

Form 65A instructions for Form 65

November 27, 2023

Background:

The excel document shown in form 65 is a replacement for 2 other documents:

1. a Branch Roster
2. an email list

As time went by and new methods came into use the Branch Roster submittal operation became more and more onerous both for the branches and for SIRinc

A workable solution, the Branch Membership List. combines both into one simple spread sheet submittal that included all the members but only a minimum of data.

Process:

Here is Form 65, Branch Membership List, which is an excel spread sheet.

	A	B	C	D	E	F	G	H	I	J	K
1	Brn	Last	First	Middle	Nick	Partner	Street	City	Zip	Telephone	Email
2											
3											
4											

You may already have an existing spread sheet that contains these fields and maybe others. Your fields may be in a different order. We can handle that and it saves you time to use something you already have. You may be using something other than excel. See "Technical" following.

Here is a sample with 3 test entries;

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2												
3	Brn	Last	First	Middle	Nick	Spouse	Street	City	State	Zip	Telephone	Email
4	1	Sale	Dwight	B.	Dwight	Laura	109 La Mesa Dr	Burlingame	Ca.	94010	650-685-6971	dwright_sale@comcast.net
5	0	Pickens	T	Bone	Bone	Mable	257 Oakhurst	San Mateo	Ca.	94020	650 123-4567	tbone@comcast.net
6	8	Steichen	Dean	J.		Marilyn	37 Pulido Ct.	Danville	Ca.	94526	925-820-3573	djsteich@comcast.net
7												
8												

Text may be all caps

- Brn** Your branch number.
- Last** Member's last name.
- First** Members first name.
- Last-First** May be combined into one field in your data. If it is show combined text in "Last"
- Middle** You may not keep track of Middle. If so keep blank
- Nick** We will use nick name when we correspond. If none and left blank we will insert the "First" name.
- Partner** We are now using "Partner" for "Spouse" as a "fits all" for the various relationships.
- Street** Obvious

City	Obvious
State	Used because some members live in Nevada.
Zip	The five digit zip code. If your data includes the +4 extension we will remove it.
Telephone	You will need add the Area Code if none shown
Email	Obvious

You can change the spreadsheet's column width to better see your information.
Do not change the number of columns or change their order.

Submit your Branch Membership List by email as an attachment to:
email: Form65Recipient@sirinc.org

Technical:

Branch Membership List (Form65)

Possible Branch Conditions & Suggested solutions:

1. Microsoft type Spreadsheet or Database with all data elements
 - Extract data elements into Form65 format
2. Microsoft type Spreadsheet without all data elements
 - Extract data elements into Form65 format and add necessary elements manually.
3. Non-Microsoft type Spreadsheet (e.g. Apple Numbers)
 - Extract data elements into Form65 format and add necessary elements manually.
4. Electronic File (e.g. Word or other text format)
 - Transcribe data elements into Form65
5. Non-electronic format
 - Transcribe data elements into Form65

The Branch Secretary or his designee completes Form 65, Branch Membership List, and submits it to the State InfoSys Email Subcommittee at Form65Recipient@SIRinc.org by the First of March. Information contained in the membership list should be current as of January 1 of each year. For technical assistance feel free to contact: Infosys Committee