

Search

View Committee

Show Community Group Member

Committee Modules

Chapter ID	Committee Module Name	Type	Member	Role
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Chapter Module (CM) Instructional Guide





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RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the Chapter 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 Association Management System (AMS), with a portal for your use called the Chapter Module. We are excited to share this tool for our council and chapter leaders, many of whom will be using the Chapter 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.

Please note: we have adjusted the name from "Committee Module" to "Chapter Module" upon request from volunteer leaders. Please note that you may still see references within the CM to "Committee Module," as this is the technical name for the portal within the Salesforce (AMS) platform.

Leaders are able to manage current membership rosters and retrieve reports of former chapter members (called deactivated members), track leadership roles, and make basic updates to chapter information. Moreover, it will allow leaders to retrieve Near Real Time (NRT) reports of prospective members 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.

As leaders are using the CM, if you run across a system error or problem that our technical staff should be aware of, please contact chapters@moaa.org. Please allow our staff adequate time 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.

LOG IN / Chapter Module (CM) PREP

This guide will help walk you through the steps to get into your personal MOAA profile and the Chapter 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 Chapter Module within MOAA's database to view, change, export, update, and manage certain 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 Chapter 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.

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) Chapter Module – terminology used as CM____
Please note that this system has formerly been referred to as the “Committee Module.” While it is now the “Chapter Module,” councils may also access data through this system.
- (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.

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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: MOAA’s previous database system CM allowed leaders to apply multiple positions to an individual's record. Under this new CM, any new records added are limited to a single position (or a defined combination of positions on one line, as described on page 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.”

Reporting Deceased Members:

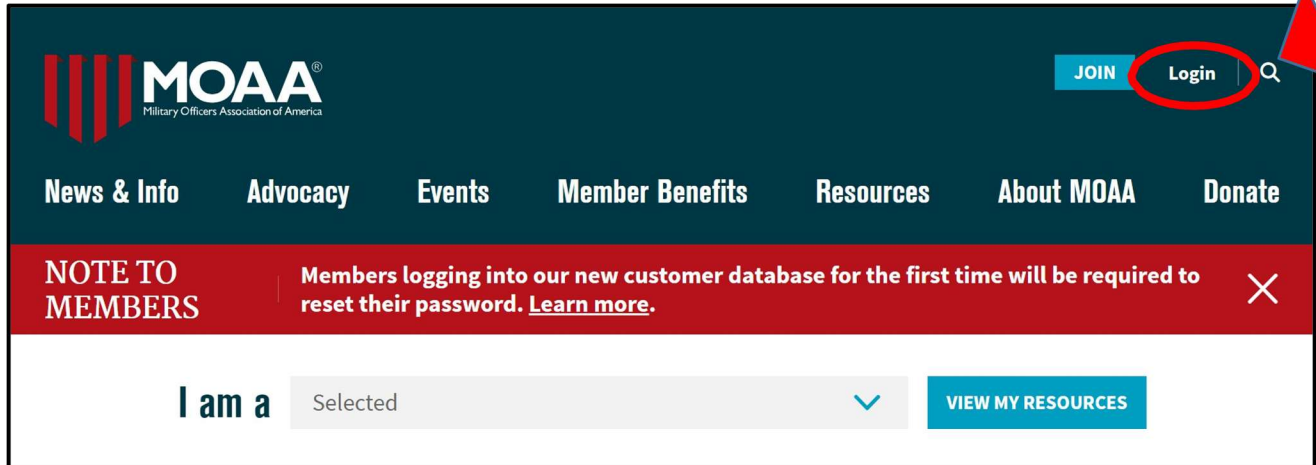
Report deceased member information through MOAA's TAPS form here: [MOAA TAPS FORM](#) or by contacting our Member Service Center (MSC) at MSC@moaa.org or call (800) 234-6622; you must include the person's name, rank, service, status, Surviving Spouse's name (if applicable), and the date the person passed 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 an end date on the person's record.

LOGIN

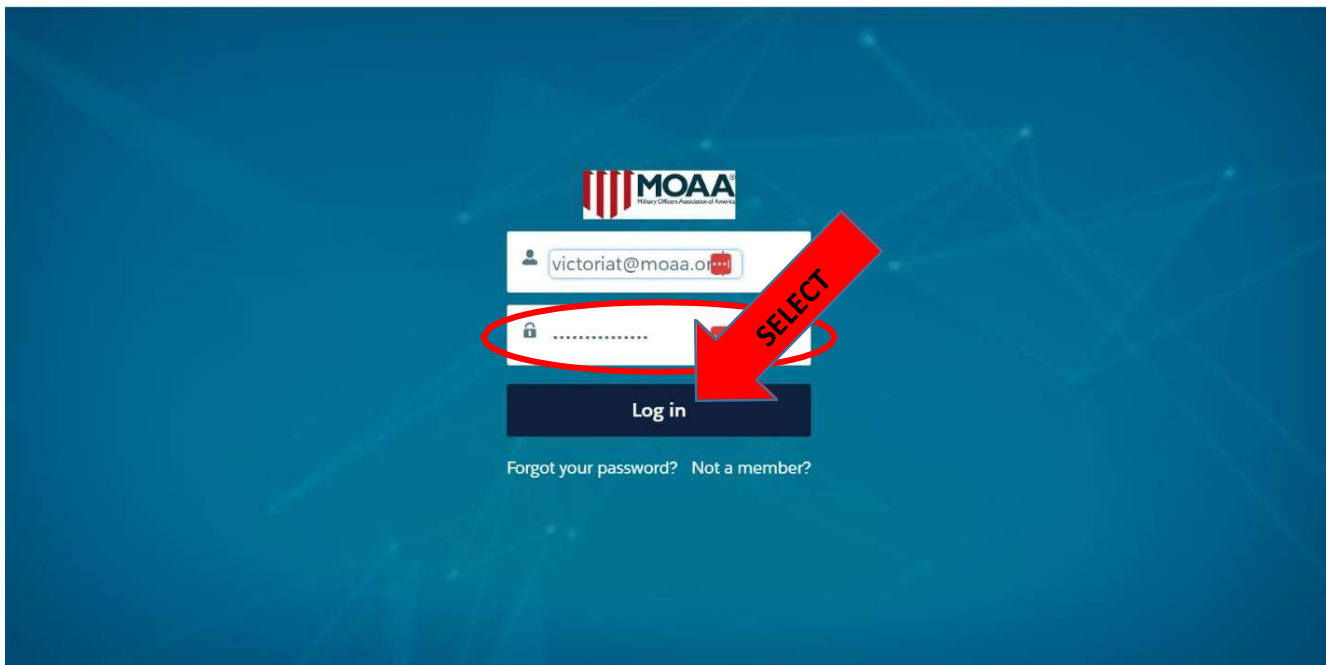
Go to <https://www.moaa.org/> Along the top bar, you will see the “Login” button. Click this button to go into your MOAA profile.



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.

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.

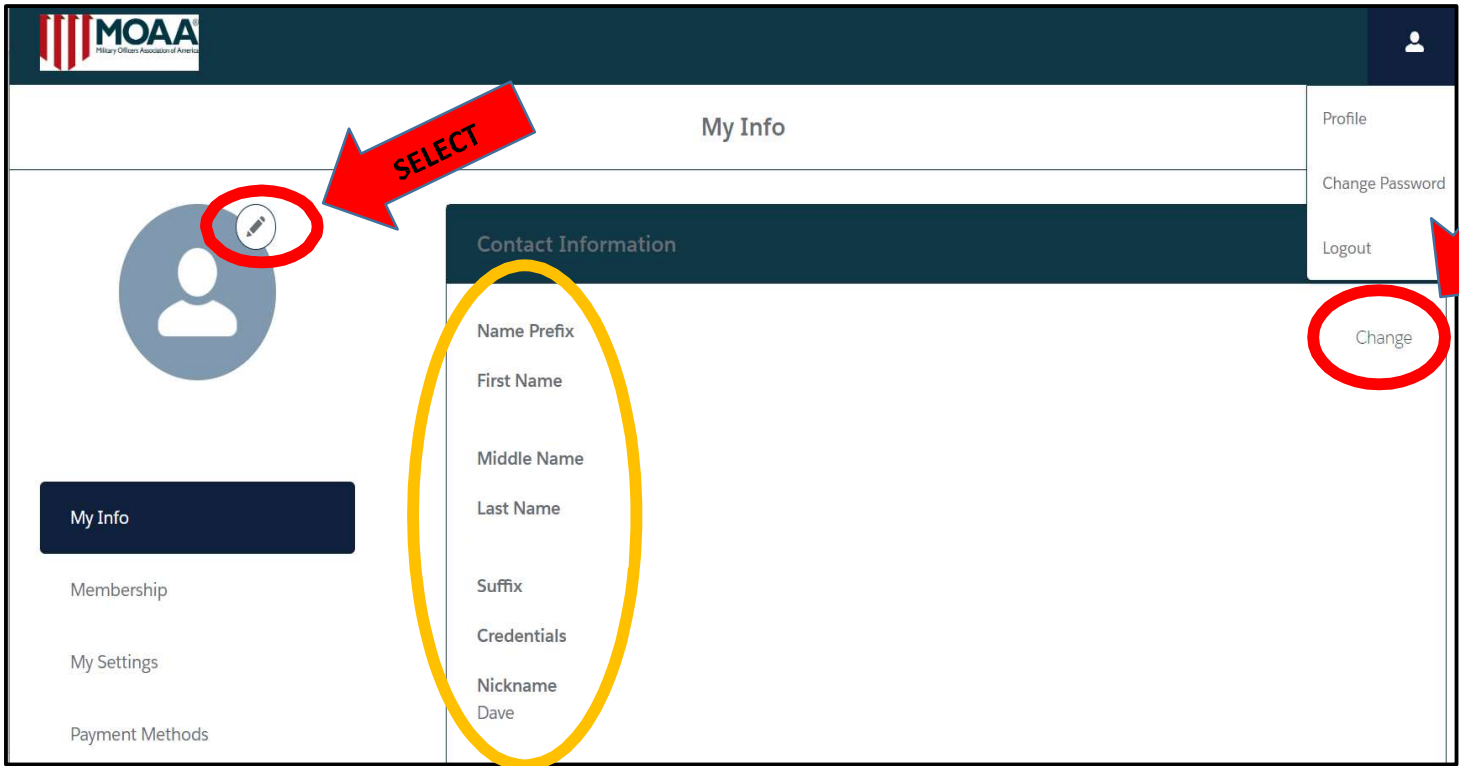
Hi Member Name:

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

Thanks,

Military Officers Association of America

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.

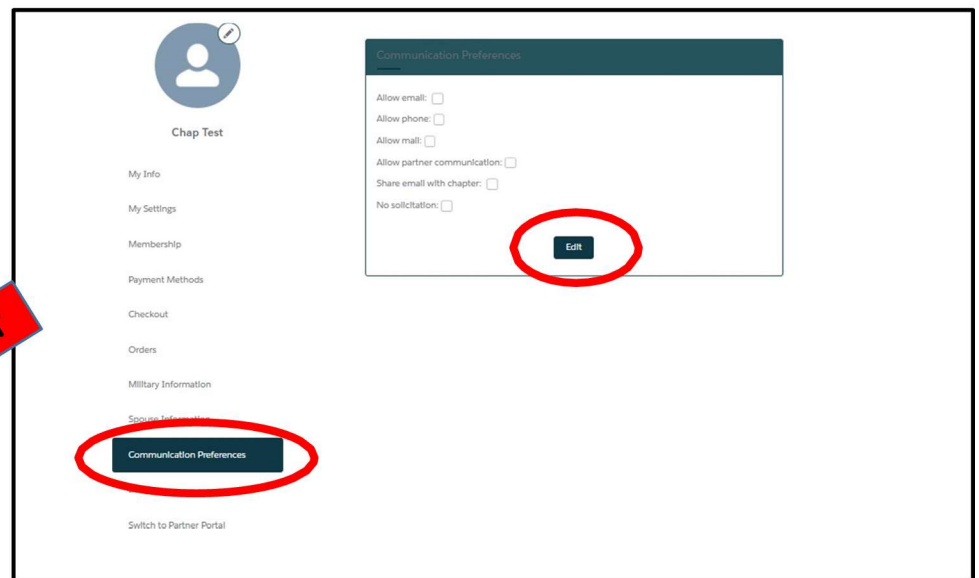
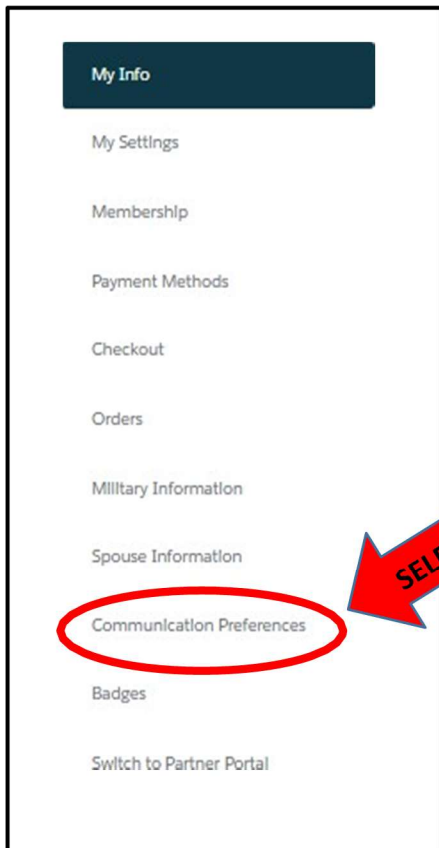
MY INFO (Cont.)

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 Chapter Module Member or Manager (assigned CM administrators) to toggle from his/her MOAA profile into the Chapter Module. After getting into the Chapter Module, there’s a button that allows you to switch back (see pg 13).

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.

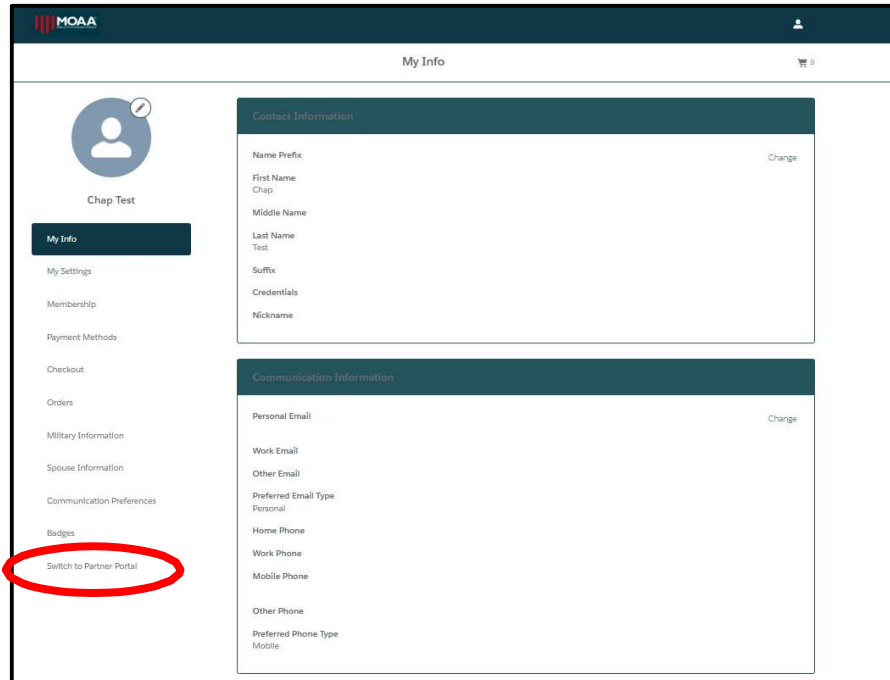
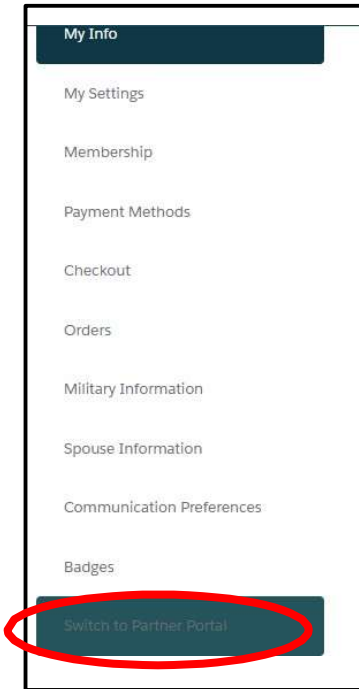


RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the Chapter Module (CM), it is recommended that you use one of these web services: (1) Chrome, (2) Safari (for Mac Users), (3) Internet Explorer, or (4) Firefox.

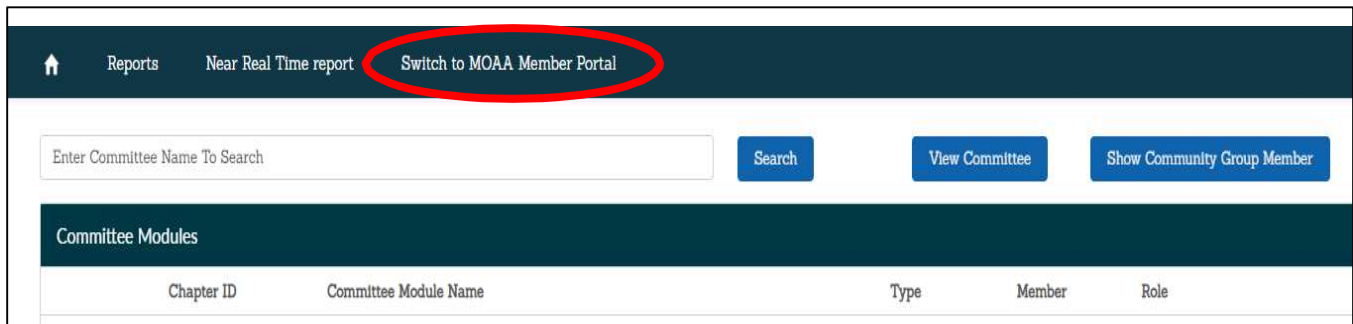
TOGGLE / SWITCH TO PARTNER PORTAL (CM) AND BACK TO MOAA PROFILE

The Chapter Module (CM) Member and Manager has a toggle button on their MOAA profile allowing them to switch between their MOAA profile and their Chapter Module (labeled “Partner Portal”). Below is a screenshot of both options to switch between the two.

MOAA Profile (My Info)



Switch to MOAA Member Portal



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WHO HAS ACCESS

Two officers will have access to the Chapter 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 Chapter 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 CM administrative "Member" which will allow "read only" access.

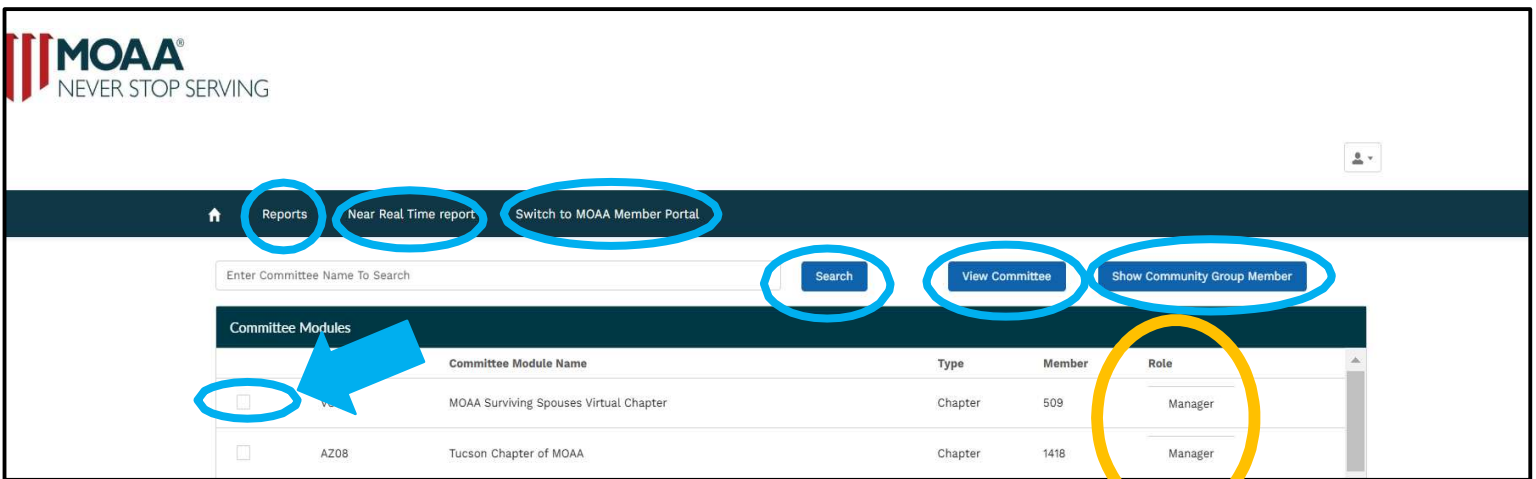
1. **MANAGER** = Can view, update, and edit roster, and generate Near Real Time (NRT) reports.
 - a. This person can place an end-date on member records, and update council/chapter location and meeting place. Additionally, the manager can generate and export NRT reports.
2. **MEMBER** = Read Only
 - a. This person can only view the roster (cannot make updates or changes; cannot generate NRT reports)

CM MANAGER / MEMBER

Below is a screenshot of the Chapter 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.

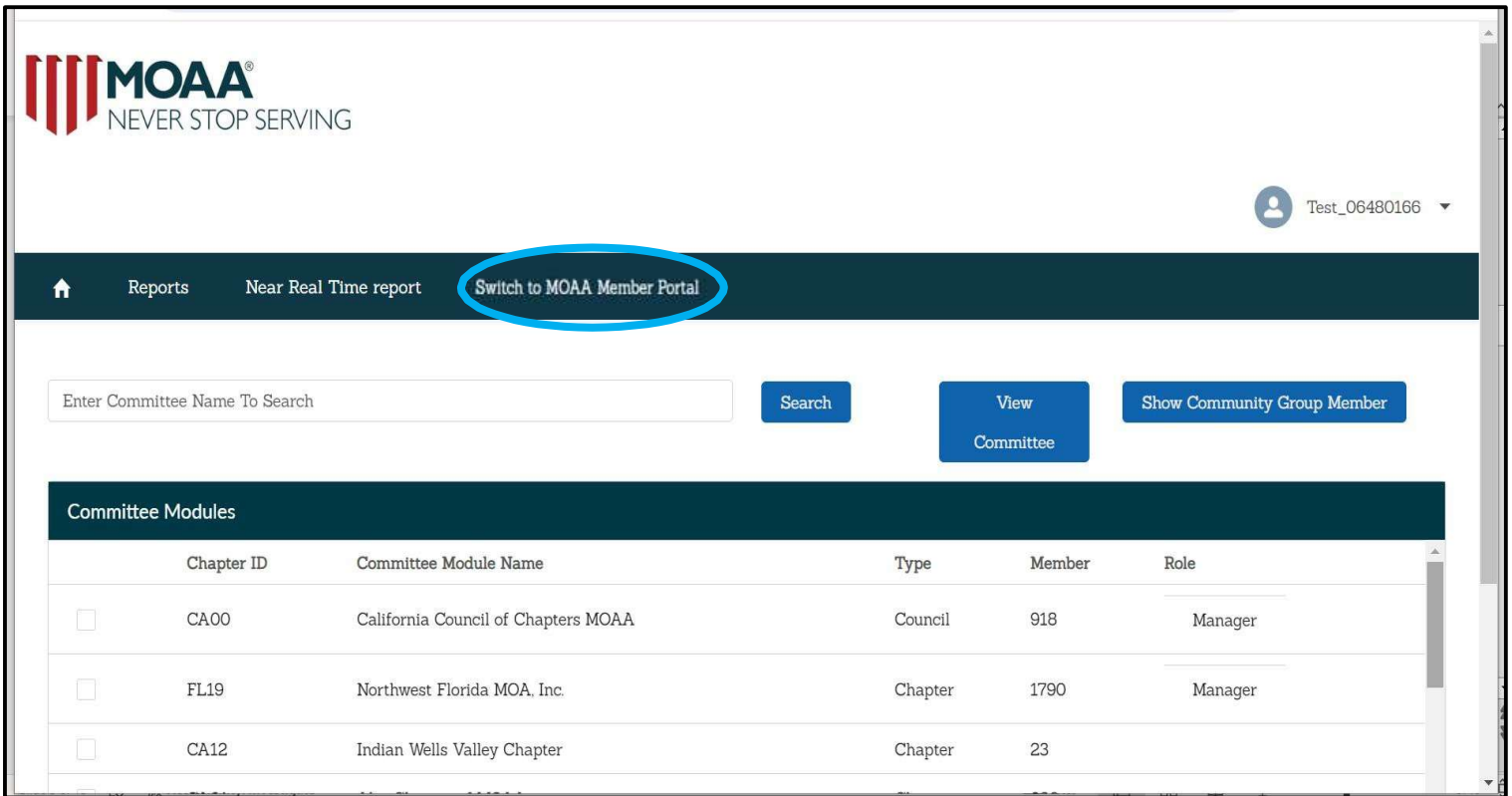
Please note that if you hold the position as the council president and have chapters in your state, you will see the affiliates in your state listed under the “**Chapter Modules**” column (see below).

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.



Committee Module Name	Type	Member	Role
MOAA Surviving Spouses Virtual Chapter	Chapter	509	Manager
AZ08 Tucson Chapter of MOAA	Chapter	1418	Manager

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MOAA®
NEVER STOP SERVING

Test_06480166

Home Reports Near Real Time report **Switch to MOAA Member Portal**

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

Committee Modules

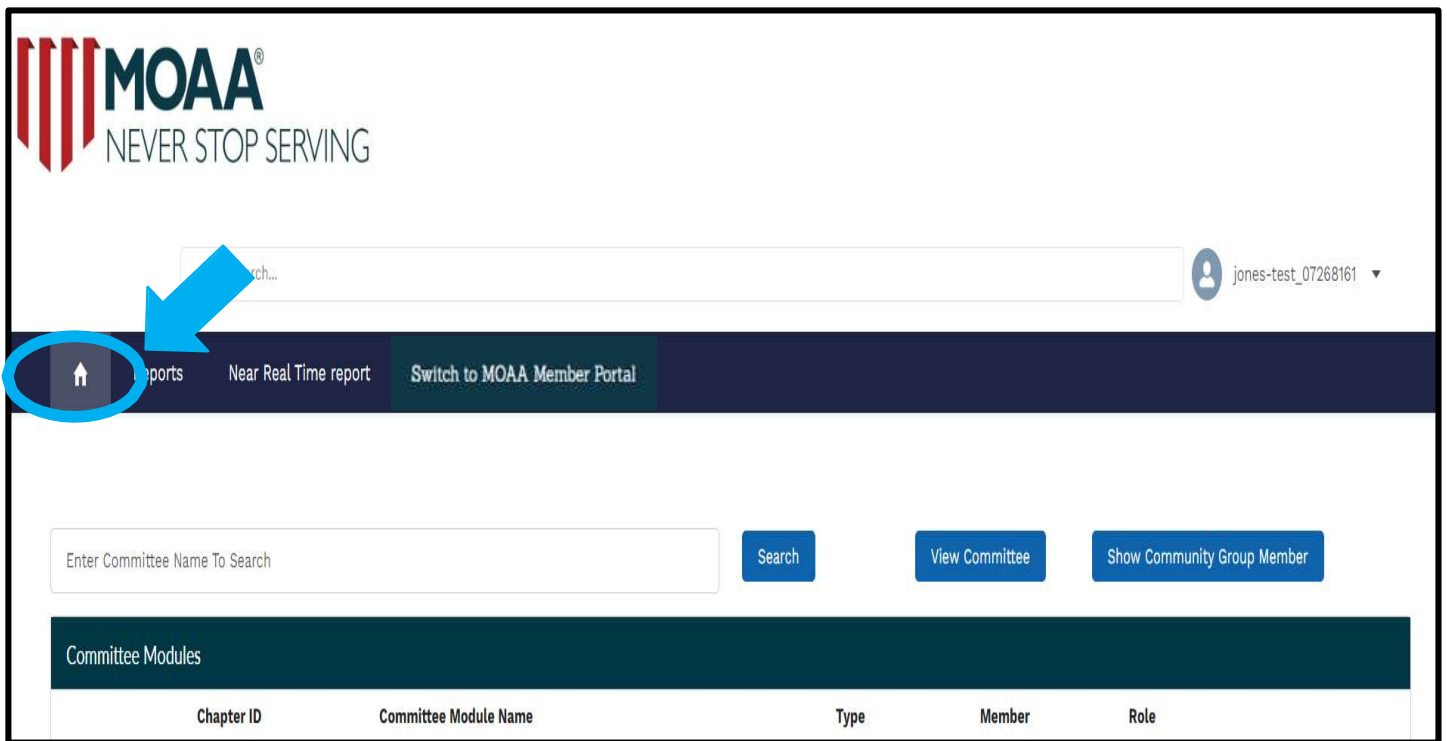
Chapter ID	Committee Module Name	Type	Member	Role
<input type="checkbox"/> CA00	California Council of Chapters MOAA	Council	918	Manager
<input type="checkbox"/> FL19	Northwest Florida MOA, Inc.	Chapter	1790	Manager
<input type="checkbox"/> CA12	Indian Wells Valley Chapter	Chapter	23	

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HOME BUTTON

At any time, CM Managers can use the “home button” to go back to their main Chapter 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.

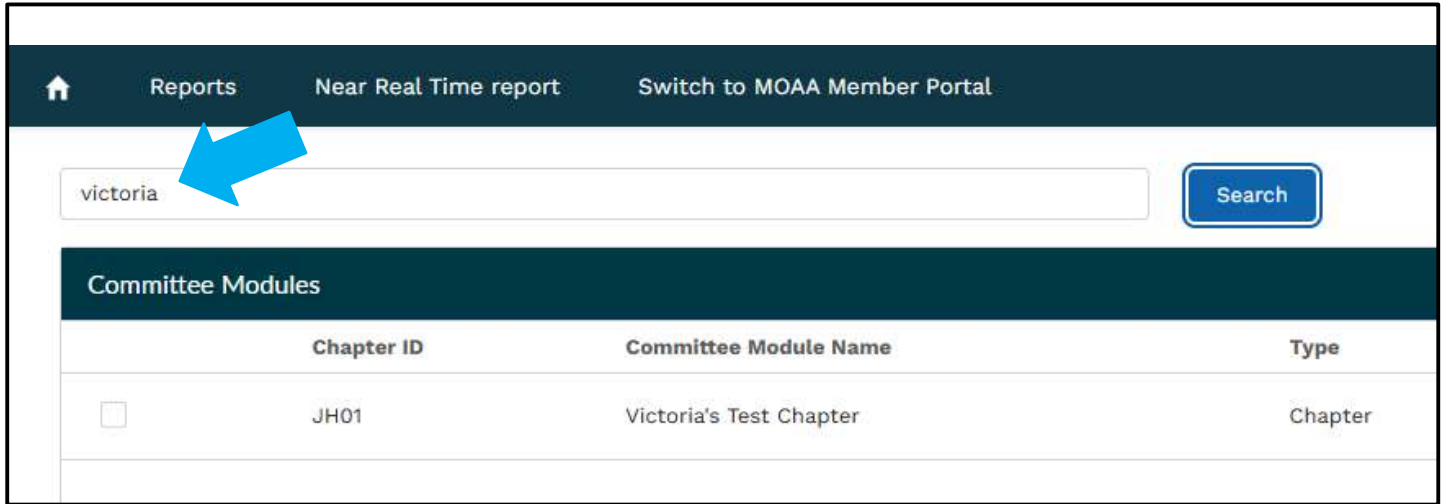


The screenshot displays the MOAA Chapter Module interface. At the top left is the MOAA logo with the tagline "NEVER STOP SERVING". A search bar is located at the top right, with a user profile icon and the name "jones-test_07268161" next to it. Below the search bar is a dark blue navigation bar containing several menu items: a home button (a house icon) which is circled in blue and has a blue arrow pointing to it, "Reports", "Near Real Time report", and "Switch to MOAA Member Portal". Below the navigation bar is a search section with a text input field labeled "Enter Committee Name To Search", a "Search" button, and two other buttons: "View Committee" and "Show Community Group Member". At the bottom of the screenshot is a table header for "Committee Modules" with columns for "Chapter ID", "Committee Module Name", "Type", "Member", and "Role".

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CHAPTER MODULE

You will be able to select one affiliate at a time 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).



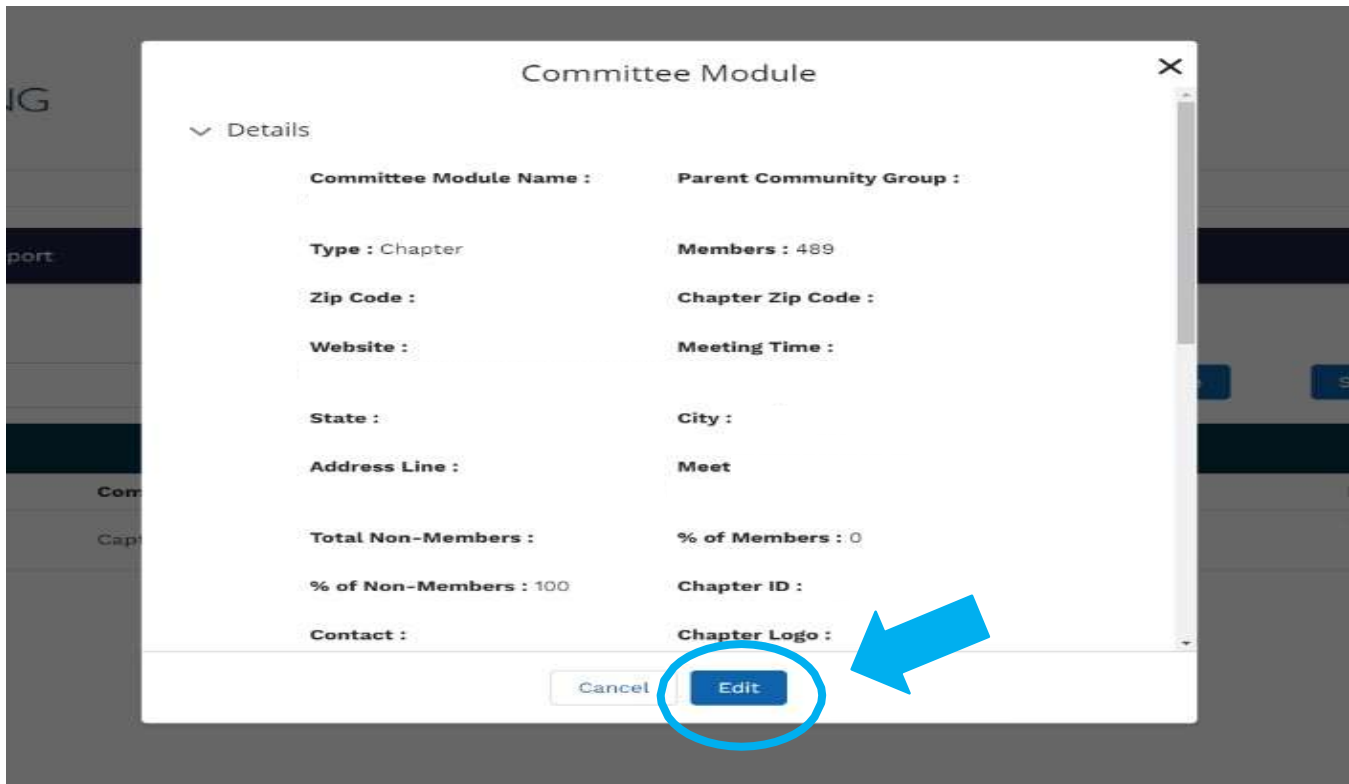
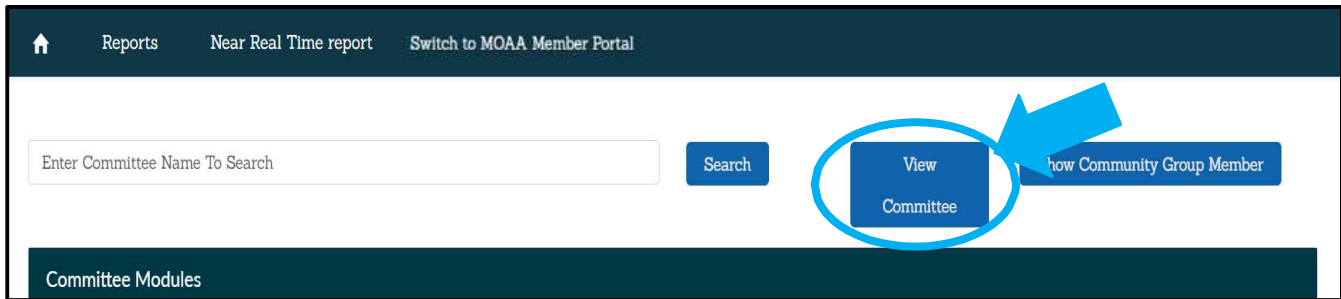
Select the chapter before selecting a function:

Committee Modules					
	Chapter ID	Committee Module Name	Type	Member	Role
<input checked="" type="checkbox"/>	JH01	Victoria's Test Chapter	Chapter	14	Manager

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UPDATE CHAPTER ADDRESS/MEETING INFO

After selecting the council or chapter name, you will next select “View Chapter” to update meeting information. Note that other information cannot be edited. The areas on this page that are not editable can be updated by Affiliated Councils & Chapters staff.



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CHAPTER MODULE, EDITABLE FIELDS

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

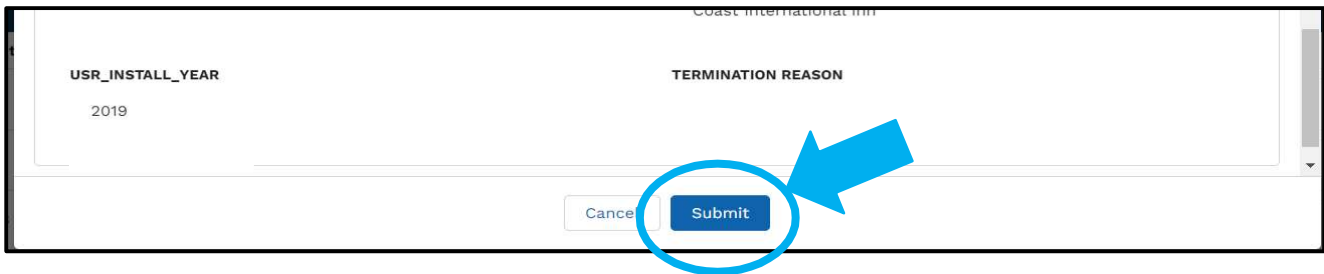
The following information will be displayed on the View Chapter screen. If you serve the role as Manager, you will have editing privileges to the selections marked in the tables (see “Can the Manager Edit” field):

Field Name (left side)	Can the Manager Edit	Field Name (right side)	Can the Manager Edit
Chapter 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		

CHAPTER MODULE, EDITABLE FIELDS

Field Name (left side)	Can the Manager Edit	Field Name (right side)	Can the Manager Edit
Chapter Status: Active	No	Chapter 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.”



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PROPER FORMATTING

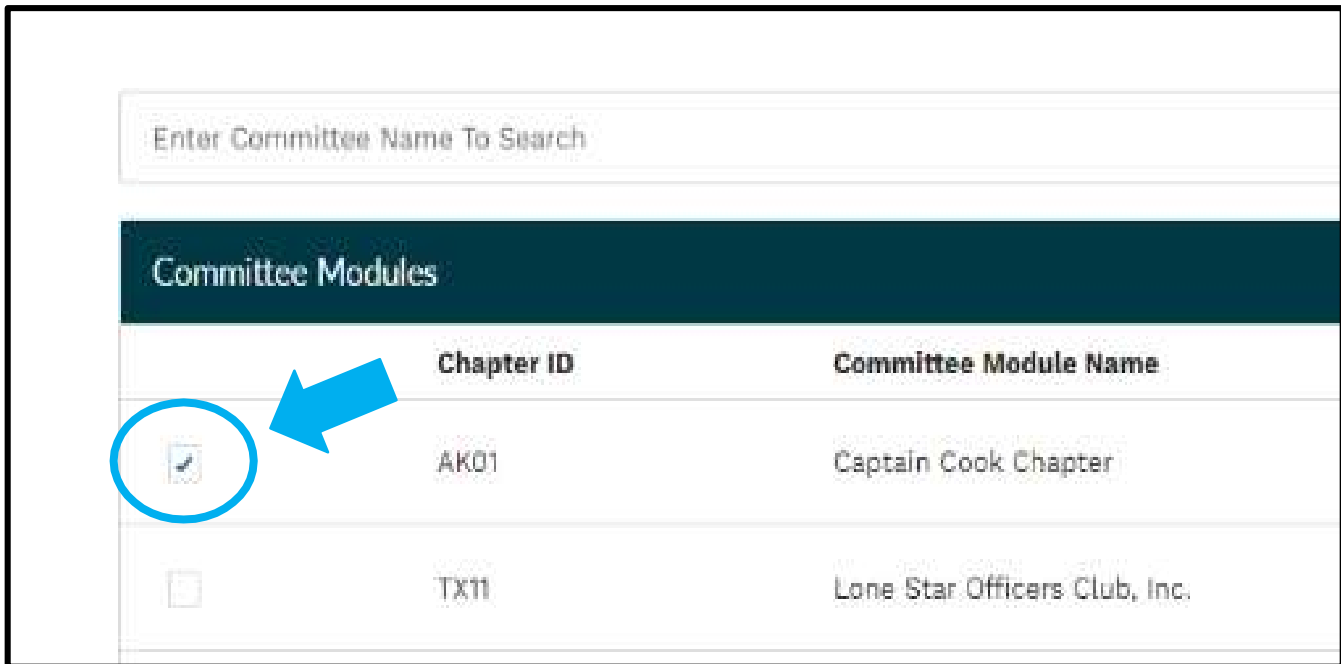
As a CM Manager, when editing fields, please be consistent and use the correct format. For example, do not use all CAPS when updating your chapter's meeting place. The edits you make will be listed in MOAA's database and viewed by MOAA staff.



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.)

ADD OR REMOVE CHAPTER (COUNCIL OR CHAPTER) MEMBER

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

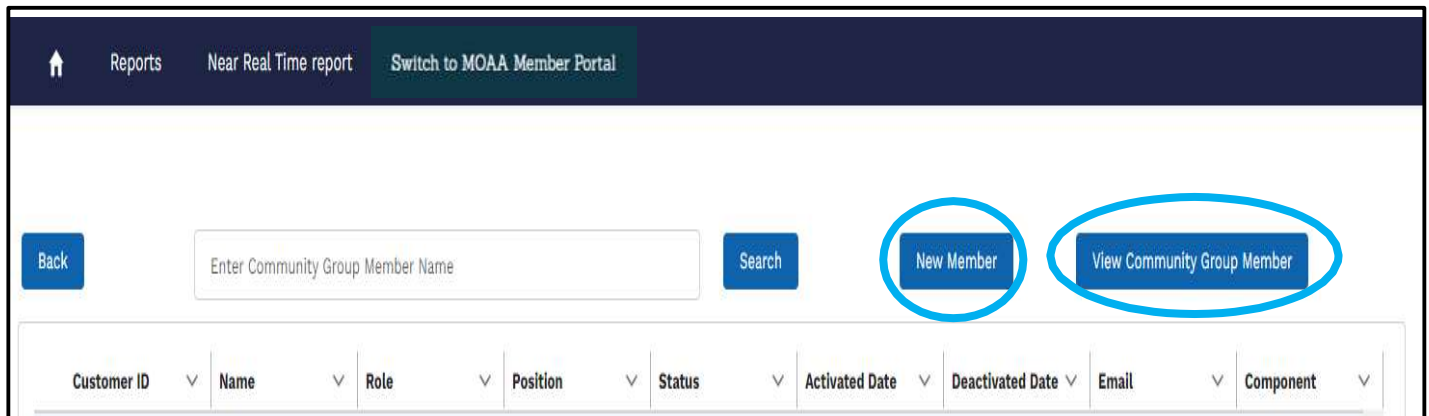


Committee Modules		
	Chapter ID	Committee Module Name
	AK01	Captain Cook Chapter
	TX11	Lone Star Officers Club, Inc.

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ADD OR REMOVE CHAPTER (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.

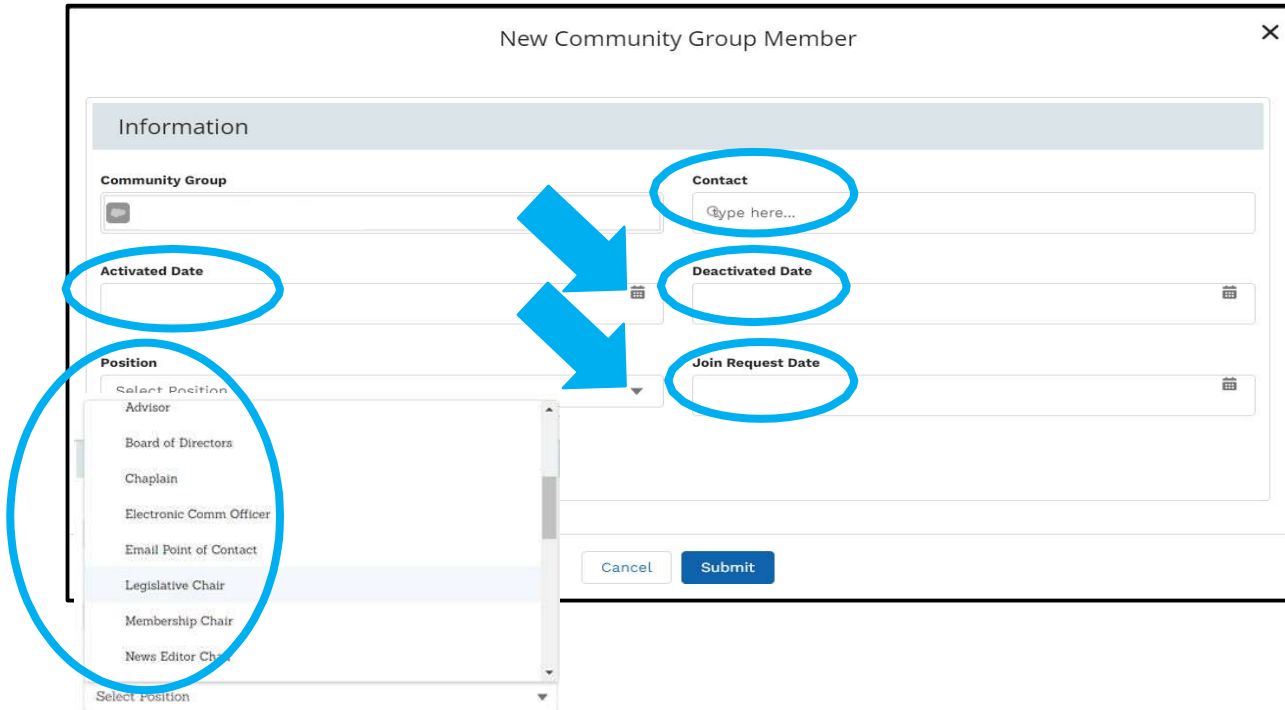


The screenshot shows a web interface with a dark blue header containing navigation links: 'Reports', 'Near Real Time report', and 'Switch to MOAA Member Portal'. Below the header is a search area with a 'Back' button, a text input field labeled 'Enter Community Group Member Name', and a 'Search' button. Two buttons are circled in blue: 'New Member' and 'View Community Group Member'. Below the search area is a table with columns: Customer ID, Name, Role, Position, Status, Activated Date, Deactivated Date, Email, and Component.

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 view data for and 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.

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 will first need to deactivate him as a member and use the New Member button to instead add him in a leadership position, such as a Program Chair, Treasurer, Secretary, etc.

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 pages 26 – 29).

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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 by 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 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.

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 an 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 most recent activated date of a record holding the same position title.

Example of a Duplicate Record

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

ar Real Time report Switch to MOAA Member Portal

Enter Community Group Member Name Search New Member View

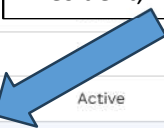
First Name	Last Name	Role	Position	Status	Activated Dat.	Deactivated
Glenn	Fetter	Member	Member	Active	2021-04-21	
Glenn	Fetter	Member	Member	Active	2024-10-08	

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 position. **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

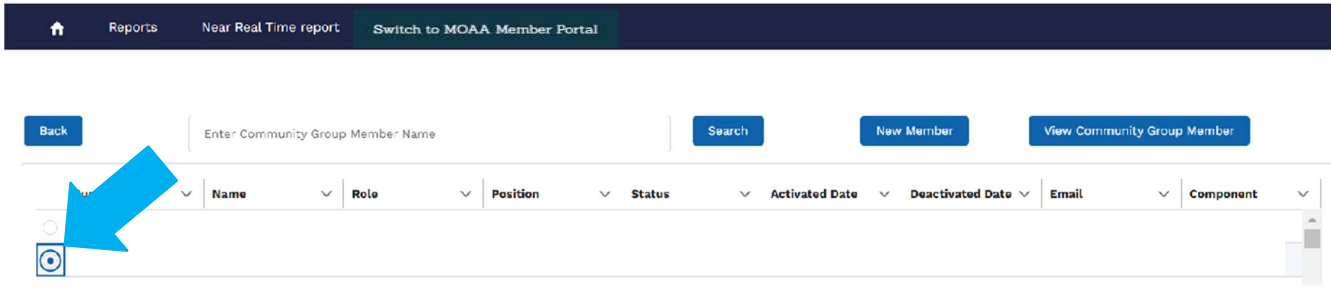


Due to the migration of MOAA's previous database system, many of the records that transferred over to this new Association Management System (AMS) listed a chapter officer multiple times if this individual held various positions in the chapter. Example is shown above. Thomas Brown, holds "member" and "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 Chapter 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.



After selecting the person you'd like to remove from your roster... click on "View Community Group Member" to bring up the individual's page. Select "Edit," then enter the "Deactivated Date," then select "Submit."

After you've followed these steps, 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.



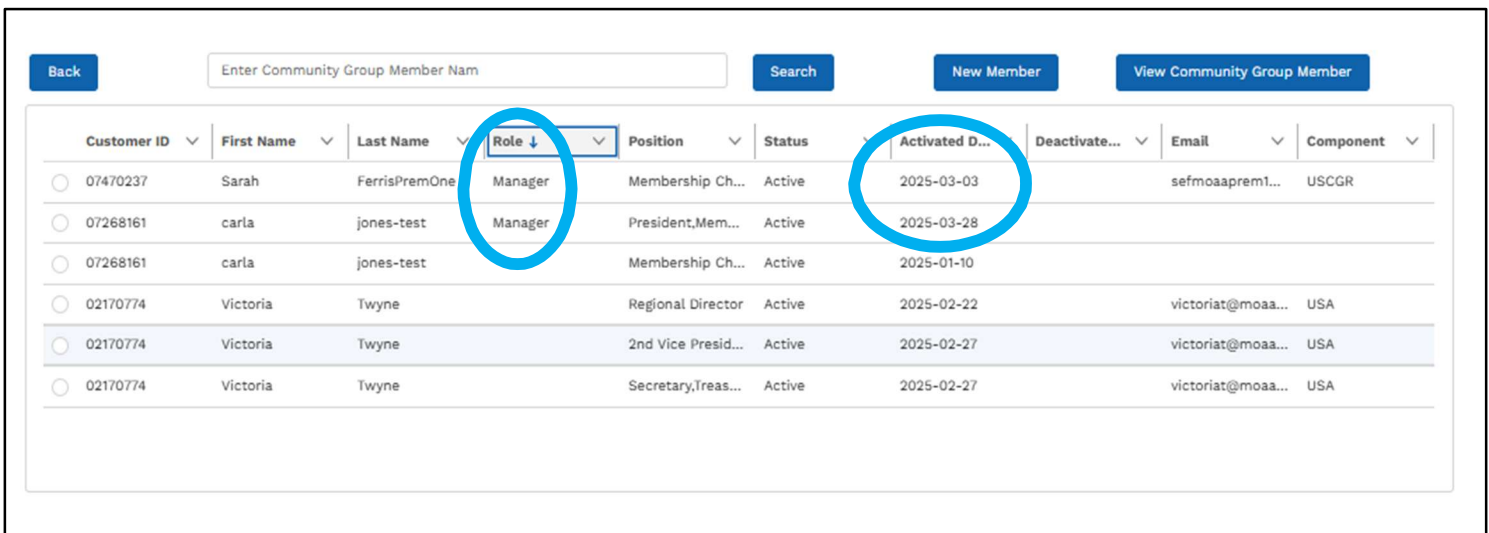
Note: as we move to each member having a single record in the CM, as someone transitions out of a leadership position, you will deactivate that position and will need to add them back to the roster separately as a member or into a new leadership position, if applicable.

DEACTIVATING A MANAGER BADGE BY MISTAKE

Officers who are listed in the “Role” column identified as manager [editable] or member [read-only] have a license for MOAA’s Database. For those with full access, this is called a “manager badge” (screen shot below); someone listed under the role of member [read-only] has a “member badge.” When an officer deactivates another officer who holds a manager (or member) badge, this person will no longer have access to the membership roster or the NRT reports.

If the CM manager inadvertently deactivates someone who holds a manager badge by applying an “end date” as of today or a previous date, the record will disappear from this roster grid and will be listed on the “deactivated roster report.”

If the manager applies a deactivated date on a leader who holds a manager badge by mistake, please contact MOAA national’s Affiliated Council and Chapters Team. Someone from our team will reactivate the manager badge for that leader.



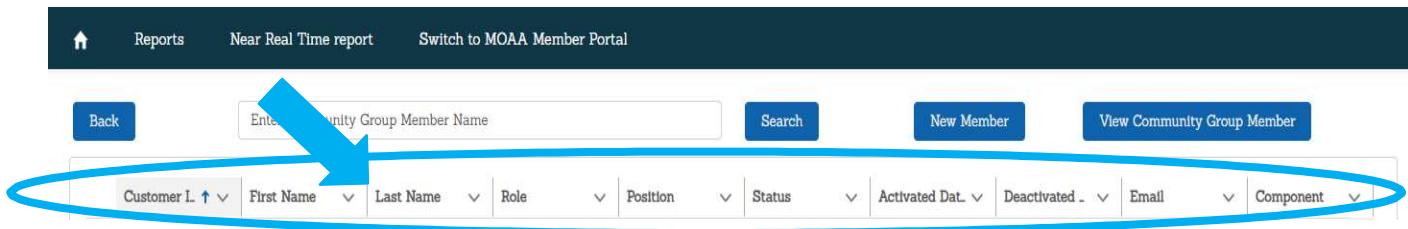
Customer ID	First Name	Last Name	Role	Position	Status	Activated D...	Deactivate...	Email	Component
07470237	Sarah	FerrisPremOne	Manager	Membership Ch...	Active	2025-03-03		sefmoaaprem1...	USCGR
07268161	carla	jones-test	Manager	President,Mem...	Active	2025-03-28			
07268161	carla	jones-test		Membership Ch...	Active	2025-01-10			
02170774	Victoria	Twyne		Regional Director	Active	2025-02-22		victoriat@moaa...	USA
02170774	Victoria	Twyne		2nd Vice Presid...	Active	2025-02-27		victoriat@moaa...	USA
02170774	Victoria	Twyne		Secretary,Treas...	Active	2025-02-27		victoriat@moaa...	USA

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SORTING CAPABILITIES

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

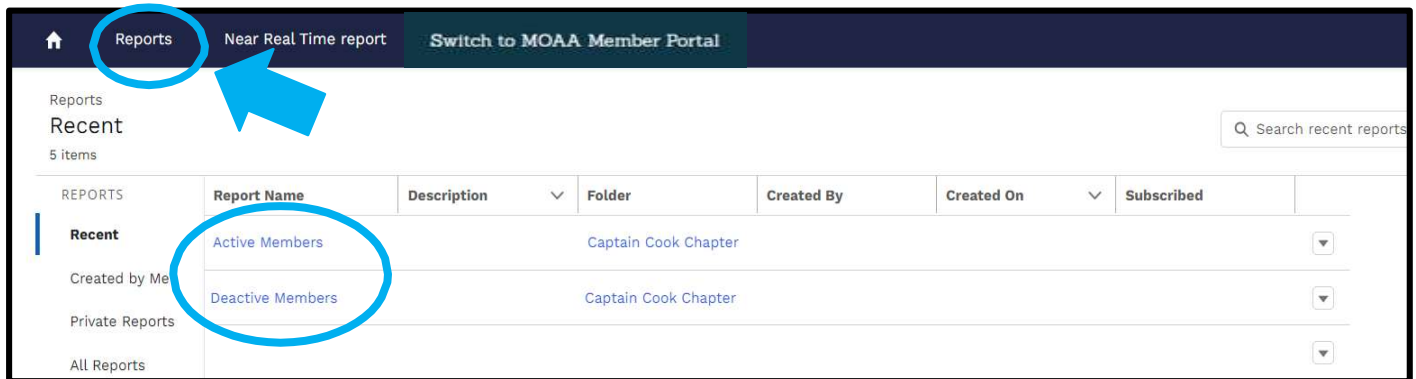
It is recommended that you sort by “Last Name” if you’re adding someone to your roster. This is to help avoid duplication of adding someone who is already listed on your roster.



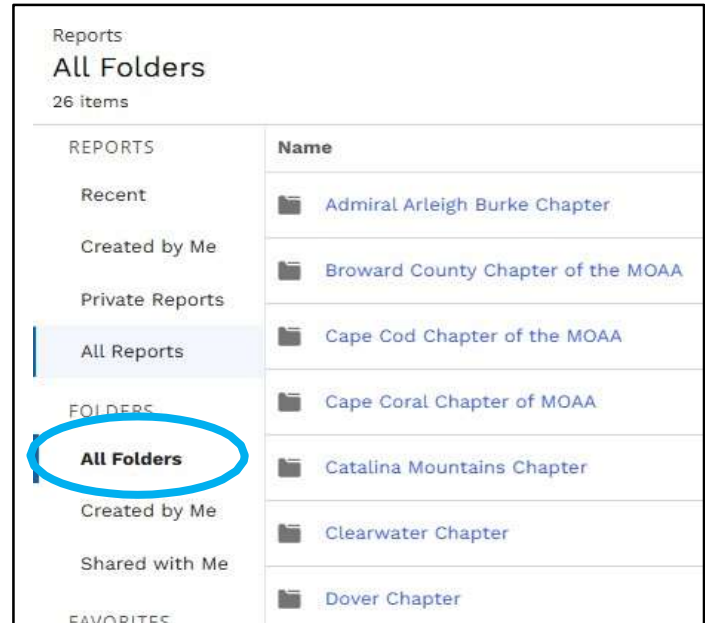
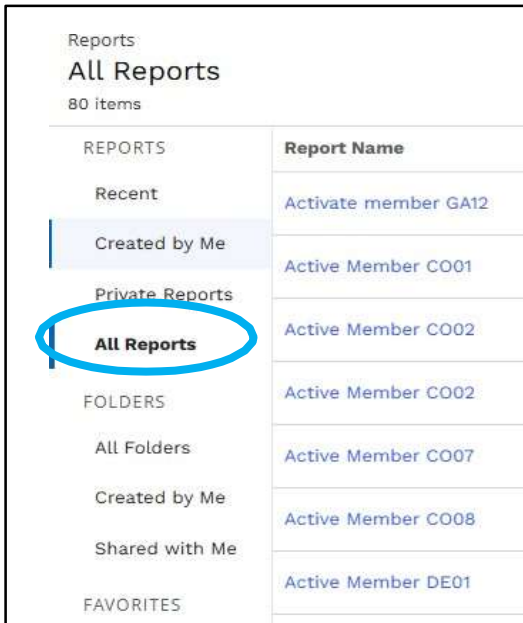
Sorting by any of the column headers.

REPORTS

CM managers can select the “All Reports” or “All Folders” button to view their full active membership roster and deactivated roster. Note: these reports include more member data than the online listing of members. There will be two reports listed on this screen, (1) Active Members, and (2) Deactivated Members. Please note the other report options are not active, aside from the NRT under a separate tab.



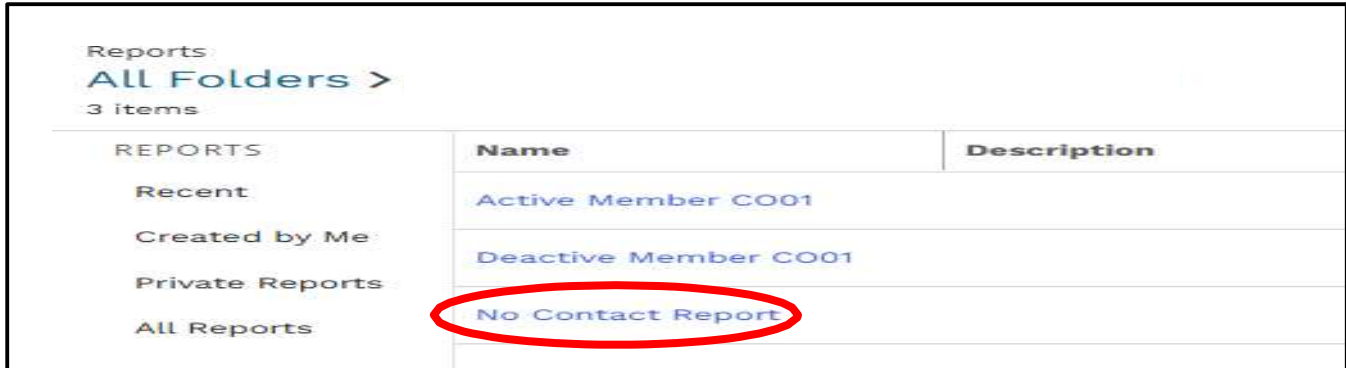
ALL REPORTS | ALL FOLDERS



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NO CONTACT REPORT

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



REPORTS	Name	Description
Recent	Active Member CO01	
Created by Me	Deactive Member CO01	
Private Reports	No Contact Report	
All Reports		

Looks like something went wrong.

We couldn't complete your request. Ask your Salesforce admin for help.

Error Details
You don't have sufficient privileges to perform this operation.

[Continue](#)

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the Chapter 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.

	Customer ID	Prefix	Last Name	First Name	Middle Name	Suffix	Display Name	Address	CITY	State	ZIP CODE	Gender	Rank	S
1	00000000		Smith	George	P		George Smith	8631 Fake Lane	Sylvester	MN		Male	LtCol	U
2	00000001		Howard	Thomas	H		Thomas L Howard	2222 Two Three Street	Grafton	MN		Male	LTC	U
3	00000002		Glass	Linda	A		Linda Glass	1089 Jazmine Court	Fort Lee	MN		Female	CW3	U

Export

Export View

- Formatted Report** (Selected): Export the report, including the report header, groupings, and filter settings.
- Details Only**: Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format: Excel Format.xlsx

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

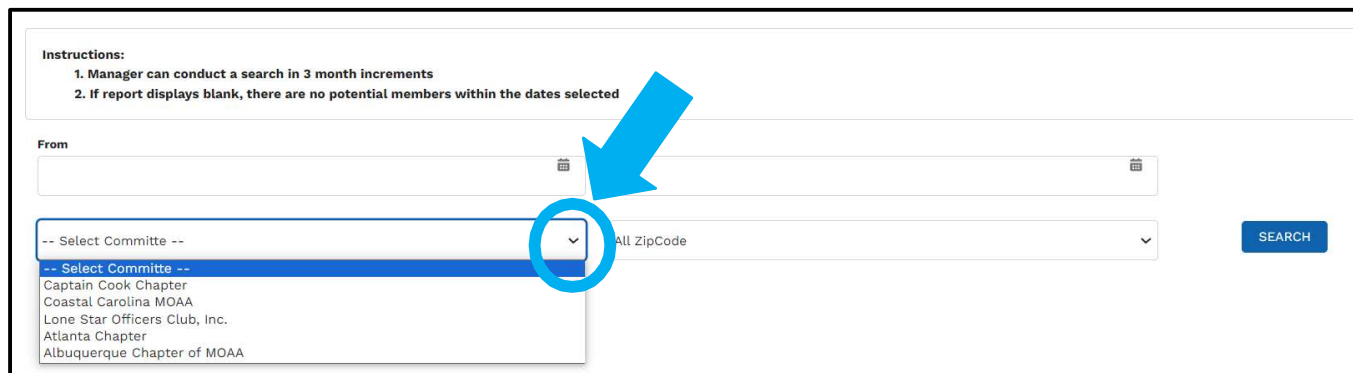
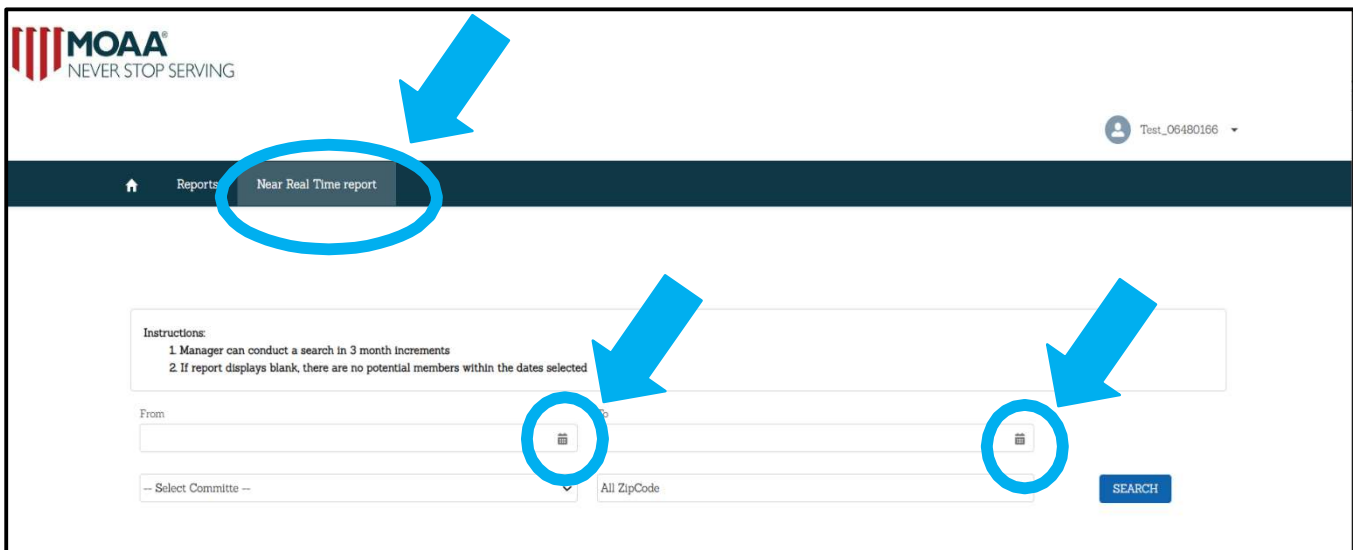
Cancel Export

RECOMMENDED WEB BROWSER: If you experience slow or sluggish lag time while using the Chapter 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.

NEAR REAL TIME (NRT) REPORTS

Find prospective members in your catchment area using the Near Real Time Report.

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 Chapter:** 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 Chapter 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 INFORMATION ON "NO CONTACT REPORT"

MOAA's previous Chapter Module included a report called "No Contact List." These were the individuals who requested not to be contacted by chapters. MOAA's Chapter Module maintains the 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 requests that they be removed from communications. Please be sure to maintain a spreadsheet with the person's name, type of communication, and 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.

THANK YOU FOR USING MOAA'S CHAPTER MODULE

Thank you for using the Chapter Module system. Please reach out to our Affiliated Councils & Chapters team 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 contact chapters@moaa.org or call (800) 234-6622.

When calling MOAA's toll free number, please use extensions x168 (preferred) or 118.

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