

# NCSFA Roster Management Guide

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## Overview & definitions

This guide is organized so that the most common tasks are described first: adding members, editing member details, removing members, year-end certification, print roster, and pay dues. This is followed by a point-by-point explanation of the Roster Management main page, and the year-end certification process. The document comes with PDF bookmarks for locating areas of interest. Consult the documentation for your PDF reader on how to view and use the bookmarks. The table of contents is also active, so that clicking on a topic jumps to that topic.

This document and the associated website are for member departments in the NCSFA, using departmental login information supplied by the NCSFA. Roster management is generally the responsibility of the chief. The NCSFA recommends keeping the login credentials private, sharing with trusted delegates only as needed.

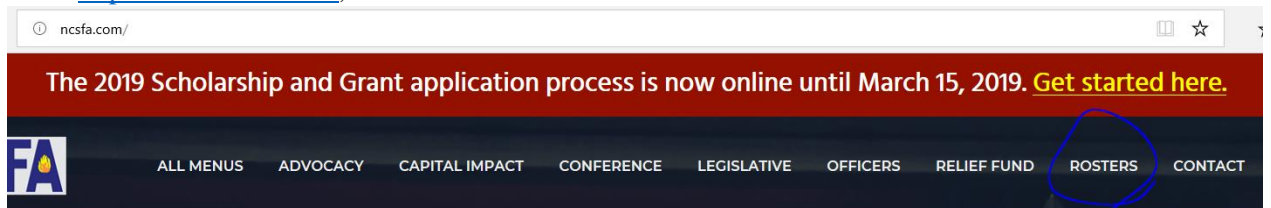
Testing indicates that the website functions best using Chrome or Firefox, although extensive testing has been done using Internet Explorer 11 and Microsoft Edge, without issues coming to light.

## Roster management calendar

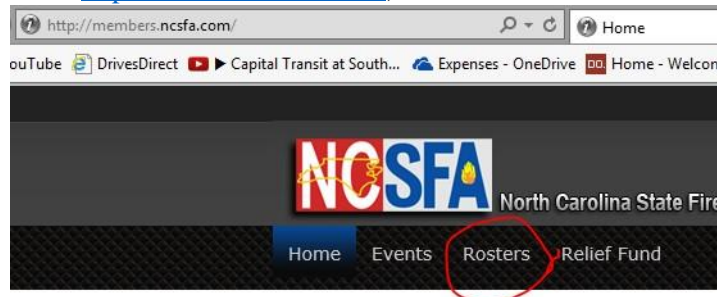
- Year-end roster & training certification begins on Dec. 1 and concludes on or around Jan. 15<sup>th</sup>.
- Once a department submits its year-end roster, then the website will allow adding new members who period of service starts on or after Jan. 1.
- Departments have from (on or around) Jan. 17<sup>th</sup> until (on or around) Feb. 17<sup>th</sup> to edit their rosters for dues and billing purposes. Bills that are not paid on-line by Feb. 17<sup>th</sup> are mailed out shortly after Feb. 17<sup>th</sup>.
- For the remainder of the calendar year, departments are expected to maintain their rosters as members are added and members depart. Roster changes

## Opening NCSFA Roster Management

- From <http://www.ncsfa.com>, click on the Rosters link in the menu bar:



- From <http://members.ncsfa.com>, click on the Rosters link:



- Either way should bring you to the Sign In page. If the roster is your responsibility, and you do not have functioning credentials, please contact the NCSFA at 800-253-4733 or [sandie@ncsfa.com](mailto:sandie@ncsfa.com). You may need to provide verification of your identity.
- Successful sign-in brings you to the main roster page. If your landing page does not look like the image below, click the Roster link on the black patterned toolbar (the “Navigation bar”)

Roster Management for NCSFA Internal - 2019

RF Trustees certified for 2018 Dues Balance: \$325.00 [Click to pay](#)

2019 Save changes Reload Add member

Paid	Ret-A	Ret-I	Vol	Non-Mem
3	1	2	7	5

Current Roster	2018 Training Certification	Member Type	Active	Date reqd to change	Original Join Date	Service Dates	Change date for member type / active / on roster
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vol			01/19/10	Start as Vol:04/03/18	

## Navigation & Account control bars

This document will use the terms “Account control bar” and “Navigation bar” to refer to the parts labelled in the above image of the Roster Management main page.

## Removing Members from the roster

To remove a member, enter the date of the member’s final day of service in the last column (change date for member type...), and then uncheck the Current Roster checkbox.

Current Roster	2018 Training Certification	Member Type	Active	Enter the change date before modifying anything but training	Original Join Date	Service Dates	Change date for member type / active / on roster
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Vol			01/19/10	Start as Vol:04/03/18	

This change is not recorded until you click the **Save Changes** button. You do not have to click **Save Changes** after every edit; you can make a set of edits and click **Save Changes** to record all of them at once. If you decide you need to start again, without recording any of your edits, click on the Reload button. That button reverts to the last recorded data, or, if no edits have been made, the data as it was when you logged on.

## Why does this page show people that are no longer on the roster?

The Roster Management page has 2 purposes:

1. To allow departments to manage who is currently on the roster.
2. To allow departments to identify which members have completed certification for their period of service.

It's for that second purpose, certification, that members no longer are on the roster are still displayed on this page. As an example, suppose Jane Doe was on the roster from January to March. She left the department then came back in November. She was able to do the necessary training for certification in the first period of service, but not in the second. The chief will need to be able to mark that she had three months of qualifying service during that first period, but not in the second.

## Adding Members

On the main roster page:

- Click the **Add Member** button on the main roster management page.
- All basic member information is required, so that the system can look for any existing records that might be a match: Gender, first and last name, date of birth, join date, and member type. It is recommended to have accurate data before you add a member, although the record can be corrected later.
- Click **Add Member** to proceed. The system will likely show you a list of existing records that come close in some way to matching your entries. If no possible matches are found, you will be taken directly to the Member Details page. Click **Cancel** to go back to the roster listing.

## Member match

It helps the membership record accuracy if you inspect the list of possible matches for the basic information entered.

- If there are no matches, click the **Create new member record...** button.
- If one of the records appears to be a match, click the Use this data button.
  - If the record is in use at another department, the details will be copied, and the member details page will be opened.
  - If the record is not in use, it will be assigned to your department, and the member details page will be opened.
  - If the record is one that is already in your department, you will be taken to the details page for that member.

## Member Details - editing

When you add a new member, you will need to complete the required information on the Member Details page, including Social Security Number (required by the Treasurer's office, for benefit eligibility).

To view or edit the Member Details from the main roster page, click on the member's name.

- Dates must be in the format m/d/yyyy, e.g. 3/14/1999.
- Social Security Numbers must be entered as digits only – no letters, no spaces, and no punctuation. The Treasurer's office requires SSNs for benefit eligibility.
- Phone numbers must be entered in the format (919) 555-1212 x 123, where the extension is optional, and can be any number of digits.
- If the person is no longer on the roster of the department, e.g. they are listed because they were on the roster at an earlier in time, then editing the member details is blocked, and all of the data fields will be locked and greyed out.

- At the bottom of the Member Details page, the periods of Roster Service and recorded certifications are listed. The NCSFA certification records in this database only go back to 2010. Please contact the NCSFA if you notice problems with these records. These records are not editable on-line.

## Year-end certification

When you have added and removed members and set certifications so that the roster is up to date, and you are satisfied that the roster is accurate, click on the **Save final for 20XX** button. This takes you a new page displaying the legal meaning of submitting your roster and certification via this website, to review the legal code before a final click to submit.

For more detailed information about editing your roster, see [Roster Management Main Page](#).

The NCSFA recommends printing or saving a copy of the roster. For details on the two Print/Save buttons, see [Save or print the roster](#)

If there are any problems with the SSNs for your roster, it will be noted on the Statutory Certification page. **Problems with SSNs will not prevent you from submitting the roster**, but it can mean that those members will not receive proper pension credit from the Treasurer’s office. You can use the **SSN Issues** button on that page to go back and address those problems.

When you click the **I certify this roster** button, the certifications for this roster year are locked in, and all eligible members of the roster are pre-certified for the upcoming year.

## Save or print the roster

Use the Save/Print buttons on the roster page to open or save a PDF version of the roster.

**Save/Print 20XX** produces a report for the currently selected year. Use the dropdown to choose which year is on view – this is particularly important when you are saving or printing the roster at certification time. Once you certify, the display automatically changes to the current calendar year; if it is after Dec. 31, then switch back to the year that just ended to get a report for the roster that has just been certified.



**Save/Print Annual** shows all members who have been on the roster at any point in the year. In the example below, Terry Mendiola is indicated as being no longer on the roster because the service period ends on 12/1/18. Amy McCall is still on the roster, as indicated by the “-now” in the service dates.

11	XXXX-XX-6789 1/1/10 - now	122378	Amy McCall 07/11/1984	P.O. Box 1568 Cary, NC 27512	amy@ncsfa.com	F	S	NM	N
12	XXXX-XX-3123 7/17/13 - 12/1/18	183055	Terry Mendiola 05/19/1975	1700 River Run Ste 1109 Fort Worth 76107	terry@ensync-corp.com	F	S	V	Y

The behavior of the Save/Print buttons varies depending on the browser in use and the configuration of the computer for handling PDFs.

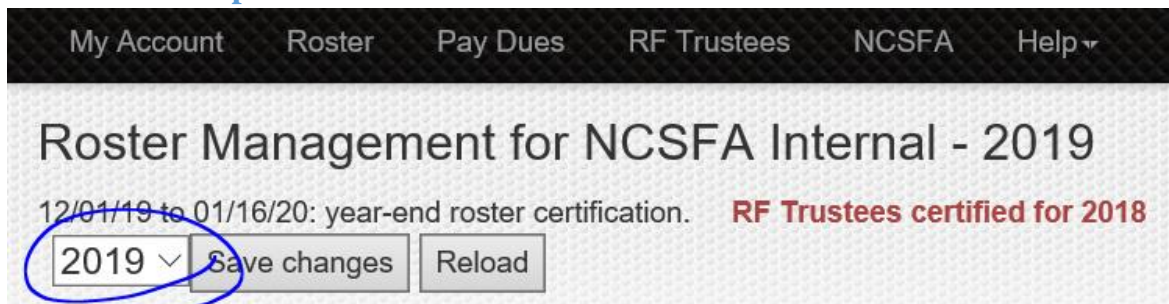
- You may immediately get a choice of whether to open or save the PDF. If you only want to print the report, choose the Open option, and print once the PDF opens – which may be in your browser, or may be in a PDF application.
- The PDF may open in your browser. You can print from there, and there will also be some option available to download or save.
- The PDF may appear as a downloaded item at the bottom of your browser screen. Use the selection arrow beside the downloaded item to display and select from the options.

## Pay Dues

Use the Pay Dues link in the Navigation bar to pay your dues online. Your balance is updated as you make changes to the roster.

## Roster Management Main Page

### Year selection drop-down



The NCSFA certification records in this database go back to 2010. As far back as those records go, selecting an earlier year shows the members who received certification in those years (and whether they're on the current (this year's) roster. The records from those earlier years cannot be edited, and thus the controls are greyed out.

### Save changes

Changes made in the roster table are not written to the database until either the **Save changes** or the **SUBMIT FINAL ROSTER** is clicked.

### SUBMIT FINAL ROSTER

This button is only visible for during the certification period, which usually runs from Dec. 1 to Jan. 15.

See the above [Year-end certification](#) section for more details.

## Mark all certified on roster

This button is only visible for during the certification period, which usually runs from Dec. 1 to Jan. 15. This button will inspect the roster and add certification for anyone who is eligible. So this will not include non-members, inactive members, or members who are not old enough.

## Reload

Clicking this button will take the records back to the last saved state – either the last time the Save Changes button was clicked, or, if it hasn't been clicked, when the page was opened.

## SSN Issues

Social security numbers are required for benefit eligibility. If there are missing or invalid SSNs for your roster, the SSN Issue button is displayed. Clicking on that button takes you to a page where you can enter and edit the problematic SSNs. Note that on that page, only the valid SSNs (digits only, 9 characters long, no punctuation) will be saved. You must click the  button to record your changes to the database.

## Add member

See the above [Adding Members](#) section for details.

## Roster columns

### Current Roster

Whether or not the person is currently on the roster.

### 20xx Training Certification

Marking this means that the member has completed a minimum of 3 hours training x the number of months of active service for the year. So, for a full year's service, the member would need 36 hours. The numbers of months of earned eligibility can be found on the Member Details page.

### Member Type

If you change the member type, you are required to first enter the  date – the last date on which the member had completed the training certification requirements to be eligible for pension credit and LODD benefits.

- Life - Life Firefighter - the department can give this honorary status. A Life FF can be Active (getting training certification) or Inactive. If a member's status is changed to Life, the system will assume they are inactive, and the Active box will be left unchecked. If the member is going to be Active, re-check the box.
- NM FF - Non Member Firefighter - not eligible for training certification, pension or LODD benefits.
- Paid - Paid Firefighter.
- Rescue – An Emergency Rescue Technician. Only departments that are classified as having this kind of member will see this member type.
  - Ret - Retired Firefighter - has 20 years of certified service in the state. A Retired FF can be Active (getting training certification) or Inactive. If a member's status is changed to Retired, the system will assume they are inactive, and the Active box will be left unchecked. If the member is going to be Active, re-check the box.



- Vol - Volunteer Firefighter.
- Non-Mem - Non Member - not a firefighter, and not participating in training certification. Departments will often have a treasurer who is not a member.

### Active

A member is **Active** if they are pursuing training certification in order to be eligible for pension credit years, or for LODD benefits. It is only for Life or Retired firefighters that this must be marked, so the checkbox is not displayed for the other member types.

### Name

The names are listed in alphabetical order. Clicking on the name opens the Member Details page, where, if the person is still on the roster, their details can be edited.

### Join Date

The Join Date is listed on this page for informational purposes. To edit the Join Date, go to the Member Details page, by clicking on the member name.

### Change date for member type...

The date on which any edits to member's type, active status, or roster status. Fill this in **before** making changes to member type, active status or roster status.