Committee Module
Instructional Guide
Version 2.0

December 2019
Table of Contents

Welcome to Committee Module 2.0 .................................................. 3
Quick Reference Guide ............................................................... 4
Committee Module Log In (New Step) ......................................... 5
Roster Column Headings ............................................................ 6
How to Sort Roster & View All Members .................................... 7
Viewing MOAA Membership Status .......................................... 8
Avoid Adding Duplicate Members/Officers ................................. 9
Verifying Member Record/Officer Position ................................. 10
Adding Chapter Member or Officer ........................................... 11-12
Adding Term Information for Chapter Member or Officer ............ 13
Putting an End Date on an Individual Record ............................ 14
Putting an End Date on Multiple Records ................................. 15-16
Exporting, Printing, or Emailing ............................................... 17-18
Near Real Time Notifications .................................................... 19-20
Logging Out ............................................................................... 21
Committee Module Functions Defined ....................................... 22
COMMITTEE MODULE 2.0

This guide will walk you through the basics of how to access MOAA’s database using this user friendly platform called the Committee Module (CM) 2.0.

The CM 2.0 provides council & chapter leaders access to MOAA’s database in order to view, change, export, and update membership & officer roster information.

Recent updates to the Committee Module are reflected in the 2.0 version. This 2.0 update added the ability to end multiple chapter memberships simultaneously, access the Chapter Information Form directly from the Committee Module, and view member numbers, ranks, and the total number of chapter members.

The changes that were made to the Committee Module were the result of great feedback and suggestions from dedicated members like you. We value all feedback that we receive on the Committee Module and continually look for ways to improve it.

Only council/chapter presidents, membership chairs, or designated council/chapter leaders are asked to use this tool in order to review and update their membership and officer roster information. Designated chapter leaders can be given access in place of the president or membership chair if requested. The updates to the Committee Module will happen in real time in the MOAA database.

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

If you have questions, want to make recommendations, or need help, please call our Member Service Center (MSC) at (800) 234-6622 or email MSC@moaa.org. You can also call our Chapter Affairs Department at that number using extensions x168 or x120.

Thank you for using this tool.
In order to maintain accuracy in the MOAA Database

**Please DO NOT:**

<table>
<thead>
<tr>
<th><strong>DO NOT</strong></th>
<th><strong>REASON</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not add “honorary members” to your roster</td>
<td>This database was designed so that leaders can view and update their membership roster in order to receive eligible incentives from MOAA headquarters. We only want to keep track of eligible MOAA members on this roster. Please keep your honorary members on a separate spreadsheet.</td>
</tr>
<tr>
<td>Do not add Spouses as “Member”</td>
<td>Spouses can only be added in the officer or leadership position they hold. Please do not add spouses as a member.</td>
</tr>
</tbody>
</table>

**Please Note:**
Anyone who is eligible for MOAA membership should be added as “Member” on your roster.
- Add regular members and surviving spouses as “Member”
- Every officer should then be added separately as their officer position, after they have already been added as “Member”

If you are unable to find someone when you conduct a search, please use the “new member gains form” to add the individual(s) as Prospect: **NEW CHAPTER MEMBER GAINS**

After adding a person to the New Member Gains form, our MOAA staff will do the following:
- Verify the person you've added is not already in the MOAA database;
- If the person is not in the MOAA database, the MOAA staff will add them as a PROSPECT;

**Council/Chapter President or Membership Chair should:**
- Encourage any new prospect to join MOAA as Basic, Premium, or LIFE member;
- Enrollment can be done online or by using one of the enrollment forms which provide: Basic, Premium, and LIFE enrollment. We offer an additional method of submitting multiple basic enrollments by submitting an Excel spreadsheet with member information. More information about this can be accessed using this link: **Multiple Basic Membership Enrollments**

**Report Deceased Members:**
- Report deceased member information to 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. Additionally, council/chapter leaders can access MOAA’s TAPS form here: **http://www.moaa.org/tapsform/**

* If you experience slow or sluggish lag time while using this module, we recommend installing an updated web Browser such as (1) Chrome, (2) Internet Explorer, or (3) Firefox.*
First, Navigate to “Committee Module Resources”, Then Log In

Go to www.moaa.org, Click “About MOAA”, followed by “Councils and Chapters”

Scroll down and select “Committee Module Resources,” then “Committee Module Login”

Leadership Resources - This section appears on the Council and Chapters home page, below the rotating articles and the “Key Resources” section

Committee Module Login - This section is the third one down on the Committee Module Resources page

Note: If you’re an Administrator for multiple chapters, select the chapter using the drop down beside “My Groups.” Then select “My Groups” after you’ve selected the roster you want to view.

LOGIN HELP

Need help with logging in?: http://www.moaa.org/Content/About-MOAA/Log-In-Help.aspx
## ROSTER COLUMN HEADINGS

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last/First Name</td>
<td>You can select this header to sort on last name.</td>
</tr>
<tr>
<td>Position</td>
<td>This is the title the person holds in your council/chapter (i.e. member, vice president, secretary, membership chair, etc.)</td>
</tr>
<tr>
<td>Membership</td>
<td>MOAA membership status (i.e. Basic, Premium or LIFE)</td>
</tr>
<tr>
<td>Location</td>
<td>Primary address of individual in your council/chapter.</td>
</tr>
<tr>
<td>From/To</td>
<td>Start and end dates of council/chapter membership.</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Email and phone number of individual</td>
</tr>
<tr>
<td>Voting Status</td>
<td>Defaulted to voting status for everyone listed in your council/chapter.</td>
</tr>
<tr>
<td>Status</td>
<td>Defaulted to active for everyone listed in your council/chapter. If individual is deceased, please report to TAPS or send an email to our Member Service Center (MSC) at <a href="mailto:MSC@moaa.org">MSC@moaa.org</a></td>
</tr>
</tbody>
</table>

Recent additions to the CM 2.0:
- **Customer ID** – everyone listed in the MOAA database will have an eight-digit customer ID, including prospects (i.e. anyone who previously held a MOAA membership or is eligible for MOAA membership)
- **Rank** - Military rank will be listed. If the person is a spouse or surviving spouse, column will be blank.

CM 2.0 allows Administrators to view:
- **Actual Chapter Member Count**: this provides a real count of all “members” listed on your roster.
- **Chapter Information Form**: Allows Administrator to update council/chapter address, provide number of ROTC/JROTC schools and meeting time and place.

Setting an “end date” on multiple records:
- **Set End Date**: administrator can apply an end date to multiple members at the same time using this action.
SELECT VIEW ALL

Before doing anything else on the Committee Module, we recommend that you select “View All” in order to view all of the members on your roster on one screen.

PROFILE ROSTER - SORT ON LAST/FIRST NAME

Your chapter roster will display. You can sort on “Last/First Name” by selecting it with your mouse. When you scroll down your roster, you can review the members. They will be displayed alphabetically by last name.
**VIEWING MOAA MEMBERSHIP STATUS**

You can view each member’s MOAA membership status (i.e. Regular Basic, Regular Premium or Regular Life) in the column marked “Membership”; you can also sort on this column.

If the Membership column is blank, the person is not a current MOAA member.

Anyone who has a current MOAA membership will have that membership type listed in this column indicated by the arrow.
AVOID ADDING DUPLICATE MEMBERS/OFFICERS

Be sure to sort on Last/First name to avoid adding duplicate names to your roster.

Each individual in your council/chapter should be listed for each position that they hold.

Example: Victoria Twyne is listed as Member, Past President and Secretary.

<table>
<thead>
<tr>
<th>NTS</th>
<th>TAKE ACTION</th>
<th>PUBLICATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daniel</td>
<td>President</td>
<td>Member</td>
</tr>
<tr>
<td>05168845</td>
<td>Secretary</td>
<td>Voting</td>
</tr>
<tr>
<td>03101409</td>
<td>Trout, Mike</td>
<td>Active</td>
</tr>
<tr>
<td>0217074</td>
<td>Twyne, Victoria</td>
<td>Voting</td>
</tr>
<tr>
<td>0170774</td>
<td>Twyne, Victoria</td>
<td>Active</td>
</tr>
<tr>
<td>02 70774</td>
<td>Twyne, Victoria</td>
<td>Active</td>
</tr>
<tr>
<td>03508406</td>
<td>Advocacy, Julie</td>
<td>Voting</td>
</tr>
<tr>
<td>05361353</td>
<td>Sr Officer, TMN</td>
<td>Active</td>
</tr>
<tr>
<td>02266601</td>
<td>Huebsch, Julie</td>
<td>Voting</td>
</tr>
</tbody>
</table>
VERIFY MEMBER RECORD BEFORE ADDING TO COUNCIL/CHAPTER

When adding a council/chapter officer, ensure the person is first listed as a “Member.” After verifying they have a Member record, you can add them in the position they hold. Example: If Julie Huebsch has been already added as a “Member,” she can then be added as added as “President.”

VERIFY OFFICER POSITIONS BEFORE ADDING NEW POSITION

After sorting the list on Last/First Name, verify the person’s position so that you don’t duplicate their position in the council/chapter. After you’ve verified this, you can now add the person in a new leadership position.
ADD CHAPTER MEMBER OR OFFICER

To add a new “Member” or to add an existing member to an “Officer Position” select “Add Chapter Member or Officer.”

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ADD NEW INDIVIDUAL

To add a chapter member or a new officer position for an already existing member, you must enter in their email address or Master Customer Id (member number) on the “Add New Individual” page that appears after you click “Add Chapter Member or Officer”

Please Note: the email must match the one in MOAA’s database.

For example: VictoriaT@moaa.org is the email listed in the MOAA database. However, if you use VictoriaT@gmail.com, it will not be recognized on this search function.
ADD CHAPTER MEMBER OR OFFICER (continued)

When the member displays, select “Continue.”

If you’re unable to find the member, please ensure the following:
(1) Individual is not a MOAA Member
(2) Individual has never joined MOAA

Then, add the person to the New Member Gains Formsite. After we receive these names, each individual will be in the MOAA database as a Prospect. In 5-7 business days, you can add this person to your Committee Module, using the email address that you provided to us for the member on this form.
ADDING THE MEMBER OR COUNCIL/CHAPTER OFFICER TERM

Add the member or chapter officer as:

1. **Position:** Use **Member**
   - **a.** If council/chapter officer, select the leadership position;

2. **Sub-position** Leave **blank**;

3. **From:** Today’s date or the date the member joined your chapter;
   - **if chapter officer, use the tenure date**;

Use the calendar icon to select the date
When done, select **SAVE**.
PUTTING AN “END DATE” ON AN INDIVIDUAL MEMBER OR OFFICER RECORD

Please note: Do not overwrite an existing officer position. Overwriting an officer position will eliminate their officer tenure history in our database.

The editing function is used when you need to update the tenure for a council/chapter officer or if you need to end a current chapter membership.

To add or update a member/officer record, click the person’s name in blue.

You will notice the committee positions held by the person you selected. You can select “Edit” to add an end date to the person’s record.
EDIT THE “END DATE” OF AN INDIVIDUAL MEMBER OR OFFICER RECORD (continued)

You can update the “To” date function to end the term for a member record or an officer record.

Do not overwrite an existing officer position. You must refer to page 11 and use “Add Chapter Member or Officer” to add a new member or council/chapter officer.

Click “Save” in order to save the updated information on the Committee Module.
PUTTING AN END DATE ON MULTIPLE RECORDS (HIGHLY RECOMMENDED)

In order to remove someone as a member or as an officer of the chapter, be sure to add an end date on their profile. To add end dates, check the box next to all of the members who have the same end date.

Go to the Actions screen to select the drop down menu – Select “Set End Date” then select “Go”.

You will need to select the date from the calendar, then click on the “Set End Date” button. This will end the term for every record that you checked earlier.
Export will allow you to download your entire roster onto a file outside of the module. You can use the “Select All” feature to export all of your member records, or you can select individual member listings by checking the specific box next to their record. After you have selected the members you’d like to export, click “Go”.

When using any action listed in the “Actions” drop down menu to affect the entire roster, please make sure that you have clicked on “View All” before clicking on the “Select All” box, so that your entire roster will be selected.

You can now export the file in Excel, CSV, or Word. You will be prompted to save the file to your c: drive, or you can save it to your desktop.

As a reminder, any files containing MOAA-provided name, address, email address, and MOAA status should be maintained in a secure manner, password-protected, and accessible only by authorized council/chapter officers.
EMAIL

You can select a specific member or a group of people to email in your chapter’s roster by using the “Send Email” action.

Use the box on the left of the member’s name to select the member or group of members you’d like to email.

The member or group you selected will be placed in a blind CC.

PRINT

To print your entire roster, select your members, then click on “Print Roster” and “Go.”

Selecting “Print” will pull up your printing options, which you can change before printing.
NEAR REAL TIME (NRT) NOTIFICATIONS

All Committee Module (CM) Administrators now have access to retrieve reports on:

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**

4) **No Contact Report – MOAA members who do not wish to be contacted by chapters**

The report will only include names of members whose status changed as above from the previous month.

For example, the August Excel report will only have names only from July 1 through July 31, 2019. September’s list will only have names from August 1 through August 31, 2019.

HOW TO ACCESS

Go to the front page of the Committee Module.

There will be a hyperlink marked “Details for: Your Chapter Name”.

Select this link to get to the NRT notification.
MONTHLY RECRUITING LIST & NO CONTACT REPORT

After selecting the hyperlink, you’ll be taken back to your Committee Profile page where you’ll see “REPORTS” again.

“No Contact Report” and “Monthly Recruiting List” can both be downloaded by clicking on their respective links under this “Reports” section.

If there are no updates for the month on the “Monthly Recruiting List,” that will be indicated on the report.

When crafting your email message to new recruits, you must include the “unsubscribe link” from the Excel spreadsheet or a link to www.moaa.org/email in your email message.

Dear Colonel Smith:

I hope this message finds you doing well. Our Julie’s Test Chapter is looking forward to meeting you at our upcoming chapter meeting which will be held at the RoseCroft Country Club, Rosecroft Avenue, Iowa, on July 28th at 2:30pm. Please be sure to register your meal selections using this link: https://www.moaa.org/

To unsubscribe from these notices please go to www.moaa.org/email

Sincerely,

Victoria Twyne

President, Julie’s Test Chapter
Log out of your MOAA Profile when you've completed updating your roster. You can log out of your profile by scrolling to the top of the page, then select “Logout.”
DEFINITIONS OF FUNCTIONS/TERMS IN THIS MODULE

Login: You must log in to access secure information on the MOAA website.
Login Help: If you need help with your log in, please contact our Chapter Affairs Office or call (800) 234-6622, and someone can reset your password.
Log Out: Log out after you’ve completed reviewing/updating your roster.
Profile: This is the page that displays your personal information, which is also reflected in the MOAA database. You can add or make changes to your personal profile.
My Profile Roster: Your chapter membership roster and officer list can be reviewed and updated on this screen.
My Groups: You will see your council/chapter name listed in My Groups. This displays on a tab beside your chapter name; when you click My Groups, your roster will display.

Export – You can Export the file to Excel, CSV, or Word format and save to your computer’s hard drive.
Print Roster – When you select the people you want to print, this will go into a print screen window to print.
Send Email – When you select the recipient(s) you want to email, it will add each person’s email into a blind CC message.
Set End Date – When you select the people you want to remove from your current roster, it will prompt you to put an End Date that applies to everyone that was selected.
Term Details: This allows you to add the term position (i.e. member or officer position) with a From/Date and To/Date. If you don’t know the To/Date the person will complete their term, please leave this blank.

Honorary Member: Individual, whether or not eligible for regular membership as set forth by the council/chapter; some of these individuals are not eligible for MOAA membership.
Spouse: A husband or wife, considered in relation to their partner; this person’s military spouse is still alive.
Surviving Spouse: Widows or widowers of deceased members or of any deceased individual who would have been eligible for membership.

Officer Position: The position the chapter leader holds in a council/chapter; if you don’t see the title of the position using the drop-down-menu, use 1st Vice Chair, 2nd Vice Chair, or 3rd Vice Chair to identify the officer’s position (e.g. 1st Vice Chair - Historian).