

# **NCSFA Roster Management Guide**

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## NCSFA Roster Management Guide

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 particular 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 the use of member departments in the NCSFA, using departmental login information supplied by the NCSFA. Roster management is generally the responsibility of the chief.

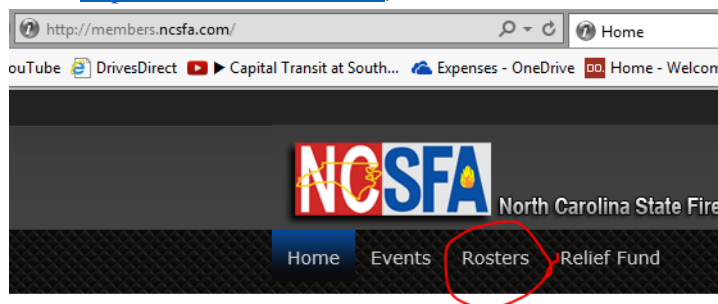
Testing indicates that the website functions best using Chrome or Firefox, although extensive testing has been done at some sites using Internet Explorer 11, without issues.

### Roster management calendar

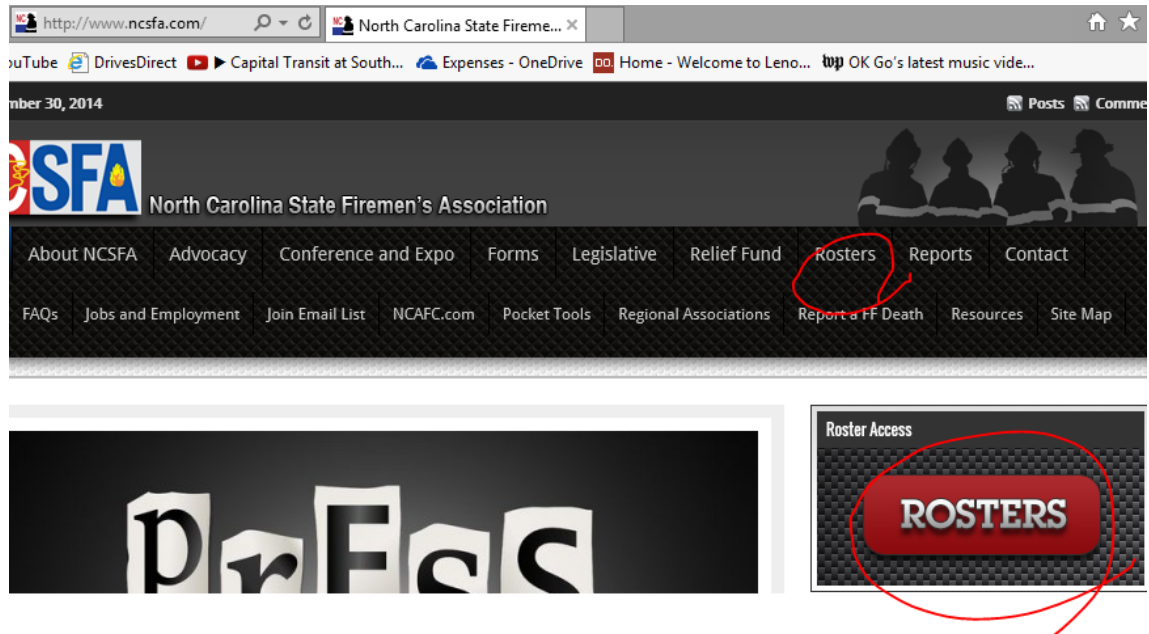
- Year-end roster & training certification begins on Dec. 1, and concludes on or around Jan. 15<sup>th</sup>.
- Once a department submits its year-end roster, the on-line management is locked for that department until two days after the end of the certification period. So, that is usually on Jan. 17<sup>th</sup>.
- 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> will be mailed out shortly thereafter.
- For the rest of the calendar year, departments are expected to maintain their rosters as members are added and members depart.

### Opening NCSFA Roster Management

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

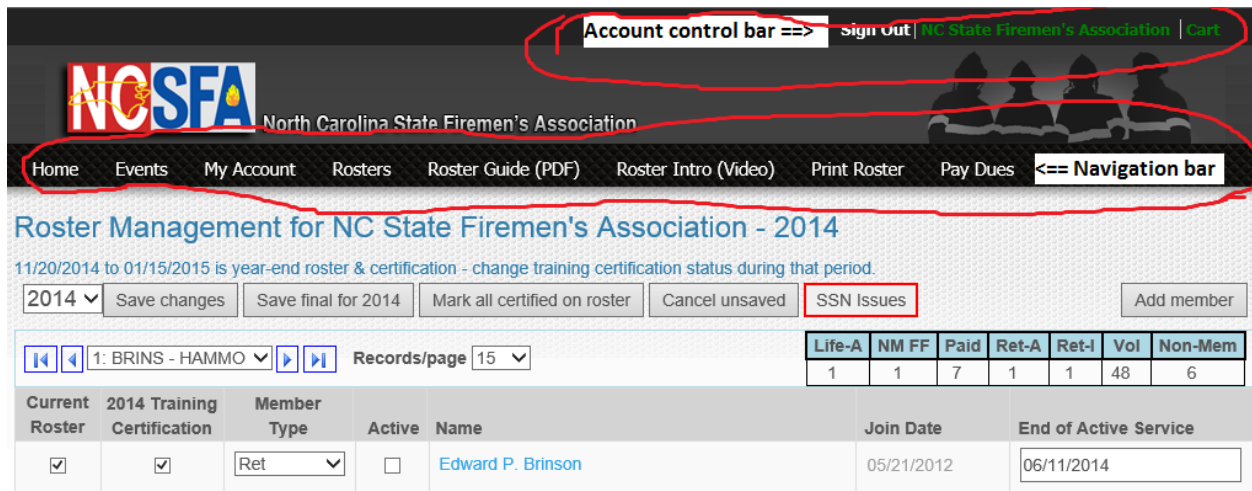


- From <http://www.ncsfa.com>, click on the Rosters link in the menu bar, or the Rosters button:



- Either way should bring you to the Sign In page. If the roster is your responsibility, and you do not have functioning credentials, you can
  - Use the password or username recovery tools on the sign-in page – if you know your username and/or have access to the associated email account.
  - Contact the NCSFA at 800-253-4733 or [sandie@ncsfa.com](mailto:sandie@ncsfa.com).

Successful sign-in should bring you to the main roster page. If your landing page does not look like the image below, click the Rosters button on the black patterned toolbar (the “Navigation bar”)



### 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.

## Adding Members

On the main roster page:

- Click the **Add Member** button on the main roster management page.
- All of the basic member information is required, so that the system can look for any existing records that might be a match.
- Click Add Member to proceed. 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.

## Editing Member Details

If 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 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 earlier in the year, then you will not be able to edit their member details, 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.

## Removing Members

To remove a member, uncheck the Current Roster checkbox, and then click the Save Changes button. You will then need to provide a date for the end of active service – the last date on which the member had completed the training certification requirements to be eligible for pension credit and LODD benefits.

## Year-end certification

When you have added and removed members and certifications so that the roster is up to date (for more information, see the Roster Management Main Page details, below), it is recommended to print the roster. Use the Print Roster link on the Navigation bar. Once you are satisfied that the roster is accurate, click on the [Save final for 20...](#) button. This will take you a new page defining the legal meaning of submitting your roster and certification via this website, to review the legal code before a final click to submit.

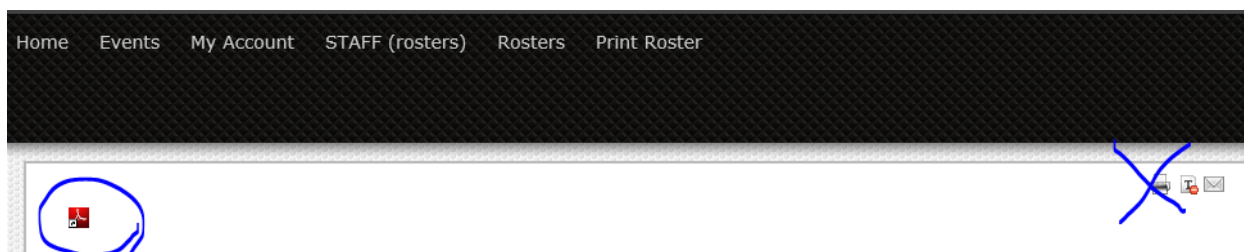
If there are any problems with the SSNs for your roster, it will be noted on the Statutory Certification page. **Problems with SSNs will not prevent you from submitting the roster**, but it can mean that those members will not receive proper pension credit from the Treasurer's office. You can use the [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.

When you return to the main roster page, all of the editable items are locked, until the new roster year begins, usually on Jan. 17<sup>th</sup>.

## Print Roster

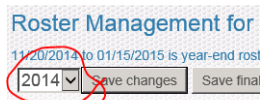
Use the Print Roster link in the Navigation bar to open the roster report. Use the Export PDF (circled) icon to save the report. Print from the saved PDF file. The Print icon (X'ed) on the web report is not functional, but it could not be removed. It is recommended to print and save your roster before the submitting for year-end roster and certification. Go back to the main roster page using the Roster link in the Navigation bar.



## 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 only 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 or not they're on the current (this year's) roster. The records from those earlier years cannot be edited, and thus are greyed out.

## Save changes

Changes made in the roster table are not written to the database until either the [Save changes](#) or the [Save final for 20...](#) are clicked.

## Save final for 20...

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.

## Cancel unsaved

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 [Save Changes](#) button to actually record your changes to the database.

## Add member

See the above “Adding Members” section for details.

## Current Roster

Whether or not the person is currently on the roster, whether or not they are active or members.

## 20.. 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

A member is **Active** if they are pursuing training certification in order to be eligible for pension credit years, or for LODD benefits. If you change the member type, you may be required to give the end of active service 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.
- 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 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.
- 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.

### End of Active Service

The last date on which the member had completed the training certification requirements to be eligible for pension credit and LODD benefits. Inactive members and non-members can still be on the roster even if they have an End of Active Service date.