



MyDAV.org Annual Financial Report User Guide



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Welcome to the MyDAV.org Annual Financial Report

The Annual Financial Report (AFR) has transitioned to an online form. It is now another one of the functions accessible through your Membership CRM Page on MyDAV.org.

Register or Sign in to MyDAV.org

If you haven't already registered for login credentials for MyDAV.org, or if you need help logging in, utilize the tools available on the Member Resources site on DAV.org.

Locate resources to help access MyDAV.org

1. Navigate to [DAV.org](https://www.dav.org).
2. Click the **Member Resources** link on the top menu.



3. Scroll down to the **Register or Sign-in to MyDAV.org** section.



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Register or Sign-in to MyDAV.org

DAV is excited to offer access to [MyDAV.org](#)! Once you're registered and validated you'll have access to your DAV record, be able to request new membership cards, manage and make payments toward your membership dues, and much more! DAV officers will also have access to a wide-variety of reports and other functions.

[Registration instructions](#)

REGISTER **SIGN-IN** **MYDAV.ORG MANUAL**

COMMUNICATE WITH US BY TEXT!

You can now get membership information and answers to your questions sent straight to your phone.

4. Click the appropriate button.

Button	Action
Register	If you haven't previously signed up, complete the New User Registration form and submit it for processing. You will receive a confirmation email when your login credentials are ready to use.
Sign-In	Use your login credentials to access MyDAV.org resources.
MyDAV.org Manual	This user guide provides an overview of the self-service repository, as well as steps to assist in registering or accessing the site. It also includes descriptions of the available resources.

Work with an Annual Financial Report

The Annual Financial Report (AFR) is an online form, available for your department or chapter, through the Membership CRM Page.

Access an AFR

1. Log in to your Membership CRM Page on MyDAV.org.
Note: See [Register or Sign in to MyDAV.org](#) in this guide for assistance.
2. Click **Membership**.

The screenshot shows the MyDAV Landing page. At the top left is the DAV logo with the tagline 'KEEPING OUR PROMISE TO AMERICA'S VETERANS'. Below the logo is a navigation bar with four tabs: 'Veterans', 'Membership', 'Our Mission', and 'Help DAV'. The main content area is titled 'MYDAV LANDING' and contains four tiles: 'Membership' (highlighted with a red box), 'State Convention', 'Volunteers', and 'Update Username and Password'. The 'Membership' tile includes an icon of three people and the text 'Membership Membership'. The 'State Convention' tile includes a map of the United States and the text 'State Convention View and download State Convention Reports'. The 'Volunteers' tile includes an icon of hands and the text 'Volunteers Volunteers'. The 'Update Username and Password' tile includes an icon of a person and a pencil and the text 'Update Username and Password Change your CRM portal username and/or password.'. The footer contains the BBB logo, 'privacy policy', 'log out', and the DAV logo.

3. Click **Annual Financial Report**.
Note: See [Email Notifications](#) in this guide to ensure you receive messages related to the AFR via your preferred email address.



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MEMBERSHIP CRM

MyDAV.org User Manual

Member Profile
View your membership and contact details, including Department, Chapter or Unit, and Membership number.

Update Username and Password
Change your CRM portal username and/or password.

Full Service Record
Update or add military service record details.

Annual Financial Report
Submit or approve an annual financial report

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 card.

Notification of Deceased
Send notification of a deceased member to the DAV National Headquarters Membership Department.

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

Report Repository
Department, Chapter, and Unit reports

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

Officer Election Report
Submit or view an Officer Election Report.

The AFR Landing Page and its features:

[Back to Membership CRM Landing](#)

A CREATE A NEW REPORT
VIEW APPROVED REPORTS

AFRs currently in process:

B REFRESH
D
E

Showing 1 to 4 of 4 entries

C Department	Chapter	Accounting Period	Income (minus lines 1 & 7)	Status	Last Modified	Last Modified By	Actions
DAV (State)	Chapter 01	2021-2022	\$0.00	Saved	04/12/24 9:10:20 AM		E Edit
DAV (State)	Chapter 02	2020-2021	\$0.00	Rejected: Rejected By:	04/12/24 9:34:29 AM		E View
DAV (State)	Chapter 03	2020-2021	\$0.00	Saved: Locked By:	04/12/24 9:45:22 AM		E View
DAV (State)	Chapter 04	2021-2022	\$0.00	Submitted	04/12/24 9:41:48 AM		E View

Show entries
Previous Next
Search:

F
G

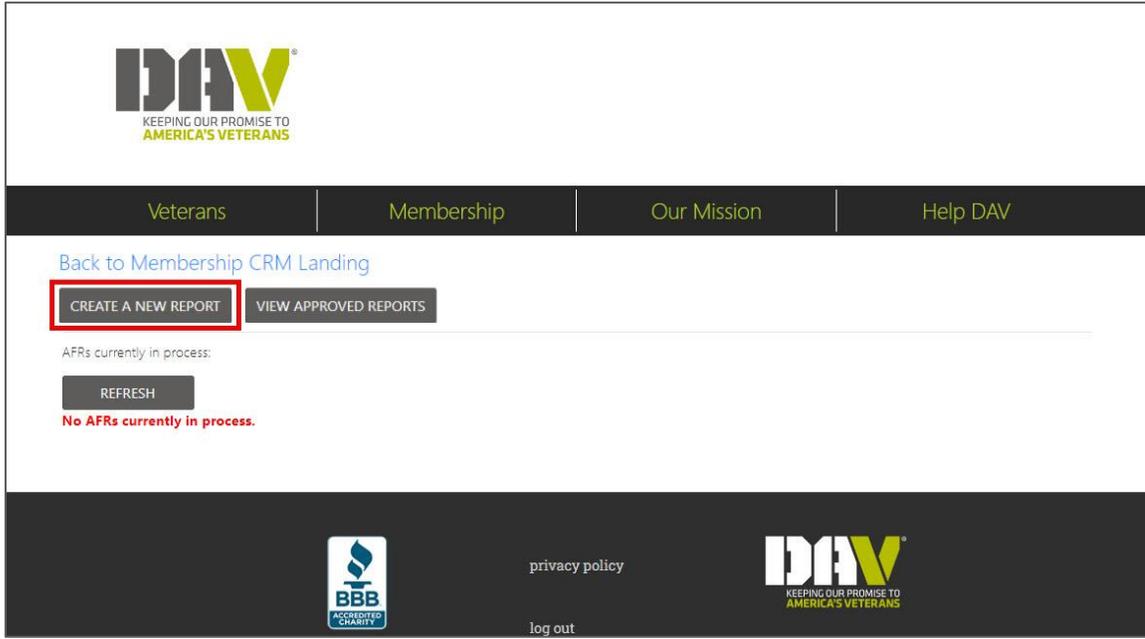
Feature	Description
A	The Create a New Report button opens a blank form for completion. Note: See Work on an AFR in this guide for assistance.
B	Click Refresh to view the most up-to-date details in the list, as necessary.
C	A list of AFRs currently in-process in the system, based on your role. Once the list grows, you can filter or sort to locate the appropriate record.
D	View the Status for each AFR in this column. <ul style="list-style-type: none"> • Saved – An in-process report that has been started but not yet finalized. This allows you to work on a report over time without losing what has been completed. • Locked By – An in-process report that an individual has temporarily made unavailable for edits by others. • Submitted – A report that has been sent for approval. While in this status, no additional changes can be made. • Rejected – A report that contains errors that must be resolved.
E	The Actions column indicates how you can interact with the record. <ul style="list-style-type: none"> • Edit – Use this to update previously entered information, complete empty fields, or as a final review before submitting the form for review. • View – Opens a read-only report for the chosen record. • Review – Chapter reports submitted and ready for the appropriate department approving authority to review, based on user role.
F	Choose to show 5, 10, or all available AFRs in the table by changing the number of entries.
G	Use the Search field to find AFRs for a particular year. For example, if you type “2022” in the field, two records, 2021-2022 and 2022-2023 display.

Work on an AFR

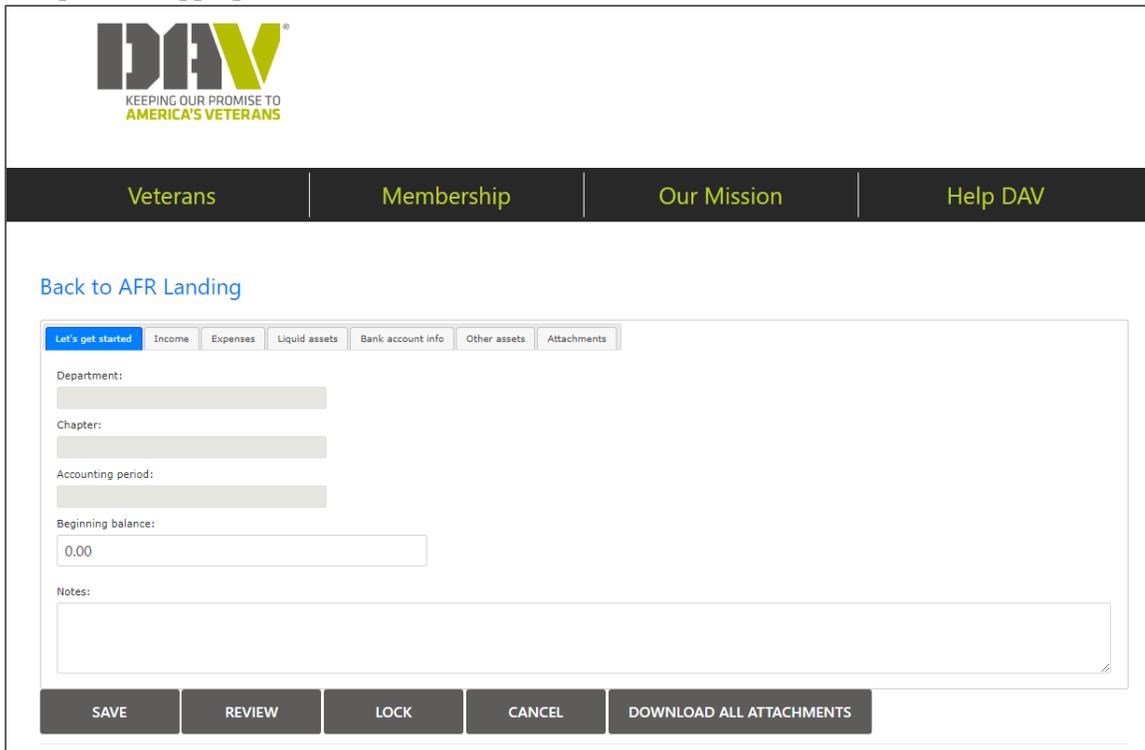
1. Create a new report or continue working with an in-process one.

Note: Thanks for your patience as the information loads on your screen. It may take a while to fully display.

Note: See [Access an AFR](#) in this guide for assistance.

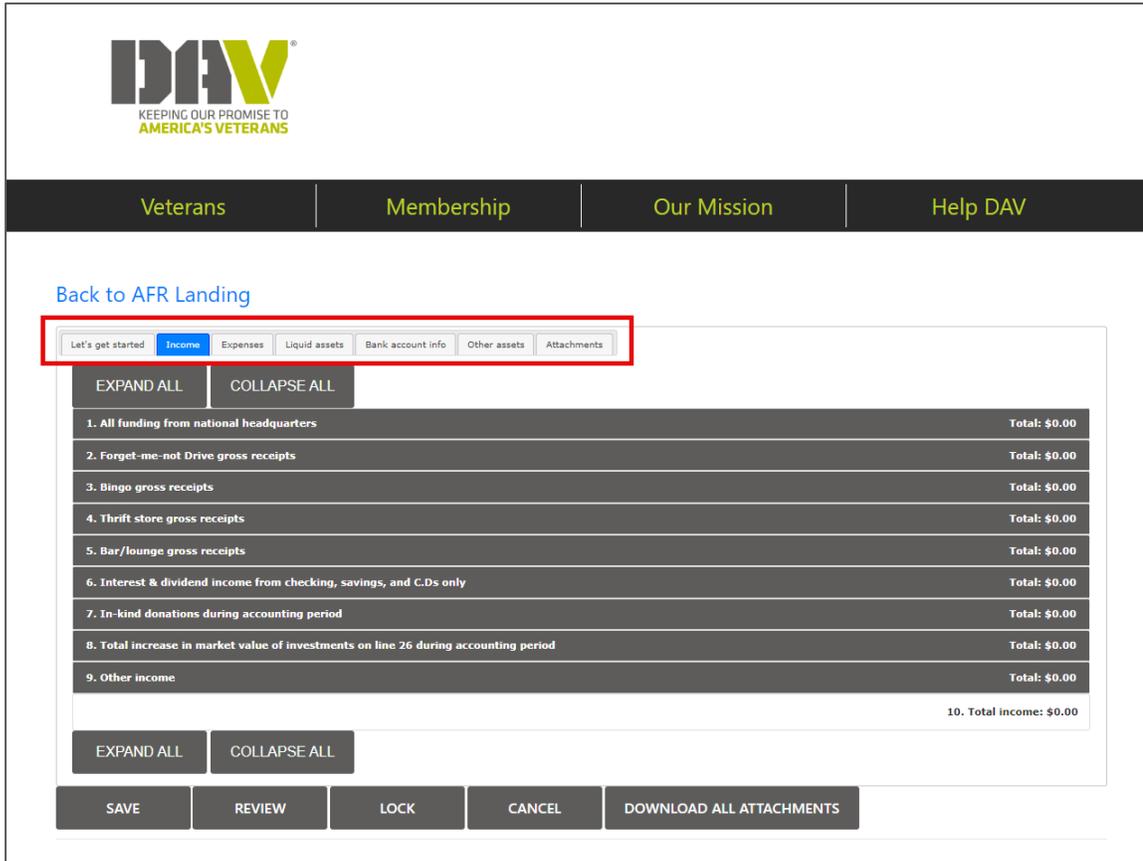


2. Complete the appropriate fields.



3. Complete the applicable fields under all of the tabs.

Note: Click the title of each line to open the schedule and access the available fields.



Back to AFR Landing

Let's get started | **Income** | Expenses | Liquid assets | Bank account info | Other assets | Attachments

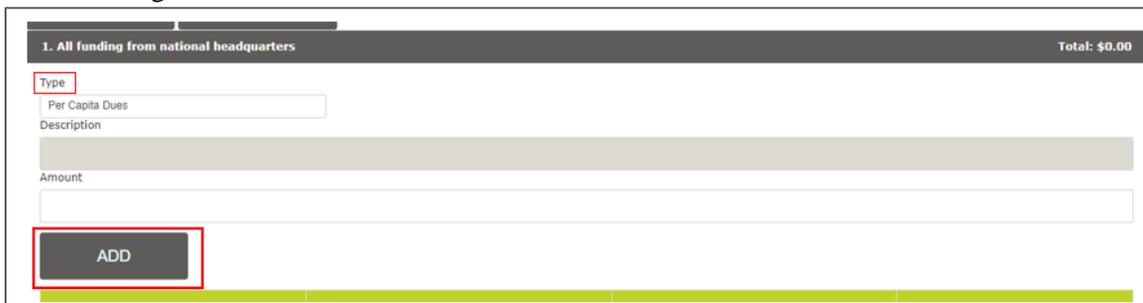
EXPAND ALL | COLLAPSE ALL

1. All funding from national headquarters	Total: \$0.00
2. Forget-me-not Drive gross receipts	Total: \$0.00
3. Bingo gross receipts	Total: \$0.00
4. Thrift store gross receipts	Total: \$0.00
5. Bar/lounge gross receipts	Total: \$0.00
6. Interest & dividend income from checking, savings, and C.Ds only	Total: \$0.00
7. In-kind donations during accounting period	Total: \$0.00
8. Total increase in market value of investments on line 26 during accounting period	Total: \$0.00
9. Other income	Total: \$0.00
10. Total income: \$0.00	

EXPAND ALL | COLLAPSE ALL

SAVE | REVIEW | LOCK | CANCEL | DOWNLOAD ALL ATTACHMENTS

4. As necessary, select the appropriate **Type**, enter the required information, and click **Add** to include it on the schedule.
- Note:** The **Add** button doesn't automatically save the data that was entered. Be sure to click **Save** before exiting the AFR.



1. All funding from national headquarters Total: \$0.00

Type

Per Capita Dues

Description

Amount

ADD

5. Click the following buttons, located along the bottom of the form, as needed:

Button	Description
Save	Keeps any information added or updates made to the form. This allows you to return later to enter the remaining details.
Review	Displays an overview of what has been entered for the AFR. Once in this option, click Adjust/View My Report to return to the form and complete any missing information or make modifications, or click Submit to send your completed report for review.



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	Note: See Submit an AFR in this guide for assistance.
Lock	Only allows the person who uses this function the ability to make updates. For example, one user hasn't finished the report yet and needs to come back to it later and they don't want anyone else making any changes to it in the meantime.
Cancel	Exits the form and returns to the Landing Page . Any data entered that hasn't been saved will be lost. Therefore, you will receive a message asking if you want to leave the AFR.
Download All Attachments	A quick way to review all supplemental documents that have been previously uploaded to support applicable fields. This will create one compressed folder, known as a .zip file, which contains each document.

Submit an AFR

1. Create a new report or continue working with an in-process one.
Note: See [Access an AFR](#) in this guide for assistance.
2. Once all information has been added and the appropriate documentation attached, click **Review**.

The screenshot shows the DAV AFR submission interface. At the top is the DAV logo and navigation menu with links for Veterans, Membership, Our Mission, and Help DAV. Below the navigation is a link for 'Back to AFR Landing'. The main content area has several tabs: 'Let's get started', 'Income', 'Expenses', 'Liquid assets', 'Bank account info', 'Other assets' (which is selected and highlighted in blue), and 'Attachments'. Under the 'Other assets' tab, there are 'EXPAND ALL' and 'COLLAPSE ALL' buttons. A checkbox labeled 'Other assets have been reviewed' is checked. Below this is a table with five rows, each representing a different asset category and its total value:

Asset Category	Total
Real Estate Titled in Department/Chapter Name	\$0.00
Loan Information	\$0.00
Furniture/Equipment	\$0.00
Vehicles (Automobiles, Trucks, Vans, Trailers)	\$0.00
Inventory/Miscellaneous	\$0.00

Below the table are another set of 'EXPAND ALL' and 'COLLAPSE ALL' buttons. At the bottom of the form are five buttons: 'SAVE', 'REVIEW' (highlighted with a red box), 'LOCK', 'CANCEL', and 'DOWNLOAD ALL ATTACHMENTS'.

3. Look over the displayed details to ensure the form is complete.



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Back to AFR Landing

Review

Beginning balance:	\$0.00
1. All funding from national headquarters:	\$0.00
2. Forget-me-not drive gross receipts:	\$0.00
3. Bingo gross receipts:	\$0.00
4. Thrift store gross receipts:	\$0.00
5. Bar/lounge gross receipts:	\$0.00
6. Interest & dividend income from checking, savings, and C.Ds only:	\$0.00
7. In-kind donations during accounting period:	\$0.00
8. Increase in market value of investments on line 26 during accounting period:	\$0.00
9. Other income:	\$0.00
10. Total income:	\$0.00
11. Administrative personnel salaries, benefits, payroll taxes & processing fees:	\$0.00
12. Conventions/conferences/seminars/meetings:	\$0.00
13. Administrative & non-service related postage & office supplies:	\$0.00
14. Service expenses:	\$0.00
15. Forget-me-not expenses:	\$0.00
16. Bingo operation expenses:	\$0.00
17. Thrift store operation costs:	\$0.00
18. Bar/Lounge operation expenses:	\$0.00
19. Chapter home/unit home/department HQ operational expenses:	\$0.00
20. Decrease in market value of investments on line 26 during accounting period:	\$0.00
21. Other expenses:	\$0.00
22. Total expenses:	\$0.00
Ending balance:	\$0.00
23. Checking accounts & cash on hand as of June 30:	\$0.00
24. Savings accounts as of June 30:	\$0.00
25. Certificates of deposit as of June 30:	\$0.00
26. Market value of investments as of June 30:	\$0.00
27. Total liquid assets as of June 30:	\$0.00
Out of balance amount:	\$0.00

4. Scroll down to the **Signors** section.
5. Enter the signee membership number or click the **magnifying glass** to search for and add the appropriate individual to each of the necessary fields, one at a time.



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Signors

Audit committee signature 1

Audit committee signature 2

Audit committee signature 3

Signature of reporter

Comments

- a. Enter the criteria to find the person.
- b. Click **Search**.



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Member Search

Lookup ID / Member ID

Membership #

Last Name

First Name

Middle Name

Suffix

Date of Birth

mm/dd/yyyy

Address Line 1

City

State

ZIP/Postal code

Phone

Include Deceased

Check Nickname

SEARCH

Cancel

- c. If multiple records are returned, locate the applicable member.
- d. Click **Select**.

Note: If the **Select** button is gray, the individual is not eligible.

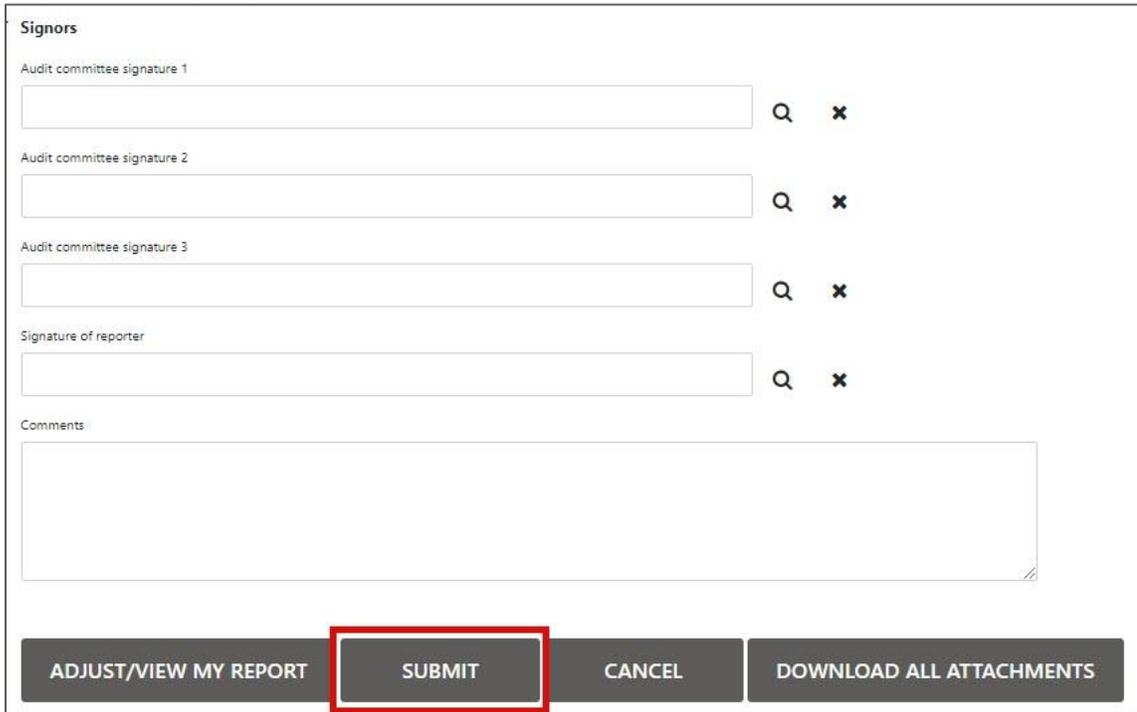
Constituent Lookup:	Suffix:	Status:
123		Active
Membership Number:	Date of Birth:	Department:
123	104	DAV (State)
Membership Account Type:	Full Address:	Chapter/Unit #:
Full Life	PO Box:	Chapter 01
Name:	82030-	SELECT
Aaron		
Constituent Lookup:	Suffix:	Status:
175		Active
Membership Number:	Date of Birth:	Department:
175	197	DAV (State)
Membership Account Type:	Full Address:	Chapter/Unit #:
Full Life	6508 Cn	Chapter 01
Name:	8200	SELECT
Aaron		
Constituent Lookup:	Suffix:	Status:
123		Inactive/Unable to Distribute
Membership Number:	Date of Birth:	Department:
123	1991	DAV (State)
Membership Account Type:	Full Address:	Chapter/Unit #:
Part Life	2308 Ch	Chapter 01
Name:	82000-	SELECT
Aaron		

Note: If there was an incorrect selection, click the **X** next to the **magnifying glass** to remove an individual.

6. Click **Submit**.

Note: Once the AFR is submitted, you will not have access to make additional changes unless the report is rejected and sent back for updates or missing information.

Note: If you are not ready to submit the report but want to keep the added individual(s), click **Adjust/View My Report** for a **Save** option.



7. If there is anything missing, review the pop-up message.

- a. Make note of the contents of the message.
- b. Click **OK**.



- c. Click **Adjust/View My Report** to make the necessary adjustments and submit the AFR again.

Note: The issues to be corrected are listed in red above the tabs and remain there as you move through the AFR.



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Back to AFR Landing

- Please check that the Other Assets have been reviewed.
- Audit committee signature 2 is required.
- Audit committee signature 3 is required.
- Signature of reporter is required.

Let's get started **Income** Expenses Liquid assets Bank account info Other assets Attachments

EXPAND ALL COLLAPSE ALL

1. All funding from national headquarters	Total: \$0.00
2. Forget-me-not Drive gross receipts	Total: \$0.00
3. Bingo gross receipts	Total: \$0.00

8. If everything required is included, the AFR will be submitted and you will be navigated to the **AFR Landing Page**.

Note: An update is emailed regarding the AFR.

Note: See [Email Notifications](#) in this guide to ensure you receive messages via your preferred email address.

Showing 1 to 3 of 3 entries

Department	Chapter	Accounting Period	Income (minus lines 1 & 7)	Status	Last Modified	Last Modified By	Actions
04 - DAV California	02 - Dick Cosgriff San Diego #2	2022-2023	\$0.00	Submitted	04/15/24 8:23:22 AM		Review
04 - DAV California	09 - Marysville #9	2020-2021	\$0.00	Saved	04/15/24 1:06:56 PM		Edit
04 - DAV California	13 - Cmp Krny Van Nuy #13	2021-2022	\$0.00	Saved	04/15/24 11:19:17 AM		Edit

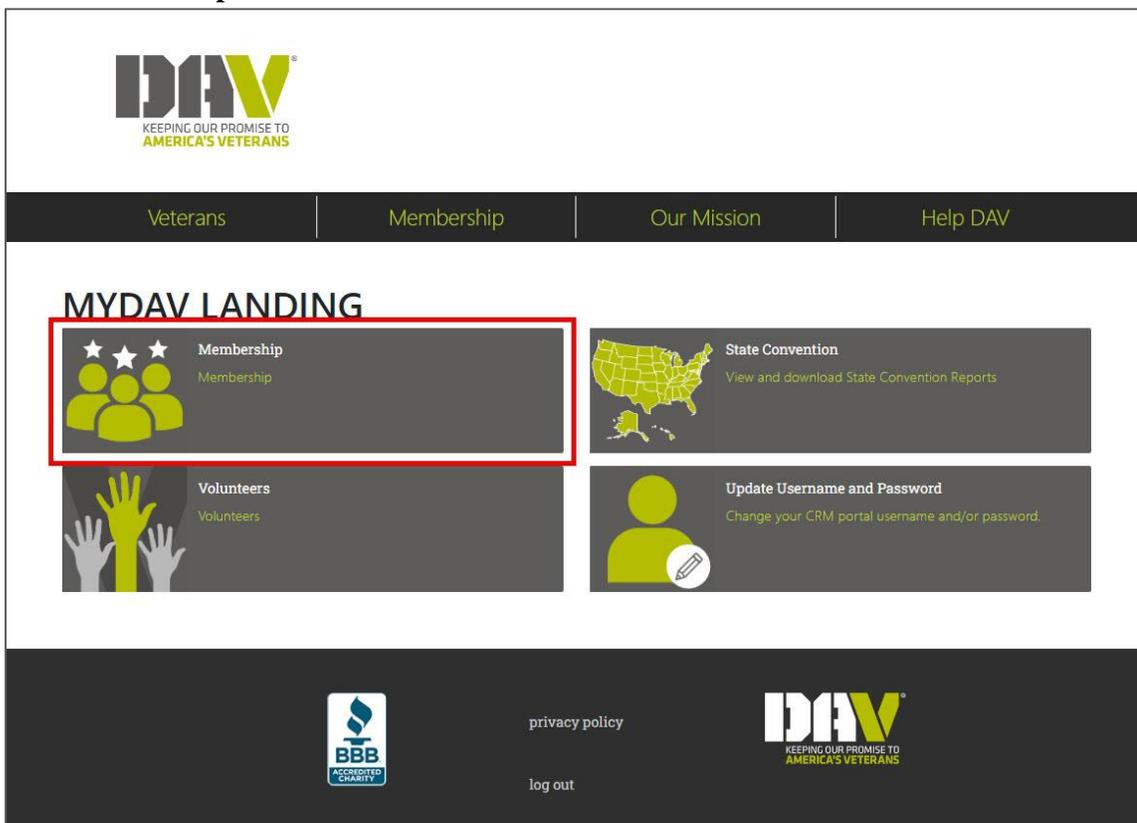
Show 5 entries Previous 1 Next Search:

Email Notifications

All email communication that occurs as a result of actions taken on the AFR will go to the email that is set as Primary in your MyDAV.org profile. This email may be different than the one you use to log in to MyDAV.org.

Set your primary email address

1. Log in to your Membership CRM Page on MyDAV.org.
Note: See [Register or Sign in to MyDAV.org](#) in this guide for assistance.
2. Click **Membership**.



The screenshot shows the MyDAV.org website interface. At the top is the DAV logo and a navigation bar with links for Veterans, Membership, Our Mission, and Help DAV. Below the navigation bar is the "MYDAV LANDING" section with four main menu items: Membership, State Convention, Volunteers, and Update Username and Password. The "Membership" item is highlighted with a red rectangular box. At the bottom of the page, there are logos for BBB Accredited Charity, a privacy policy link, a log out link, and the DAV logo.

3. Click **Member Profile**.



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MEMBERSHIP CRM

- MyDAV.org User Manual**
View your membership and contact details, including Department, Chapter or Unit, and Membership number.
- Update Username and Password**
Change your CRM portal username and/or password.
- Annual Financial Report**
Submit or approve an annual financial report.
- Membership Card Request**
Submit a request for a new membership card.
- Membership Transfer Request**
Chapter transfer request form. Complete this form, including proper signatures, and mail to the address on the form.
- DAVA Membership Payment History**
View your Auxiliary membership pledge and payment details. Make a payment toward your Auxiliary membership balance due.

4. Within your **Member Profile**, scroll down to the **Email** section.

The screenshot shows the DAV logo at the top left. Below it is a navigation bar with four sections: **VETERANS** (Need Claims Help?), **MEMBERSHIP** (Join, Log In, Shop), **LEARN MORE** (Learn About Our Mission), and **HELP DAV** (Support, Volunteer, Advocate). The main content area is titled **MEMBER PROFILE** and includes a link to "Back to Membership CRM". Under the heading "Your memberships", there are two columns of information: **Department:** 16 - DAV Kentucky, **Status:** Active, **Chapter/Unit:** Frederick R. Bristol Mem. #19, and **Account Type:** Full Life.

5. Select the appropriate email as **Primary**.
6. Click **Submit**.



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Email

Work: officer@gmail.com

Primary

Edit Delete

Home: familyemail01@gmail.com

Primary

Edit

Add New

SUBMIT