

January 31, 2021: Membership Count Update and LWVUS Database Overview

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January 31st Membership Count Deadline

LWVUS requires an annual update of League rosters every Jan. 31st. Therefore all local League roster managers must update their roster in the LWVUS membership database by **Sunday, Jan. 31st**.

The update is important because membership information provided through the LWVUS Roster Manager portal is used for a variety of purposes including helping prospective members find a League and contact League officers from lww.org, documenting voting rights at Convention, ensuring members get LWVUS and LWVMA e-newsletters, and assessing Per-Member Payment (PMP) obligations. This year's update will ensure your PMP billing for FY 21-22 is accurate.

Note: Units, and members-at-large do not have to complete an update because LWVMA takes care of this task for you.



Roster Manager To-Do List

- Add new members: primary, student, additional
- Deactivate lapsed members
- Update existing member's contact and membership information
- Add new League officers
- Deactivate former League officers
- Export a roster for your records



Getting Started

- To access the database go to: <https://lwwus.force.com/s/login/>. Your username will typically be your email address. If you forget your password, use the following URL: <https://lwwus.force.com/s/login/ForgotPassword>. If the “forgot password” link doesn’t work or if you need to designate a new roster manager, email rostersupport@lww.org and bgorman@lwwma.org.
- Note that the database was designed to work with modern web browsers on either a desktop or laptop computer. If you access the new portal through Internet Explorer, you will experience poor performance and technical issues that may impact your League’s member data. However, Microsoft’s modern browser—Microsoft Edge—is now fully supported by the platform. In addition, you may also use either Google Chrome, Mozilla Firefox, or Apple’s Safari (for Mac users) when working in the portal.



Add new primary or student members

To add a member that is the only member of a membership or the “primary” member of a membership, use the "Add New Member" entry form available on the League page view. For step-by step instructions on how to do this, [click here](#).

By default the “member type” in the entry form will be “primary”, if the member is a student ensure to change the “member type” to “student” on the form.

- **A unique email address is required.** If the member didn’t provide an email address, please use the following syntax to override the requirement: `firstname_lastname@lww.org`. I.E. if the member’s name is Jane Smith, the override email is `jane_smith@lww.org`.
- **A complete home address is required.** A complete home address consists of a mailing street (and an optional mailing street 2), city, state, zip code (5 or 9 character values), and country value. In the event the member is unable to provide a complete home address, you may use your League's complete address in order to submit them. Unlike with Email - a complete home address is not required to be unique.



Add new additional household members

To add a new household member, navigate to the primary member's contact record, click the button labeled "Add New Household Member" (upper right hand side). For step by step instructions, [click here](#).

- Note: When adding a new household member - you cannot reuse an email address associated with the primary member. Please provide a unique email for the additional member. If you don't have an email, you can use the same syntax explained in slide 5, `firstname_lastname@lww.org`.
- The complete household address doesn't have to be unique and should be the same as the primary household member.



Deactivate/Reactivate members

- If a member didn't renew their membership, you must change their "membership status" from "active" to "inactive". Failure to do so by Jan. 31st will result in an unwanted PMP charge.
- To update a membership status, click "member search" located on the tool bar at the top left of the database and search for the member you wish to deactivate.
- Select the member's name then "go to record".
- Once in the member record, look to "member status" on the top right hand blue tool bar.
- Change "membership status" from "active" to "inactive" and select "next" to save your changes.
- If you need to reactivate a former member, follow the same steps as above but instead change their membership status from "inactive" to "active".
- Alternatively, changes can be made from your League's main record page. Go to your League page, scroll down, and you will find "active" and "inactive" tabs with a list of all members. Search the appropriate tab to find the member and field you wish to update.
- Note: Roster managers can't delete or merge duplicate records in the database. Lapsed members should only be made inactive. The only case where a record should be deleted is when it is inaccurate or submitted by mistake. In these instances, submit a ticket via the "Get Help/Contact Support Functionality" so Roster Support may assist you.



Double check active member's contact and membership information

- Check each active member's contact information and make any necessary changes. Here are the instructions on how to update a [mailing address](#), [email address](#) or [mark a member as deceased](#).
- Sometimes it may be necessary to adjust a member's type. For instance, you should change a member type to "life" if the member reaches their 50th consecutive year of membership. For instructions on how to adjust all membership types, [click here](#).
- You will notice start and expiration dates listed on member records. These dates are mainly for your internal records and you should change the dates as needed. If a member's expiration date passes, the database won't automatically remove the member from your active roster.
- If you would like to update more than one record at a time (often done for expiration dates) you can batch update members. [Click here](#) for instructions on how to mass edit members.



Adding/Removing League officers

It is important to keep your League officer list updated. Your officer list will not change your PMP invoices but updates will feed to the “contact a local League” page on the LWVUS website. For instructions on how to add a new League officer, [click here](#).

For instructions on how to deactivate a former officer, [click here](#).



Exporting a Local League Roster

- It is best practice to export your active League roster prior to the 1/31 deadline to double check your work and archive your records outside of the database.
- For instructions on how to export a roster as a local League roster manager, [click here](#).



Get more help!

- Questions? Contact Brynne Gorman (bgorman@lwwma.org), LWVMA Membership and Community Engagement Manager, with general database questions or to schedule a one-on-one overview of the database.
- Technical questions will need to be submitted to the LWV Roster Support team. For information on how to submit a support ticket [click here](#). Note: emails sent to Rostersupport@lww.org will no longer be answered...unless your question is related to a database lock out issue.
- If you need help please let Brynne and Roster Support know as soon as you can. Note that it can take Roster Support up to 4-5 business days to process support tickets.

