

State Officers' Guide to the New Website

I hope this guide will help you use the options available to you on our website. Not all options below will be available to all officers depending on the permissions set for each individual. If you have any questions, please send them to governance@uschess.org.

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LOGGING IN TO THE NEW WEBSITE

It is necessary to log in to the new website to manage your affiliate. If you haven't yet done so, the link to get started is in the upper left of the home page (circled in red in the image below). Please keep in mind that the password saved to your browser prior to June 2020 will not work.



On the log in page (see below), links at both the top and bottom of the page are intended to help you. If you are prompted to enter a new account, please talk to someone in membership at 800-903-8723 so that you don't create a duplicate account.

Clicking on "How to log in" at the top of that page, takes you to [a page of useful information and instructions](#). This page also includes an introduction to the various kinds of information available on the site.

Please review [how to log in](#). If you have questions contact membership@uschess.org.

User Account

Please log in below to access our improved Members-Only Area and Tournament Director/Affiliate Support Area.

First time logging in here?

If we already have your email address, you may already be able to log into this site. Use the "Reset Password" link above to get a one-time login link via email.

You can also create a new website login using your Member ID. You'll need an email address to sign up. Please note that each email address can only be associated with one US Chess Member ID.

YOUR PERSONAL PROFILE

Once you're logged in, you will see a profile similar to the screenshot below. Note the orange "Update My Profile" button circled in red below. I'm bringing your attention to that because it is not on your affiliate profile. More on that a little further down

Find a Member Find Tournaments Find Clubs

Manage Email Preferences and TLAs

Jennifer Pearson Membership number: 13506216

Membership: GM Complimentary

Expiration: October 31, 2021

TD Level:

Email: jennifer.pearson@uschess.org

Phone:

Address:

Change Password **Update My Profile**

Change Request for Key Member Info

Download Ratings Supplement Files (Regular/Blitz Ratings)

Download Ratings Supplement Files (Regular/Quick Ratings)

Get a crosstable for any event

MAP Standings

Governance Material

US Chess Member Options

Scroll to the bottom of your profile and you will see an area called My Authorized Affiliates and beneath that links to each of your affiliates. Clicking on the link takes you to your affiliate's profile page.

Change Password Update My Profile

My Authorized Affiliates

JEN'S CHESS CLUB (A6053104)

My Family Members

ADD FAMILY MEMBER

Club / Affiliate Search

Collaboration Hub

Elections Committee

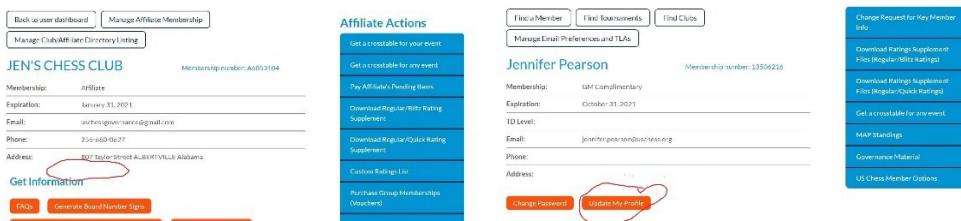
- Elections Committee Discussion
- Members

Share Your Feedback

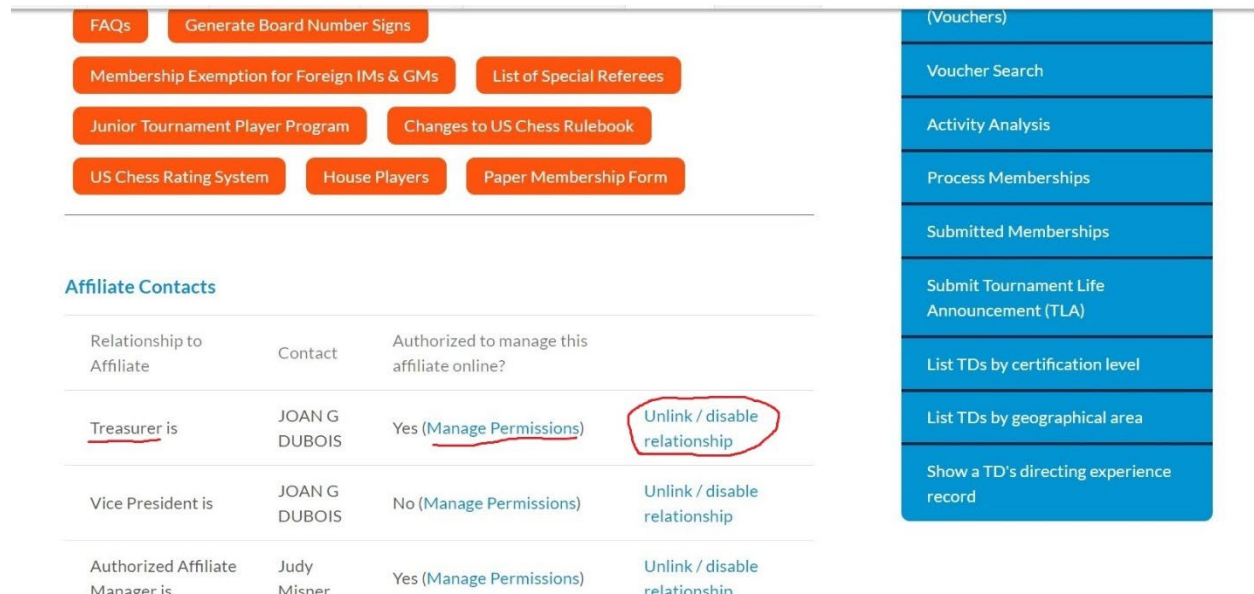
YOUR AFFILIATE PROFILE

Please note that your affiliate profile (below left with an empty circle) does not have an “Update My Profile” button as your individual profile does (below right). That means the only way for you to change how US Chess contacts your affiliate is by contacting someone in membership to update the information. You’re not able to do it via your club affiliate profile area.

You’ll see as we move forward that there’s a place for you to add and change contact information that shows up ONLY in the [club search/listings](#) on the website. What you enter in the “Manage Club/Affiliate Directory” does not affect what we have on file for contacting you or sending your affiliate information. The two are completely separate.



Scrolling down your affiliate profile page, you will notice your officers listed in the “Affiliate Contacts” area. If you have permission, you will see links for both “Manage Permissions” and “Unlink/disable relationship.” The next screenshots will take you into each of those options.



MANAGING PERMISSIONS

Please keep in mind this is not the place to change who your officer is. To do that requires adding a “relationship,” which is covered below. In this area the person remains the same but you can change their title, for example if they change from being Treasurer to Vice President, or you can give or take away the power to alter information within the Affiliate Profile area by using the “Authorized to Manage Affiliate” area. Note that the changes won’t stick until you click on the “Update Relationship” button at the bottom of the page.

Upper half of page:

Affiliate Users: Update Permissions

Affiliate / Organization

Organization Name

JEN'S CHESS CLUB

Individual Contact

Name Prefix

--None--

First Name

Judy

Middle Name

Last Name

Misner

Name Suffix

--None--

Authorized to Manage Affiliate?

- No, this is an affiliate contact person only
 Yes

Is this contact authorized to manage this affiliate online (renew membership, update club listing details, manage affiliate contacts, etc.)?

Relationship to Affiliate / Organization Relationship Type(s)

Contact of

Lower half of page:

- No, this is an affiliate contact person only
 Yes

Is this contact authorized to manage this affiliate online (renew membership, update club listing details, manage affiliate contacts, etc.)?

Relationship to Affiliate / Organization Relationship Type(s)

- Contact of
 Officer of
 Tournament Director of
 Main Contact of
 President of
 Secretary of
 Treasurer of
 Vice President of
 Authorized Affiliate Manager of

UPDATE RELATIONSHIP

UNLINK/DISABLE

From your affiliate profile page, if you click on the “Unlink/disable Relationship” link, you’ll be taken to the page below.

When you click on the button circled below, it ends that relationship with that person. **However, you will continue to see that person among your officers unless you refresh your affiliate profile page the next time you go to it.** On the back end, however, rest assured the relationship has ended immediately.

✔ You are viewing this form as JEN'S CHESS CLUB. Please click here if that's not you.

Disable Affiliate Contact: Officer

Affiliate / Organization

Organization Name

JEN'S CHESS CLUB

Individual Contact

Name Prefix	First Name	Middle Name	Last Name	Name Suffix
--None--	Judy		Misner	--None--

[UNLINK / DISABLE THIS RELATIONSHIP](#)

ADD NEW

On your affiliate profile, when you scroll to the end of the list of officers, you will see the button circled below that allows you to add a new officer.

Officer is	Misner	Yes (Manage Permissions)	relationship
Main Contact is	Jennifer Pearson	Yes (Manage Permissions)	Unlink / disable relationship
President is	Jennifer Pearson	Yes (Manage Permissions)	Unlink / disable relationship
Treasurer is	Sara Raab	No (Manage Permissions)	Unlink / disable relationship
Officer is	Boyd M Reed	Yes (Manage Permissions)	Unlink / disable relationship
<div style="border: 2px solid red; border-radius: 15px; padding: 5px; display: inline-block;">ADD NEW AFFILIATE CONTACT / RELATIONSHIP</div>			
Tournament Directors			
Name	Custom text		
JOAN G DUBOIS	Unlink / disable relationship		

Affiliate Contributions

Once you're on this page things get tricky!

Add New Affiliate Contact

Affiliate / Organization
JEN'S CHESS CLUB x

Contact

Existing Contact

Optional: If you re adding an affiliate contact who already has a US Chess Member ID, enter their ID here.

Name Prefix First Name Middle Name Last Name Name Suffix
--None-- --None--

Email

Relationship Details

In the "Existing Contact" area, enter the person's **US Chess ID** then **WAIT**. The system is searching the database for a match, which will show up in green below the window. Click on that when it presents and then fields below (circled in green) will populate automatically. The e-mail address field will disappear because it's not needed for an existing contact.

Please DO NOT enter a person's name in any of the fields and DO NOT "Create New" even if prompted to do so. It will create a duplicate contact in our system for that person and create problems for us and them further down the road.

Instead, either contact the person for their ID number or send their name and any other identifying information you have (such as their e-mail, the city/state they live in, etc) to governance@uschess.org and we will try to locate the correct person and will add them to your list of officers on our end. If the person isn't a US Chess member, please ask them what information they would like added to our system (name, city, state, email?) and we will add them as a non-member in our system and as an officer to your state chapter.

Now you're past the tricky area.

The rest of the page looks very much like what you saw on the managing permissions page, a list of titles to select from and the option to grant someone affiliate manager powers (screenshot on next page).


Relationship Details

- Officer of
- Tournament Director of
- Main Contact of
- President of
- Secretary of
- Treasurer of
- Vice President of
- Authorized Affiliate Manager of

Authorized to Manage Affiliate?
Is this contact authorized to manage this affiliate online (renew membership, update club listing details, manage affiliate contacts, etc.)?

No, this is an affiliate contact person only

Yes



The blue bar at the bottom of the page with the blue arrow pointing at it is the top of the SUBMIT button.

Some points regarding assigning relationships:

- Note that “Scholastic Coordinator” has not yet been added here. For now, please just send any scholastic coordinator changes to governance@uschess.org because I have that title option on the back end.
- If you try to add two titled positions, for example two Vice Presidents, the system will turn the second one automatically into an “officer.”
- To my knowledge, you can add as many “officer”s as you like.
- You can assign more than one role/relationship to the person in the contact field, such as naming one person as both secretary and treasurer and affiliate manager.
- I’m not sure why we have duplication of the “affiliate manager” option that appears in the list circled in red and then again at the bottom circled in green. I expect you can use one, the other, or both to assign that status. I also expect that if there is any contradiction between the two areas that the manager status will not be enabled. If you don’t assign a person the affiliate manager position in the titles list and don’t make any choice at the bottom, I assume the view-only default permissions will be assigned.

MANAGE CLUB/AFFILIATE DIRECTORY LISTING

At the top of your affiliate profile is a “Manage Club/Affiliate Directory Listing” link button.

The screenshot shows the top of the affiliate profile page. At the top, there are two buttons: "Back to user dashboard" and "Manage Affiliate Membership". Below them is a button labeled "Manage Club/Affiliate Directory Listing", which is circled in red. The main content area displays the club's name "JEN'S CHESS CLUB" and its membership number "A6053104". Below this, there is a table of contact information:

Membership:	Affiliate
Expiration:	January 31, 2021
Email:	uschessgovernance@gmail.com
Phone:	256-660-0627
Address:	807 Taylor Street ALBERTVILLE Alabama

Below the table, there is a section titled "Get Information" with two buttons: "FAQs" and "Generate Board Number Signs". To the right of the main content area, there is a vertical list of "Affiliate Actions" in blue buttons:

- Get a crosstable for your event
- Get a crosstable for any event
- Pay Affiliate's Pending Items
- Download Regular/Blitz Rating Supplement
- Download Regular/Quick Rating Supplement
- Custom Ratings List
- Purchase Group Memberships (Vouchers)

Top of Manage Affiliate page:

Manage Affiliate: Club & Affiliate Directory

AFFILIATE PROFILE

Organization Name

JEN'S CHESS CLUB

Show in Club Directory

- Yes, including address
- No
- Yes

Club Directory: Affiliate Type

- Club
- College
- School
- League
- Organizer

Show in Club Directory (circled in red)

I assume all state chapters will want to have at least “yes” chosen for this section. The example affiliate shown has “no” because it is not a real affiliate but one set up to provide information like this. In addition to having this set to “yes,” we must have a state

indicated on our membership record for your affiliate. To check your club directory listing check here:

<https://new.uschess.org/club-search-and-affiliate-directory>

Club Directory Affiliate Type (circled in green)

I don't recommend that you change anything in this area. You will see that State Affiliate is not listed, yet it is an option for people searching the Club Directory (linked above). It's absent from the standard Affiliate Type list because the status of state affiliate requires an approval process and it can only be applied behind the scenes after that process is complete.

Additional options as you scroll down the page:

League
 Organizer
 Prison Club
 Chess Camp/Program
 Other

Affiliate Details

Affiliate Meeting Time

Additional Club Information

Club Activities

Beginners Welcome
 Blitz Play
 Book Library
 Bughouse

Simuls
 Smoking Permitted
 US Chess Rated Play
 Unrated Events
 Under 18 Permitted

Club: Other Activities

CLUB DIRECTORY CONTACT DETAILS

These details will be published in the online Affiliate & Club Directory.

Location Name (Optional) <input type="text"/>	Street Address <input type="text"/>
Address Line 2 <input type="text"/>	Address Line 3 <input type="text"/>

(important information about red circled area on next page)

Club Directory Contact Details

This information only shows up in the public directory. It does not change the contact information we have on file for your affiliate. We do this so that you can have private (the affiliate profile) and public (Club and Affiliate Directory) information. As I mentioned above under Your Affiliate Profile, if you want to change your affiliate membership profile information, which is how we contact you via phone, e-mail and for mailing membership cards and magazines, you will need to email the changes to governance@uschess.org or call membership at 800-903-8723.

Don't forget that you need to click the Submit button at the bottom of the page to save your changes.

Address Line 2		Address Line 3	
<input type="text"/>		<input type="text"/>	
City	State/Province	Postal Code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	United States ▼
Club Phone	Club Email		
<input type="text"/>	<input type="text" value="uschessgovernance@gmail.com"/>		
<small>This phone number will be published online.</small>		<small>This email address will be published online.</small>	
Website			
<input type="text"/>			
<input type="submit" value="SUBMIT"/>			

I hope this guide has been helpful for you as you manage your organization's information on our website. If you have any other questions, please feel free to send them to governance@uschess.org.