making your entries for this session

1. Click on **"Renewals and Donations Worksheet"** to review / save a record of your entries
 - If there are errors, it's not too late to go back and fix them

	A	B	C	D	E	F	G	H	I	J	K
1	AAUWId	FirstName	LastName	Membersh	Status	StartDate	EndDate	Renew	Donation#	IndividualTotal	
2	123456	Susie	Member	National	Grace	7/1/2023	6/30/2024	TRUE		\$82.00	
3											
4											

2. Once you're satisfied, click **"Pay Now"**

Select an Existing Credit Card or Bank ACH or Add New Credit Card

* Select an Existing Credit Card

Mastercard ending in 8537

Total to be charged:

\$82.00

Cancel

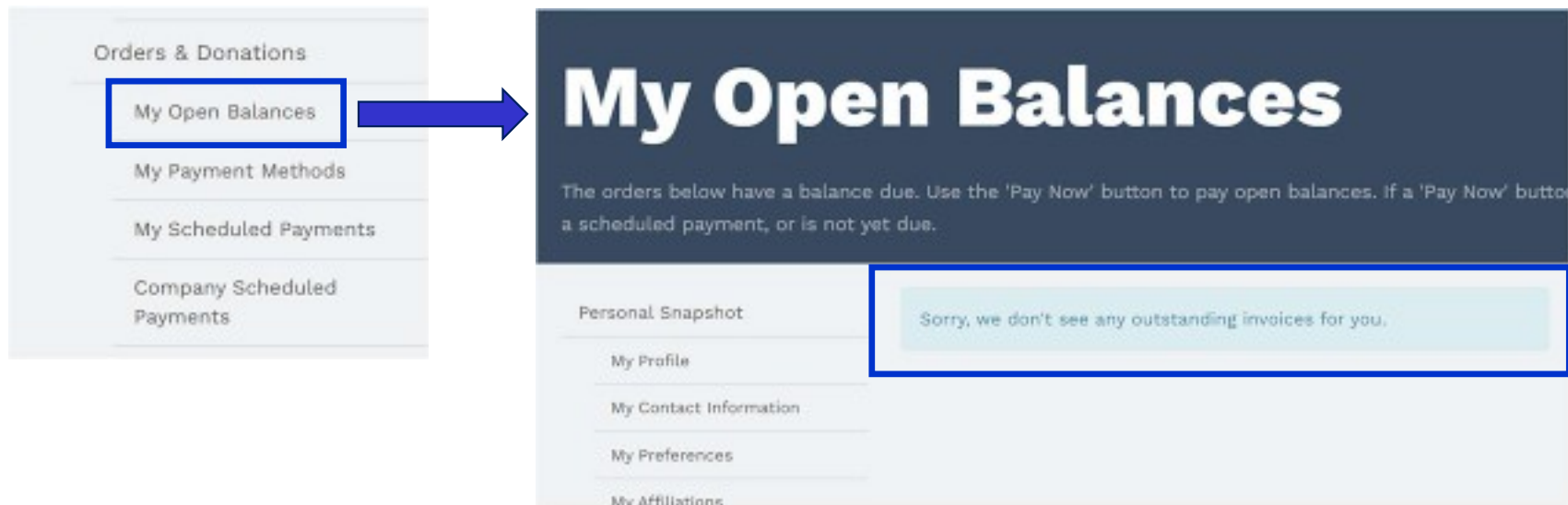
Process Payment

When the **"Select an Existing Credit Card...."** window pops up

- Click in the box to select your payment method
- Click **"Process Payment"**
- You'll then see a message that says your payment is being processed and do not resubmit the same transactions; At this point, it's too late to correct any errors

Renewals - continued

- This portion of the Community Hub has been greatly streamlined from last year - yeah!
- The only feature that went away was the one to 'Save' your order and edit/pay it up to 4 days later
 - You must **"Pay Now"** or your order will disappear and you'll have to re-enter the data
 - This can be confusing since there is still **"My Open Balances"** in the Community Hub, however it will almost always have no outstanding invoices for you
 - Outstanding invoices appear only if there is an issue with a payment you already tried to make (eg, erroneous routing number); you'll be notified by AAUW so the issue can be resolved



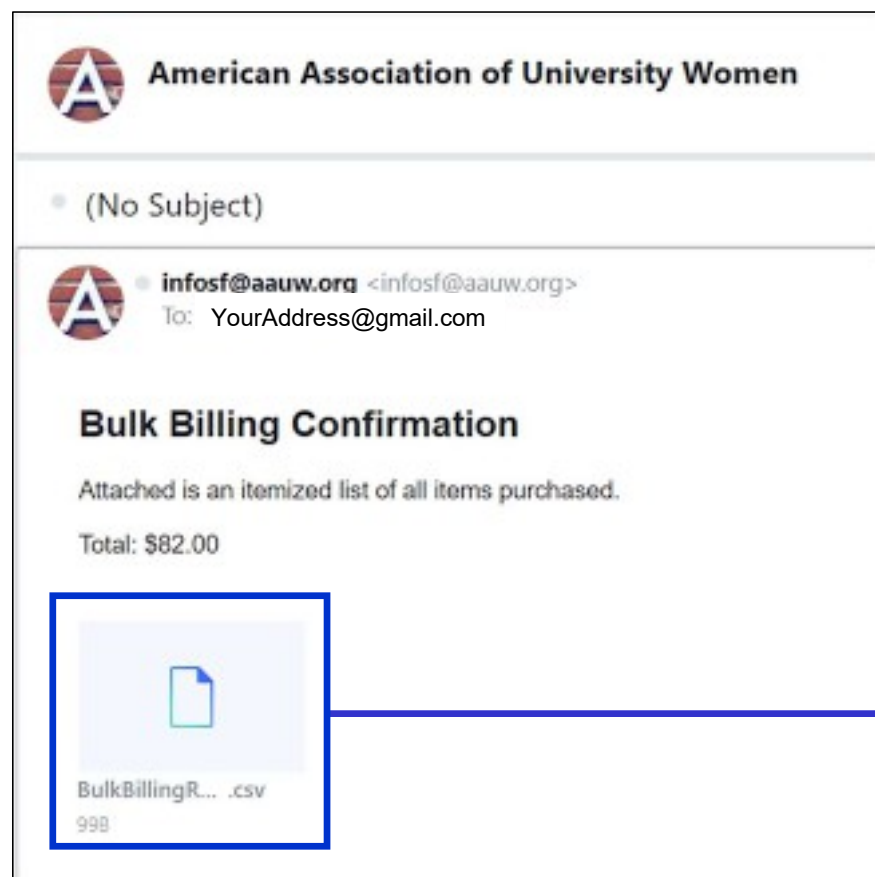
Renewals - continued

- Once you've paid, you can access a **"Bulk Renewals And Donations Payment Report"**
 - Go to **"Personal Snapshot"** and click on **"Orders & Donations"**
 - Click on **"Bulk Renewals And Donations Payment Report"**

The image shows a two-part screenshot. On the left, a sidebar menu is displayed with the following items: "Orders & Donations" (highlighted with a blue box), "My Open Balances", "My Payment Methods", "My Scheduled Payments", and "Company Scheduled Payments". A large blue arrow points from the "Orders & Donations" box to the right. On the right, the "Orders & Donations" page is shown. It has a dark blue header with the title "Orders & Donations" and the subtitle "View your past orders, donations, and payments." Below the header, there is a "Personal Snapshot" section with links: "My Profile", "My Contact Information", "My Preferences", "My Affiliations", "My Education", "My Memberships", and "My Ballots". To the right of this is a section titled "Bulk Renewals And Donations Payment Report" with the text "Please click the button below to create a report." Below this text is a blue button with the text "BULK RENEWALS AND DONATIONS PAYMENT REPORT" (highlighted with a blue box). Further down, there is a "My Orders" section with the text "All orders billed to you." and "Order 0091787".

- This same report will also be attached to the e-mail confirmation you'll receive from AAUW shortly after you've paid

E-mail Confirmation and “Renewals & Donations” Reports



- In addition to this report / e-mail to the branch, I believe an renewal confirmation e-mail will be sent to each person who has been renewed – similar to the e-mail a person receives when they renew online themselves
- **Note:** Unlike with the MSD, when a member renews themselves online, you will *not* receive a confirmation; you will see an updated “exp_date” on the roster, but you will not know if the member paid more than National dues [AAUW is working on improving this process]

	A	B	C	D	E	F	G
1	First Name	Last Name	National Dues	State Dues	Action Fund	Donation	
2	Sally	Smith	69	10	3	0	
3							
4							
5							
6							

Renewing Members Who've Paid by Check **Special Cases (*aka potholes to avoid*)**



1. If a primary member of another branch is renewing your branch, neither you *or* the member themselves can process their membership through the Hub, their renewal must be processed manually outside of the Community Hub. You must:
 - Send the State dues directly to the AAUW-WA VP Finance, including the contact information for the new member (applies to dual members whose primary branch is out of state)
 - Notify AAUW National (by e-mail or phone) that the dual member has renewed your branch (and WA State, if applicable) so that National can activate them accordingly in the system.
2. If you are processing a member who has received a free **“Shape the Future”** national membership for renewal, you must process their renewal manually outside of the Community Hub. You must:
 - E-mail your completed “SHAPE THE FUTURE CAMPAIGN FREE MEMBERSHIP REDEMPTION FORM” to connect@AAUW.org – AND –
 - Send the State dues directly to the AAUW-WA VP Finance, including the contact information for the renewing member

A Note on Members Who've Renewed Online

- A member's “exp_date” is updated when they've renewed their National dues; until you see which members have paid branch or state dues on the Disbursement Report, you can't know for sure...

[illegible]

WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Chile	France	3220000	David	Davidson	patrick.watson@gmail.com	2017-11-19-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Chile	France	3260000	Justin	Waring	justy.waring@gmail.com	2016-05-18-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3220000	Richard	Chen	richard@patco.com	2011-12-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3080000	Patricia	Crane	patrickcrane@gmail.com	2016-08-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	Spain	4212700	Jesus	Wray	jesuswray@comcast.net	2015-02-28-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3220000	Ge	Arnsperger	garnsperger@gmail.com	2016-04-01-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3600000	Anna	Avard	anna.avard@seasat.com	2016-02-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3212000	Randy	Salter	randysalter@satellite.net	2016-08-09-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3240000	Robert	Parsons	robertparson@yahoo.com	2016-01-19-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3260000	Jeffrey	Anderson	jeffrey_anderson@sat.net	2015-11-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3230000	Tony	Salter	tonysal@satellite.com	2016-07-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3200000	Walter	Polak	wpolak@gmail.com	2016-03-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3230000	Wynne	Hugh	wynne@sat.net	2016-07-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3220000	Robert	Van Dine	robertvandine@gmail.com	2016-03-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Chile	France	3600000	Sharon	Spate	sharonspate@gmail.com	2011-08-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Chile	France	2700000	Yolita	Green	folita.green@satellite.com	2012-02-17-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3240000	Christi	Chan	christi@satco.com	2016-04-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3260000	Arne	Arnold	arnold@satellite.com	2016-02-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	France	3230000	Patricia	Ward	pat.ward@satellite.com	2016-04-04-2018
WAG019 Satellite (U), Spanish Dye	WAG019A (U) (S) (S)	22.25.00	Norfolk	USA	3500000	Sharmika	Leighton	shawn@satellite.com	2016-04-04-2018
	Subtotal	Sum			2380000				
		Sum			2380000				

To determine which members paid branch / state dues, you'll need to review the AAUW Disbursement Reports that are e-mailed to all State & Branch Finance, Membership & Pres/Admins after auto-deposits are made:

- These are NOT membership renewal reports, as they reflect only those transactions processed through the Community Hub
- Disbursements are made the month *after* the payment has been recorded

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 new members who joined by sending a check to their Branch, then the Branch processed online using “Join Individual”

Resources for Navigating the Community Hub

- Refer to the AAUW National website:
 - [Community Hub FAQ](#)
 - [Community Hub Tools & Resources](#)
- Reach out to your branch's 'expert' in the Community Hub
- Reach out to me (Barbara Sando) at bylaws@aauw-wa.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

Hoping for a smoother road ahead



We may not be able to patch the potholes, but we can steer around them

