## Note

**The instructions in this document were derived in MSOffice 360. Adjustments may be needed to use earlier versions of Office.**

## Introduction

The process falls into very few simple steps: download from Beacon the list of those requiring TAM and upload the result, then remove the TAM request from New Members

## Download the data from Beacon

1. From the main menu page, Membership column, click Addresses export.
2. On the subsequent page, set Format to Third Age Matters, Status to Current, Classes to Individual and Joint, and Poll to TAM
3. At the bottom of the page click Download TAM
4. Beacon will download an XLS file
5. Save this file (it matters not whether you save as xls, xlsx, or ods. I will refer to this file later as *downloaded.xls*

## Upload to U3A

1. Obey the instructions in the reminder email.
2. Record when you did this in the table below.

# Remove TAM request from New members

1. From the main menu page, Membership column, click Recent members
2. On the subsequent page, set the date range by referring to the table below
3. For every member on the list, go to that member’s record (<Ctrl>Click opens this in a new tab) and remove the TAM request. SAVE the member’s record