

NCSFA Roster Management Guide

This is a guide for the year-end roster management and certification process. Access is available by using login credentials supplied by NCSFA. It is recommended to keep the login credentials private, sharing them with trusted delegates only. If login credential assistance is needed or there has been a Chief change, please contact NCSFA.

To process a Chief change, the information below is required. Please email the letterhead to Midori@ncsfa.com.

In order to update a Chief change in our system, we need the following information on **Department Letterhead**:

- Department Mailing Address
- Department Phone Number
- Chief's Name
- Chief's Cell Number
- Chief's Email Address
- Effective Date

Each year certifying your roster and managing the Relief Fund Board of Trustees is a crucial part of your responsibility as Chief. You are responsible for ensuring each member and Trustees' information contained on your roster and Relief Fund Board is accurate. **The annual certification period for your fire department begins December 1st and must be completed by midnight on January 15th.**



It is good practice to go over your roster throughout the year to make changes. This will save time once roster season comes along and will help prevent errors.

Contents

1 Roster Management

1.1 Roster Overview

1.2 NCSFA Roster Management Access

1.3 Roster Member Removal

1.3.1 Removing a Certified Member

1.4 Training Certification Hours

1.5 Member's Designation Type Change

1.6 Adding a Member to the Roster

1.6.1 Existing Records

1.7 Editing Member Information

1.8 Submitting Final Roster

1.8.1 Social Security Number Issues

2 Relief Fund Board of Trustees

2.1 Certification of the Relief Fund Board

2.2 Trustee Modifications

2.3 Trustee Positions

2.4 Membership Dues

2.5 Save or Print the Roster

1. Roster Management

1.1 Roster Overview

It is key to remember that roster certification management has two purposes.

The first is to allow departments to certify members on the roster for the upcoming year. Membership dues will be required for these members.

The second is to identify the members that have completed their training hours certification for the previous year.

It is important to remember when changing a member's type or editing their status, *work right to left*.

On the right-hand side is a column labeled "Change date for member type/active/on roster," it is imperative that in this box you always put a date before making a change.

1.2 NCSFA Roster Management Access

To access the NCSFA roster management web page, go to NCSFA.com.

Click on "Rosters" from the banner at the top of the website.

From the drop-down options, click on "On-line Roster Management."

Click on the gray box labeled "Click for IMIS On-line Roster Management."

You will then be brought to a secure site to access the roster where you'll use your login credentials.

A successful sign-in brings you to the main roster page. If your landing page does not reflect your roster, click the "roster" link from the navigation bar.

1.3 Roster Member Removal

To remove a member that will not be on the roster for the upcoming year, you will enter the date in the box under the "Change date for member type/active/on roster" column on the far right.

The date should reflect the member's last day with the department.

This can be a past, present, or future date.

2024		Save changes	Undo changes	SSN/DOB Issues	Add member									
1: BERG - WYATT		Records/page		100		Life-A	Paid	Ret-A	Ret-I	Vol	Member			
						1	1	1	2	1	3			
Current Roster	2023 Training Certification	Member Type	Active	Enter change date before editing anything except the training certification checkbox		Original Join Date	Service Dates		Change date for member type / active / on roster					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Paid		Daniel W. Berg*		04/01/14								
<input checked="" type="checkbox"/>		Member		Tabitha Breen		10/19/21								
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Life	<input checked="" type="checkbox"/>	Edward P. Brinson		01/01/76								
<input checked="" type="checkbox"/>		Ret	<input type="checkbox"/>	Sandie Houck		01/05/22								
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Vol		Julie Hussey		07/01/20								
<input checked="" type="checkbox"/>		Ret	<input type="checkbox"/>	Debra Milette		03/01/19								
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ret	<input checked="" type="checkbox"/>	Paul F. Miller*		05/21/10								
<input checked="" type="checkbox"/>		Member		Midori Mukoyama		11/06/23								
<input checked="" type="checkbox"/>		Member		Kris Wyatt		03/08/08								

After inserting the date in the box, you'll go to the far-left column under "Current Roster", and you'll remove the check mark from the blue box.

From the tab at the top, click on "Save Changes."

Once the save has been made, a date will populate under the "Service Dates" column.

It is highly encouraged to click on the "Save Changes" tab after each edit to ensure the change has been solidified.

1.3.1 Removing A Certified Member

When removing a member for the upcoming year that received their 36 hours of training for the previous year - make sure that before unchecking the box under "Current Roster" - the box under the "(YEAR) TRAINING CERTIFICATION" column is check marked.

1.4 Training Certification Hours

The "(Year) Training Certification" column reflects certification that each member that has a check mark received their 36 hours of training for the previous calendar year.

It is vital that this column is accurate and saved correctly.

You'll notice this column is greyed out all year except during roster season. Edits to this column can only be made from Dec. 1st to Jan. 15th.

1.5 Member's Designation Type Change

Another edit that may be made on the roster is changing the member's designation type. This information is found under the "Member Type" column.

First, you put in the date on the far right-hand side in the box under the "Change Date for member type/active/on roster" column.

Then under the "Member Type" column, click the drop-down to see your options.

The roster member categories are as follows:

1. Junior
2. Member
3. Non-Member
4. Paid
5. Rescue
6. Retired-Active
7. Retired-Inactive
8. Volunteer

Disregard the options "Life" and "NM-FF," neither of these should be used.

If you have questions regarding the member types and would like to discuss them in more detail, please contact NCSFA. The descriptions for each category are located at www.ncsfa.com on the NCSFA benefits PowerPoint, pages 57-58.

Once you have determined the correct type, click on that option from the drop-down, and then click on "Save Changes."

To confirm that the change has been made you'll see a date appear under the "Service Dates" column.

1.6 Adding a Member to the Roster

To add a member – click on the "Add Member" tab at the top of the page.

Although a record can be corrected later, before you add a member, it is important that you have accurate data.

On the top of the page where it says in red letters, "Dues payment required within 30 days when adding new member(s), to ensure full benefits," - this refers to when a member is added throughout the year, it is not relevant until after membership dues are paid during roster season. Once dues are paid in full, any member added will require payment within 30 days.

Dues payment required within 30 days when adding new member(s), to ensure full benefits.

Fill in the member information. The system can check if there are any closely matching records. The matching is based on name similarity and birth date proximity.* means that the entry is required.

Gender: *

First Name: *

Last Name: *

Date of Birth: * (e.g. 3/5/2010)

Original Join Date: (e.g. 3/5/2020. This is usually the same as the effective date, unless the member has previously served at this department. This is not a required field.)

Effective Date: * (e.g. 3/5/2010. The date when the member will begin their period of service.)

Member Type: *

Fill in all required fields - the member's gender, member's LEGAL first and last name – there is a box on the member's details page to add a nickname, the member's date of birth, effective date, and member type.

Once all required fields have been entered, click the "Add Member" button.

A pop-up will show on the screen, click continue.

1.6.1 Existing Records

The system may show you a list of existing records that come close in some way to the information you entered. Verify that there is not already an account created before going forward.

If there is an existing account, use that account to be added to your roster. Verify all information is accurate.

If no other accounts match, click the "Create New Member" button.

If no possible matches are found, you will be taken directly to the member details page.

It is on the member's detail page that you will fill in the required fields - member's home address, telephone number, social security number, and email address.

Do not use the fire department's address, telephone number, or email address for your members.

Accurate information assists with ensuring your members' information is correctly shared with the Fire & Rescue Pension Office and OSFM.

Once fields are completed, click on the “Save and go back to roster” button.

1.7 Editing Member Information

To view or edit a member's information - from the roster, click on the member's name that is highlighted in blue to open the member's details page.

Update any necessary changes, then click on the “Save and go back to roster button.”

1.8 Submitting Final Roster

Once you have added, removed, and certified training hours so that the roster is up to date, and you are satisfied that the roster is accurate, you may then click on the green button that says, “SUBMIT FINAL ROSTER.”

It is recommended before submitting the roster that you log out and log back in to refresh your edits and go over line by line one last time to confirm all information is correct.

If you run into any problems, contact NCSFA!

At this point, once you hit the “SUBMIT FINAL ROSTER” button, you will be taken to a new page displaying the legal meaning of submitting your roster and certification via the website.

1.8.1 Social Security Number Issues

If there are any problems with the social security numbers for your roster, it'll be noted on the statutory certification page. Social Security numbers are required for benefit eligibility.

Problems with social security numbers will not prevent you from submitting the roster, however, 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 to address those problems.

Lastly, verify that the email address located on the final submission page is correct. A confirmation email will be sent to that address.

Then click the “I certify this roster” button.

Once clicked, the certifications for your roster are locked in.

2. Relief Fund Board of Trustees

2.1 Certification of the Relief Fund Board

After you certify the roster, you will automatically be directed to the Relief Fund Board of Trustees page.

You may also access this page at any time by clicking the “RF Trustees” link at the top of the page.

Certification of the Board of Trustees Report must be completed by January 15th. General Statute requires that the information on the Board of Trustees Report be reviewed by the Chief annually to ensure each person on the report is currently serving as a relief fund board Trustee and that each person is listed correctly. This includes the Chairperson and Treasurer.

It is a statutory requirement that correct and complete contact information for each member is provided. Please make any necessary changes to your Board of Trustees and select the certification button on the top right-hand side.

Failure to certify the correct contact information for your Trustees on the BTR will result in forfeiture of your relief fund allocation and distribution for the upcoming year.

Once the Board of Trustees is updated and accurate, click on the certification button on the top right-hand side of the page.

2.2 Trustee Modifications

You may edit or replace Trustees by clicking the “Edit” button.

You may also change the member type from the member type drop-down.

Do not use the fire department’s information as a replacement for the Trustees’ information.

Board Trustees elected by Fire Department

Trustee #1			<input type="button" value="Edit"/>
First & middle names:		<input type="text" value="Trustee"/>	
Last name:		<input type="text" value="One"/>	<input type="button" value="Replace"/>
Address:		<input type="text" value="1 Main Street"/>	Use the Replace button to clear the data when a new Trustee is added.
City:		<input type="text" value="Highlands"/>	
State:	<input type="text" value="NC"/>	Zip: <input type="text" value="28000"/>	
Email:		<input type="text" value="t1@ncsfa.com"/>	
Phone:		<input type="text" value="9195551212"/>	<input type="button" value="Member"/>

2.3 Trustee Positions

The Trustees are either elected or appointed.

Trustees #1 and #2 are elected by the fire department.

Trustees #3 and #4 are appointed by local government.

Lastly, Trustee #5 is appointed by the "State Fire Marshal."

Trustee #5 is the only position that cannot be edited by the department. The only edit the department can make is the position of the trustee by using the member type dropdown.

Board Member appointed by State Fire Marshal

The NCSFA maintains all data for this entry, except the Department can edit the position (Chair, Treasurer, Member).

If Trustee #5 needs to be changed, you must follow instructions on the right-hand side by sending an official letter on fire department letterhead to OSFM.

The State Fire Marshal appoints position 5. To change the person serving in this position, the Fire Chief **MUST email or mail a letter on official fire department letterhead** addressed to Fire Marshal Brian Taylor. Letters should be emailed to: FireRescueGrants@ncdoi.gov or mailed to: **OSFM, C/O Fire Rescue Grants, 1201 Mailer Service Center, Raleigh, NC 27699-1201**. The letter must request the removal of the current person serving in position 5 and the appointment of the new person. Please provide the new person's **full name, the effective date of the change, the reason for replacement (retired, stepped down, deceased, etc), nominee's position (Chair, Treasurer, or Member), along with their mailing address, phone number, and email address**. Once the person is appointed, OSFM will provide the NCSFA with the new appointee's name and contact information.

Please note that any Board of Trustees member may serve as the Treasurer of the Relief Fund.

Once OSFM has approved the change and appointed a new Trustee, NCSFA will be contacted and will update Trustee #5 position's information.

The five Trustees of the board will elect a Chairperson, Treasurer, and Secretary. *Keep in mind that the Chairperson and Treasurer may not be the same person.*

2.4 Membership Dues

After submitting the roster and certifying the Relief Fund Board of Trustees, you can find the amount for your membership dues located at the top of your roster where it says, "Dues Balance."

Click on the link, and you will be directed to a cart page. This is where you will have the opportunity to add dues for the National Volunteer Fire Council.

For more information about NVFC and what it offers, please visit NVFC.org.

Adding NVFC dues is not a requirement.

Once you are satisfied with your cart, from Step 2 - click, "Add to cart".

Step 1: Options - NCSFA dues include regional association membership.

Description	Total Dues	Balance Due	Include?
NCSFA Membership Dues <i>Required item - \$25/member</i>	\$250.00	\$249.98	<input checked="" type="checkbox"/>
National Volunteer Fire Council Dues <i>Optional item - \$21/member</i> Benefits include \$10,000 AD&D, \$20,000 LODD/member	\$210.00	\$210.00	<input checked="" type="checkbox"/>
Total:	\$460.00	\$459.98	

Set your desired dues options

****If you're planning to remove members from the roster, please do that first, then return to this page for the correct balance.****

Step 2: Add to Cart Click to add your department dues to your cart and access your invoice.

You will then be directed to a payment page that will allow you to either pay by credit card or by check.

Check payment instructions are located on the left-hand side.

If paying by credit card, on the right-hand side, fill out the required fields and click submit.

2.5 Save or Print the Roster

Once submission of the roster has been completed, you may save it as a PDF or print the roster.

Click on the "Print" button located at the top right right-hand corner of the page.

To print the updated roster, click on "Print Current."

Please be advised that the printable version will only be current once it has been submitted for certification.

If you would like a printable version of what has been edited throughout the year, click on "Print (Year) Working Copy."

The (year) drop-down will also allow you to print any previous year's rosters from 2010 to present.