DAV

Department Admin Training DAV National Headquarters National Membership Department October 22, 2024^o

Doug Wells National Membership Director dwells@dav.org (859) 442-2060





Welcome to the MyDAV.org Annual Financial Report (AFR)



Purpose

- The MyDAV.org Annual Financial Report was designed for:
 - Improved efficiency
 - Enhanced communication
 - Transparency for all parties



How to Access

- A new function available on MyDAV.org.
 - Log in to your Membership CRM Page on MyDAV.org.
 - Click Membership tile > Annual Financial Report tile.
- To register or for assistance logging in:
 - Navigate to <u>DAV.org</u>.
 - Click the **Member Resources** link on the top menu.
 - Scroll down to the Register or Sign-in to MyDAV.org section.
 - Click the appropriate button: Register, Sign-In, or MyDAV.org Manual.

Create and Submit an AFR

- Let's walk through the MyDAV.org AFR process together.
 - <u>Here</u> are the steps to complete a sample report.



Approval Process

- No changes to the review and approval procedures currently established, except it's now all online.
- Emails are automatically sent with status updates.
- Once an AFR is submitted, it will be processed accordingly.
 - Department Under \$25,000
 - National \$25,000 and over



DRV Email Notification Example

	Officers, Your Annual Financial Report for 2021/2022 has been received, and your effort on behalf of DAV is greatly appreciated. The submission will be reviewed accordingly, and you'll be contacted if we need anything else. No other action is required at this time. View Thank you, DEPARTMENT OF i@outlook.com	
	DAV National Headquarters 860 Dolwick Drive Erlanger, KY 41018	
2024/2022	Subject:	hee heen
2021/2022	Annual Financial Report: Received	has been

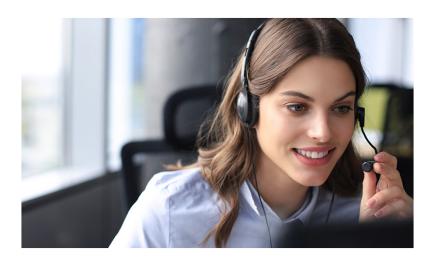
DAV Resources

- MyDAV.org User Manual
- MyDAV.org AFR Walkthrough PowerPoint
- AFR Report Kit
- AFR Supplemental Instructions
- Other Resources to Come



Have Questions?

- For assistance with MyDAV.org set up or log in:
 - membership@dav.org
- For help with the online AFR:
 - DAVOfficerSupport@dav.org
- Or call 1-888-236-8313





MyDAV.org

MyDAV.org

- What is it? A self-service and reports repository for members and member leaders
- Who has access?
 - All DAV and Auxiliary members
 - DAV and Auxiliary Department & Chapter/Unit officers have expanded, role-based access

Complete the User Registration

Link to register: https://www.mydav.org/member-registration

* First name:		
* Last name:		
* Preferred Email:		
Home Phone:		
* Country:		
United States	~	
* Address:		
		,
* City:		
* State:		
<please select=""></please>	~	
* ZIP:		
Birth date:		
mm/dd/yyyy		
* Membership Number:		

Enter your name and contact information

•

Be sure to enter the correct membership number

Complete the User Registration

Account Information			
* Username:			
* Password:			
12 characters or more.			
* Confirm Password:			



User Login

Create a **Username** and **Password**

- Emails are commonly used for usernames
- Passwords must be at least 12 characters long and include a special character

New User Registration Email

After submitting the registration, you will receive the following email:

New User Registration Email

Subject: DAV/DAV Auxiliary MyDAV.org Portal Registration

From name: DAV

From address: <u>MembershipAssistant@dav.org</u>

Thank you for joining our online community. We appreciate your patience while we process your sign-up request, which might take up to 2 business days. You will receive another email confirmation when the process is complete. At that point, you will be able to log in to the MyDAV.org portal to access your profile and other areas of the community.

We have included your username below for your reference. Username: <username>

Registration Confirmation

- Allow 2 business days for your registration to be processed.
- Once your registration has been processed, you will receive an email confirming access to the Membership MyDAV.org portal.

Registration Confirmation

Subject: DAV/DAV Auxiliary MyDAV.org Portal Registration

From name: DAV

From address: MembershipAssistant@dav.org

Welcome to the DAV/DAV Auxiliary MyDAV.org Portal!

log into your page.

Your MyDAV.org portal account request has been processed. You can now the portal to view your profile and update your details. If you have forgotten password, you can submit a password reset request from the login

Log in Now

We look forward to interacting with you and hope that you enjoy the MyDAV.org portal.

The login link that is included in the automated confirmation email is: <u>https://www.mydav.org/login</u>

DEV Logging In

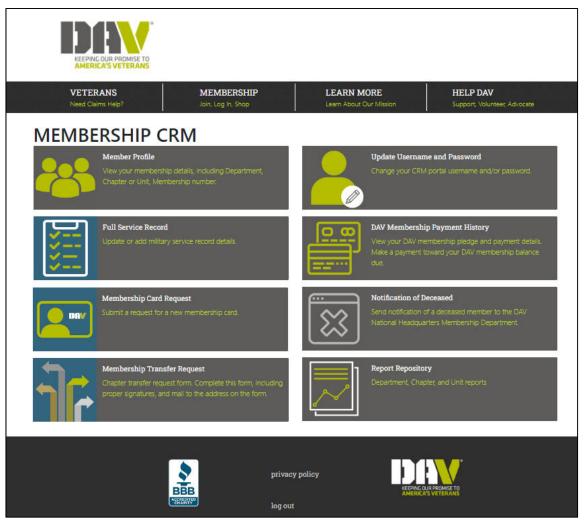
The Login Screen

KEEPING OUR PROMISE TO AMERICA'S VETERANS	
VETERANS MEMBERSH Need Claims Help? Join, Log In, Shop	
Please enter your username and password	l below.
Login	
Username:	
Password:	
🗌 Remember login	
LOGIN	
Forgotten password	
ввв	privacy policy
ACCREDITED	login

- Use your new
 Username and
 Password to
 access MyDAV.org
- Don't check the Remember login field if you are on a shared computer
- If you forget your password you can now reset your own password



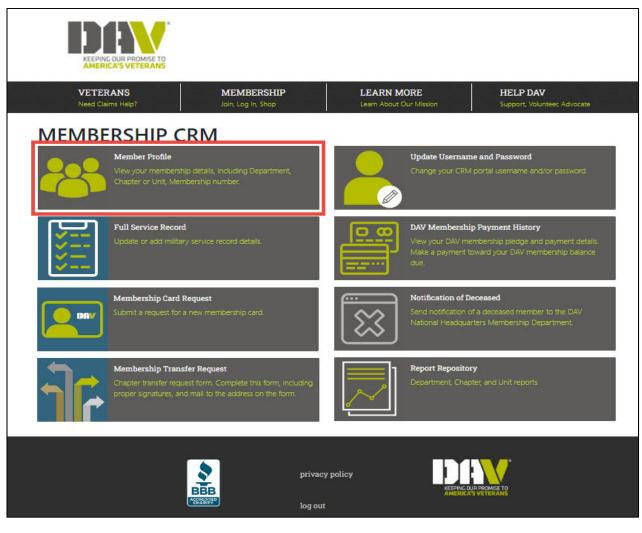
Home Screen



- After you log in you will be on the main page where you can access all the functions within the application
- Access is based on criteria set up in MyDAV.org that is reflective of your role(s) within DAV



Member Profile



DEV Navigation

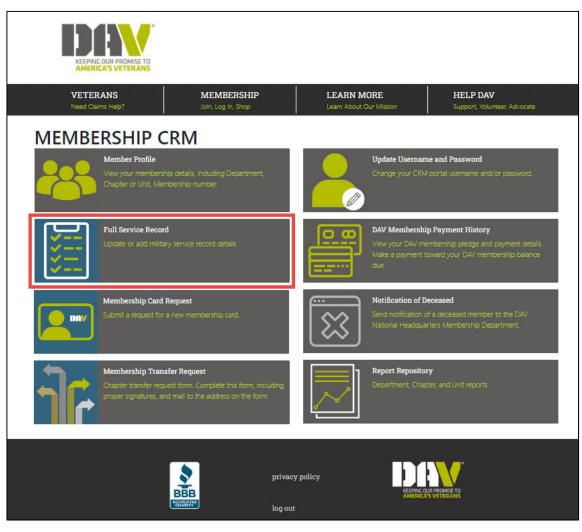
Member Profile

KEEPING OUR PROMISE TO AMERICA'S VETERANS			
VETERANS Need Claims Help?	MEMBERSHIP Join, Log In, Shop	LEARN MORE Learn About Our Mission	HELP DAV Support, Volunteer, Advocate
Back to Mer	IBER PROFILE		
Your mer Departmer	nberships	Chapter:	
16 - DAV Ke		FREDERICK R BRISTOL MEMORIAL #19	
Status:		Account Type:	
Active		Full Life	
Membersh	ip number:	Active Positions:	
16019386195		<none></none>	
Departmen	nt #:	Chapter #:	
16		19	
Departmen	ıt:	Chapter:	
13 - DAV Inc	liana	DEARBORN CO #75	
Status:		Account Type:	
Active		Part Life	
Membersh	ip number:	Active Positions:	
1307538619	541	<none></none>	
Departmen	nt #:	Chapter #:	
13		75	

- View membership information
- This example shows someone with multiple memberships

DAV Navigation

Service Record



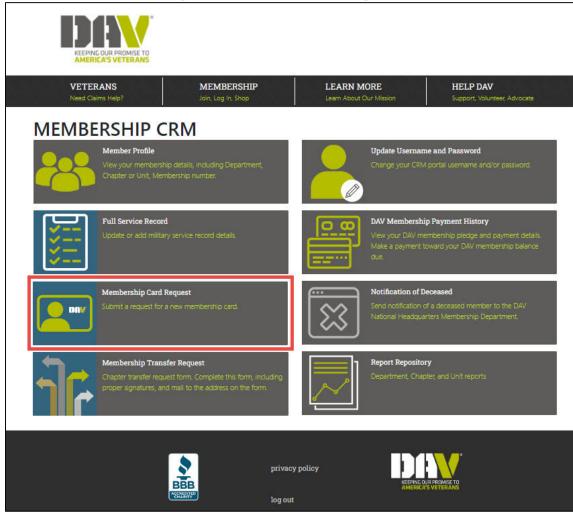
Service Record

ERANS Claims Help?	MEMBERSHIP Join, Log In, Shop	LEARN MORE Learn About Our Mission	HELP DAV Support, Volunteer, Advocate
FULL S Back to Members Your Full Serv	NOT NOT	ORD	
Branch:		Marines	
Rank:		Corporal	
Start date:		07/03/1975	
End date:		05/01/1981	
Service Retirem	ent:	No	
Disabled:		No	
Gassed:		No	
Injured:		Yes	
POW:		No	
Wounded:		No	
Hearing Impaire	d:	No	
Visually Impaire	d:	No	
Purple Heart:		No	
Other:		No	
Amputee:		No	
Agent Orange:		No	
PTSD/TBI:		No	
Gulf War Illness:		No	
Burn Pits:		No	
Medals:			
EDIT			
ADD			

- Review your full service record
- If we don't have your information, click Add to enter your service information
- If needed, click
 Edit to make any changes or additions to an existing record



Membership Card Request



Membership Card Request

TERANS d Claims Help?	MEMBERSHIP Join, Log In, Shop	LEARN MORE Learn About Our Mission	HELP DAV Support, Volunteer, Advoca
5		1	
MFM	BERSHIP CARE		
Back to Memb		ILLQUEST	
Please update	your Membership Number and the Re-iss	ue Reason. The Membership Number must e	exactly match
the number a	filiated with the membership for which you	u are requesting a new card.	
	•	Ids are already populated, a previous required fields are blank. Otherwise, your previous re	
be canceled. I	you think your previous request has alrea	dy been processed, please try logging out ar	
back into the	portal.		
YOUR N	IEMBERSHIP NUMBER(S)	
	na / 75 - Dearborn Co #75 / Membership		
16 - DAV Kent	ucky / 19 - Frederick R Bristol Memorial #1	9 / Membership Number 1601938619541	
* Membersh	p Number		
160193861	9541		
* Re-issue Re			
	2502		

Make sure to

enter the full

Membership

issue Reason,

such as lost,

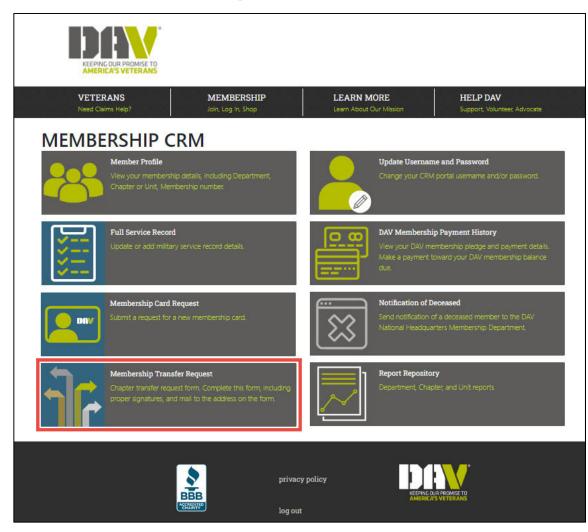
damaged, or

stolen.

Number

Enter a Re-

Transfer Request

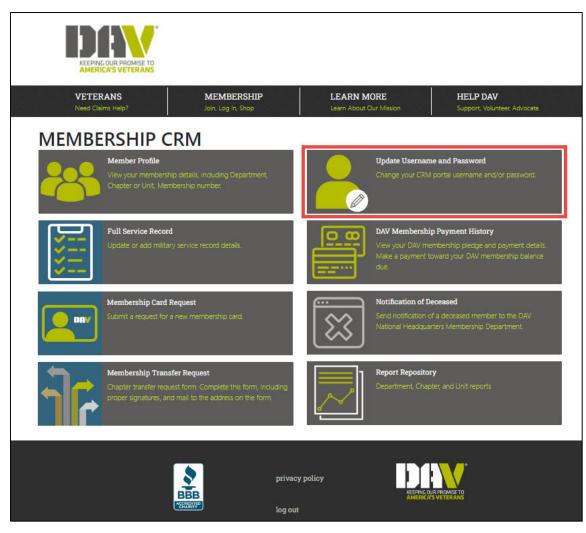


Transfer Request

😻 Disabled American Veterans Nati 🗙 🕥 Filla	ble Membership Transfer For 🗙 a			
Fillable Membership Transfer Form	1 / 1 - 100%	+ 🗈 -	♦ Downloa	d 🕂 🖻
	FULFILLING OUR PROMISE	P.O. Box 145	Membership Transfer Form 5550 - Cincinnati, OH 45250 - 888-236-8313 -	10
1	Name		Membership Code No	
	Street Address			Apt/Unit No
	City/Town	State	ZIP Phone Num	ber ()
	Cell Number () D	ate of Birth	Email	
	I request a transfer of my membership:			
	FROM Chapter No.	State	TO Chapter No.	State
	Member's Signature		Cherry Party Solid House House	
	Approved Rejected (Note: Approval of	this transfer is require	d by the receiving Chapter under Article	e 11, Section 11.8 of the Bylaws.)
	Name of Chapter Commander/Adjutant		Phone Nu	imber ()
	Signature of Chapter Commander/Adjutant			
			Dare sign	901316 (1/19)

- After filling in the necessary information, print the form and mail it in to the address listed on the form after getting the appropriate signatures
- This form can also be downloaded and saved for future use

Update Login Information



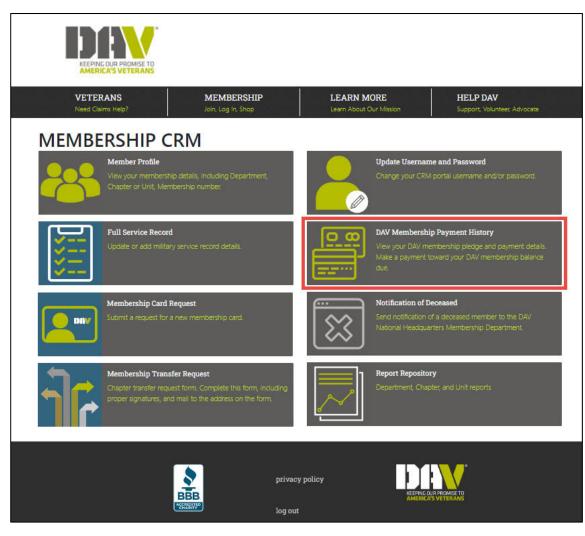
Update Login Information

KEEPING OUR PROMISE TO AMERICA'S VETERANS			
VETERANS Need Claims Help?	MEMBERSHIP Join, Log In, Shop	LEARN MORE Learn About Our Mission	HELP DAV Support. Volunteer, Advocate
USER Back to Memb • Username sarahevans@ • Password 12 characters o • Confirm Pas	ogmail.com	ASSWORD	
		SUBN	ИТ
	priva BBB FECTOR	acy policy	MUSE TO TERANS

Type your • new **Username** and/or Password and enter the new password again in the Confirm Password field. • The password must be 12 or more characters.

• Click Submit.

View Payment History



View Payment History

Acti	ve History	У				
Date	e range:					
All	dates		~			
Desi	ignations:					
All	designations		~			
Grou	up by:					
			~			
	APPLY					
					Export:	🔁 PDF 🔏
	Date 👻	Amount	Balance	Gift type	Designation	Pendir
ŧ	3/19/2003	\$125.00		Pledge payment	16 - DAV Kentucky	No
٠	1/1/2003	\$125.00	\$0.00	Pledge	16 - DAV Kentucky	No
ŧ	5/27/1993	\$85.00		Pledge payment	09 - DAV Florida	No
٠	1/1/1993	\$105.00	\$0.00	Pledge	09 - DAV Florida	No
ŧ	1/1/1993	\$20.00		Pledge payment	09 - DAV Florida	No
٠	2/1/1971	\$100.00	\$0.00	Pledge	45 - DAV Virginia	No
+	2/1/1971	\$100.00		Pledge payment	45 - DAV Virginia	No
<u> </u>	ge 1 of 1					
				ning pledge total	Donation total	
Pag	ledge total					

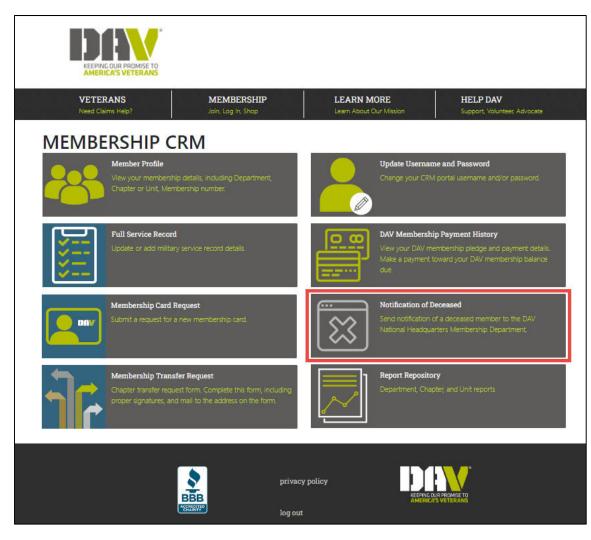
- In this example, the member has a membership in three different departments
- Pledge = Membership
- Pledge payment = Payment toward the membership
- Designation = department the membership is in
- You can also view all dues statements history for your membership record(s).

Make a Payment

The second se				Export: 7	PDF SCSV
Date	Amount	Balance	Gift type	Designation	Pending
H 4/19/2021	\$50.00		Pledge payment	DAV - AUX Indiana	No
() 7/30/202	0 \$20.00		Pledge payment	DAV - AUX Indiana	No
H 7/30/202	0 \$25.00		Pledge payment	DAV - AUX Indiana	No
(E) 3/10/2016	\$20.00		Pledge payment	DAV - AUX Indiana	No
H 9/23/2014	4 \$200.00 (Pay)	\$85.00	Pledge	DAV - AUX Indiana	No
\$ 25.00					
\$ 25.00					
Department:					
13 - AUX Indiar	na		_	Pay by card	
\$85.00			Ľ	ray by card	
Current Balance	e:				
current baiano				Or bu wallet	
\$85.00				Or by wallet	
				VISA 🌔 🕾	

- If there is an outstanding balance there is an option to make a payment
- Note that the amount defaults to the total outstanding balance, edit to make a different amount

Deceased Notification



Deceased Notification

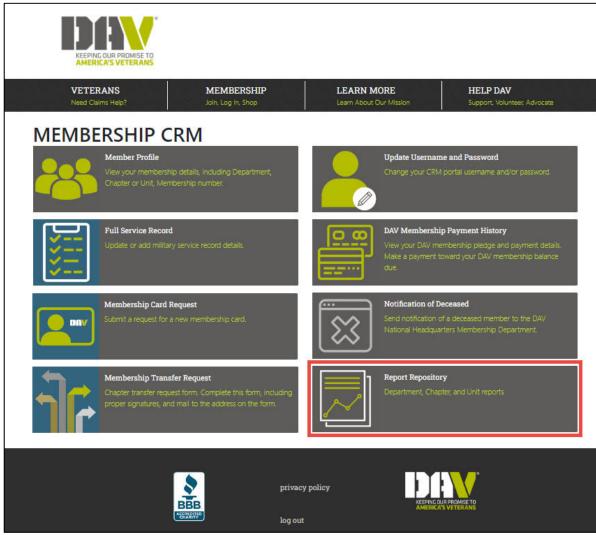
KEEPING OUR PROMISE TO AMERICA'S VETERANS			
VETERANS Need Claims Help?	MEMBERSHIP Join, Log In, Shop	LEARN MORE Learn About Our Mission	HELP DAV Support, Volunteer, Advocate
Back to Membe	this form to notify us that a member ha I Name mber Number 40	s deceased.	UBMIT
1 2 3 5 6 7 8 9 12 13 14 15 16 19 20 21 22 23 2627 2829 30	0 11 7 18 14 25	y policy	COUR PROMISE TO CAS VETERAMS

Ability to notify NHQ of the death of a member

- Enter the full **Name** and full **Member Number**,
- If known provide the **Deceased Date**
- If you go back to submit another member, the previous member's details may still be there. Clear the information and enter the next notification.

Generating Reports

Report Repository



DAV Generating Reports

Report Repository

Membership Deceased Report
 Member Recruitment Report

• DAV Membership Prisoners Of War Eligibility Report



Veterans	Membership	Our Mission	Help DAV
Back to Memi	bership		
	ORT REPOSITOR	Y	
o H	opulation Summary Report istorical Population Summary Report irect Deposit Register Report		
• M	1embership Listing Report 1embership Activity Report		

- Please reach out to Membership should you have trouble generating reports
- This section is only accessible by department /chapter officers

DEV Generating Reports

Population Summary Report

KEEPING OUR PROMISE TO AMERICA'S VETERANS			
VETERANS Need Claims Help?	MEMBERSHIP Join, Log In, Shop	LEARN MORE Learn About Our Mission	HELP DAV Support, Volunteer, Advocate
Report Repository			
DOWNLOAD © DAV O AUX Department:	POPULATION SUM	MARY REPORT	
16 - DAV Kentucky Chapter\Unit: 19 - Frederick R Brist	✓ ol Memorial # ✓		
DOWNLOAD			
	privacy Dog out	KEEPING	COUR PROMISE TO CAS VETERANS

Summary of the member population in a department /chapter. It also lists the new member goal for each department /unit

DEV Generating Reports

Population Summary Report

		Рорг	Population Summary Current Year			Goal			
DCU No DCU Name		Total Trial			Total Paid Members	Total Members	Goal	Goal %	Goal Variance
	and the second s	Total IIIa					10,700		- maile
the statement							1,000		=4
Active	At Large	Merg		<u>(</u>	On Hold	Re	voked	Suspe	ended
40	1	10			0		ים	1	lu:

View, save, and/or print

Membership Listing Report

KEEPING OUR PROMISE TO AMERICA'S VETERANS			
VETERANS Need Claims Help?	MEMBERSHIP Join, Log In, Shop	LEARN MORE Learn About Our Mission	HELP DAV Support, Volunteer, Advocat
 DAV AUX Department: 	OAD MEMBERSHIP LI	Chapter/Unit:	
16 - DAV Ke	Contraction of the second s	19 - Frederick R Bristol Memorial # 💙	
Type: (Ctrl/Sh Part Life Full Life Trial	ift click for multiple)	Status: (Ctrl/Shift click for multiple)	
Include Uncla	imed Address:	Sort Method:	
		Part Life / Full Life 🗸 🗸 🗸	
File Format:			
PDF	~		
DOWNLO	DAD		

- Listing of the members in your department /chapter
- Can generate multiple statuses and types (ctrl + shift)
- File Format.
 - **PDF** = Printable format
 - **CSV** = spreadsheet of data, sortable

Membership Listing Report

	KEEPING OUR PROMISE TO AMERICA'S VETERANS		Memb	pership Listing	9		Exe	cution Date: 6/2		
		DA	V Kentucky - Frede	rick R Bristol M	lemorial #19		** Denotes Unclaimed Address * Denotes Credit Card Payment			
embership #	Member Name	Address	City	St Zip	Phone #	Email	Balance	Status	Age	Yrs of Srvc
	Contraction of the local division of the loc		and the second			THE REPORT OF	1000		174	
The Ball	The second second	10.000	The second second	1000	and the second second	and in case of the local division of the	10.0	1000		
	A DESCRIPTION OF TAXABLE	Contraction of the local division of the loc		And Personal Property lies	No. of Concession, Name	and the second se	1000			
	A CONTRACTOR OF	and the second se	1.000	-		Contraction of the local division of the loc				
	and the second sec	AND DESCRIPTION OF A	1000	-	-			-		100
	and the second second	and the second se	10.00	-			100	-	100	
	Contraction in the second second	Marco and		-	10.000	The second second	1000			
	and the second se		1000	-						10
	and the second second second	ALC: U.S. MARCH & M.	-	-		Conception and		-		
		1 Courses	-				100	-	-	
	A DESCRIPTION OF	AND IN COLUMN 2 IN COLUMN 2	1000	-			100	-		
		and a sub-	1000	1000			100			
	A COMPANY AND A COMPANY		1.000	-	1000			-	-	100
	In the second second	and the second sec	1000	-	-			-	-	
1.01	and the second	the second second	the second second		and the second second	and the second second				100
	and the second second	1000	1000	-		and the second second second	1000	-	-	-
-	The second second second	CONTRACTOR OF TAXABLE IN	1.000	-			1000	-	101	10
	and the second se	and the second sec	1000	-			1000	-	100	
	AT LODGE MODEL		100.000	-			1000	1000		100
-	IN THE R. LEWIS CO.		-	-	-	A REPORT OF LAND	1000	-	-	100
-	 International contraction 	100 million (100	1000	-	-	THE OWNER OF TAXABLE PARTY.	1000	-	-	-
	A DECK THE OWNER.	100 million (100 million)	100	and second second	-	and the second se		-		

View, save, and/or print

Historical Population Summary Report

KEEPING OUR PR AMERICA'S VE	IOMISE TO TERANS		
VETERANS Need Claims Help	MEMBERSHII ? Join, Log In, Shop	P LEARN MORE Learn About Our Miss	ion Support, Volunteer, Advocate
Heed claims help	. Son, Log in, Shop		Support, Polancel, Autocate
	Report Repository		
	The Control Control of		
	DOWNLOAD HISTORICAL	POPULATION SUMMAR	Y REPORT
	 DAV AUX 		
	Department:		
	16 - DAV Kentucky 🗸		
	Chapter/Unit:		
	19 - Frederick R Bristol Memorial # 💙		
	Run Date:		
	12/27/2021 ~		
	DOWNLOAD		
	BBB	privacy policy	KEEPING OUR PROMISE TO AMERICA'S VETERANS
	ACCREATED	log out	

- Historical version of the population summary that allows you to view the report from select historical dates
- Run dates typically 6/30, 7/1, and Mondays

Historical Population Summary Report

Run Date: 11/1/2021 3:00:08 AM	Historical Po			·,		-		Į.,
DCU No DCU Name	Total Part Life	Current Ye Total Full Life	Total Paid Members	Total Members	Quota	Quota	Quota Variance	
	LIIO	LING		i mano	Quota	Quota /6	Variance	
10 Transformer (1997) 199		1.00	100	_ 0	210	JU.00 14		
National Totals	2	12.20	18.7%	5		08-020	1009	

- Review the report.
- Save and/or print the report.

Membership Activity Report

KEEPING OUR PROMISE TO AMERICA'S VETERANS			
VETERANS	MEMBERSHIP	LEARN MORE	HELP DAV
Need Claims Help?	Join, Log In, Shop	Learn About Our Mission	Support, Volunteer, Advocate
Report Repository			
DOWNLOA	D MEMBERSHIP ACTIV	/ITY REPORT	
DAV			
O AUX			
Department:			
16 - DAV Kentuck	у ~		
Chapter/Unit:			
	ristol Memorial # 💙		
Start Date	_		
	נ		
End Date			
05/31/2022 Eile Format:	ו		
PDF	~		
DOWNLOAD			
	-		
			•

 Listing member activity (payments, address change, etc.) within your department/chapter

• File Format.

- **PDF** = Printable format
- **CSV** = spreadsheet of data, sortable

Membership Activity Report

	AND WOMEN WHO SERVED	Report		through 2022-05-31 Execution Date: 6/22/2022 3:38:48 PM
Member Name	Membership	Status	Activity Date	Activity
		an paint superior	a de Contrato e	Berlanta Alexandra Infeld
Ender States	STATISTICS.	Addr Change	05/31/2022	And the second sec
Binner Timera B	ALC: NAMES OF	Deceased	05/31/2022	
Emain Para		Addr Change	05/04/2022	Contraction for the second second
	Contraction of the local division of the loc	Payment	05/05/2022	(Pledge) 10.00 Other - Tantin Bindem
En la compañía de la	The second	Addr Change	05/31/2022	295 Claiborne Dr Dry F
Entry instance instance	the state and	Payment	05/28/2022	(Pledge) 10.00 Credit c
Challense Brangerse Br	THE R. LEWIS CO.	Payment	05/02/2022	(Pledge) 40.00 Check
Entered and the		Payment	05/19/2022	(Pledge) 20.00 Credit control of the second se
PROPERTY AND	COLUMN 2 NO. OF COLUMN	Payment	05/02/2022	(Pledge) 10.00 Other -
tions and it	The second	Payment	05/20/2022	(Pledge) 10.00 Credit c
Finance Research	the statement	Payment	05/03/2022	(Pledge) 30.00 Credit c
King and a second second	And in case of	Payment	05/24/2022	(Pledge) 10.00 Credit c
	-	Payment	05/24/2022	(Pledge) 260.00 Credit
	COLUMN STREET, SAME	Payment	05/06/2022	(Pledge) 10.00 Credit care and a second
No. and There are a	The state of the s	Payment	05/24/2022	(Pledge) 200.00 Credit
	and all strength	Payment	05/25/2022	(Pledge) 10.00 Credit c
	ALC: NOT THE OWNER.	Deceased	05/11/2022	Date of death

- Review the report.
- Save and/or print the report.

MEMBERSHIP CRM



*Also roles based.

BACK TO MEMBERSHIP CRM

Frederick R. Bristol Mem. #19

Showing 1 to 5 of 22 entries

Membership Year	÷ S	tatus	~	Last Mo	dified By	÷			÷
2023 / 2024	N	lot Started	~				Start		
2022 / 2023	A	pproved					Revise	View	
2021 / 2022	A	pproved					View		
2020 / 2021	А	pproved					View		
2019 / 2020	А	pproved					View		
Show 5 ventries	Previo	us 1	2 3	4	5 Nex	Sear	rch:		

BACK TO OER LANDING PAGE

OFFICER ELECTION FORM

Organizational Details

Organization:	Membership Year:					
AUX	2022 / 2023 - Revision					
Department:	Chapter/Unit:					
16 - AUX Kentucky	19 - Frederick R. Bristol Mem. #19					
Employer ID (EIN):	Date of Annual Election:					
237336849	03/19/2019					
State:	Date of Installation:					
КҮ	03/19/2019					
City:	Election Month:					
Erlanger	March ~					
Web Site Address:	Revision Date Changed:					
	*Required					
	mm/dd/yyyy					

Meeting Details

Address of Regular Meetings:	Meeting Day of Week:	
860 Dolwick Dr	Tuesday	~

BACK TO OER LANDING PAGE

OFFICER ELECTION REPORT

PRINT/DOWNLOAD

Organization:

DAV

Department:

21 - DAV Michigan

Election Date:

5/8/2024

Message from Approver:

24-25 OER Approved

Officer Authorized To Receive Mail: Commander: Senior Vice Commander: 1st Junior Vice Commander: Adjutant: Treasurer: Membership Year:

2024 / 2025

Chapter/Unit:

01 - Keane-rankin M Det #1

Installation Date:

5/8/2024

Report Status:

Approved

Revision Change Date:

5/8/2024

MyDAV.org

Back to MyDAV Landing

MEMBERSHIP CRM



Update Username and Password

Change your CRM portal username and/or password



Full Service Record

Member Profile

Update or add military service record details.



DAV Membership Payment History View your DAV membership pledge and payment details Make a payment toward your DAV membership balance due.



Membership Card Request

Submit a request for a new membership care



Notification of Deceased Send notification of a deceased member to the DAV



Membership Transfer Request

Chapter transfer request form. Complete this form, including proper signatures, and mail to the address on the form



Report Repository



DAVA Membership Payment History

View your Auxiliary membership pledge and payment details. Make a payment toward your Auxiliary membershi balance due.

Officer Election Report

ubmit or view an Officer Election Re



Annual Financial Report

Submit or approve an annual financial report



DAV Questions?

