Enter Committee Name To Search   Search   View Committee   Show Community Group Member

Committee Modules

Chapter ID	Committee Module Name	Type	Member	Role

Committee Module (CM)

Instructional Guide

MOAA®

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RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

WELCOME

Welcome to MOAA's new Association Management System (AMS), with a portal for your use called the Committee Module. We are excited to unveil this new tool for our council and chapter leaders, many of whom will be using the Committee Module (CM) for the very first time as a new president or membership chair. The CM may be used for maintaining your membership roster and recruiting new members. It's also a way to keep track of chapter membership trends and maintain the history of chapter membership.

The CM will have more capabilities than the previous Committee Module. Leaders will now be able to update their meeting place, location, and meeting time. Additional updates will include managing current membership rosters and retrieving reports of former chapter members (called deactivated members). Moreover, it will allow leaders to retrieve Near Real Time (NRT) reports for recruitment purposes with the ability to go back multiple months or years by using the filter option and applying dates in three-month increments.

With every new system, as leaders are using the CM, if you run across a system error or problem that our technical staff should be aware of, we're asking you to help us collect this information and fill out a CM/NRT Survey Feedback form using this link:

https://forms.office.com/r/r7uymYmL7s

This survey will allow leaders to send an email with the error message and/or the URL link/page being displayed on your screen. After sending us the error, please allow our staff up to 48 hours to contact our technical staff to help resolve the issue. Our staff will be in touch with the CM manager who reported the error as quickly as possible.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

LOG IN / Committee Module (CM) PREP

This guide will help walk you through the steps to get into your personal MOAA profile and the Committee Module if you serve as a CM manager.

Additional steps will help you navigate through the following:

1. Logging into your MOAA profile:
   i. Adding your picture
   ii. Updating your contact information
   iii. Updating your service information
2. Updating your council/chapter membership roster
3. Generating Reports:
   i. Active/Current Members
   ii. Deactivated Members
   iii. Near Real Time (NRT) reports (i.e., recruitment list)
4. Updating council/chapter Info:
   i. Updating meeting details.

Council & chapter leaders have access to the Committee Module within MOAA's database to view, change, export, update, and manage membership and officer roster information for MOAA's affiliates.

Changes made in the CM will reflect as real-time updates in MOAA's database.

We're encouraging our council and chapter leaders to please keep us abreast of any errors or inconsistencies you experience as you're using the Committee Module. We value the feedback we receive on the CM and appreciate your patience and partnership as we work together to make enhancements.

Council and chapter presidents, membership chairs, or designated leaders are asked to use this tool to review and update their membership and officer roster information.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

CONFIDENTIALITY OF RECORDS

Please Note: Any files containing MOAA-provided name, address, email address, and MOAA status should be maintained securely, password-protected, and accessible only by authorized council/chapter officers.

TERMINOLOGY

As you're reviewing this guide, you'll notice two specific words and the acronyms used to describe each word are listed throughout this instructional guide. Please note that the term and its acronym used is as follows:

      (1) Committee Module – terminology used as CM

      (2) Near Real Time (report) - terminology used as NRT

FINDING ERRORS / MAKING RECOMMENDATIONS

During the testing period of MOAA's database transition, the programming project team used some test records to ensure the capabilities of the CM were functioning properly. These test records were removed before exposing the new CM to the leaders. However, some test records might still exist. If you notice any test records in your CM or records that are not supposed to be on your roster, please let us know by using the CM/NRT Feedback Survey (link below). **These records will be deleted from your roster. Please don't deactivate records that are not supposed to be there. MOAA ACC staff will need to delete people who should not have been added to your chapter roster.**

Additional feedback on deleting records, making recommendations, changing manager roles, or if you need help, please use the CM/NRT Feedback Survey: https://forms.office.com/r/r7uymYmL7s

Finally, another method of contacting our Affiliated Councils & Chapters staff is by phone at (800) 234-6622 or email chapters@moaa.org.

Affiliated Councils & Chapters would like to thank you for using this tool.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

QUICK REFERENCE GUIDE

(Examples are provided throughout this guide for help)

Please Note: To maintain accuracy in the MOAA Database, please do not add Honorary members and spouses as members of your council or chapter.

DO NOT	REASON
Do not add "honorary members" to your roster	Only eligible MOAA members should be added to your roster. *Please keep honorary members on a separate roster/spreadsheet.
Do not add spouses as "Member"	Spouses (i.e., their spouse/service member is living and eligible for MOAA membership, but they, themselves, are not) cannot be added as a member of a chapter. If the spouse is a chapter leader, the spouse should only be added in the leadership position they hold.

Everyone who is eligible for MOAA membership can be added as "Member" on your roster.

- Add regular members and surviving spouses as "Member"
- If this a newly added member is serving in a leadership position, you will **instead** add the individual in the officer position they hold; example: President, Secretary, Membership chair, Chairperson.
  - **Note: the old CM allowed for multiple positions to be added to an individual's record. Any new records added are limited to a single position (or a defined combination of positions, as described on pages 25-29).**
  - If the spouse or non-eligible person is an officer/leader in your chapter, they will only be listed once, in the officer/leader position they hold. Do not add this person as a "member."

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RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

Reporting Deceased Members:

Report deceased member information through MOAA's TAPS form here: MOAA TAPS FORM or by contacting our Member Service Center (MSC) at MSC@moaa.org or call (800) 234-6622; you must include the person's name, rank, service, status, Surviving Spouse's name (if applicable), and the date the person passed away. The chapter leader's name and chapter will be added to our records as reporting the person's death.

Place an "End Date/Deactivated Date" on Deceased Members:

After reporting a deceased member to MOAA's MSC or through the online TAPS form, place a deactivated date on the deceased member's record. Be sure to confirm the death notification with the MSC before placing and end date on the person's record.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.
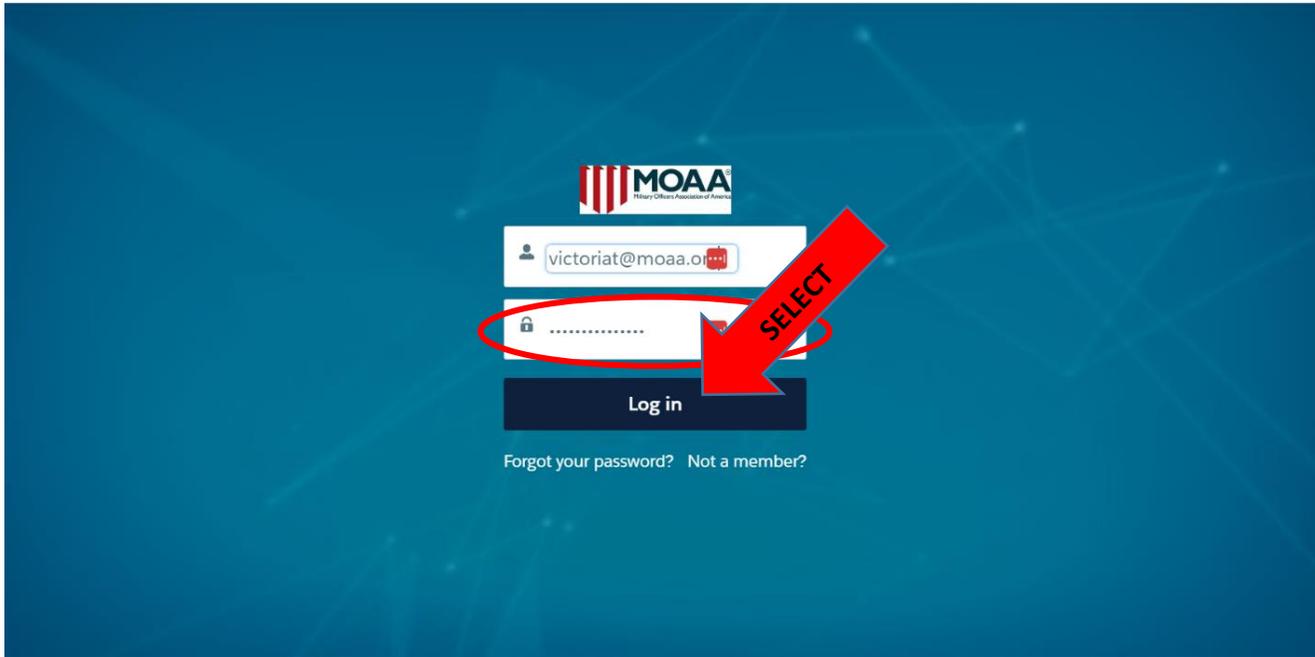
LOGIN

Go to https://www.moaa.org/ Along the top bar, you will see the "Login" button. Click this button to go into your MOAA profile.
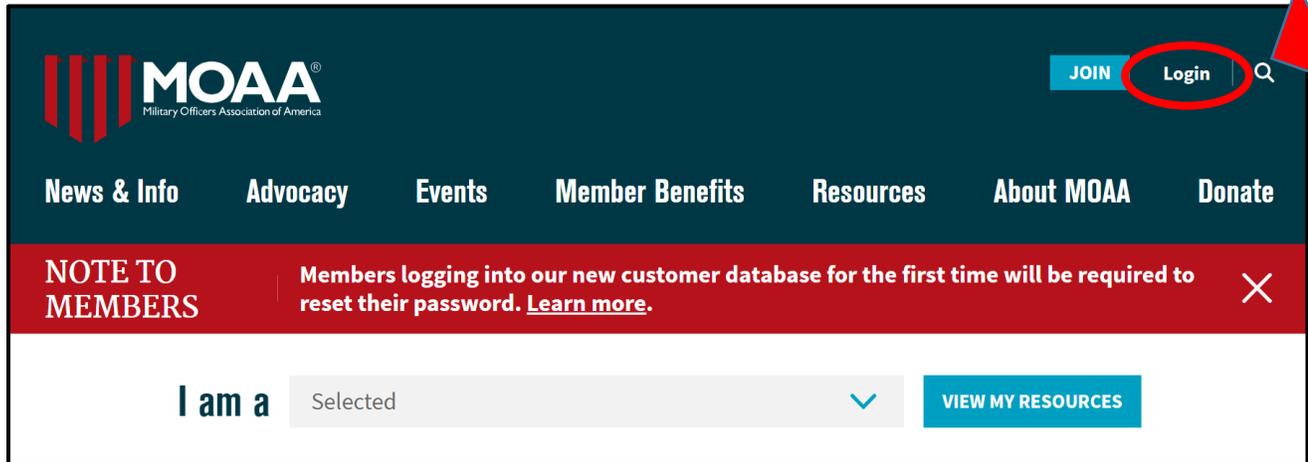
If this is the first time logging into MOAA's new customer database, you will be required to reset your password. Please use the "Forgot Password" button shown on the next page.

If you've already received a new password, proceed to your profile after logging in.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

PASSWORD RESET

If you select the "Forgot Password," you will receive the message below which will include a hyperlink for you to reset your password.
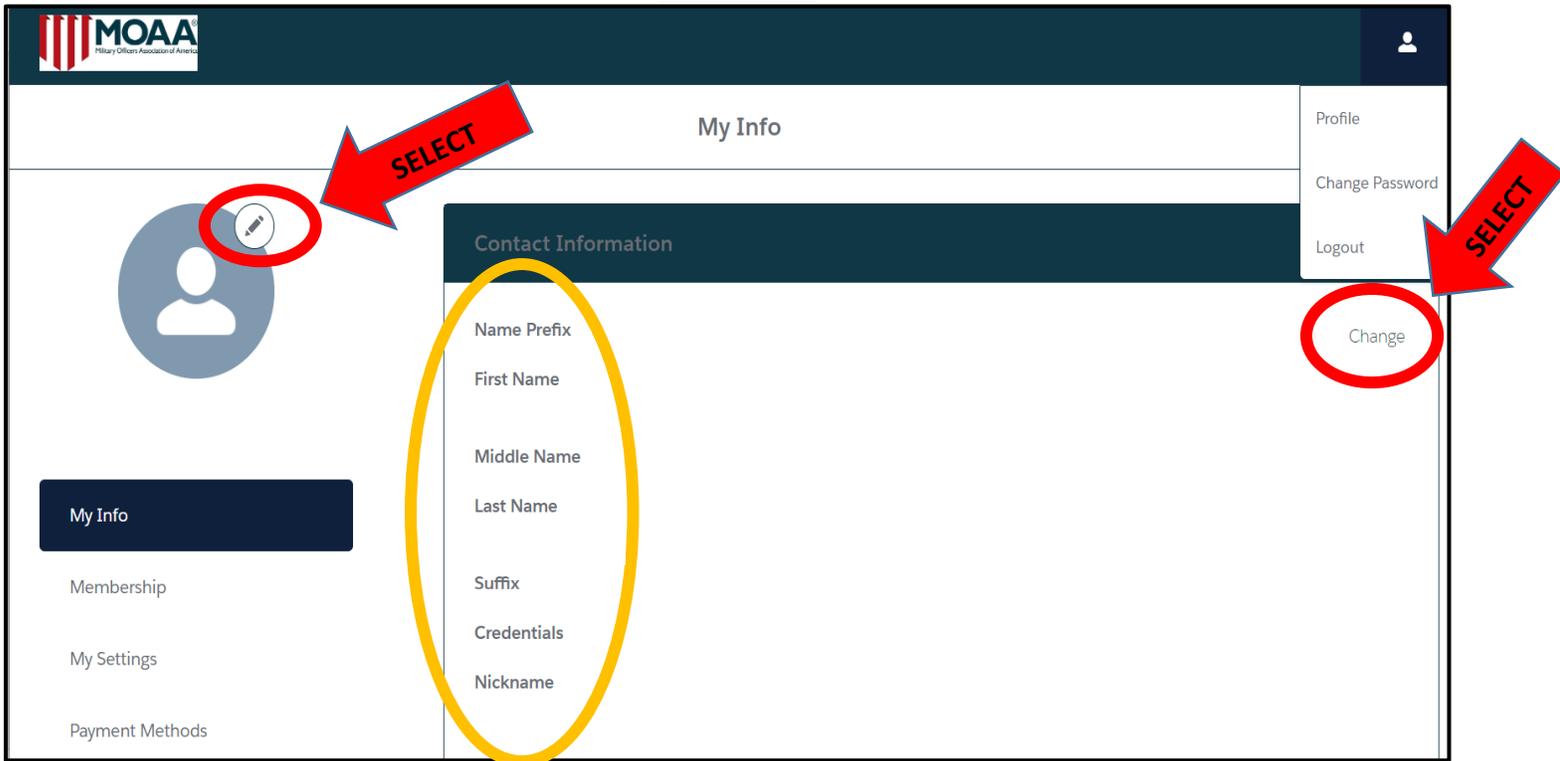
Hi Member Name:

Your password has been reset for Lightning Member Portal. Go to: **RESET HYPERLINK WILL BE PROVIDED**.
Thanks,

Military Officers Association of America

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

MY INFO

**MY INFO includes the following line items and details about each item:**

1. My Info – this is your MOAA profile; you can add your picture by clicking on the pencil icon (shown above).
2. Membership – this is your current and past membership information.
3. My Settings – this will display your Username, member portal email, and address information; use the "change" button to make changes to any of these items.
4. Payment Methods – allows you to add new or edit existing credit card payment methods.
5. Orders – allows you to review orders and pending orders.
6. Military Information – allows you to add/update military information.
7. Spouse – allows you to add your spouse's name and other details.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

MY INFO (Cont.)

8. Communication Preferences – allows you to opt-in or out of communication with MOAA and its partners.
9. Company Info – allows you to add a different address or company address where you would like mail or packages to be sent; you can add/update company phone number, billing street, city, state, and zip code. You can also add employees.
10. Company Subscriptions – when/if MOAA staff adds a subscription, this will allow you to view your company's subscriptions.
11. Company Orders – when/if MOAA staff adds an order, this will allow you to view your company's order.
12. Badges – the term "badges" is used to describe the membership status of someone. If you are a LIFE member, your badge would be listed as "LIFE member."
13. Switch to Partner Portal – this button allows the Committee Module Member or Manager (assigned CM administrators) to toggle from his/her MOAA profile into the committee module. After getting into the committee module, there's a button that allows you to switch back (see pg 13).

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

NAVIGATING OR CHANGING "MY INFO"

As you navigate your "My Info" page, you can select the button that allows you to change or edit your personal information. The categories for *My Info* are listed as follows:
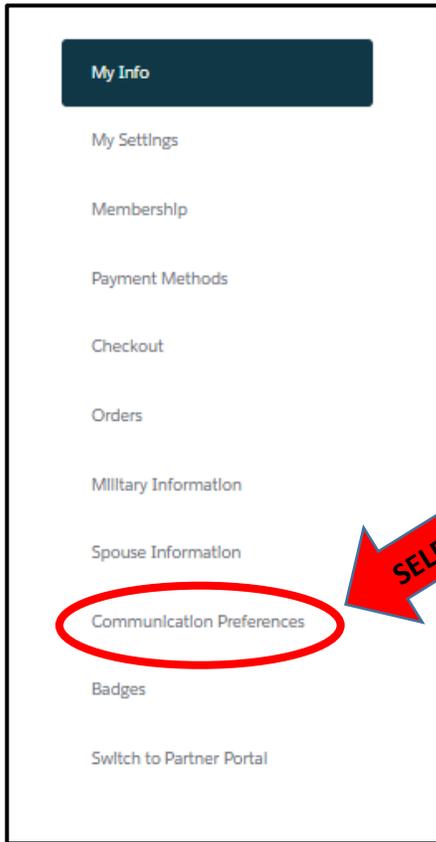
The example below is for "**Communication Preferences**;" the edit button will allow the user to receive emails, phone calls, allow MOAA's partner communication, share email with chapters or the user can remove themselves from all solicitations.
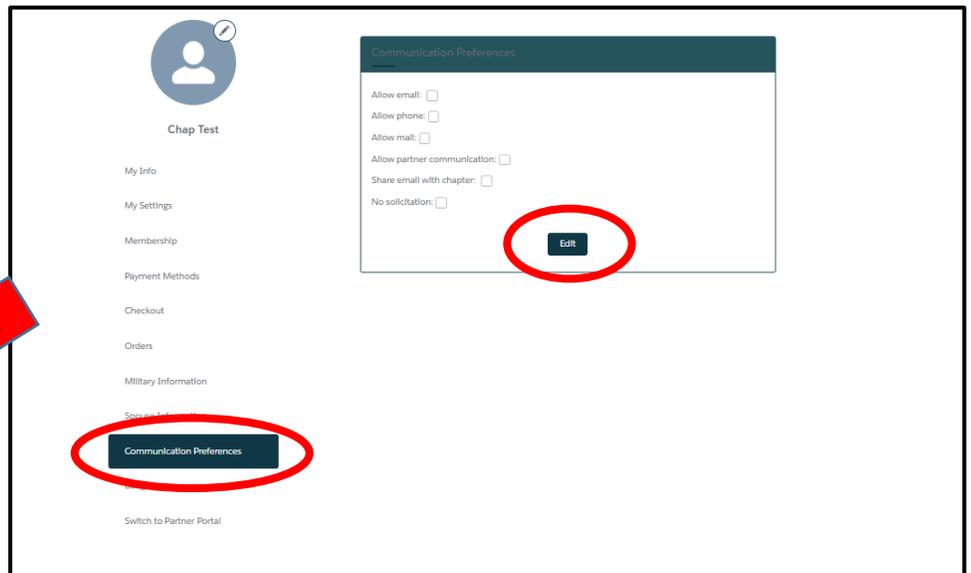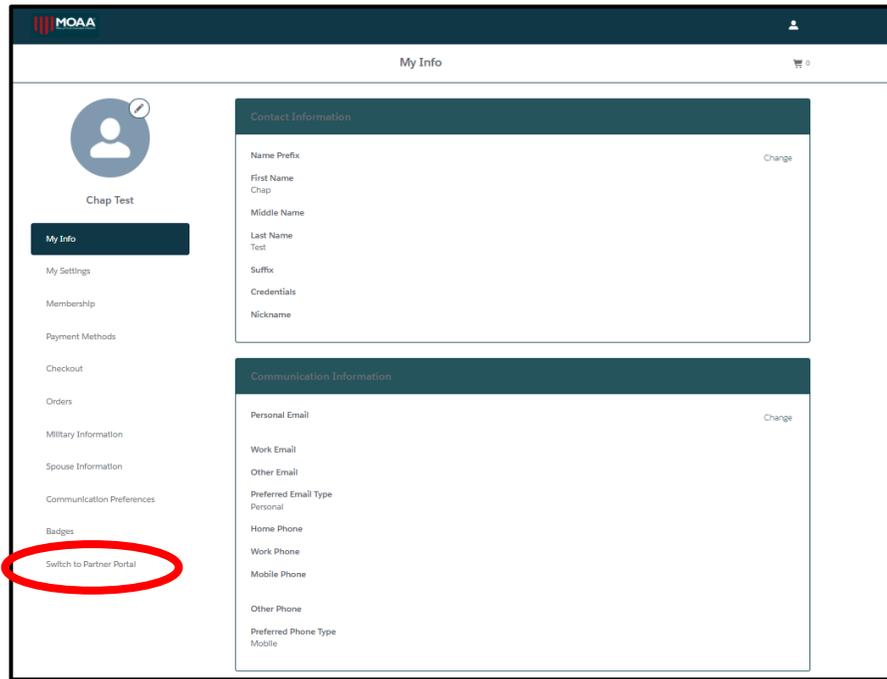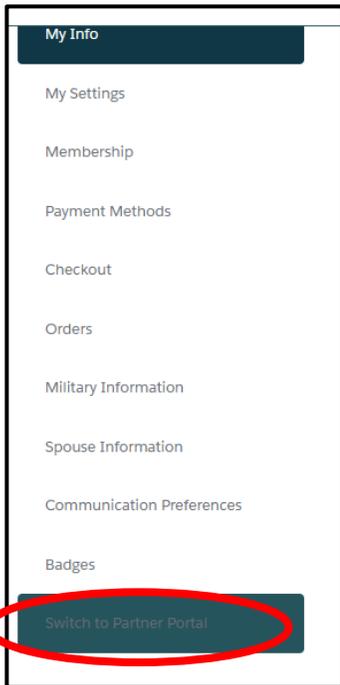
RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.
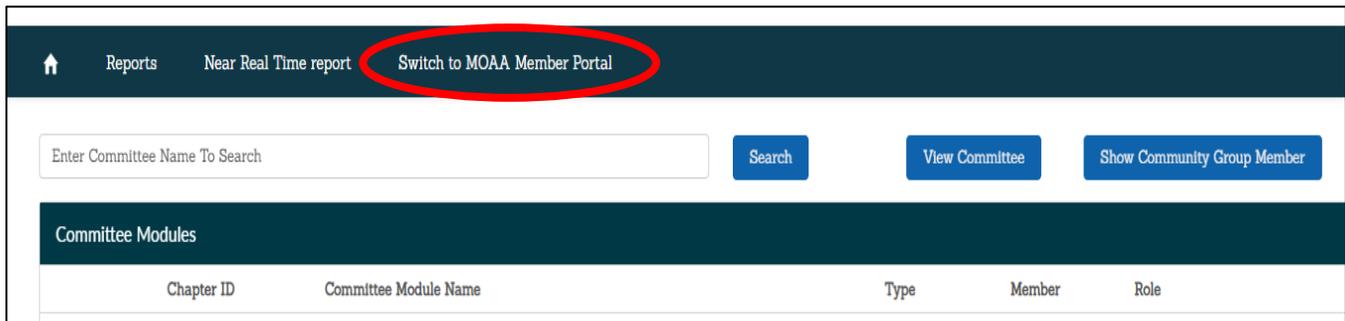
TOGGLE / SWITCH TO PARTNER PORTAL AND BACK TO MOAA PROFILE

The Committee Module (CM) Member and Manager has a toggle button on their MOAA profile allowing them to switch between their MOAA profile and their committee module. Below is a screenshot of both options to switch between the two.

MOAA Profile (My Info)

Switch to MOAA Member Portal

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

WHO HAS ACCESS

Two officers will have access to the Committee Module as Managers:
1. President
2. Membership Chair
- President and Membership Chair are the only two officers who will have editable access to update their membership roster.
- The president will have the authority to swap his/her role as manager and replace with a different chapter officer. Additionally, the president can swap the membership chair's role as manager with a different leader if necessary. When a change is warranted, please call or email the name of the person being added as the "Manager." Affiliated Councils & Chapters staff will update the records to add the new manager then remove manager access from the previous leader.

There are two privileges set up on the Committee Module to identify leaders who have read only or editable access.

The President and Membership Chair of each council and chapter will have full editable access which will allow them to make changes. These individuals will be identified as "Manager."

Council presidents who have chapters in their state will be granted the role of "member" which will allow "read only" access.
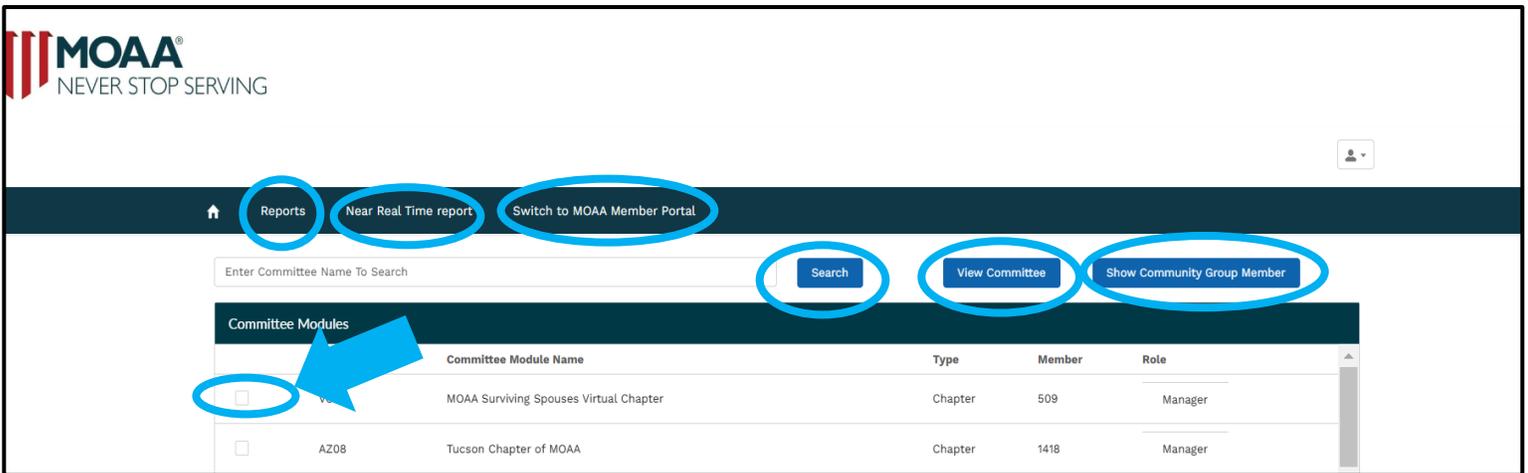
1. **MANAGER** = Can view, update, and edit roster, and generate Near Real Time (NRT) reports.
   a. This person can place an end-date on member records, and update council/chapter location and meeting place. Additionally, the manager can generate and export NRT reports.
2. **MEMBER** = Read Only
   a. This person can only view the roster (cannot make updates or changes; cannot generate NRT reports)
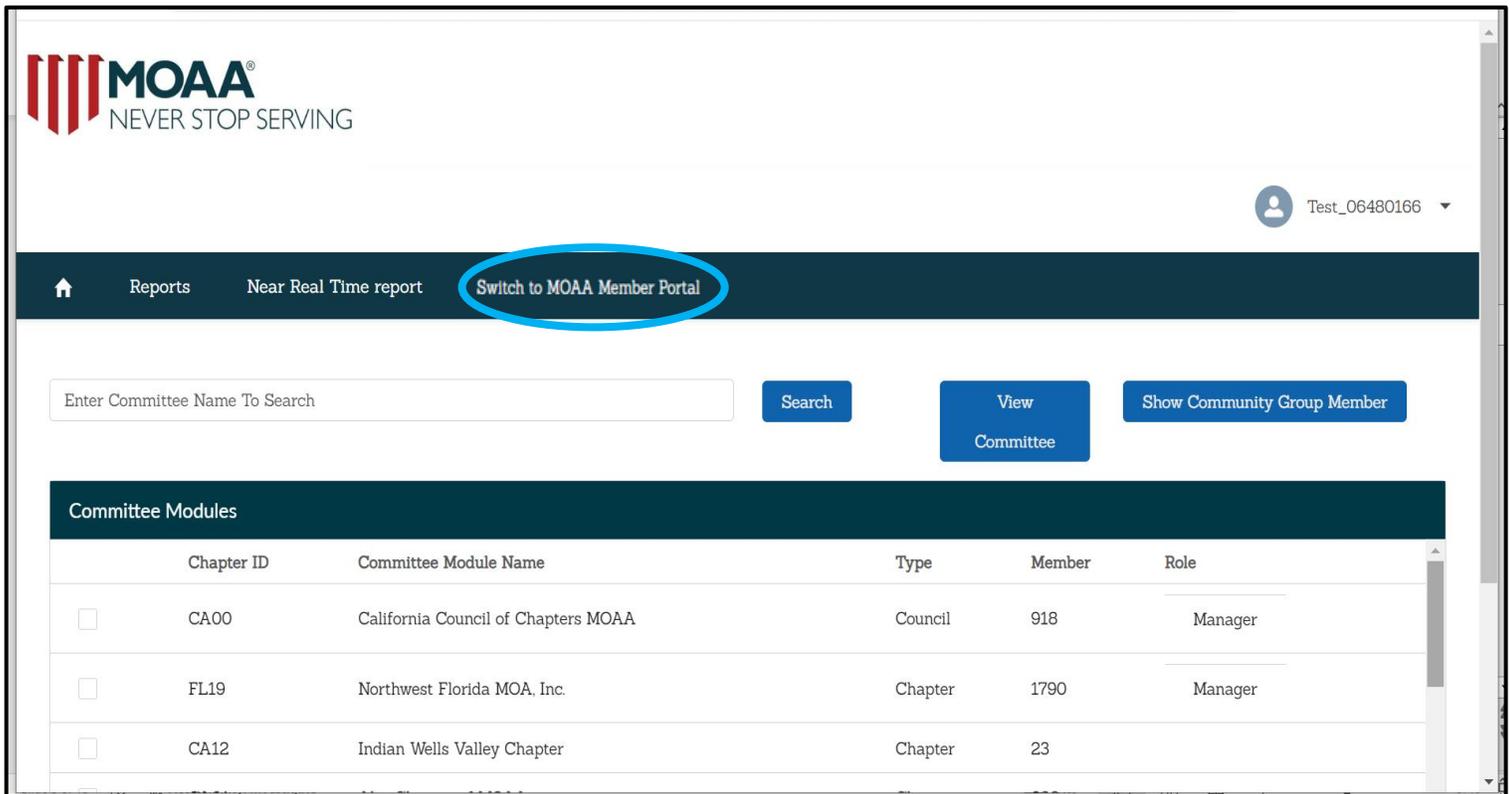
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CM MANAGER / MEMBER

Below is a screenshot of the Committee Module if you are assigned the role of "Manager" or "Member." Note: only MOAA's Affiliated Councils & Chapters staff can assign administrative roles to your CM.

Please note that if you hold the position as the council president and have chapters in your state, you will see the affiliates in your state listed under the "Committee Modules" column (see below).

The items circled in blue (below) denote additional buttons the CM member and manager can use when reviewing or updating a chapter or its members or generating Near Real Time (NRT) reports.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

MOAA
NEVER STOP SERVING

Test_06480166 ▼

🏠 | Reports | Near Real Time report | Switch to MOAA Member Portal

Enter Committee Name To Search | Search | View Committee | Show Community Group Member

Committee Modules

	Chapter ID	Committee Module Name	Type	Member	Role
☐	CA00	California Council of Chapters MOAA	Council	918	Manager
☐	FL19	Northwest Florida MOA, Inc.	Chapter	1790	Manager
☐	CA12	Indian Wells Valley Chapter	Chapter	23	

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RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

HOME BUTTON

At any time, CM Managers can use the "home button" to go back to their main committee module screen.

As you are working on your roster updates and you start to click the next screen to work on other areas of your roster, keep in mind that your home button will take you back to your main screen when you want to start a new task.
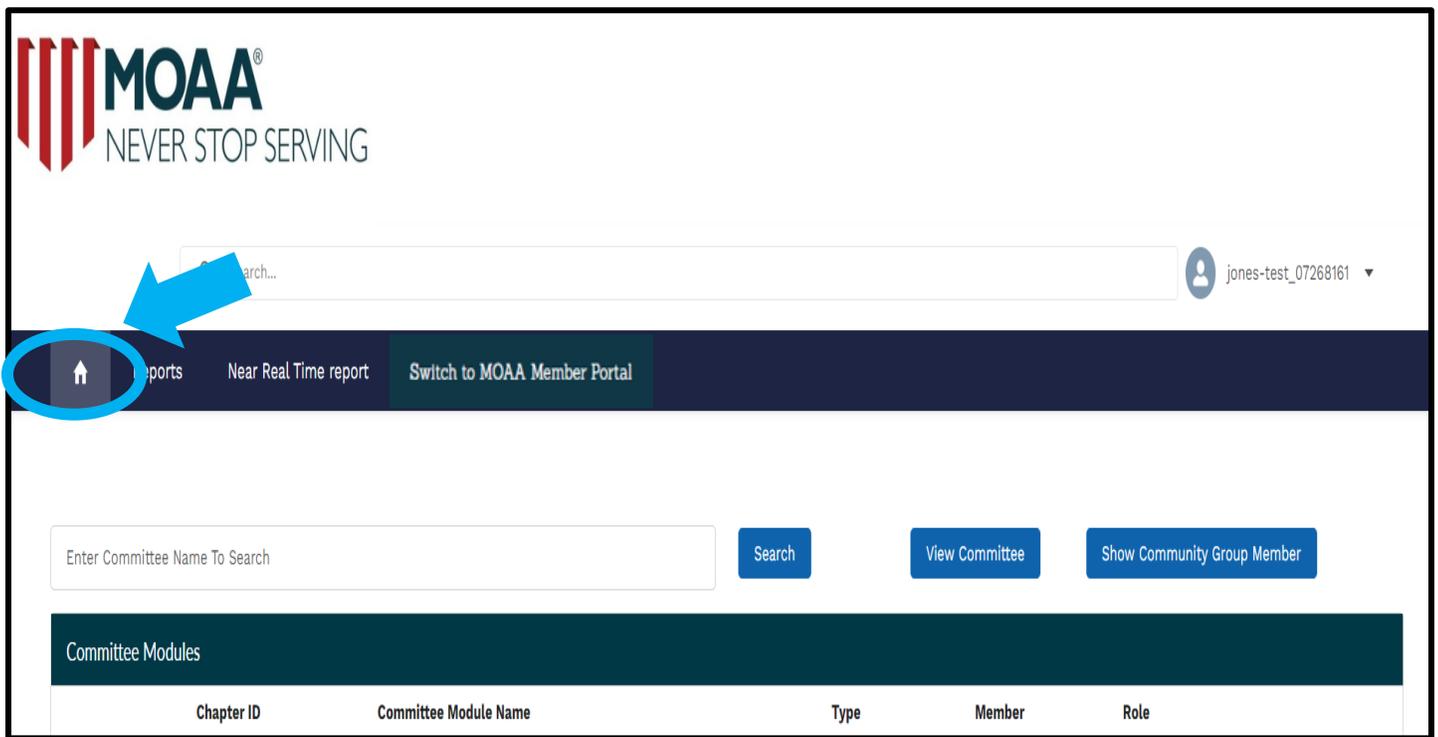
RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

COMMITTEE MODULE

You will be able to <u>select one affiliate at a time</u> or use the search bar if you have a list of chapters. If using the search option, you will need to type the full or partial name of the chapter (example: Victoria or Victoria's Test Chapter).

	Reports	Near Real Time report	Switch to MOAA Member Portal	

victoria   Search
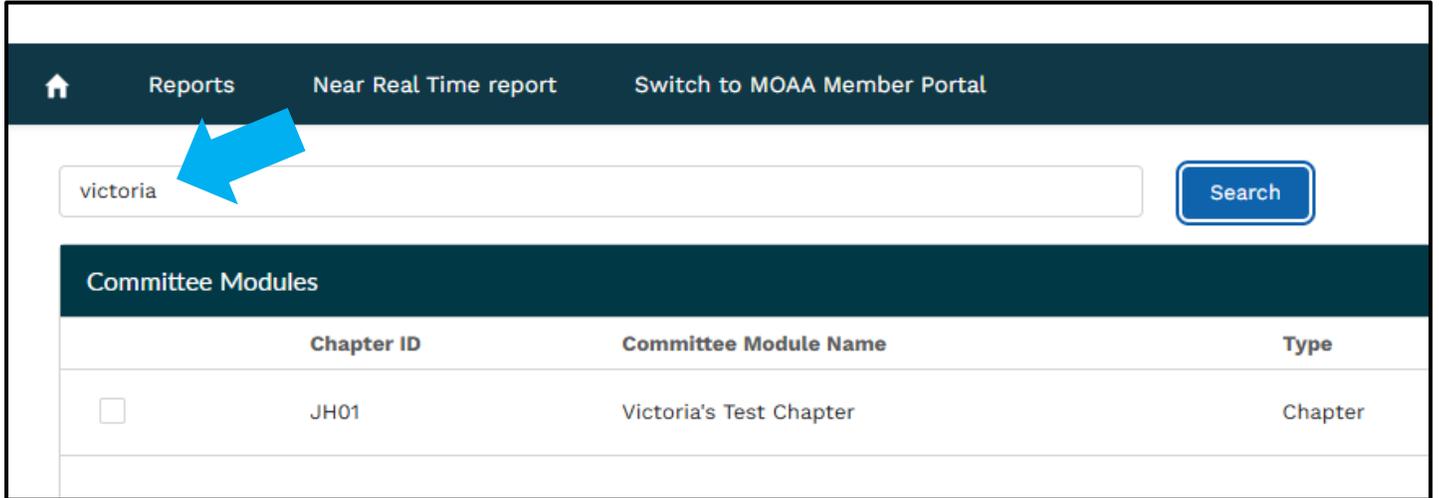
Committee Modules

	Chapter ID	Committee Module Name	Type
☐	JH01	Victoria's Test Chapter	Chapter

Committee Modules

	Chapter ID	Committee Module Name	Type	Member	Role
☑	JH01	Victoria's Test Chapter	Chapter	14	Manager

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

UPDATE COMMITTEE ADDRESS/MEETING INFO

After selecting the council or chapter name, you will next select "View Committee" to update meeting information. The areas on this page that are not editable can be updated by Affiliated Councils & Chapters staff.
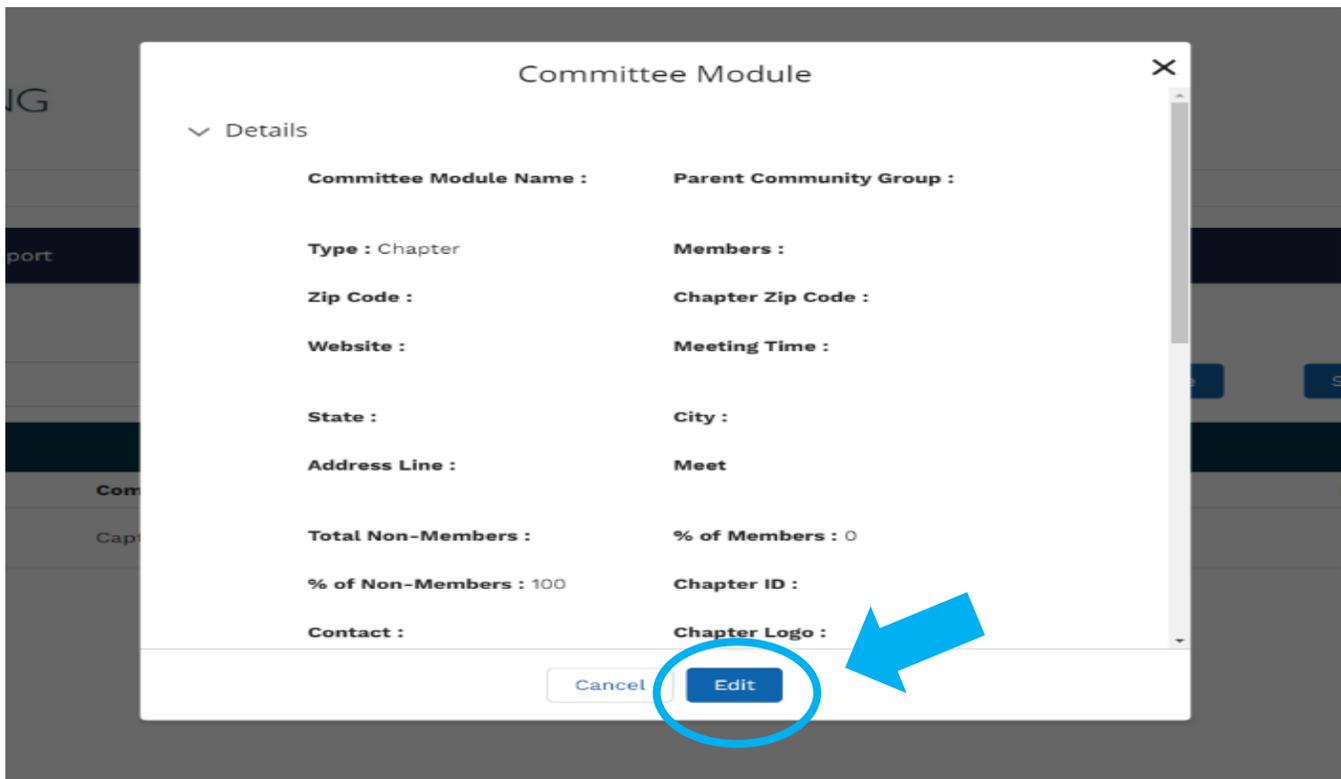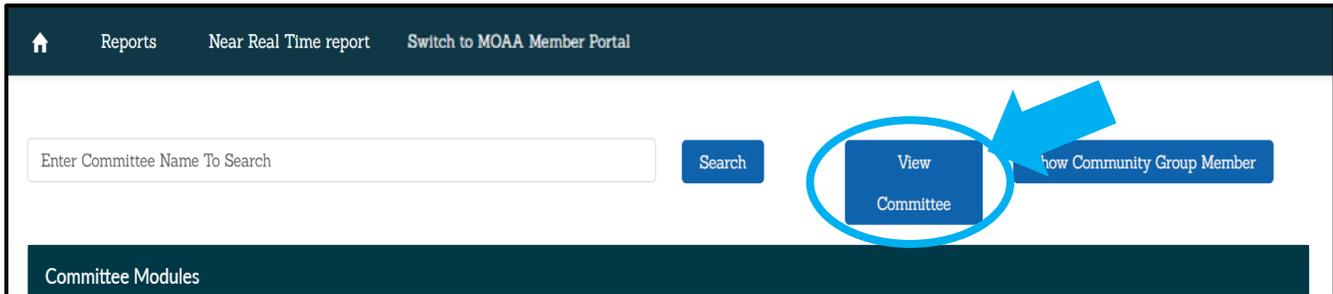
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RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

COMMITTEE MODULE, EDITABLE FIELDS

When the CM manager selects the "View Committee" button, it will take you to the Committee Module tab which will display information about your chapter (see pg. 17).

The following information will be displayed on the View Committee screen. If you serve the role as Manager, you will have editing privileges to the selections marked in the tables (see "Can the Manager Edit" field):

Field Name (left side)	Can the Manager Edit	Field Name (right side)	Can the Manager Edit
Committee Module Name: Affiliate Name (chapter name)	No	Parent Community Group: Affiliate council (if applicable)	No
Type: chapter/council	No	Members: # of members	No
Zip Code: zip + 4	No	Chapter Zip Code:	No
Website:	No	Meeting Time: (ex. Monthly, third Thursday)	**Yes**
State:	**Yes**	City:	**Yes**
Address Line:	**Yes**	Meeting Place:	**Yes**
Total Non-Members	No	% of Members:	No
% of Non-Members	No	Chapter ID:	No
Contact:	No	Chapter Logo:	No
Active Members:	No	Deactive Members:	No
Unique Active Members	No		

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COMMITTEE MODULE, EDITABLE FIELDS

Field Name (left side)	Can the Manager Edit	Field Name (right side)	Can the Manager Edit
Committee Status: Active	No	Committee Status Date	No
Primary Fax	No	Email	No
Chapter Install Month	No	Chapter Install	No
Chapter Meeting	No	Chapter Meeting Location	No

After making your edits to your CM, you can select, "Submit."
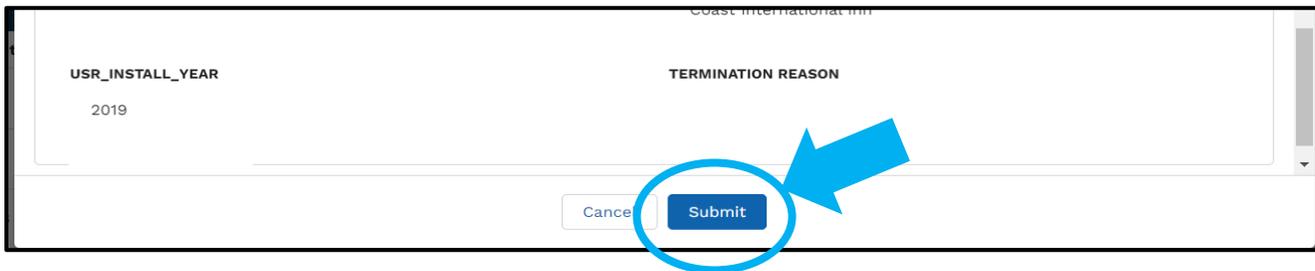
RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

PROPER FORMATTING

As a CM Manager, when editing fields, please be consistent and use the correct format. For example, <u>do not use all CAPS</u> when updating your chapter's meeting place. The edits you make will be listed in MOAA's database and viewed by MOAA staff.

Please use proper:
1. Spelling (verify spelling of your meeting place)
2. Formatting (do not use all caps)
3. Punctuation (do not abbreviate words and sentences; only abbreviate states, ex: MD for Maryland, GA for Georgia, etc.)

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

ADD OR REMOVE COMMITTEE (COUNCIL OR CHAPTER) MEMBER

Select the council or chapter for which you'd like to either add new member(s) or remove member(s).

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

ADD OR REMOVE COMMITTEE (COUNCIL OR CHAPTER) MEMBER

This screen will allow the CM manager to "add a new member" or "remove a member" by placing an end date on the individual's record.
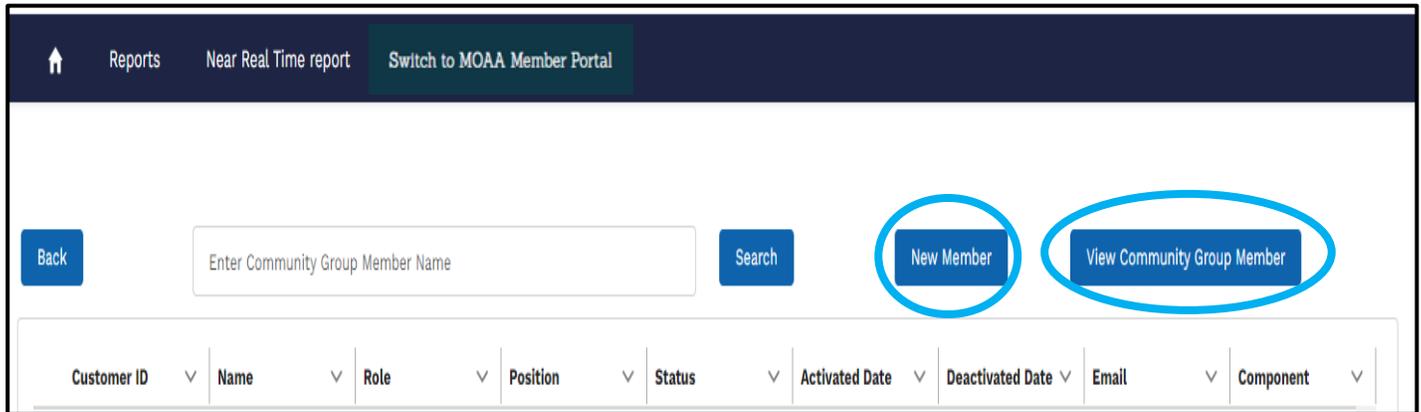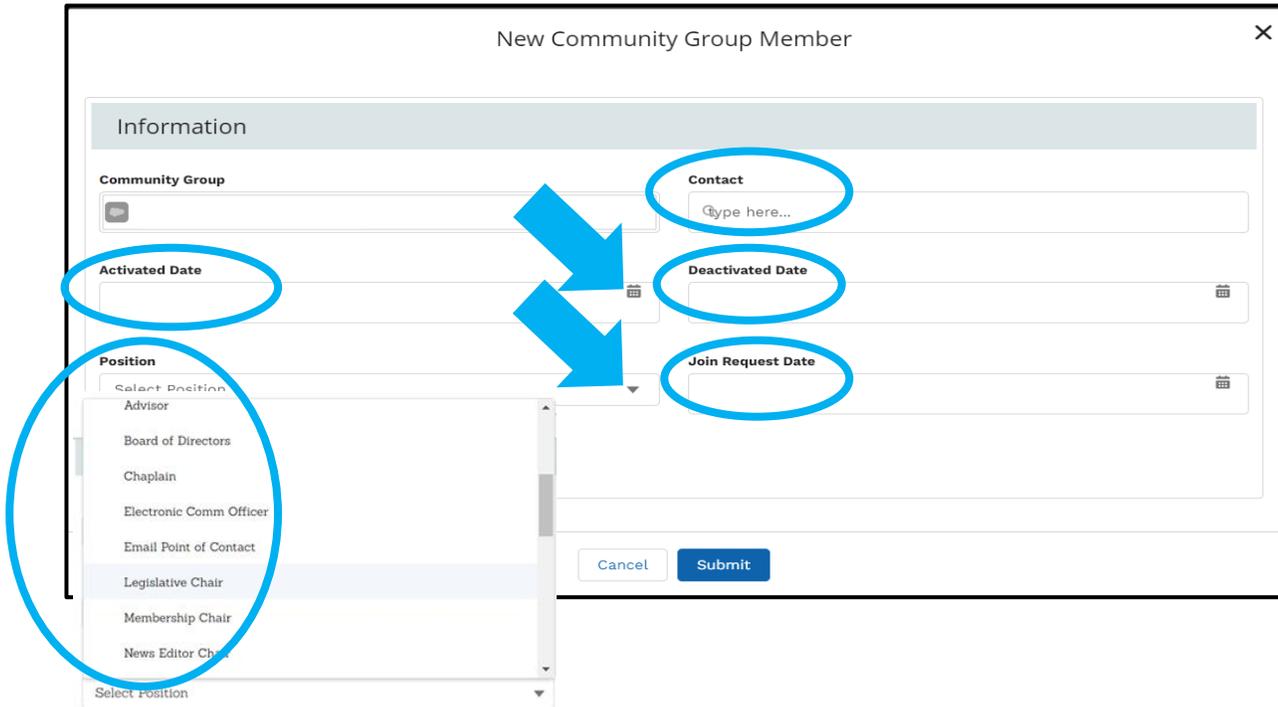

WHEN YOU SELECT:

1. New Member: allows the CM manager to add a new member to the roster. This is someone who is eligible for MOAA membership (i.e. Regular member (active duty, retired, or former) or Surviving Spouse (widow/widower whose military spouse was a MOAA member or eligible for membership has passed away).

2. View Community Group Member: allows the CM manager to update a current member who is already listed on the roster. The CM manager can place a "deactivated date" on the individual's record. When the end date is applied, this person will be removed from your roster if the date is a past date. When the CM manager adds a future date, the individual will be listed on the roster as of the date listed as the future date.

- Deactivated members can also be viewed on the "Deactivated Roster" when you select 'Reports' on the roster grid.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

ADDING A NEW MEMBER

Activated Date: use the calendar icon to place the date the new member joined. The New Member option can also be used when a new officer (council/chapter leader) has been appointed in a leadership position that's not currently listed on your roster. For example, CPT John Smith is listed as a member. You can use the New Member button to add him as a Program Chair, Treasurer, Secretary, etc. You will need to add a person for each position they hold, including "member" of the council or chapter.

Position: use the drop-down menu to select the position of the new member (as pictured). Please note that multiple positions were added for leaders who hold more than one position. Apply the most current position(s) for each officer being added to your chapter roster (see pg's 26 – 29).

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

ADDING A NEW MEMBER, ADDITIONAL FIELDS

Contact: to locate someone, you must conduct a search using the individual's customer ID or email address. The database will display anyone matching either of these identifiers. Please note that if you search on an email address, the person will need to have that email in their MOAA profile record in order to display on your search screen. If the Customer ID or Email address matches the MOAA database, the individual's name will display. You can select the individual's name in order to add them to your council or chapter.

If you're unable to find the individual you'd like to add, please send an email to the Member Service Center staff at msc@moaa.org; be sure to copy the Affiliated Councils & Chapters department at chapters@moaa.org. Our staff will conduct a search and verify this individual in our database. When requesting a look-up by our staff, please include name, rank, service, MOAA member ID, and email address so that we can verify our records and provide feedback on the correct individual you'd like to add to your council or chapter.

We ask that you give our staff at least 24 – 48 hours to send you feedback on adding this individual to your council or chapter.

Deactivated Date (removing a member from active status): use the calendar icon to place an "end date" on the individual's record. More information on this process may be found on the next page.

Important to remember: **Please do not place an end date on the council/chapter president's record unless you are able to add the successor with a date that follows the immediate past president's term end date.**

Join Request Date: this is an optional field; use this date if the chapter is interested in keeping track of the date someone requested to join the chapter.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

AVOID DUPLICATION OF MEMBERS/LEADERS

As the CM Manager, it's your responsibility to ensure you are not adding duplicate members and leaders to your existing roster. Everyone listed on the roster grid when you select "View Community Group Member" will display current chapter members which are also displayed on your Active Roster Report.

To locate duplicates, the person's name and "position" would be listed more than once. For example, you shouldn't see the same person listed in the position of "member" more than once. This is also true for any leadership position a person holds. The new CM will limit new entries to a single position to avoid duplication, but older records will remain unless you remove duplicates.

The next page will display an example of a duplicate member (Glenn Fetter) who is listed twice as "Member" on a chapter roster; both entries have a different begin date or Activated Date. In order to remove one of the entries, look for the entry that has the most current date; this is the record you will keep. In this example, you would keep the entry with a Activated Date as of 10-08-2024 and remove the one listed as of 04-21-2021.

If this member never left your chapter, you must place a deactivation date for the record marked as 10-08-2024, to keep the history of the person joining your chapter on 04-21-2021. If you're unsure of which record to remove, please contact our Affiliated Councils & Chapters Department for help.

To place a deactivation date on the person's record, select the name of the record you're removing, then click "View Community Group Member" then place a deactivation date one day prior to the date of the latest record. For good record keeping, you must apply a deactivation date one day prior to the latest activated date of a record holding the same position title.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

Example of a Duplicate Record

(see previous page on how to remove a duplicate record)

First Name		Last Name ↑		Role		Position		Status		Activated Dat.		Deactivated _	
Glenn		Fetter		Member		Member		Active		2021-04-21			
Glenn		Fetter		Member		Member		Active		2024-10-08			

(Table header also includes: ar Real Time report · Switch to MOAA Member Portal · Enter Community Group Member Name · Search · New Member · Vie)

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ADDING A NEW OFFICER/LEADER WITH DUAL OR TRIPLE POSITIONS

CM Manager will have the option of adding a leader who holds one to three positions for each person listed on the roster. When using the dropdown menu, scroll down to view the selections. If you don't see two applicable positions for a leader, please be sure to maintain **one key position** for the officer if it applies to their leadership postion. **Key positions include: President, 1st Vice President, Membership Chair, Secretary, Treasurer, Surviving Spouse Liaison, and Legislative Chair.**

| Customer ID	First Name	Last Name	Role	Position	Status	Activated D...
07268161	carla	jones-test		Membership Chair	Active	2025-01-10
	Thomas	Brown		Member	Active	2025-01-14
	Thomas	Brown		2nd Vice Chair		
	Thomas	Brown		1st Vice President		
	Thomas	Brown		Member		2025-01-17
	Thomas	Brown		3rd Vice Chair	Active	2025-01-17
02170774	Victoria	Twyne		President,Membership Chair	Active	2025-02-17

Dual position:
President, Membership Chair
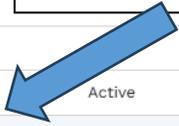
Due to the migration of MOAA's previous database system, many of the records that transferred over to this new Association Management System (AMS) listed a chapter officer multiple times if this individual held various positions in the chapter. Example is shown above, Thomas Brown, holds "member" and "3rd Vice Chair." Additionally, a different Thomas Brown, holds the positions of "member," "2nd Vice Chair" and "1st Vice Chair." With this new database system, CM managers will soon start to see each person listed with one unique record beside their position title. There will be some leaders listed more than once who have a position outside of the positions listed on the dropdown menu. Going forward, MOAA is asking the CM manager to apply the most applicable single, double or triple position title for each of the officers being added to the roster. Then, add any others as a single position title if it's not offered on the dropdown menu. As always, chapter members should be listed as a "member" if they do not serve in a leadership position.
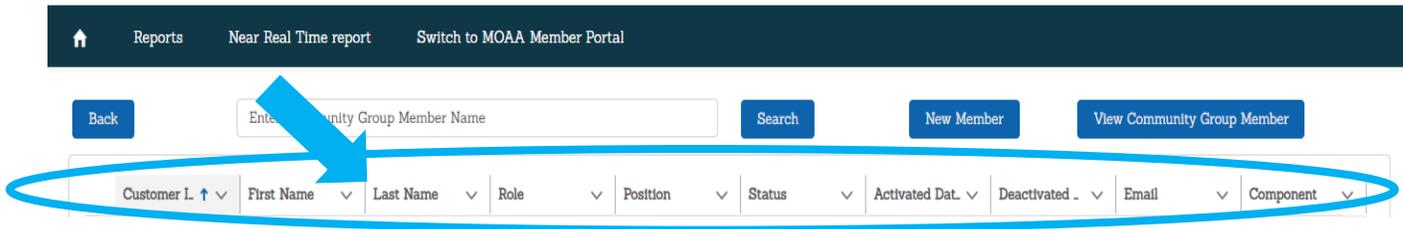
RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

DEACTIVATE COMMUNITY GROUP MEMBER

CM managers can deactivate members or officers/leaders who need to be removed from the roster. To deactivate a member, you must be on your main roster page. Select the person you'd like to remove from your roster.
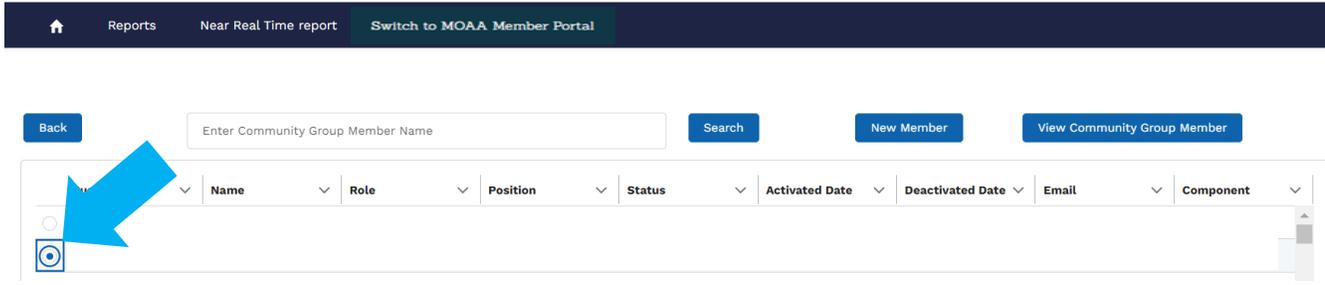
When you've added the deactivated date and select "submit," this person will be removed from your roster and will be listed on the "deactivated list" from your reports bar. You can generate a report of "deactivated members" to see all the people who received a deactivated date. Note: deactivating a record from leadership position does not impact an individual's separate member record.
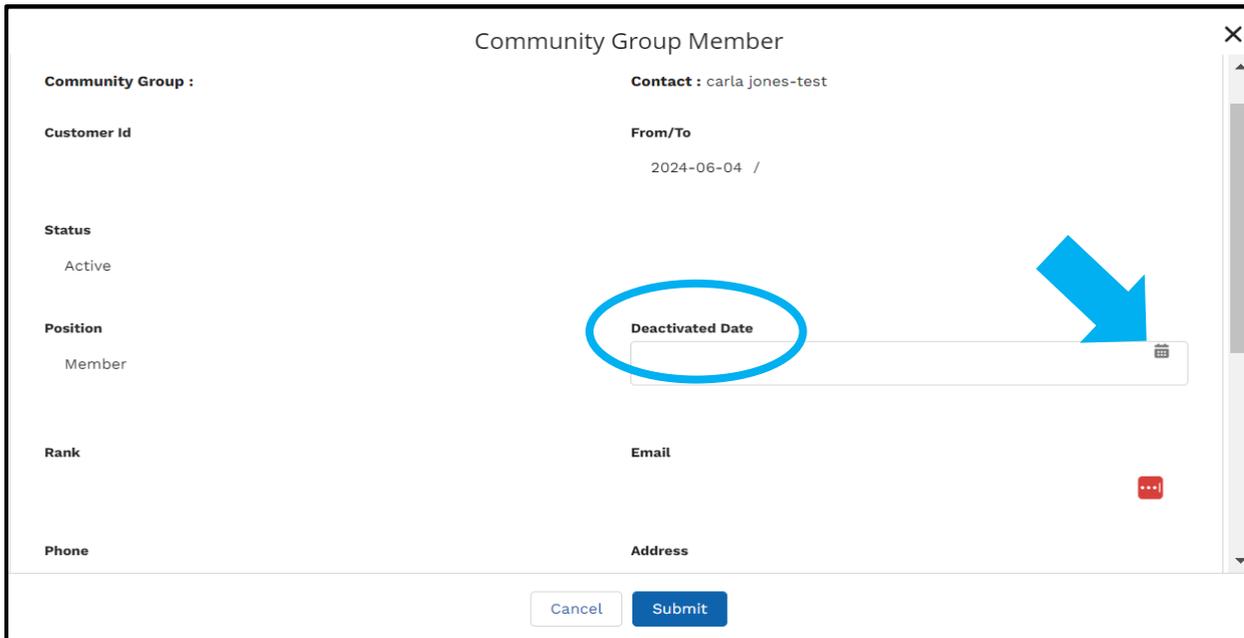
30

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

SORTING CAPABILITIES

CM managers will be able to sort by all the column headers listed on the roster grid.

It is recommended that you sort by "Last Name" if you're adding someone to your roster. This is to help avoid duplication of adding someone who is already listed on your roster.

| Reports | Near Real Time report | Switch to MOAA Member Portal |

| Back | | Enter Community Group Member Name | | Search | | New Member | | View Community Group Member |

| Customer I. ↑ ∨ | First Name ∨ | Last Name ∨ | Role ∨ | Position ∨ | Status ∨ | Activated Dat. ∨ | Deactivated . ∨ | Email ∨ | Component ∨ |

Sorting by any of the column headers.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

REPORTS

CM managers can select the "All Reports" or "All Folders" button to view their full active membership roster and Deactivated Roster. There will be two reports listed on this screen, (1) Active Members, and (2) Deactivated Members.
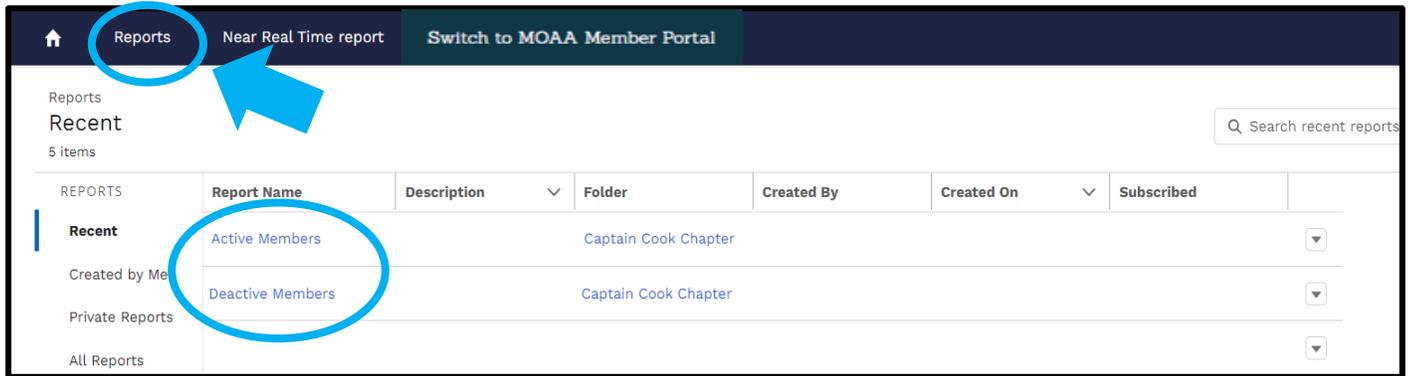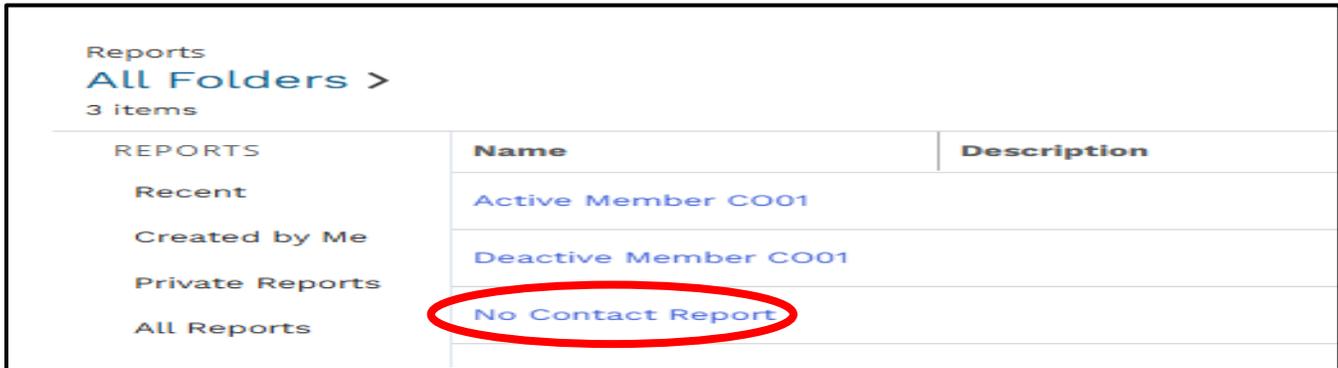

ALL REPORTS | ALL FOLDERS
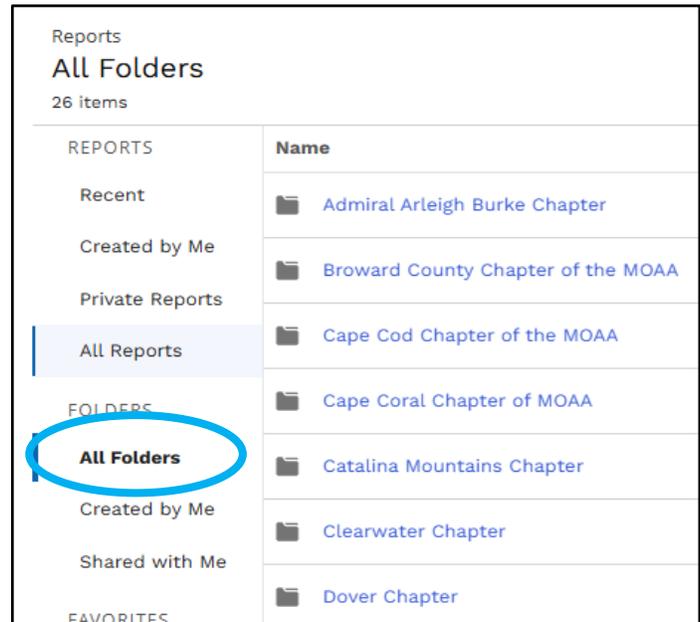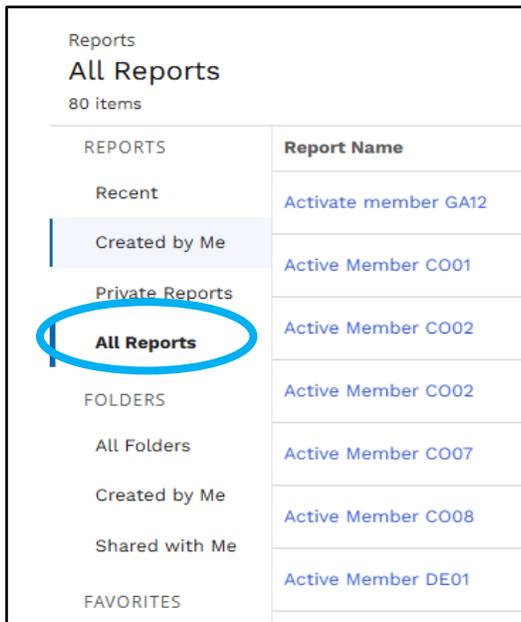
RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

NO CONTACT REPORT

Please note, CM managers will see a report called "No Contact Report" in their reports folder. This report is inoperable; when you attempt to open it, it will display an Error Message. MOAA's programmers are working to fix this issue.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

EXPORTING REPORTS

After opening the "active members" report, this screen will appear. Use the dropdown option to export the roster in Excel or CSV format.

If you wish to save a report to your computer's hard drive, the Export box will allow you to save the roster on your computer's hard drive. Note: you may find it easier to view your full member roster in a report, as you are not limited to the window for the online viewing grid. You will also see additional data fields.
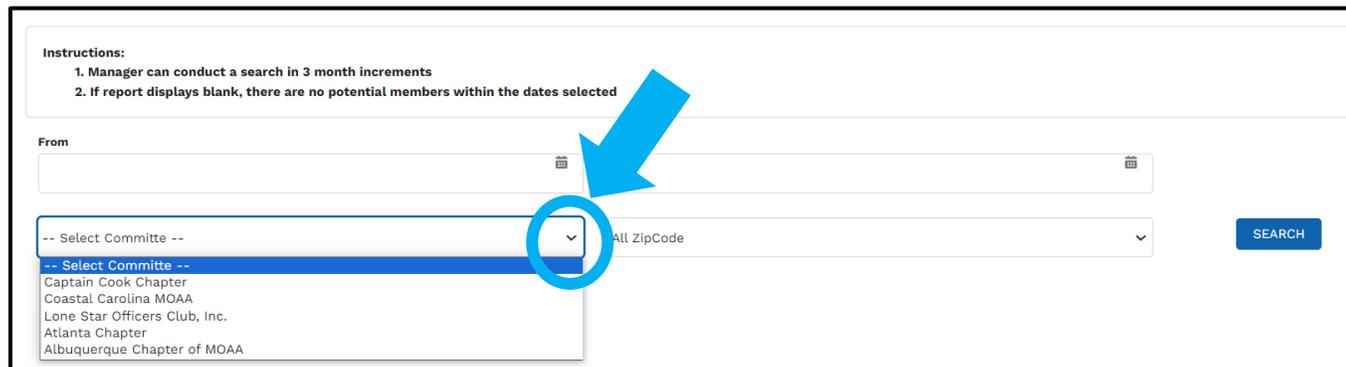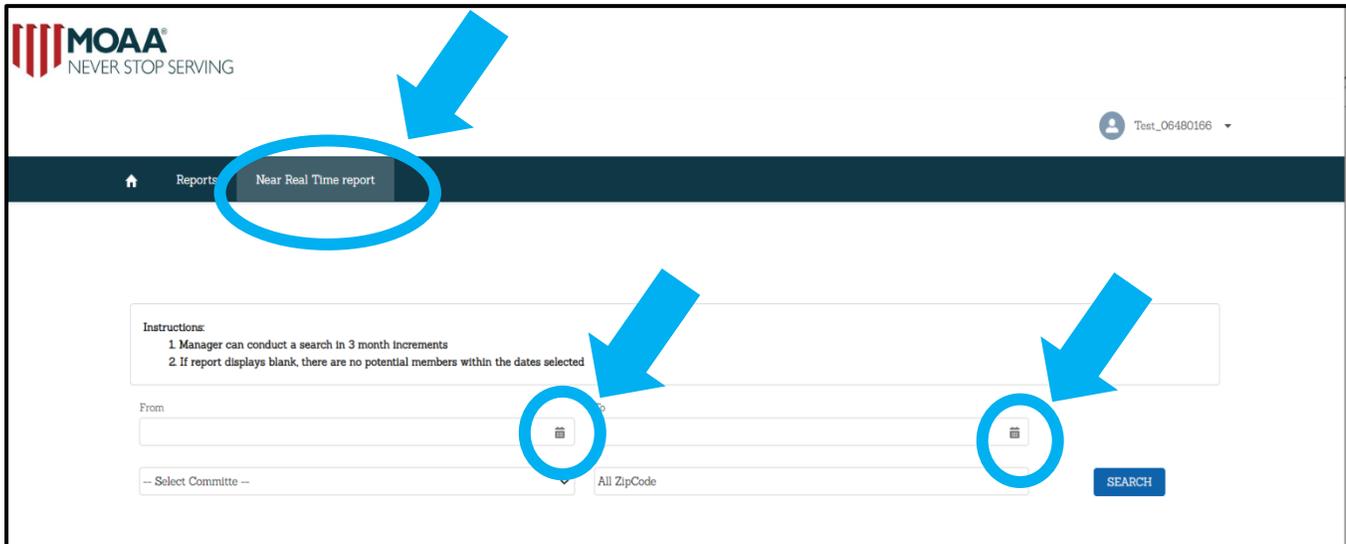

Dropdown window will allow the CM manager to select the format to save on your computer's hard drive.

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NEAR REAL TIME (NRT) REPORTS

Selecting the Near Real Time report will take you to the screen which allows the CM manager to use the dropdown menu and apply the "From" and "To" dates. This report can retrieve reports from previous months. The CM manager can select a date range of up to three-month increments. Note: we expect NRT data to become more robust as data entry backlogs are resolved. **Select Committee**: allows the CM manager to select the chapter's NRT report.

All Zip Code: use this dropdown to select "all zips" or a specific zip code.

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the committee module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

INFORMATION ON YOUR NRT REPORT

When the CM manager generates the NRT report, the information will provide the following three categories:

(1) Brand new MOAA members in the catchment area (Basic, Premium or LIFE)

(2) MOAA members who recently moved into the chapter's catchment area

(3) Members in the area who recently opted-in to receive chapter communications

IMPORTANT INFORMATON ON "NO CONTACT REPORT"

MOAA's previous committee module included a report called "No Contact List." These were the individuals who requested not to be contacted by chapters. MOAA's committee module maintains record of an affiliate's membership and anyone who has opted out of communication with our affiliates and partners.

In maintaining MOAA's policy not to contact anyone who has requested to be removed from communication, we are asking CM managers to maintain a roster of any individual who request that they be removed from communications. Please be sure to maintain a spreadsheet with the person's name, type of communication, and the date they opted-out of communication.

A new "No Contact List" is under development. When this report is fixed, it will refresh automatically based on current member preferences. Therefore, chapters will no longer need to manually update older lists they received under MOAA's previous database system.

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THANK YOU FOR USING MOAA'S NEW Committee Module

Thank you for using the Committee Module system. Please reach out to our Affiliated Councils and Chapters if you have any questions or would like to provide feedback on this system.

AS A REMINDER

If you discover errors, want to switch manager roles with a different leader, or need help, please use the provided CM Feedback Survey Link. Affiliated Councils & Chapters staff would like to keep record of problems and recommendations on one portal. To fill out the CM Feedback Survey, use this link: https://forms.office.com/r/r7uymYmL7s

If you need to speak with someone about the issue, please call (800) 234-6622 or email chapters@moaa.org.

If calling MOAA's toll free number, please use extensions x168 (preferred).

Thank you for using this tool to discover new potential members in your area, generate reports, and manage leadership and membership rosters.

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