

Survival Guide for Officers

Use Member and Officer Lists Effectively

1/3/25 by UAT-Team. Editing by Martha, Dorothy, Fran, Bill. Last Updated: 1/24/25.

NOTE: Both Lists and Reports exist in the Association Management System (AMS) database. Both forms of information can be used to find answers to frequently asked questions by officers. This survival guide helps officers find answers even **if** Officer Portal Reports are not available.

LISTS: - Download Officer, Member, and Federation Search Lists and SAVE in Excel.

FIND: New Members

In the AMS Member List, sort the list by clicking the JOINED column header once - Click the column header again; newest is on top.

FIND: Members Past Expiration Date

In the AMS Member List sort by clicking the EXPIRES column once: oldest is at top.

LOCKBOX limbo - may have renewed but not entered into the member list.

After September, mail is being redirected to NARFE.

Checks may be deposited, but member info may not be entered.

INFO: [What is a Lockbox?](#) and [What is Lockbox Banking?](#)

VERIFY: Deaths

- Search for Obituaries in the news
- Subscribe
 - People Finders - <https://www.peoplefinders.com/>
 - Find a Grave - <https://www.findagrave.com/> - useful if gravestone exists
 - White Pages - <https://www.whitepages.com/> - do not have deaths listed!
 - Ancestry.com - <https://www.ancestry.com/> - paid subscription - Some public libraries have it free for card holders in the library.
 - County Appraisal District "CAD" - search by address or name. Check deed history for transfer from the couple's name to the surviving spouse's name.
- REPORT an annuitant's death - [Tutorial](#) by Fran - how to report a death to OPM

IDENTIFY: Distinguished Members

Members with 20 or more years of membership are eligible for Distinguished Membership when a chapter President or Secretary signs and submits the recommendation. Distinguished Members pay dues. Do not submit an Honorary Member for Distinguished Membership unless they are willing to resume paying dues.

Note: The 20-year date is usually "as of today."

- Use the AMS Chapter Member list for Chapter members and National[-only] Members button for national-only members (certain federation officers).
- Click the JOINED column header once to sort ascending so the oldest record is at top. You may need to hide some columns to see the JOINED column.
 - If you can Export to Excel. In the exported file, delete those members who JOINED date is less than 20 years ago (newer).
 - If you have view only rights, hide the columns you don't need, then copy the screen for all the members whose join date is greater than 20 years ago and paste as plain text into a blank Excel worksheet.
- On the spreadsheet of JOINED older than 20 years ago, sort on the column labeled **SPEC** on the Chapter member list or **DM** on the National Member list (it does not appear on Federation Search).

- This will tell you whether they have been designated and received certificates previously.
 - Delete those members who have “Yes” in the SPEC or DM columns.
- On the spreadsheet, sort on the column labeled Dues.
 - Delete those members whose Dues are “Honorary”.
- Delete all columns **except**:
 - Chapter Member List: NARFE ID, First Name, Last Name, Street, Suite/Apt, City, ST, Postcode, Telephone, Email, Spec, Joined.
 - National Member List: Name, NARFEID, Joined, Email, Phone, Street, Suite/Apt., City, ST, Postcode, DM.
- Prepare [F-128 Distinguished Member Application](#) and attached spreadsheet and send to Member Services at HQ (this can be done hard copy or electronically)
- **NOTE**: Unless otherwise specified, the Distinguished Member packages will be sent together to the officer submitting the request who will be responsible for getting the appropriate items to each new Distinguished Member.

FIND: [Honorary Members](#) - use Federation Member Search, export to Excel, filter the Member Rate for “Honorary”.

COUNT: [Honorary Members](#) - use Federation Member Search and create a Pivot chart in Excel.

REPORTS - IF THESE REPORTS ARE STILL NOT AVAILABLE, is there a workaround?

W101 OPM REPORT: Look at your W101 for the same month last year. All members still on your roster renewed on the same anniversary date at the same amount. Members missing today who were on the old report have passed away, transferred out, or voluntarily cancelled. New names that weren't on the report are either new (check joined) or transferred in.

A220 CHAPTER DUES ACTIVITY REPORT: Each new member generates \$8 dues regardless of chapter dues rate. Members whose EXPIRATION was updated since last month have renewed at your chapter dues rate times the number of years for which they've renewed.

M130 CHAPTER RECRUITING FEE REPORT: No easy work-around.

M112 CHAPTER ACTIVITY REPORT:

- New: See **Find New Members** earlier in this tutorial.
- Renewed: See A220 description.
- Dropped: See [Compare Two Membership Lists](#)
- Prospects: No current alternative.
- Transfer in/out: Only alternative is to compare two member lists.
- Payment status change: No easy alternative.

M260 INDIVIDUAL RECRUITING REPORT (FEDERATION): No current alternative.

LABELS

- Mail merge with Excel spreadsheet - [Microsoft 365 Mail Merge Tutorial](#)
- Avery online - [Demo by Harold](#) using the Avery method (4:30 min).
- Printing company

LABEL ALTERNATIVES:

- Email through FEDHub for Federation/Chapter communities
 - Only for members with email
- Only send to those with email - BUT, big disservice to our members - about 25% use postal mail

SOURCES:

- **Tutorials**
 - Federation Search - [Who is a Member](#) - and who is NOT
 - [Word Mail Merge for Labels](#)
 - Excel spreadsheet, import into Avery - creates PDF file - by Harold (soon)
 - [AMS Tutorials](#) by the CAB
- **Presentations**
 - **FEDcon24 - AMS Strategies for Officer Success** - [NOTES](#) or [PPTX](#)
 - •Improve your use of Member Lists,
 - •Download and use Member Reports,
 - •Reconcile Financial Reports,
 - •Add and update the Officer List, and
 - •Update the Chapter and Location records.
 - **Federation Presidents Meeting, Scottsdale, 8/19-20/22** - [PDF](#) or [PPTX](#)
 - AMS User Groups
 - CAB Digital Tools