

Local Section Membership Roster SOP

Local Section membership rosters are available to all current Local Section Board members on mycwea.org. The reports are dynamic and pull the latest information from CWEA's Association Management System database.

Process Outline:

1. Logon Mycwea.org, navigate to My Account.
2. Download member Roster Report.

Process Detail:

1. Logon Mycwea.org, navigate to My Account

Go to www.mycwea.org and logon using your email address and password. Go to **My Account** page. Click **Local Sections I Manage**.

The screenshot shows the 'My Account' page on mycwea.org. On the left is a blue navigation menu with 'My Account' highlighted. A red arrow points from a box labeled 'Navigate to My Account' to this menu item. The main content area shows 'My Account' with a profile picture of Mr. Chris Lundeen, CAE, and his contact information. A 'View Profile' link is visible. Below the profile is a 'Member Details' section with a 'Bio' field that says 'Coming soon...'. To the right is a 'My Recent Invoices' section with a table of invoice data and a 'View All Invoices' button. At the bottom, a list of account options is shown, with 'Local Sections I Manage' highlighted in yellow. A red arrow points from a box labeled 'Click here' to this option.

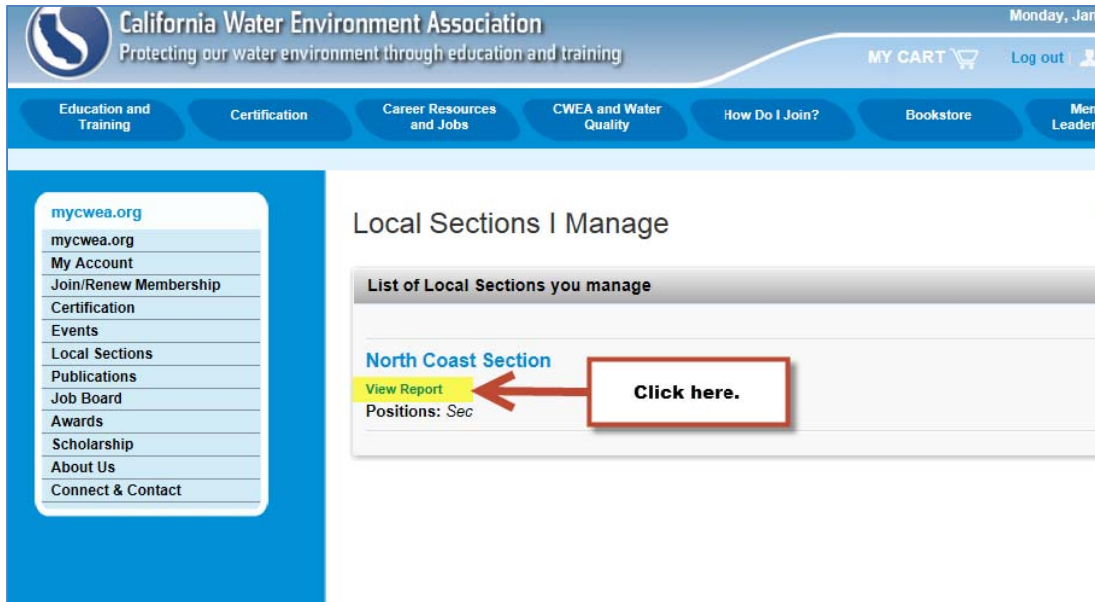
Invoice	Invoice Date	Total	Payment	Balance Due

- > My Membership
- > My Certifications
- > My Events
- > My Abstracts
- > My Downloads
- > My Transactions
- > Local Sections I Manage
- > My Education Credits
- > Change My Password

Local Section Membership Roster SOP

2. Download Member Roster Report

Click **View Report** to begin download of your Local Section roster.



Select **Member Status**.

Active = current members that still receive member benefits.

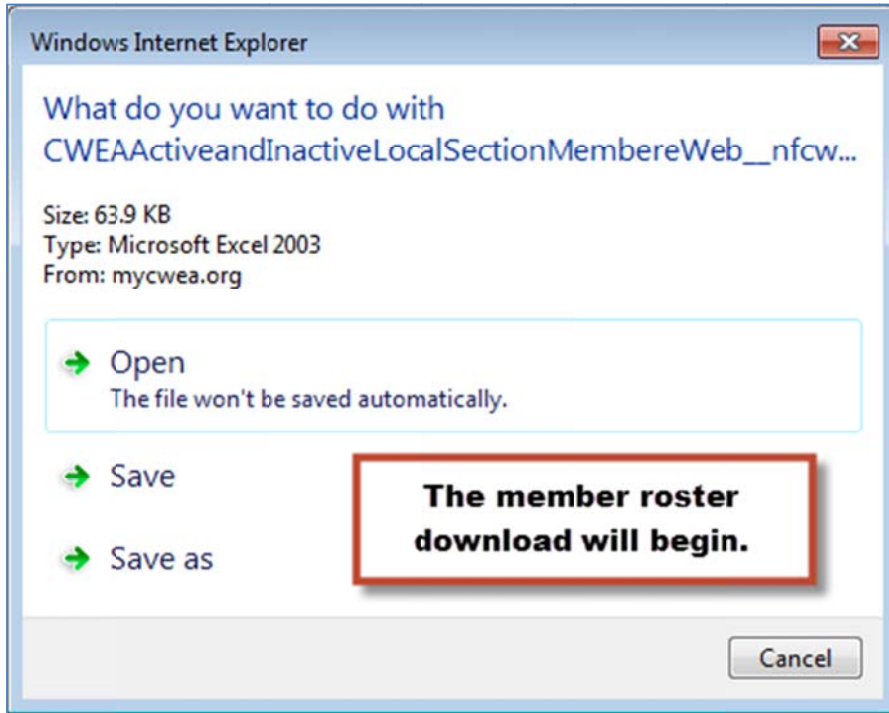
Inactive = members who have lapsed and no longer receive member benefits.

Both = Active and Inactive members are shown on the list.



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Your download will begin. You can save the file or open it directly, and then save it.



The file type is MS Excel 2003.

Access to Reports:

All current local section officers should be able to access the report. You can view the list of officers we have on file at mycwea.org. Click on the name of your local section and you will see the current list of officers.

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Notes on LS Roster Data Columns

Field	Notes
Member ID	Unique ID for individual. All individuals and organizations have a unique ID whether a member or not. This is not a "member number".
First Name	
Middle	
Last Name	
Company Name	
Local Section	
Local Section Membership Status	If "Active" then individual is in good standing and is entitled to receive member benefits at the local section.
Local Section Expiration Date	
Local Section Terminate Date	This is the date when membership is no longer active at the local section.
Local Section Member Through	If the member receives benefits through an organization membership (Utility or Corporate membership), the organization is listed here. The organization is entitled to one representative who shall have all the rights and privileges of an Active Member and recorded as such. The representative may be changed at the discretion of the Organization Member
CWEA Member Type	
CWEA Member Since	Date when member originally joined at the state level.
CWEA Member Expiration Date	CWEA state membership expiration date. Members lapsed at the local section level could have a current CWEA membership if they are joined at another local section.
Address1	
Address 2	
City	
State	
ZIP	
Email	
Phone	
Extension	
Fax	
OK to Mail	If "No" then the member has requested that CWEA not send them mail.
Member Record Updated	Last update to the member record