



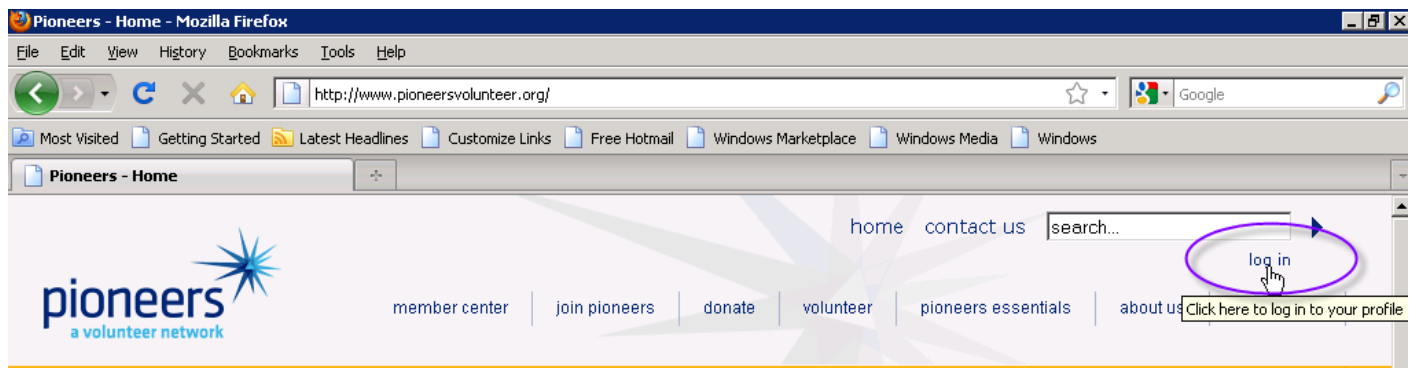
PALS Pioneer Maintenance Reference Guide



Logging into PALS - Pioneer Maintenance

PALS - Pioneer Maintenance is an internet-based application located at <http://www.pioneersvolunteer.org>. Once you reach the Pioneers website home page, use the following steps to log in.

Pioneers website home page



1. Click the "log in" link in the upper right-hand corner to access the web login page
2. When the "web login" page displays (as illustrated below), enter your username and your password and click the "Log in" button



- log in
- forgot password

web login

One web login gets you into volunteer now!, Project Connect, and Power Up to Read.

- **volunteer now!** — Search for projects and programs to volunteer for in your local community.
- **Project Connect** — Play a series of 7 web-based learning applications that combine a fun, gaming experience with educational content related to our everyday experiences with the telecommunications industry.
- **Power Up to Read** — Become a tutor using this engaging multimedia program with universally designed features to help all kinds of students learn to read with success. The program includes leading-edge interactive features including animated coaches, multimedia glossaries, and online worklogs to monitor student progress.

log in

If you have an existing Username and Password to either volunteer now!, PALS, Project Connect, or Power Up to Read use those credentials to log in here.

User Name:	<input type="text"/>
Password:	<input type="password"/>

[Log In](#)

[Forgot your username or password?](#)

3. Once the system accepts your User Name and Password, it will display the “pioneers center” screen (as illustrated below)
4. Click the “Pioneer Alliance Linkage System (PALS) link to access PALS

pioneers center

welcome, patricia - what would you like to do?

Profile Management

- **Become a Pioneer!**
Become a member of the world's largest industry-related charitable non-profit volunteer organization!
- **Edit My Profile**
Change your contact information.

Pioneer Applications

- **Pioneer Alliance Linkage System (PALS)**
Manage individuals in your chapter hierarchy.
- **volunteer now!**
Create, manage and find Pioneer volunteer opportunities.



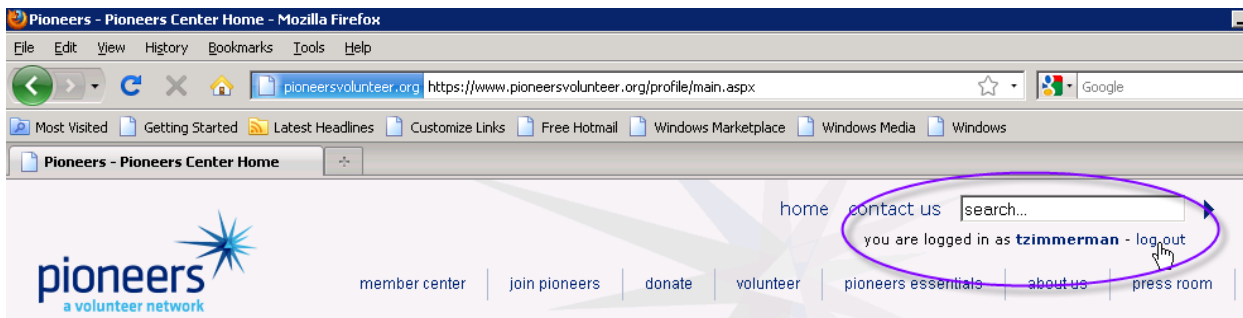
If the system does not accept your User Name and Password, it will display a Login Error Message and you can try again.

NOTE: If you are unable to remember your User Name and Password, click on 'Forgot your User Name or Password' link *before you log in*. You will be asked to provide your email address. PALS will send your User Name and Password to that email address as long as it is the same as the one that's stored in PALS.

If you continue to have problems logging into PALS, please contact the help desk at <http://telecompioneers.helpdeskconnect.com>

Logging off PALS

1. From any screen within the PALS application, click the "log out" link at the top of the screen





Pioneer Maintenance

The PALS Pioneer Maintenance functionality provides the ability to not only Add a Pioneer Member to PALS, but to also Find, View and Update Pioneer Member data already stored in the system.

Pioneer Maintenance Find Screen

pioneer maintenance

pioneer maintenance

Find Records

Find Advanced Find

Search By: Name

Name

PALS ID

City, State

Email

Chapter/Council/Club Name

Search

Add New

* - Required

Save Cancel

Find a Pioneer Member

1. To find a record in PALS on the "Find" screen, select the search criteria you intend to use from the **Search By** dropdown list.
 - Name - this field is a wildcard search. You can enter the name as first name (space) last name OR last name (space) first name. You can also enter in partial name information such as a few letters of the first name followed by a few letters of the last name. Keep in mind that the looser your search, the more results you will have returned. The more specific the search, the more specific the search results.
 - PALS ID - When searching by the ID number, the member's record is immediately called up on screen
 - City/State
 - Email
 - Chapter/Council/Club Name



2. Click on the *Search* button.
3. To perform an Advanced Find (Search), click on the Advanced Find tab at the top of the display window.

Pioneer Member Advanced Find Screen

A screenshot of the Pioneer Member Advanced Find screen. At the top left, there are two tabs: "Find Records" and "Advanced Find", with the latter being selected and circled in purple. Below the tabs is a yellow-bordered area titled "search criteria". This area contains a list of search fields: PALS ID, Name, Home Phone, Member Type (dropdown), Member Status (dropdown), City, State/Province (dropdown with "Select a State/Province" text), Join Date On or After (MM/DD/YY) (calendar icon), Join Date On or Before (MM/DD/YY) (calendar icon), DMI Account ID, Employee ID, Partner Name, Chapter/Council/Club Name, and Company Name. At the bottom of the form are two buttons: "Search" and "Add New".

4. Enter all the information you have available for the Pioneer Member. The additional fields are:
 - **PALS ID:** Enter the unique identification number assigned to the Pioneer member by the Pioneer Alliance Linkage System (PALS).
 - **Name:** Enter the Pioneer Member's Name. The name can be entered in First Name (space) Last Name format or Last Name (space) First Name format. This field is a wildcard search as explained previously

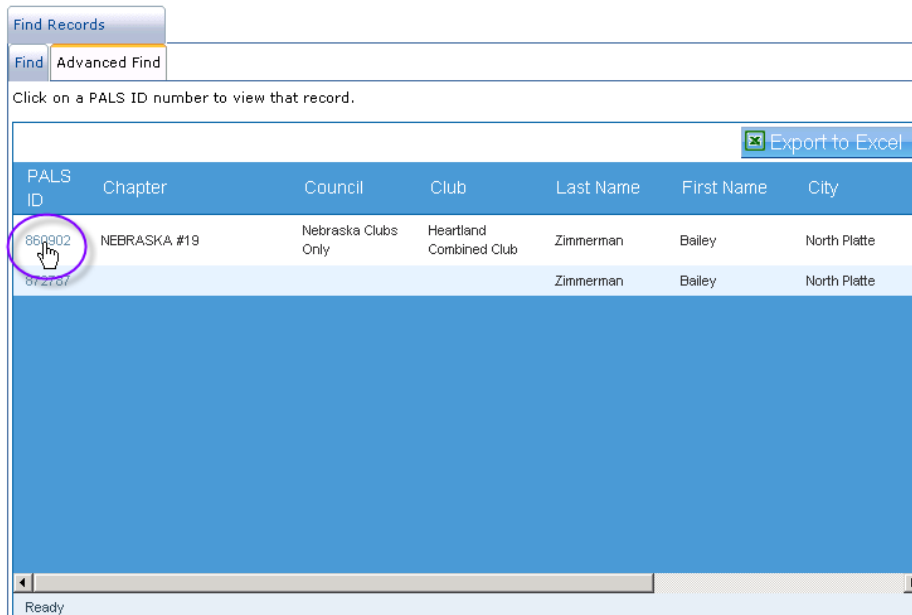


- **Home Phone:** Enter the Pioneer Member's home phone number. Enter only the numbers. PALS will format the field for you.
- **Member Type:** Select the Pioneer member's Member Type from the drop down list.
- **Status:** Select the Pioneer member's record Status from the drop down list.
- **City:** Enter the city where the Pioneer Member lives
- **State/Province:** Select from the drop down list the State or Province where the Pioneer member lives.
- **Join Date On or After (MM/DD/YY):** Enter the date, in MM/DD/YY format
- **Join Date On or Before (MM/DD/YY):** Enter the date, in MM/DD/YY format
- **DMI Account ID:** This field is only used by Headquarters staff.
- **Employee ID:** Enter the unique identification number assigned to the Pioneer Member by the company where he/she works or worked.
- **Partner Name:** Enter the Pioneer member's Partner's Name. The name can be entered in First Name last name format or Last Name, First Name format.
- **Chapter/Council/Club Name:** Enter the name of the Chapter, Council or Club the Pioneer member has been assigned based on his/her work location (regular member) or home address (life member).
- **Company Name:** Enter the name of the Company where the Pioneer Member works or worked.

5. Click on the **Search** button.

Pioneer Member Search Results Screen

pioneer maintenance



Find Records

Find Advanced Find

Click on a PALS ID number to view that record.

Export to Excel

PALS ID	Chapter	Council	Club	Last Name	First Name	City
868902	NEBRASKA #19	Nebraska Clubs Only	Heartland Combined Club	Zimmerman	Bailey	North Platte
				Zimmerman	Bailey	North Platte

Ready

6. PALS displays a listing of Pioneer Members meeting the search criteria you specified. This listing contains the following information:
- **PALS ID:** This field displays the unique identification number assigned to the Pioneer member by the Pioneer Alliance Linkage System (PALS).
 - **Chapter:** This field displays the Chapter (Name and Number) the Pioneer member has been assigned based on his/her work location (regular member) or home address (life member).
 - **Council:** This field displays the name of the Pioneer Council, if any; the Pioneer member has been assigned.
 - **Club:** This field displays the name of the Pioneer Club, if any; the Pioneer member has been assigned.
 - **Last Name:** This field displays the Pioneer Member's Last Name.
 - **First Name:** This field displays the Pioneer Member's First Name.
 - **City:** This field displays the city where the Pioneer Member lives.
 - **State/Province:** This field displays the state or province where the Pioneer Member lives.
 - **Email:** This field displays the Pioneer Member's email address.



7. Scroll through the listing using the scroll bars to the right and bottom of the display window to locate the Member information you'd like to View.
8. To view detailed information for a member, click on the PALS ID associated with that member and see the View Pioneer Member Data procedure for detailed field descriptions.

➤ Pioneer Maintenance - Personal Information Screen

After clicking on the PALS ID number for the record you wish to view (from the search results screen) PALS will then display the "Personal Information" screen for that specific Pioneer member.

860902 - ms. bailey zimmerman

Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records
Prefix:	Ms.			
First Name:	Bailey			
Nickname/Preferred Name:				
Middle:				
Last Name:	Zimmerman			
Suffix:				
Maiden Name:				
Gender:	Female			
Partner Name:				
	<input type="button" value="Find in PALS"/>	<input type="button" value="Enter Directly (don't link to PALS)"/>	<input type="button" value="Clear"/>	
Birth Day (MM/DD):				
Deceased Date (MM/DD /YYYY):				
Deceased Year (YYYY):				
Notes or Comments:				



NOTE: PALS displays not only Personal Information, but also the Address, Membership (Pioneer Information) and Pioneer History data stored in the database for the Member.

To update or change the Address, Membership (Pioneer Information) or Pioneer History data, click on the tabs at the top of the display window.

Prefix

This field displays the title/prefix associated with the member name. Change this value by selecting a different one from the drop down list.

First Name (required field)

This field displays the member's First Name. Change this value by typing a different First name in this field.

Nickname/Preferred Name

This field displays the name the member prefers to be called by. Change this value by typing a different Nickname (or Preferred Name) in this field.

Middle

This field displays the member's Middle Name or Initial. Change this value by typing a different Middle Name or Middle Initial in this field.

Last Name (required field)

This field displays the member's Last Name. Change this value by typing a different Last Name in this field.

Suffix

This field displays the suffix associated with the member's name. Valid values include Jr., Sr., II, and III. Change this value by selecting a different value from the drop down list.

Maiden Name



This field displays the member's Maiden Name. Change this value by typing a different value in this field.

Gender

This field indicates whether the member is Male or Female. Change this value by selecting a different value from the drop down list.

Partner Name

This field displays the name of the member's Partner (if known). There are two ways that you can save a Partner's name on a Pioneer's record.

- If the partner has their own record in PALS, you can click the "Find in PALS" button to search for their record
- If the partner does not have their own record in PALS, you can click the "Enter Directly (don't link to PALS)" button and just type the partner's name in the field

A screenshot of a web form. On the left, the text "Partner Name:" is followed by a text input field. To the right of the input field are three buttons: "Find in PALS", "Enter Directly (don't link to PALS)", and "Clear".

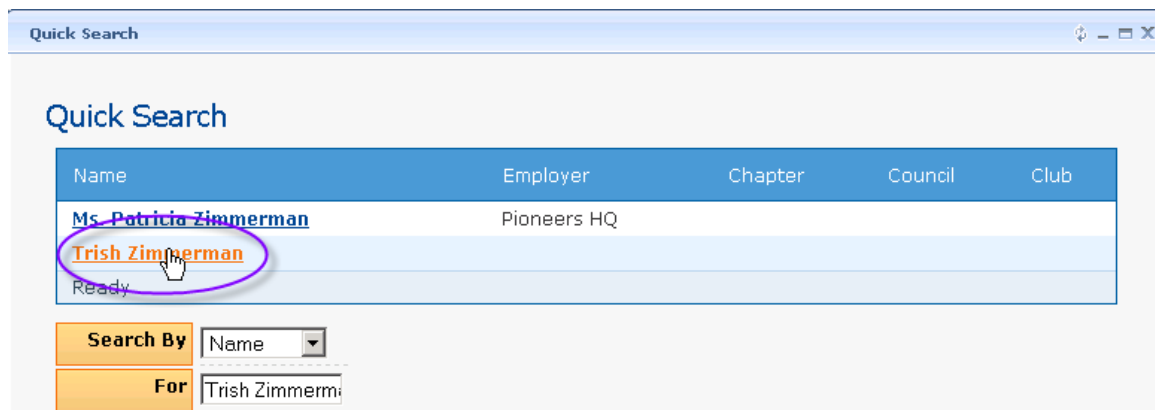
If you click "Find in PALS" a pop-up window provides the ability to search for a Pioneer Partner by Name or by company.

- Select the search criteria you intend to use within the 'Search By' drop down list.
- Enter either the name or company (based on your selection)
- Click "Search"

A screenshot of a "Quick Search" pop-up window. The window has a light blue header with the text "Quick Search". Below the header, the title "Quick Search" is displayed in a larger blue font. There are two orange buttons: "Search By" and "For". The "Search By" button is next to a dropdown menu currently showing "Name". The "For" button is next to a dropdown menu currently showing "Name" and "Company". At the bottom right of the window are two blue buttons: "Search" and "Cancel".



PALS displays a listing of Pioneer Partners meeting the search criteria specified (only if the partner has their own record in PALS).



Scroll through the listing using the scroll bar to the right of the display window to locate the appropriate Partner Name. Click on that name and PALS will insert the PALS ID and name into the Pioneer Partner field. After you have selected a name in the list, this person will then be entered on the Personal Information screen in the Partner Name field.



Birth Day (MM DD)

This field displays, in MM/DD format, the month and day the member was born. Change this value by typing the correct birth day, in MM DD format, in this field.

Deceased Date (MM/DD/YYYY)

This field displays, in MM/DD/YYY format, the month, day and year the member died (or passed away). Change this value by typing the correct deceased date, in MM/DD/YY format, in this field.

Deceased Year (YYYY)

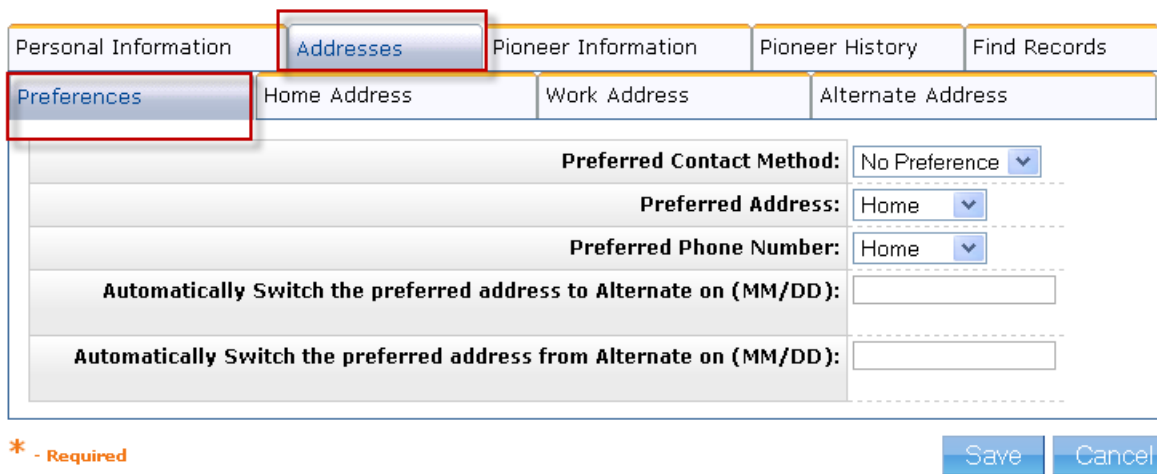
This field displays the year, in YYYY format, the member died (or passed away). Change this value by typing the correct a-digit year in this field.

NOTE: If you are making updates to fields within a Pioneer’s record across multiple screens, click the [Save] button once, AFTER all your changes have been made to use PALS most efficiently.

- To access Address information for this Pioneer Member, click on the “Addresses” tab. PALS displays the Address Preference information stored in the system for this Pioneer Member.

Pioneer Maintenance - Address Preferences Screen

860902 - ms. bailey zimmerman



Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records
Preferences	Home Address	Work Address	Alternate Address	
Preferred Contact Method:		No Preference ▾		
Preferred Address:		Home ▾		
Preferred Phone Number:		Home ▾		
Automatically Switch the preferred address to Alternate on (MM/DD):		<input type="text"/>		
Automatically Switch the preferred address from Alternate on (MM/DD):		<input type="text"/>		

* - Required

Save Cancel

NOTE: To update the Home Address, Work Address or Alternate Address information for this member, click on the Home Address, Work Address or Alternate Address tab now displayed at the top of the screen.



Preferred Contact Method

This field displays the way the member prefers to be contacted by the TelecomPioneers. Change this value by selecting a different method from the drop down list. Valid values are:

- No Preference (this is the default setting - only change if the Pioneer member has requested a specific contact method as follows):
 - Email
 - Mail (Postal Service)
 - Telephone

Preferred Address

This field displays the address to use when sending mail through the postal service. Change this value by selecting a different address type from the drop down list. Valid values are:

- Home
- Work
- Alternate

Preferred Phone Number

This field displays the phone number to use when phoning the member. Change this value by selecting a different telephone number from the drop down list. Valid values are:

- Home
- Work
- Alternate

Automatically Switch the preferred address to Alternate on (MM/DD)

This field displays the date, in Month/Day format, to **begin** sending mail to the member at his/her specified Alternate Address.

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date then selecting the date to begin sending mailings to the member's Alternate Address.



Automatically Switch the preferred address from Alternate on (MM/DD)

This field displays the date, in Month/Day format, to **stop** sending mail to the member at his/her specified Alternate Address. On this day, the mailing address will return to the Preferred Address specified above.

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date then click on the date to stop sending mailings to the member's Alternate Address.

NOTE: The Automatically Switch dates will only apply if the member has specified an Alternate Address in PALS.

- To access Home Address information for this Pioneer Member, click on the **HOME ADDRESS** tab. PALS displays the Home Address information stored in the system for this Pioneer Member.

Pioneer Maintenance - Home Address Screen

860902 - ms. bailey zimmerman

Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records
Preferences	Home Address	Work Address	Alternate Address	

Status:	Active
Address 1:	816 S Elm St
Address 2:	
City:	North Platte
State/Province:	Nebraska
Zip/Postal Code:	69101
Country:	United States of America
Home Phone:	
Home Email:	

* - Required

Save Cancel



NOTE: To update the Work Address or Alternate Address information for this member, click on the Work Address or Alternate Address tab now displayed at the top of the window.

Status

This field indicates whether mail can be successfully delivered to this member's home address as it is stored in the database. Change this value by selecting a different value from the drop down list. Valid values are:

- Blank or Active - Mail can successfully be delivered to this address as stored in the PALS database.
- Undeliverable - Mail cannot be delivered to address as stored in the database.

Address 1 (required field)

This field displays the street address associated with the member's home address. Change this value by typing a different street address in this field.

Address 2

This field displays additional street address or building information required by or helpful to the postal service to successfully deliver mail to this member's home address. Change this value by typing a different value in this field.

City (required field)

This field displays the city associated with this member's home address. Change this value by typing a different City in this field.

State/Province (required field)

This field displays the state or province associated with this member's home address. Change this value by selecting the appropriate State or Province from the drop down list.

Zip / Postal Code (required field)

This field displays the zip or postal code associated with this member's home address. Change this value by typing a different zip or postal code in this field.



Country (required field)

This field displays the Country associated with this member's home address. Change this value by selecting a different Country from the drop down list.

Home Phone

This field displays this member's home phone number. Change this value by typing a different home phone number in this field.

Home Email

This field displays this member's home email address. Change this value by typing a different home email address in this field.

- To access Work Address information for this Pioneer Member, click on the **WORK ADDRESS** tab. PALS displays the Work Address information stored in the database for this Pioneer Member.

Pioneer Maintenance - Work Address Screen

860902 - ms. bailey zimmerman

* - Required

Save Cancel



NOTE: To change or update the Alternate Address information for this member, click on the Alternate Address tab now displayed at the top of the window.

Status

This field indicates whether mail can be successfully delivered to this member's work address as it is stored in the database. Change this value by selecting a different value from the drop down list. Valid values are:

- Blank or Active - Mail can successfully be delivered to this address as stored in the PALS database.
- Undeliverable - Mail cannot be delivered to address as stored in the database.

Address 1

This field displays member's work street address. Change this value by typing a different street address in this field.

Address 2

This field displays additional street address or building information required by or helpful to the postal service to successfully deliver mail to this member's work location. Change this field by typing different or additional street address information in this field.

City

This field displays the city associated with the work location where this member's mail is to be delivered. Change this information by typing a different city in this field.

State/Province

This field displays the state or province associated with the work location where this member's mail is to be delivered. Change this field by selecting a different State or Province from the drop down list.



Zip / Postal Code

This field displays the zip or postal code associated with the work address where this member's mail is to be delivered. Change this value by typing a different Zip or Postal Code in this field.

Country

This field displays the Country associated with the work address where this member's mail is to be delivered. Change this value by selecting a different Country from the drop down list.

Work Phone

This field displays this member's work phone number. Change this value by typing a different work phone number in this field.

Work Email

This field displays this member's work email address. Change this value by typing a different work email address in this field.

Floor Number

This field displays the floor number associated with this member's work address. Change this value by typing a different floor number in this field.

Cubicle Number


This field displays the cubicle (cube) where this member sits at his/her work location. Change this value by typing a different cubicle number in this field.

CLLI (Common Language Location Indicator) Lookup - ** for future use**

- To access Alternate Address information for this Pioneer Member, click on the **ALTERNATE ADDRESS** tab. PALS displays the Alternate Address information stored in the database for this Pioneer Member.

Pioneer Maintenance - Alternate Address Screen

860902 - ms. bailey zimmerman



* - Required

Save Cancel

Status

This field indicates whether mail can be successfully delivered to this member's Alternate Address as it is stored in the database. Change this value by selecting a different value from the drop down list. Valid values are:

- Blank or Active - Mail can successfully be delivered to this address as stored in the PALS database.
- Undeliverable - Mail cannot be delivered to address as stored in the database.



Address 1

This field displays the street address associated with this member's Alternate Address. Change this value by typing a different street address in this field.

Address 2

This field displays additional street address or building information required by or helpful to the postal service to successfully deliver mail to this member's alternate address. Change this field by typing different or additional street address information in this field.

City

This field displays the city associated with this member's alternate address. Change this value by typing a different city in this field.

State/Province

This field displays the state or province associated with the alternate address where this member's mail is to be delivered. Change this value by selecting a different State or Province from the drop down list.

Zip / Postal Code

This field displays the zip or postal code associated with the alternate address where this member's mail is to be delivered. Change this value by typing a different Zip or Postal Code in this field.

Country

This field displays the Country associated with the alternate address where this member's mail is to be delivered. Change this value by selecting a different Country from the drop down list.



- To access Pioneer Information (Membership, Employment, Opt-Outs, Interests, Skill and Talents and Volunteer Comments) information for this Pioneer Member, click on the PIONEER INFORMATION tab.

Pioneer Maintenance - Pioneer Information Membership Screen

Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records	
Membership	Employment	Opt-Outs	Interests	Skill and Talents	Volunteering

PALS ID:	860902
Member Type:	Regular Member
Member Status:	Active
Chapter Hierarchy:	Company: Qwest Pioneers Chapter: NEBRASKA #19 Council: Nebraska Clubs Only Club: Heartland Combined Club
Recruited By:	<input type="text"/> <input type="button" value="Find"/> <input type="button" value="Clear"/>
Join Date (MM/DD/YY):	<input type="text"/> <input type="button" value="pick 7"/>
Paid Thru Date (MM/DD/YY):	<input type="text"/> <input type="button" value="pick 7"/>
Resignation Date (from Pioneer Membership) (MM/DD/YY):	<input type="text"/> <input type="button" value="pick 7"/>
Dues Indicator:	<input type="button" value="v"/>
Payroll Deduction:	<input type="button" value="v"/>
New Member Certificate Sent Date (MM/DD/YY):	<input type="text"/> <input type="button" value="pick 7"/>
New Member Certificate Note:	<input type="text"/>
Life Member Certificate Sent Date (MM/DD/YY):	<input type="text"/> <input type="button" value="pick 7"/>
Life Member Certificate Note:	<input type="text"/>
President's Circle (staff only):	<input type="checkbox"/>
Eligible for Recognition:	<input type="checkbox"/>

NOTE: To change or update the Employment, Opt-Outs, Interests, Skills and Talents and Volunteer Comments for this member, click on the appropriate tab at the top of the display window.



PALS ID

This field displays the unique identification number assigned to the Pioneer member by the Pioneer Alliance Linkage System (PALS). This field **cannot** be changed in PALS.

Member Type

This field specifies the membership classification assigned the member based on his/her work status (current employee or retiree), affiliation with a sponsor group and/or Pioneer member. Change this value by selecting a different Member Type from the drop down list. Valid values are:

- **Regular Member** - TelecomPioneers who are employees of any of the qualifying sponsor groups (or their subsidiaries) or who have left the group without qualifying for Life Membership are known as regular members and shall be responsible for paying annual dues.
- **Life Member** - Regular members who retire from employment with a qualifying sponsor group and receive a service pension shall be granted Life Membership, effective the day following retirement. Life Members are entitled to all membership privileges, but are exempt from paying annual dues.
- **Affiliate Member** - Any Life Member who lives in or moves into an area under the jurisdiction of another chapter and establishes a permanent residence and stays there longer than six (6) months during a span of 12 consecutive months may be granted affiliate status in that chapter and its subordinate units.
- **Honorary Member** - Honorary membership may be granted to any person making a truly unusual or outstanding contribution to the TelecomPioneers or the telecommunications industry. This membership is not conferred upon anyone who could otherwise attain eligibility as a Regular or Life Member.
- **Associate Member** - The chapter executive committee may grant Associate membership to the designated Partner of a deceased Regular or Life member. Associate membership recognizes the long-term relationship between the organization, a Pioneer and his or her family.
- **Partner** - Pioneer Partner status is automatically bestowed upon the spouse of a Regular or Life member. Additionally, another family member or other individual designated by the Pioneer may serve as his/her Pioneer Partner.



Status

This field specifies the status of a member's record in the PALS database. Valid values are:

- Active
- Inactive
- Deceased
- Marked for Deletion (to be used ONLY when there are duplicate records in PALS for the same member or if a record is created in PALS by mistake)

Chapter Hierarchy (Company, Chapter, Council, Club) - required field

These four fields identify the Sponsor Group (Company), Chapter, Council and/or Club the Pioneer member is assigned based on his/her work location (Regular Member) or Home Address (Life Member).

Change these values by selecting a different Company, Chapter, Council and/or Club from the drop down lists.

Recruited By

This field displays the name of the Pioneer Member who recruited this individual to become a member. Change this value by clicking on the **Find** button to display the Search By window.

This window provides the ability to search for a Pioneer Member by Name, PALS ID, City/State, Chapter Number or Chapter Name. Select the search category you intend to use from the Search By drop down list.

Enter the value associated with the selection criteria you selected in the Search By field then click on the **Search** button.

PALS displays a listing of Pioneers meeting the search criteria you specified. This listing contains the following information:

- Name
- Company

Scroll through the listing using the scroll bar to the right of the display window to locate the appropriate Member. Click on the Name to place that name in the Recruited By field.



Join Date (MM/DD/YY)

This field displays the date, in MM/DD/YY format, this member became a Pioneer.

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date, and then click on the date that the individual became a Pioneer member.

NOTE: This date reflects the date the member signed the TelecomPioneers Membership Form, not the date his/her information was entered into PALS.

Paid Thru Date (MM/DD/YY)

This field displays the date, in MM/DD/YY format; the Pioneer member's dues are paid through.

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date, and then click on the date that the member's dues are paid through.

PALS places the new date in the Paid Thru Date field.

Resignation Date (from Pioneer Membership) (MM/DD/YY)

This field displays the date, in MM/DD/YY format; the Pioneer canceled his/her Pioneer membership.

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date, and then click on the date that the member canceled his/her membership.

PALS places the new date in the Resignation Date field.

Dues Indicator

This field displays the method the Pioneer uses to pay his/her Annual Dues. Change this value by selecting a different payment method from the drop down list. Valid values are:

- Cash
- Exempt
- Payroll



Payroll Deduction (Annual Dues Deduction Frequency)

This field specifies how often payroll deducts membership dues from the employee's paycheck. Change this value by selecting a different payroll deduction frequency from the drop down list. Valid values are:

- Annual Payroll Deduction
- Bi-Monthly Payroll Deduction
- Monthly Payroll Deduction
- Quarterly Payroll Deduction
- Semi-Annual Payroll deduction

New Member Certificate Sent (MM/DD/YY)

This field displays the date, in MM/DD/YY format, when a New Member Certificate was sent to the New Pioneer Member.

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date, and then click on the date that the new member certificate was sent.

PALS places the new date in the New Member Certificate Sent field.

New Member Certificate Note

This field displays any notes entered into PALS regarding the New Member Certificate. This note could contain the name and address of the person the certificate was sent to if other than the new member him/herself.

To add new notes to this field, delete the existing note and type the new one in this field.

Life Member Certificate Sent (MM/DD/YY)

This field displays the date, in MM/DD/YY format, a Life Member Certificate was sent to the Life Member.

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date, and then click on the date that the Life Member Certificate was sent.



PALS places the new date in the Life Member Certificate Sent field.

Life Member Certificate Note

This field displays any notes entered into PALS regarding the Life Member Certificate. This note could contain the name and address of the person the certificate was sent to if other than the Life Member him/herself.

To add a new note to this field, delete the existing note and type the new one in this field.

President's Circle

This checkbox is checked if the Pioneer is a member of the TelecomPioneers President's Circle. This field can only be updated by TelecomPioneers Headquarters staff.

- To access Employment information for this Pioneer Member, click on the **EMPLOYMENT** tab. PALS displays the Employment information stored in the database for this Pioneer Member.

Pioneer Maintenance - Pioneer Information Employment Screen

Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records	
Membership	Employment	Opt-Outs	Interests	Skill and Talents	Volunteering
Employee ID:		<input type="text"/>			
Company Name:		Qwest Pioneers		<input type="button" value="Find"/>	
		<input type="button" value="Clear"/>			
Employment Date (MM/DD/YY):		<input type="text"/>		<input type="button" value="date"/>	
Work Status:		<input type="button" value="v"/>			
Retirement Date (MM/DD/YY):		<input type="text"/>		<input type="button" value="date"/>	
Discontinue Date (from the Company) (MM/DD/YY)		<input type="text"/>		<input type="button" value="date"/>	
Discontinued Reason:		<input type="button" value="v"/>			

* - Required

NOTE: To change or update the Opt-Outs, Interests, Skills and Talents and Volunteer Comments for this member, click on the appropriate tab at the top of the display window.



Employee ID

This field displays the unique identification number assigned the employee/retiree by the Sponsor Group (Company).

Company Name (Sponsor Group)

This field displays the name of the Company (or Sponsor Group) where the member works (Regular Member) or worked (Life Member). This field **cannot** be changed in PALS.

Employment Date (MM/DD/YY)

This field displays the date, in MM/DD/YY format, the member started working for the Sponsor Group (Company). This date is also referred to as the 'Net Credited Service Date'.

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date, and then click on the date that the member started working for the Sponsor Group (Company).

PALS places the new date in the Employment Date field.

Work Status

This field displays the member's status with the Sponsor Company (Group). Change this value by selecting a different work status from the drop down list. Valid values are:

- Active
- Left Company
- Retired

Retirement Date (MM/DD/YY)

This field displays the date, in MM/DD/YY format, the member retired from employment.



Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date then clicking on the date that the member retired.

PALS places the new date in the Retirement Date field.

Discontinue Date (from the Company) (MM/DD/YY)

This field displays the date, in MM/DD/YY format, the member left the Sponsor Company (Group).

Change this date by clicking on the calendar icon, scrolling through the calendar to get to the appropriate date, and then clicking on the date that the member left the Sponsor Group (Company).

PALS places the new date in the Discontinue Date field.

Discontinue Reason

This field displays the reason the member left the Sponsor Company (Group). Change this value by selecting a different Discontinue Reason from the drop down list. Valid values are:

- Leave of Absence
- Left Company
- Long-Term Disability
- On Active Duty
- Short-Term Disability

➤ To access Opt-Outs information for this Pioneer Member, click on the **OPT-OUTS** tab. PALS displays the Opt-Outs information stored in the database for this Pioneer Member.



Pioneer Maintenance - Pioneer Information Opt-Outs Screen

860902 - ms. bailey zimmerman

Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records	
Membership	Employment	Opt-Outs	Interests	Skill and Talents	Volunteering

Opt-Outs	<input type="checkbox"/> Direct Mail 1x Per Year	<input type="checkbox"/> No Gifts
	<input type="checkbox"/> Direct Mail 2x Per Year	<input type="checkbox"/> No Lapel Pin
	<input type="checkbox"/> Direct Mail 4x Per Year	<input type="checkbox"/> No Liberty Mutual
	<input type="checkbox"/> Do Not Email	<input type="checkbox"/> No Local Communications
	<input type="checkbox"/> Do Not Send Announcements	<input type="checkbox"/> No Mailing Labels
	<input type="checkbox"/> Do Not Send Newsletters	<input type="checkbox"/> No Member Benefit Emails
	<input type="checkbox"/> Do Not Telephone	<input type="checkbox"/> No Pioneers Financial Center
	<input type="checkbox"/> Exclude from All Communication	<input type="checkbox"/> No Recognition Certificate
	<input type="checkbox"/> No Calendar	<input type="checkbox"/> Receive Only Local Mailings
	<input type="checkbox"/> No Credit Card Offers	<input type="checkbox"/> Special 1
	<input type="checkbox"/> No Direct Mail	<input type="checkbox"/> Special 2
	<input type="checkbox"/> No Event Invitations	<input type="checkbox"/> Special 3

* - Required

Save Cancel

NOTE: To change or update the Interests, Skills and Talents and Volunteer Comments for this member, click on the appropriate tab at the top of the display window.

Opt-Out Preferences

This screen displays the types of communications the member wants to limit or not receive. The methods of communication include mailings, telephone calls and emails. The methods to be limited have a checked checkbox next to them.

To change this member's Opt-Out preferences, click on the checkbox to place the indicator (check mark) in or remove the indicator (check mark) from the appropriate options. *Please refer to Appendix A for a definition of Opt-Outs and their impact to a Pioneer members local and national communications.*



- To access Interests for this Pioneer Member, click on the **INTERESTS** tab. PALS displays the Interests stored in the database for this Pioneer Member.

Pioneer Maintenance - Pioneer Information Interests Screen

860902 - ms. bailey zimmerman

Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records	
Membership	Employment	Opt-Outs	Interests	Skill and Talents	Volunteering

Interests	<input type="checkbox"/> Administrative Support	<input type="checkbox"/> Humanitarian/Disaster Relief
	<input type="checkbox"/> Arts/Culture	<input type="checkbox"/> Military
	<input type="checkbox"/> Child Welfare	<input type="checkbox"/> Pioneer Leadership
	<input type="checkbox"/> Disadvantaged/Underprivileged	<input type="checkbox"/> Project/Program Planning
	<input type="checkbox"/> Education	<input type="checkbox"/> Social Services
	<input type="checkbox"/> Environmental	<input type="checkbox"/> Special Events
	<input type="checkbox"/> Fundraising	<input type="checkbox"/> Technical/PC
	<input type="checkbox"/> Health/Wellness	

* - Required

Save Cancel

NOTE: To change or update the Skills and Talents and Volunteer Comments for this member, click on the appropriate tab at the top of the display window.

Interests

This screen displays the types of projects and/or volunteer opportunities the member likes to participate in. The member's interests will have a checked checkbox next to them.

To update this member's project Interests, click on the checkbox to place the indicator (check mark) in or remove the indicator (check mark) from the appropriate options.

- To access Skills and Talents for this Pioneer Member, click on the **SKILLS and TALENTS** tab. PALS displays the Skills and Talents stored in the database for this Pioneer Member.



Pioneer Maintenance - Pioneer Information Skills and Talents Screen

860902 - ms. bailey zimmerman

Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records																																																	
Membership	Employment	Opt-Outs	Interests	Skill and Talents																																																	
<table border="1"> <tr> <td rowspan="13">Skills and Talents</td> <td><input type="checkbox"/> Accounting</td> <td><input type="checkbox"/> Crafts</td> <td><input type="checkbox"/> Music</td> <td><input type="checkbox"/> Signing</td> </tr> <tr> <td><input type="checkbox"/> Administrative</td> <td><input type="checkbox"/> Data Entry</td> <td><input type="checkbox"/> Nutrition/Health</td> <td><input type="checkbox"/> Social Events</td> </tr> <tr> <td><input type="checkbox"/> Artist</td> <td><input type="checkbox"/> Editing</td> <td><input type="checkbox"/> Organizational</td> <td><input type="checkbox"/> Sports</td> </tr> <tr> <td><input type="checkbox"/> Bi-Lingual</td> <td><input type="checkbox"/> Electrical</td> <td><input type="checkbox"/> Painting</td> <td><input type="checkbox"/> Telephone</td> </tr> <tr> <td><input type="checkbox"/> Carpentry</td> <td><input type="checkbox"/> First Aid</td> <td><input type="checkbox"/> Photography</td> <td><input type="checkbox"/> Theater</td> </tr> <tr> <td><input type="checkbox"/> Ceramics</td> <td><input type="checkbox"/> Fitness/Exercise</td> <td><input type="checkbox"/> Plumbing</td> <td><input type="checkbox"/> Training</td> </tr> <tr> <td><input type="checkbox"/> Clerical/Secretary</td> <td><input type="checkbox"/> Gardening</td> <td><input type="checkbox"/> Power Point</td> <td><input type="checkbox"/> Transportation</td> </tr> <tr> <td><input type="checkbox"/> Clown</td> <td><input type="checkbox"/> Gopher</td> <td><input type="checkbox"/> Project Leadership</td> <td><input type="checkbox"/> Tutoring</td> </tr> <tr> <td><input type="checkbox"/> Computer</td> <td><input type="checkbox"/> Graphics</td> <td><input type="checkbox"/> Public Speaking</td> <td><input type="checkbox"/> Volunteer Management</td> </tr> <tr> <td><input type="checkbox"/> Cooking/Baking</td> <td><input type="checkbox"/> Handyman</td> <td><input type="checkbox"/> Quilting</td> <td><input type="checkbox"/> Wallpaper/Painting</td> </tr> <tr> <td><input type="checkbox"/> Cosmetology</td> <td><input type="checkbox"/> Knitting</td> <td><input type="checkbox"/> Reading</td> <td><input type="checkbox"/> Web Design</td> </tr> <tr> <td><input type="checkbox"/> CPR</td> <td><input type="checkbox"/> Leadership</td> <td><input type="checkbox"/> Sewing</td> <td><input type="checkbox"/> Writing</td> </tr> </table>					Skills and Talents	<input type="checkbox"/> Accounting	<input type="checkbox"/> Crafts	<input type="checkbox"/> Music	<input type="checkbox"/> Signing	<input type="checkbox"/> Administrative	<input type="checkbox"/> Data Entry	<input type="checkbox"/> Nutrition/Health	<input type="checkbox"/> Social Events	<input type="checkbox"/> Artist	<input type="checkbox"/> Editing	<input type="checkbox"/> Organizational	<input type="checkbox"/> Sports	<input type="checkbox"/> Bi-Lingual	<input type="checkbox"/> Electrical	<input type="checkbox"/> Painting	<input type="checkbox"/> Telephone	<input type="checkbox"/> Carpentry	<input type="checkbox"/> First Aid	<input type="checkbox"/> Photography	<input type="checkbox"/> Theater	<input type="checkbox"/> Ceramics	<input type="checkbox"/> Fitness/Exercise	<input type="checkbox"/> Plumbing	<input type="checkbox"/> Training	<input type="checkbox"/> Clerical/Secretary	<input type="checkbox"/> Gardening	<input type="checkbox"/> Power Point	<input type="checkbox"/> Transportation	<input type="checkbox"/> Clown	<input type="checkbox"/> Gopher	<input type="checkbox"/> Project Leadership	<input type="checkbox"/> Tutoring	<input type="checkbox"/> Computer	<input type="checkbox"/> Graphics	<input type="checkbox"/> Public Speaking	<input type="checkbox"/> Volunteer Management	<input type="checkbox"/> Cooking/Baking	<input type="checkbox"/> Handyman	<input type="checkbox"/> Quilting	<input type="checkbox"/> Wallpaper/Painting	<input type="checkbox"/> Cosmetology	<input type="checkbox"/> Knitting	<input type="checkbox"/> Reading	<input type="checkbox"/> Web Design	<input type="checkbox"/> CPR	<input type="checkbox"/> Leadership	<input type="checkbox"/> Sewing	<input type="checkbox"/> Writing
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	<input type="checkbox"/> CPR	<input type="checkbox"/> Leadership	<input type="checkbox"/> Sewing	<input type="checkbox"/> Writing																																																	

NOTE: To change or update the Volunteer Comments for this member, click on the Volunteer Comments tab at the top of the display window.

Skills and Talents

This screen displays the skills and talents the member possesses. The member's skills and talents will have a checked checkbox next to them.

To update this member's Skills and Talents, click on the checkbox to place the indicator (check mark) in or remove the indicator (check mark) from the appropriate options.

- To access Volunteer Comments stored in the PALS database for this Pioneer member, click on the Volunteer Comments tab. PALS displays the Volunteer Comments stored in the database for this Pioneer Member.



Pioneer Maintenance - Pioneer Information Volunteer Comments Screen

860902 - ms. bailey zimmerman

Personal Information	Addresses	Pioneer Information	Pioneer History	Find Records
Membership	Employment	Opt-Outs	Interests	Skill and Talents
				Volunteering

Volunteer Comments	<div style="border: 1px solid gray; height: 100px;"></div>
Availability	<input type="checkbox"/> Weekday Mornings <input type="checkbox"/> Weekend Mornings <input type="checkbox"/> Weekday Afternoons <input type="checkbox"/> Weekend Afternoons <input type="checkbox"/> Weekday Evenings <input type="checkbox"/> Weekend Evenings
Communications	E-mail when a project has been submitted for Administrative Review. <input type="button" value="v"/> E-mail when an individual has volunteered for a project for which I am either the Owner or Leader. <input type="button" value="v"/> E-mail me when a new project in my Chapter, Club, or Council matches my Interests, Skills and Talents, or Availability. <input type="button" value="v"/> E-mail me a reminder the day before I have a volunteer commitment. <input type="button" value="v"/> E-mail me a reminder to record my hours after a volunteer project has concluded. <input type="button" value="v"/>

* - Required

Volunteer Comments

This screen displays the Volunteer Comments the member has entered into PALS.

To enter additional comments to this field, type the new comments in front of the existing ones.



- To access Pioneer History stored in the PALS database for this Pioneer member, click on the Pioneer History tab. PALS displays the Pioneer History stored in the database for this Pioneer Member.

Pioneer Maintenance - Pioneer History Screen

860902 - ms. bailey zimmerman

The screenshot shows the Pioneer History screen for member 860902. The 'Pioneer History' tab is selected and highlighted with a red box. A sidebar on the left contains a list of menu items, also highlighted with a red box: Projects, Hours, Offices Held, Donations, Orders, Meetings, Requests, Communications, Subscriptions/Dues, Change Log, and Relationships. The main content area displays a table with the following data:

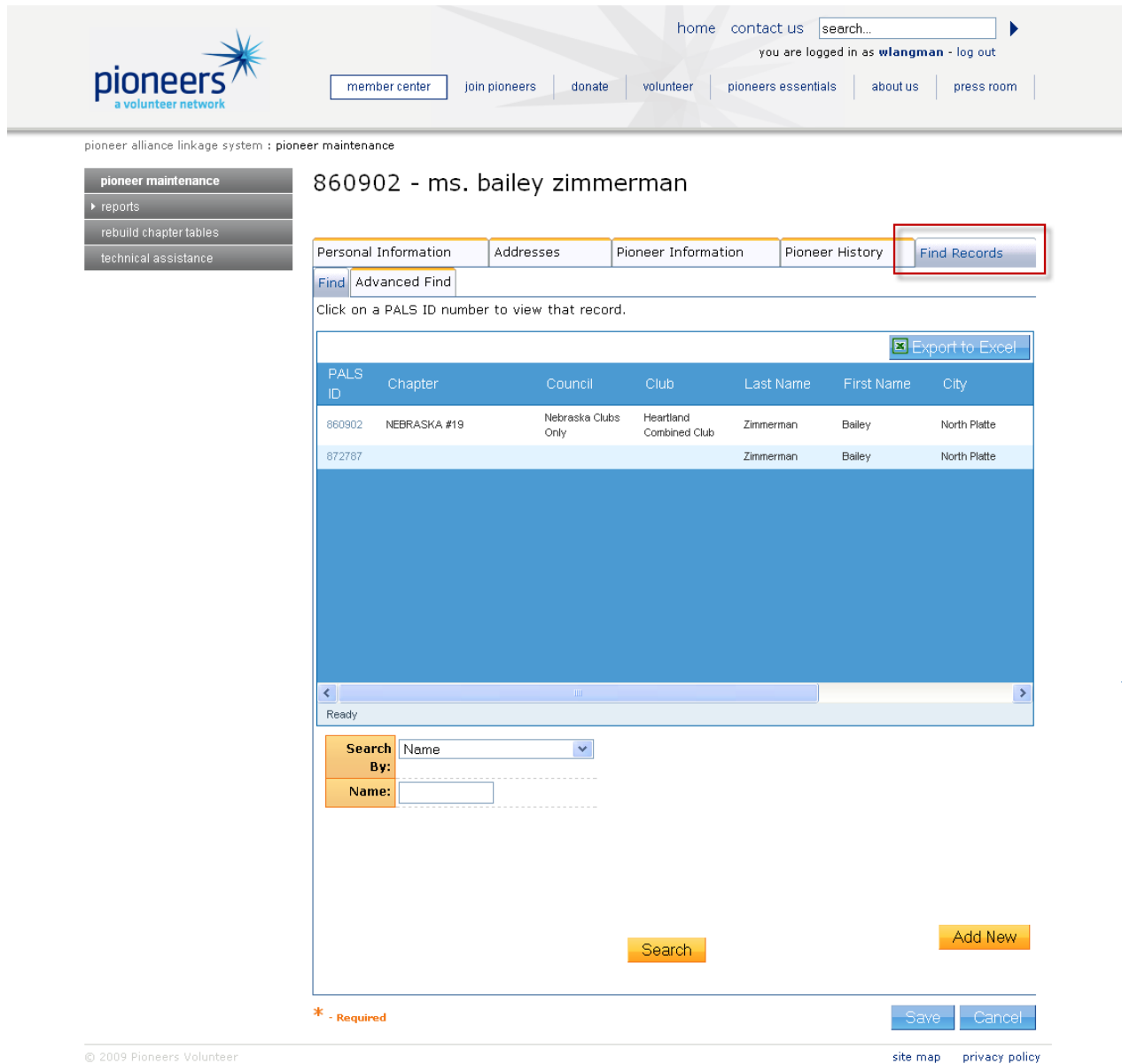
Projects	Time Slot	Start	End	Hours Reported
Sparkling Support for Soldiers and Their Families (ID# 16797) — 2 Total Hours				
Packing Comfort Kits for Military Deployed Overseas	Ready	Feb 27, 2010 1:00 AM	Feb 27, 2010 2:30 PM	2

At the bottom left, there is a red asterisk icon followed by the text '* - Required'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Data is collected and displayed for the following:

- Projects
- Hours
- Offices Held
- Donations
- Orders
- Meetings
- Requests
- Communications
- Subscriptions / Dues
- Change Log
- Relationships

Click on the Find Records tab at the top of the display to return to the Search By screen to search for or find another Pioneer member or Click [Log Out] to sign off PALS.



pioneer alliance linkage system : pioneer maintenance

pioneer maintenance

- reports
- rebuild chapter tables
- technical assistance

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Personal Information | Addresses | Pioneer Information | Pioneer History | **Find Records**

Find | Advanced Find

Click on a PALS ID number to view that record.

[Export to Excel](#)

PALS ID	Chapter	Council	Club	Last Name	First Name	City
860902	NEBRASKA #19	Nebraska Clubs Only	Heartland Combined Club	Zimmerman	Bailey	North Platte
872787				Zimmerman	Bailey	North Platte

Ready

Search By: Name

Name:

* - Required

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Appendix A PALS Opt-Outs Definitions

It is critical to understand how the use of the Opt-Out preferences will impact how we communicate with Pioneer members. The options below are intended to provide the ability to tailor communications to individual members based solely on their expressed preferences.

Prior to updating the "Opt-Out" choices for a Pioneer member record, please review this list carefully to understand the impact to the communications for that member. Remember, if you automatically remove a member from all opportunities to make a financial contribution - that is revenue that is lost for your Chapter, Council, or Club in annual distributed income.

If a member is indicating they are receiving too many mailings, offer them the opportunity to receive mail 4 times, 2 times or 1 time per year. The last resort should be to pull them from all mailings unless the situation is appropriate to do so.

- Direct Mail 1x Per Year
 - Offer this option to any Pioneer who asks to be removed from direct marketing appeal mailings. This allows for the ability to keep the Pioneer in the communication loop, and also presents another way in which they can support the Pioneer mission.
- Direct Mail 2x Per year
 - Offer this option to any Pioneer who asks to be removed from direct marketing appeal mailings. This allows for the ability to keep the Pioneer in the communication loop, and also presents another way in which they can support the Pioneer mission.
- Direct Mail 4x Per year
 - ***This is the first option to offer to any Pioneer*** who asks to be removed from direct marketing appeal mailings. This allows for the ability to keep the Pioneer in the communication loop, and also presents another way in which they can support the Pioneer mission.
- Do Not E-mail
 - The Pioneer will be excluded from all types of e-mail communications.
- Do Not Send Announcements
 - The Pioneer will be excluded from any announcement specific mailings (events, volunteer projects, etc.)
- Do Not Send Newsletters
 - The Pioneer will no longer receive Pioneer Press newsletters.
- Do Not Telephone
 - The Pioneer will be excluded from all types of telephone communications.



- Exclude from ALL Communications
 - The Pioneer will not receive any type of communications in any format (mail, telephone, e-mail) from either the local or HQ level.
- No Calendar
 - The Pioneer will not receive the annual calendar from HQ.
- No Credit Card Offers
 - The Pioneers will not receive credit card benefit offers from HQ.
- No Direct Mail
 - This opt-out preference will remove the Pioneer from all direct mail appeals. Please use this option only as a last resort. Don't automatically assign this to a Pioneer record if he/she says that they are being mailed too often. Offer the Pioneer the opportunity to receive mail less often (1x, 2x, or 4x per year).
- No Event Invitations
 - The Pioneer will be excluded from lists where the purpose of the mailing is an invitation to an event.
- No Gifts
 - The Pioneer will not receive any gifts or premiums from HQ.
- No Lapel Pin
 - The Pioneer will not receive the annual Pioneer Lapel Pin from HQ.
- No Liberty Mutual
 - The Pioneer will not receive communications or offers from Liberty Mutual.
- No Local Communications
 - The Pioneer will only receive communications from HQ.
- No Mailing Labels
 - The Pioneer will not receive the mailing label direct marketing appeal package from HQ.
- No Member Benefit E-Mails
 - The Pioneer will be excluded from HQ member benefit e-mail communications announcing or highlighting benefits.
- No Pioneers Financial Center
 - The Pioneer will not receive any benefit offers or updates related to the Pioneers Financial Center (Wells Fargo, Pioneers Banking Center, US Bank, Liberty Mutual).
- No Recognition Certificate
 - The Pioneer will not receive any type of recognition certificate from HQ.



- Receive only local mailings
 - The Pioneer will only receive local communications - nothing will be sent via mail to the individual from HQ.
- Special 1, Special 2, and Special 3
 - These can be used in any way to flag a record for special mailings at the local level.