OSSBA

Oklahoma State School Boards Association

Membership Portal Manual

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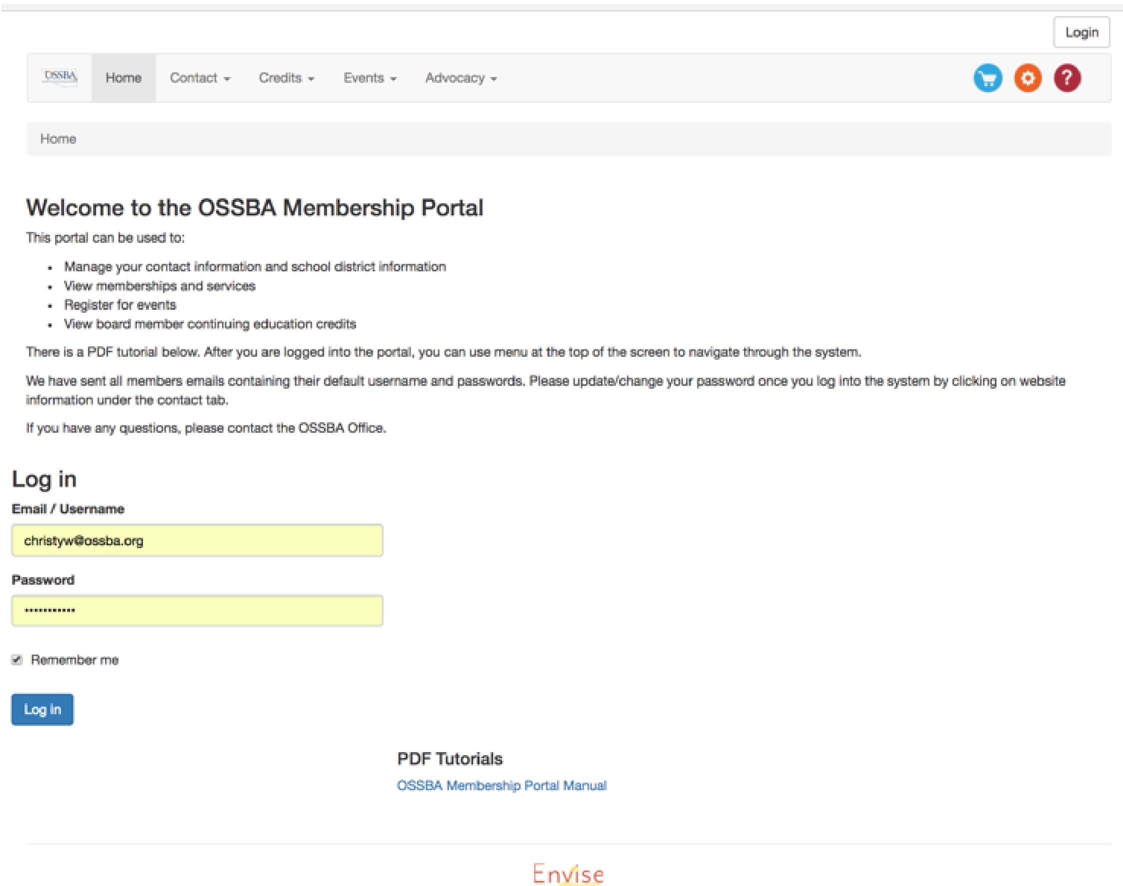
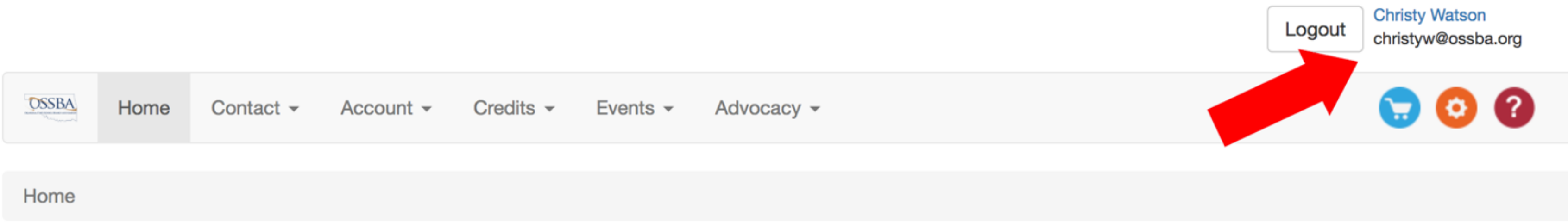
Login

Go to http://www.ossba.org/. Click on the MEMBER PORTAL link at the top of the page (or in the dropdown menu if you're viewing on a mobile device). Next, enter your member login information. If you haven't received this information, please call our office at 888.528.3571 or click here to request login information.

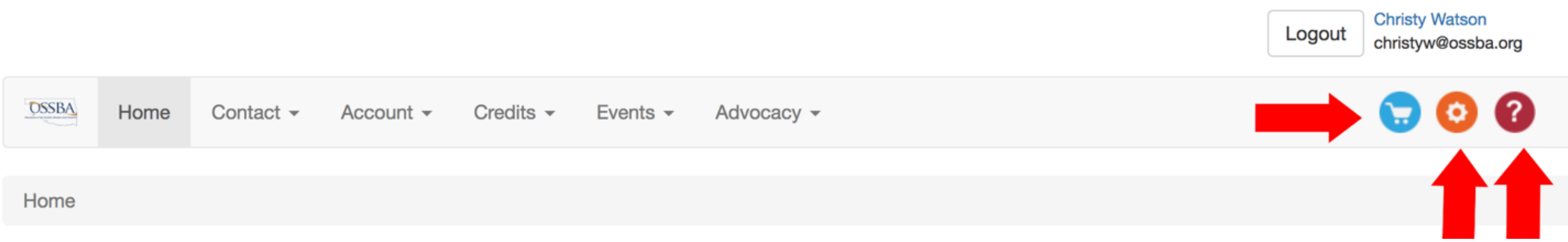


The homepage of OSSBA's membership portal

Once you have logged in you will see that you have a navigation bar going across the top with tabs and in the upper right-hand corner your name and email address will be displayed:



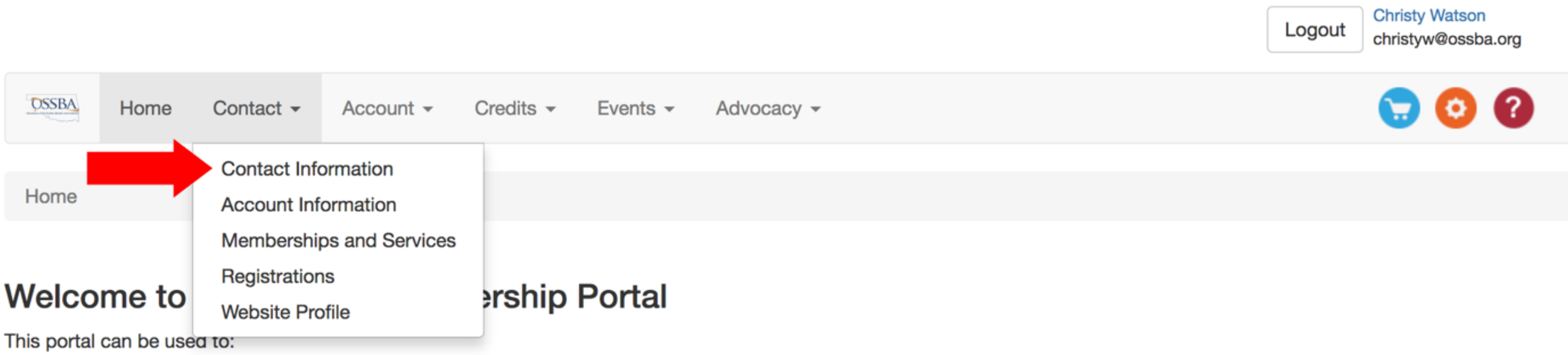
1. Clicking on the blue shopping cart icon will show you any items and registrations you have in your cart.
2. The orange gear icon will allow you to update your portal profile. Here, you can change your password, add a picture and change your email address. *****Please keep in mind this page does not make changes to your contact record in our system, this is just your portal profile.***** If you need to change your email address, please do so on the contact information page.
3. The red icon with a question mark will show you a listing of tutorials that you can click on to help you navigate through this system.



Contact Tab

Contact Information Dropdown

- Click on “Contact” and then select “Contact Information”

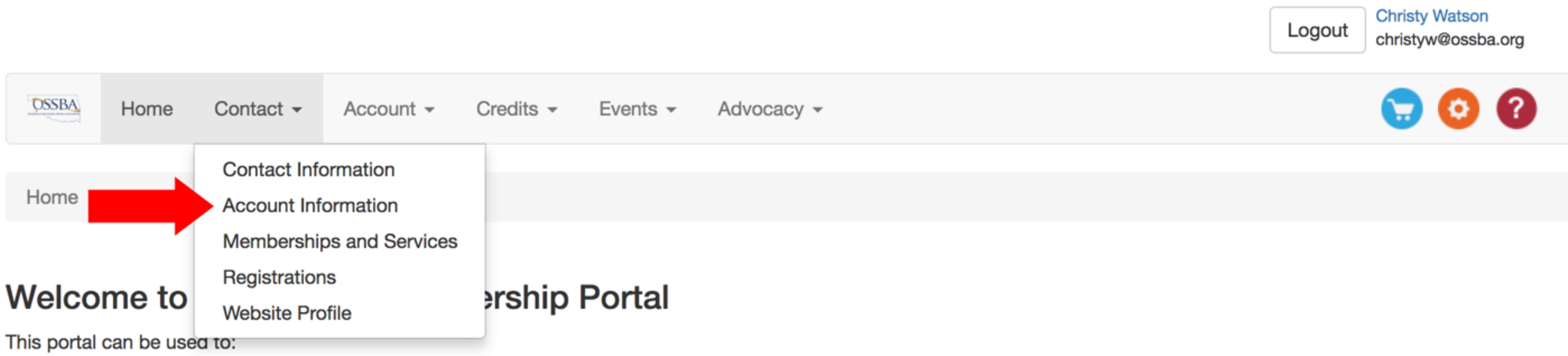


Features on the Contact Information Dropdown

1. On this page you will see your contact information, including general contact information, mailing and email addresses, and demographics.
2. If you need to make changes to anything on this page, simply make your changes and hit “submit” at the bottom of this page.
3. Once you hit “submit” you will see that it is loading your changes and then scroll back up on the page and you will see the following message:

Account Information Dropdown

- Click on “Contact” and then select “Account Information”

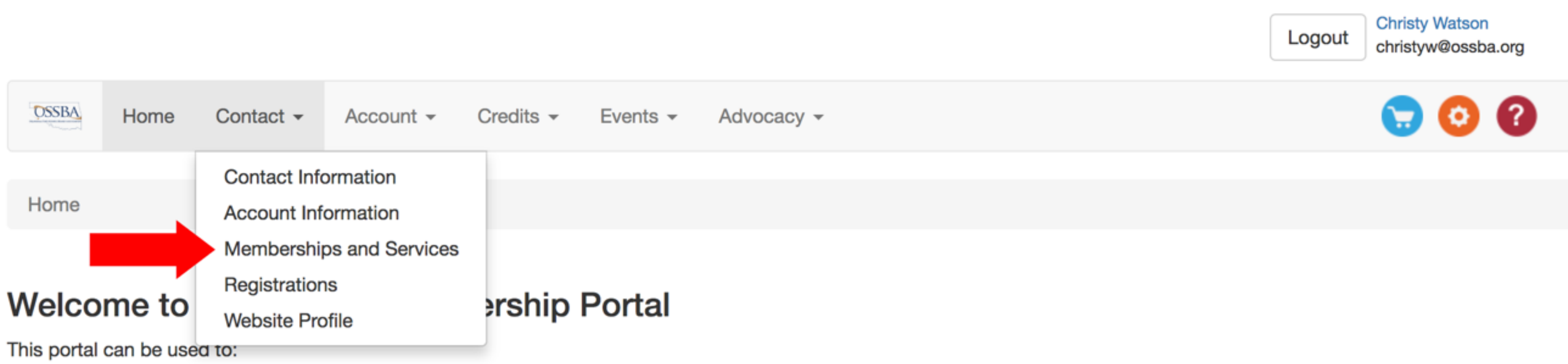


Features on the Account Information Dropdown

1. This page brings up your school district's information. You will notice that this is only an informational page and you are not able to edit any information on this page.

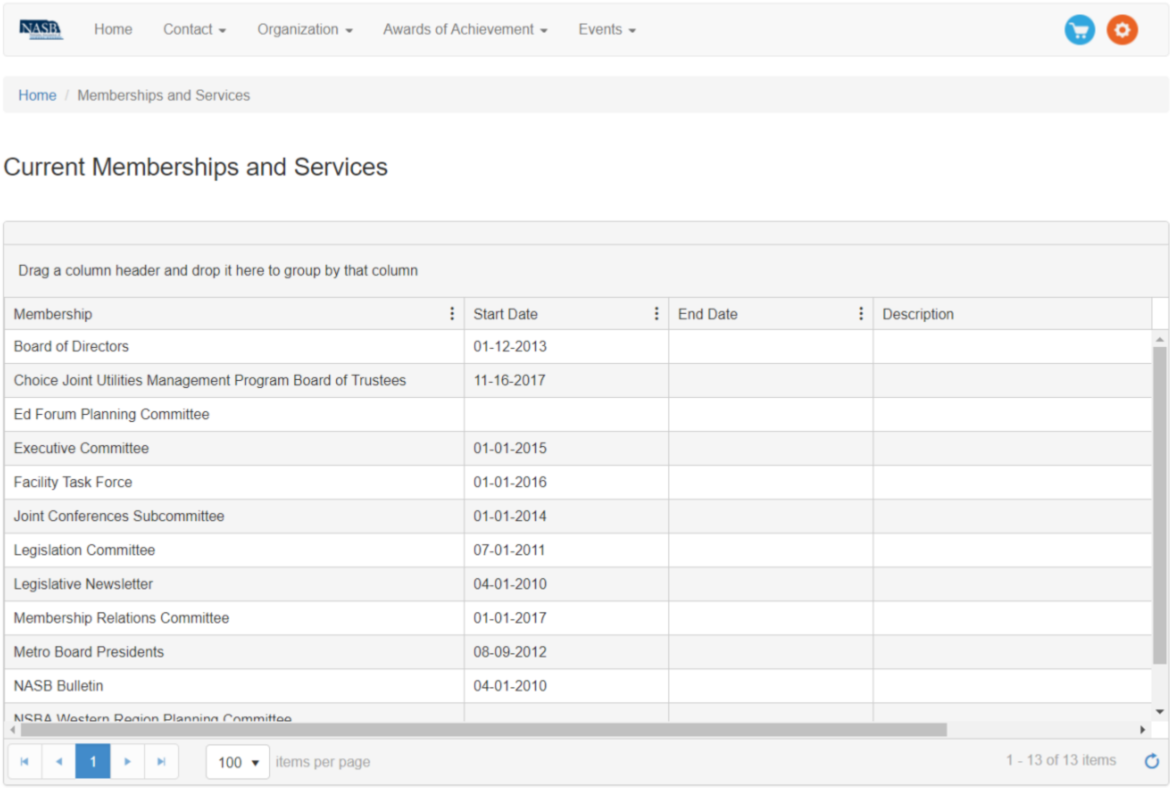
Membership and Services Dropdown

- Click on "Contact" and then select "Memberships and Services"



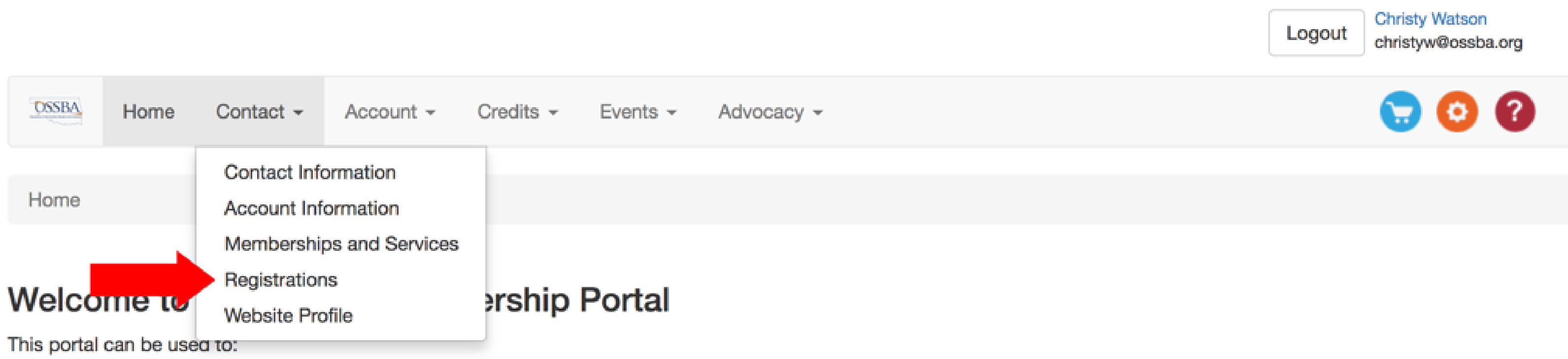
Features on the Membership and Services Dropdown

1. This page displays any **individual** current subscriptions, committee and memberships. (At this time, OSSBA has very few individual memberships so don't be alarmed if nothing shows on this page).



Registrations Dropdown

- Click on “Contact” and then select “Registrations”

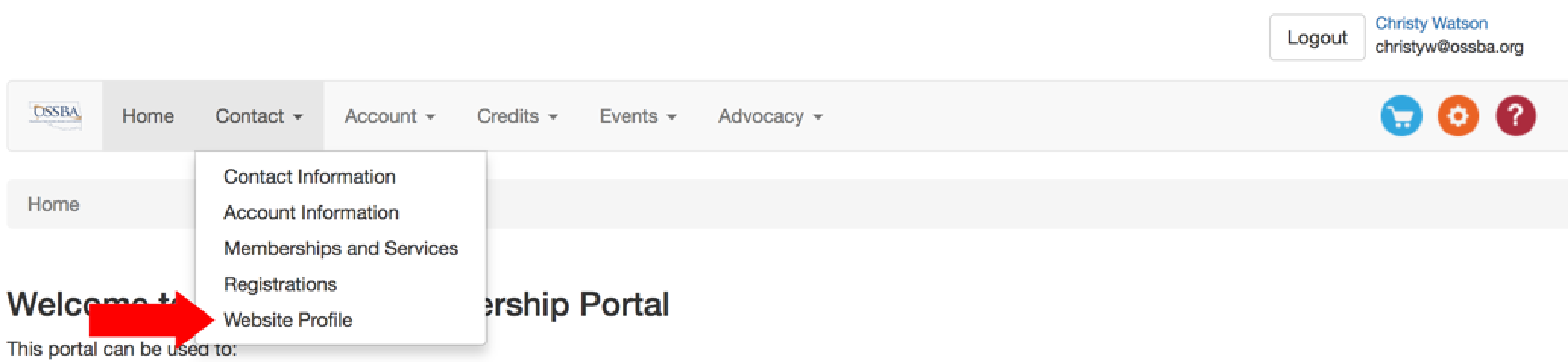


Features on the Registration Dropdown

1. This page displays all individual “Event Registrations.” Export the information in the table by clicking export to excel.

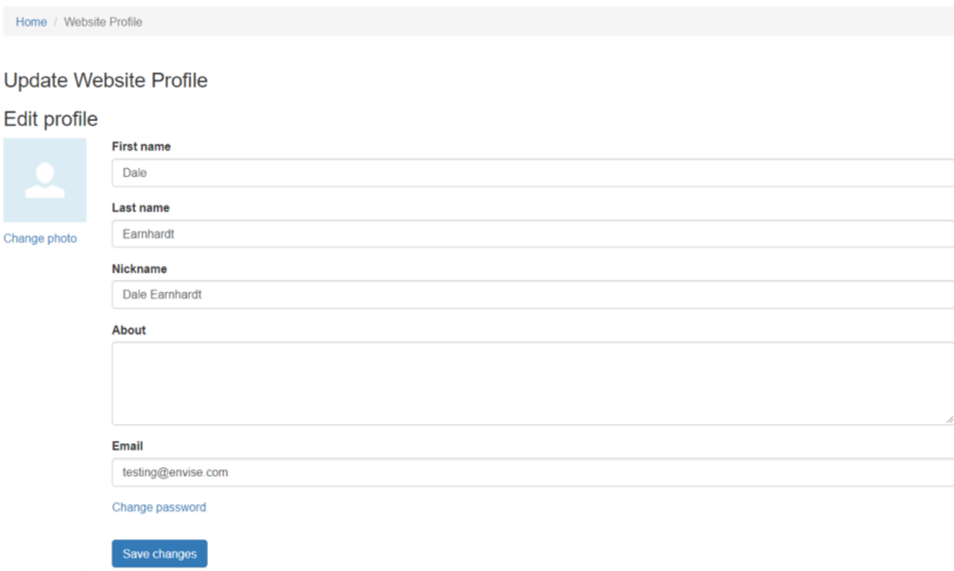
Website Profile Dropdown

- Click on “Contact” and then select “Website Profile”



Features on the Website Profile Dropdown

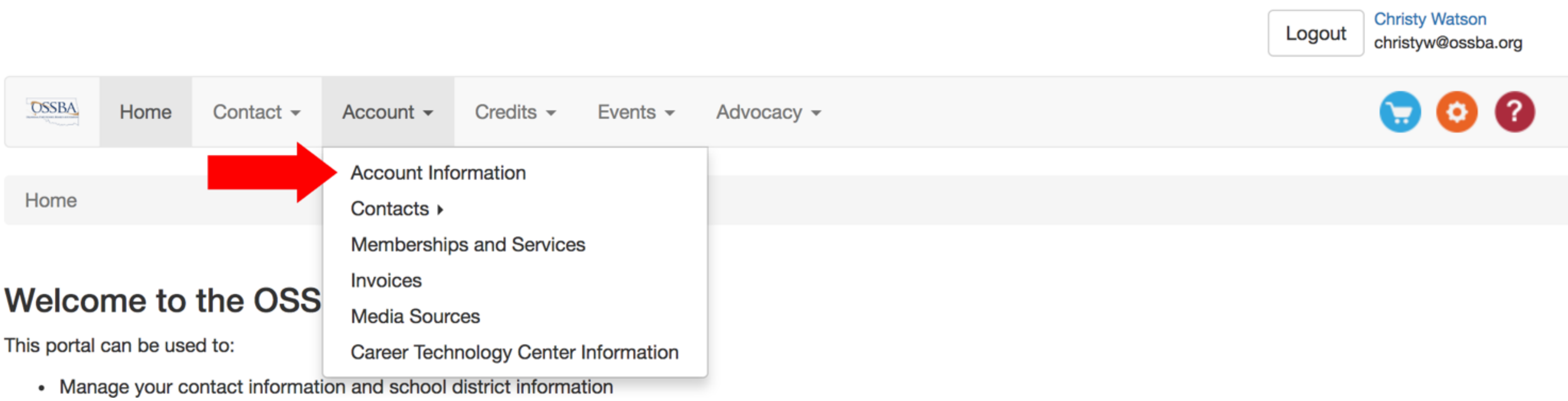
1. This page displays your portal profile. Here you can add a photo and make changes to your name and email address. *****Please keep in mind this page does not make changes to your contact record in our system, this is just your portal profile.***.**
2. You can change your portal password by clicking “change password” highlighted in blue. Once you’ve updated your password, click the “Save changes” button.



Account Tab (only viewable by designated administrators)

Account Information Dropdown

- Click on “Account” and then select “Account Information”



Features on the Account Information Dropdown

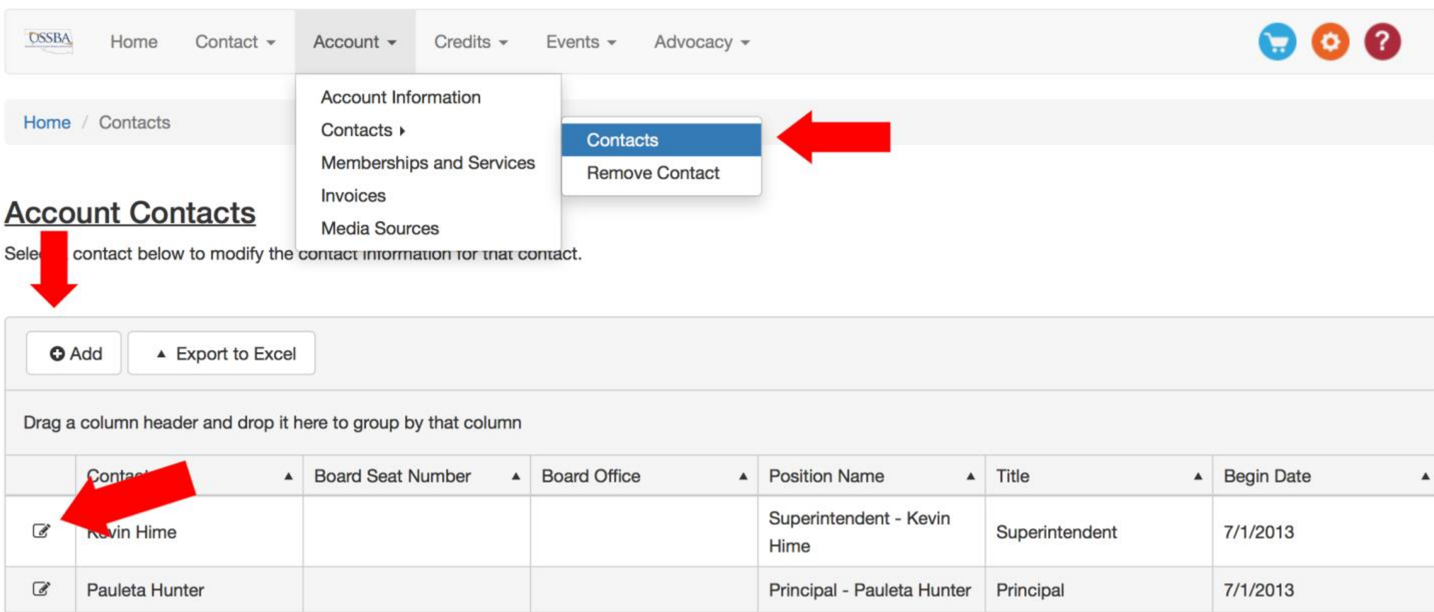
1. This page displays all the general, school, board meeting and legislative information.
2. Please take the time to review all this information and make sure it is accurate. If you have any changes to make, please make the changes and hit “submit” at the bottom of the page.
    a. If you need to make changes to a phone number, please enter as xxx-xxx-xxxx.
3. **Please note that some fields are not editable.**
4. Once you hit “submit” scroll up the page and a message stating “thank you for updating your account information in our system” will be displayed.

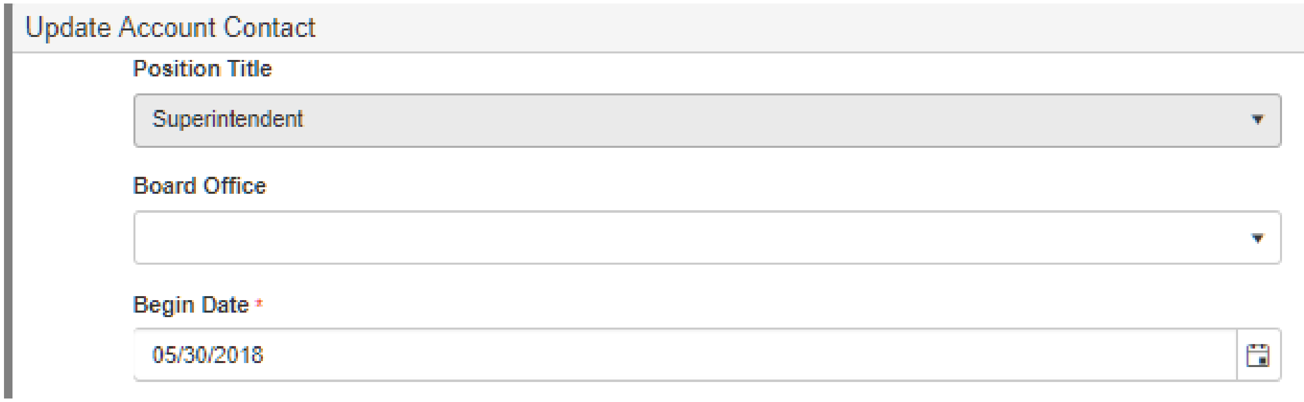
Contacts Dropdown: Contacts

- Click on "Organization" and then select "Contacts" and then select "contacts."

Features on the Contacts Dropdown

1. This will populate in all your contacts for your school district, including the position title, office and seat number. (**If you are not able to see a listing of all your contacts for the school district, please let us know and we will change your permissions.)**
2. **Edit** a contact by clicking on the pencil icon to the left of the contact you want to update. A new screen will pop up for you to make changes and scroll down to the bottom and hit "submit" when you are done. You can edit the position title, board office and begin date by choosing the appropriate drop-down menu.





3. Add a contact by click on the “Add” box. A new screen will populate to input all your information for the new contact.
    i. You will see that you must select from the drop-down menu “Contact Type” and “Position Type.” All other fields are text fields.
    ii. Hit “submit” at the bottom and you will now see that your new contact has populated in to your list of contacts for your school district.
    iii. Account Administrator role should be reserved to superintendents and other district staff tasked with updating account and contact information.
    iv. **Please note any fields marked with an * are required fields**.

New Contact

General Contact Information

Contact Type

Company Name

Clinton

Note: When creating a board member position enter the current term beginning date in the "Begin Date" field below.

Position Title

Board Office

Election Status

Begin Date *

09/18/2018

Board Seat Number

IMPORTANT - If you select "Yes" for the Account Administrator field the newly created user will be able to update your school district information and register others for events when logged in. If you choose "No" the newly created user will only have access to updating their own information and registering only his or her self for events.

Account Administrator

- Yes
- No

4. You can also export these contacts into excel by clicking on “Export to Excel.”
5. You can also sort the table on this page by dragging/moving the column headers. For example, click on position and drag the column to the designated area. Drag additional columns to the header to refine the display order. Click export to excel to download the information to a spreadsheet.
6. Now you will notice that your screen is grouping all your contacts by “Position”. You can drag more than one column heading and it will sort in the order that you drag the columns to the top.

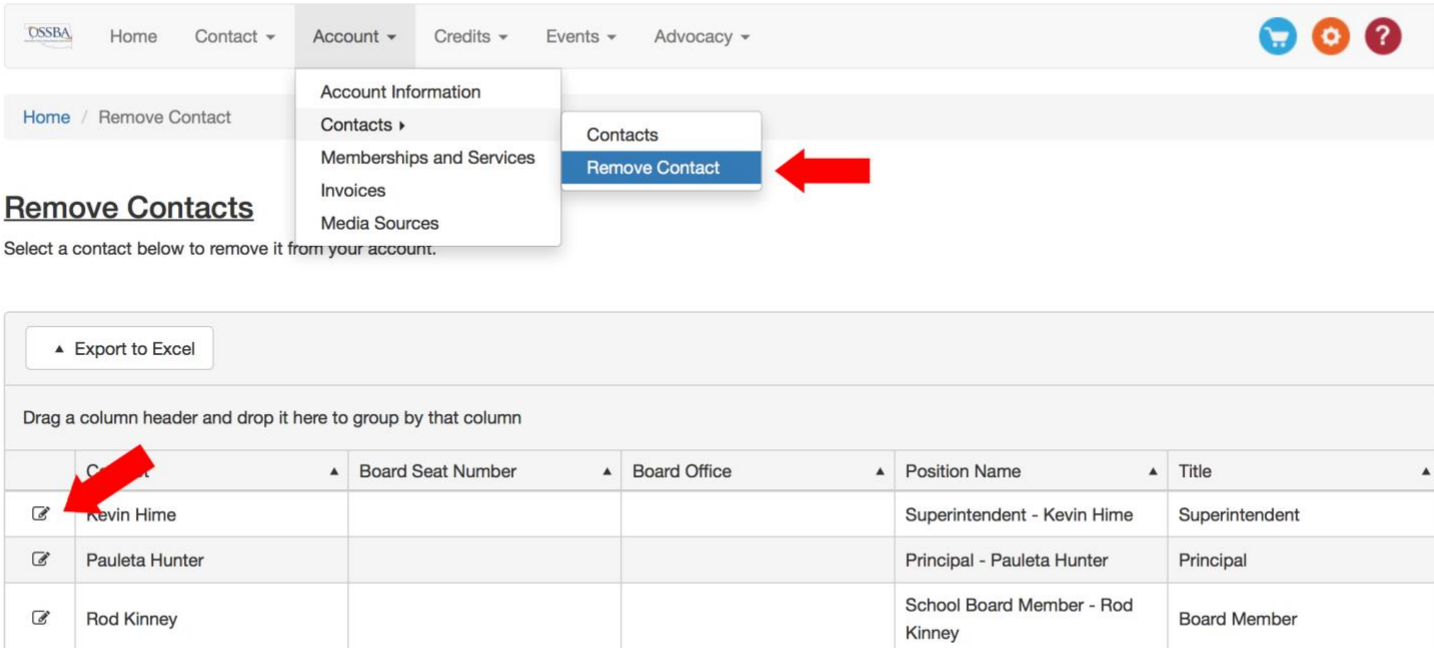
Contacts Dropdown: Remove Contacts

Features on the Remove Contacts Dropdown

- Click on “Organization” and then select “Contacts” and then select “Remove Contact”. **This option you need to only access if you need to delete a contact from your school district.**
- All your contacts will populate down below.

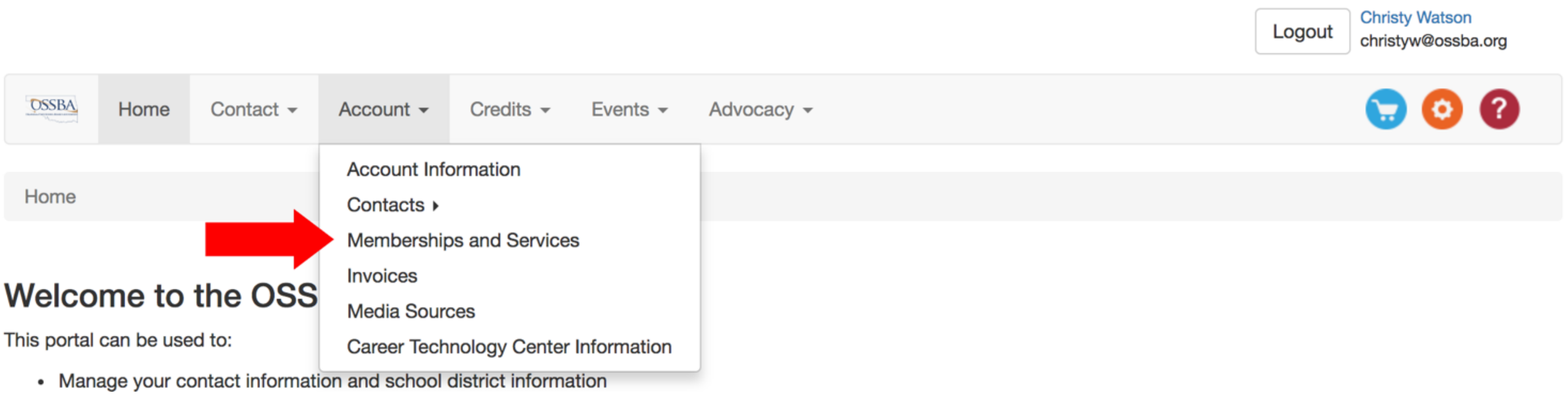
1. **If you are not able to see a listing of all your contacts for the school district, please let us know and we will make a change to your permissions.**

- To remove a contact, select the pencil mark icon to the left of the contacts name. This will bring up a new screen where you enter in the “Term End Date” and hit “submit” when done.
- You will notice that your contact has now been removed.
- The option to “Export to Excel” is still available and you can also do the grouping of the column headers here as well. See above instructions on how to group.


OSSBA
Home
Contact
Account
Credits
Events
Advocacy
Account Information
Contacts
Memberships and Services
Invoices
Media Sources
Contacts
Remove Contact
Home / Remove Contact
Remove Contacts
Select a contact below to remove it from your account.
Export to Excel
Drag a column header and drop it here to group by that column
Board Seat Number
Board Office
Position Name
Title
Kevin Hime
Superintendent - Kevin Hime
Superintendent
Pauleta Hunter
Principal - Pauleta Hunter
Principal
Rod Kinney
School Board Member - Rod Kinney
Board Member

Memberships & Services Dropdown

- Click on “Account” and then select “Memberships and Services” from the dropdown.



Features on the Membership & Services Dropdown

1. This brings up a listing of all your district memberships, services, etc.
2. You have the option to “Export to Excel”.

Current Memberships and Services

Export to Excel

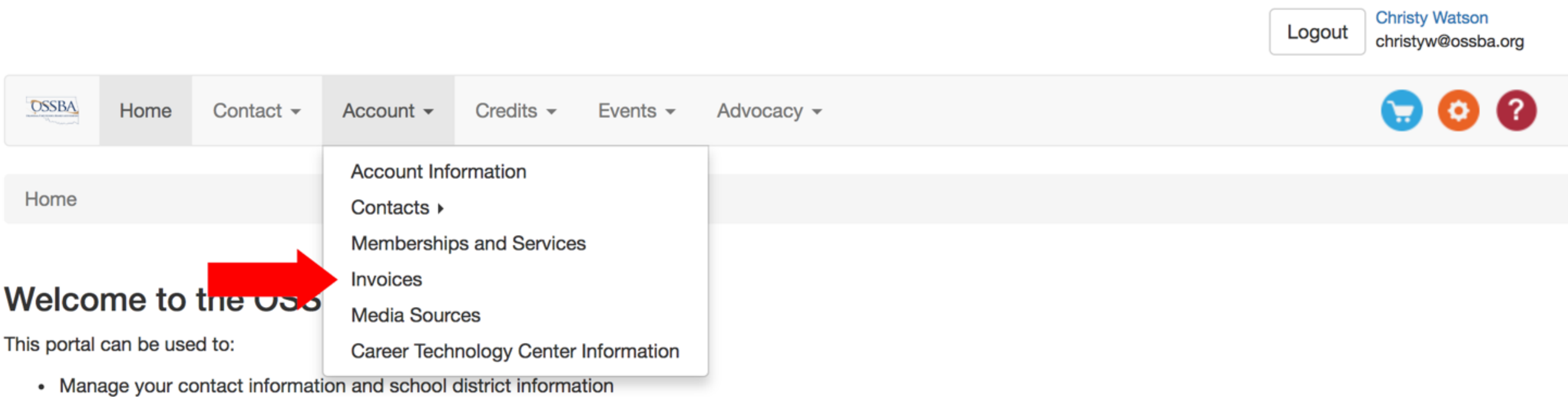
Drag a column header and drop it here to group by that column

Membership	Start Date	End Date	Description
North Star Negotiations Module 1	06-30-2016		
North Star Negotiations Module 2	09-16-2015		
Policy Online	06-29-2016		
Sparq Meetings	11-29-2016		
Sparq Meetings	06-30-2016		
Sparq Meetings	06-30-2016		
Sparq Meetings	06-30-2016		
Superintendent Search Salary Survey	05-16-2018		
Superintendent Search Salary Survey	12-07-2016		
Superintendent Search Salary Survey	03-23-2016		
Superintendent Search Salary Survey	03-23-2016		

1 100 items per page 1 - 22 of 22 items

Invoices Dropdown

- Click on "Account" and the select "Invoices" from the drop down.

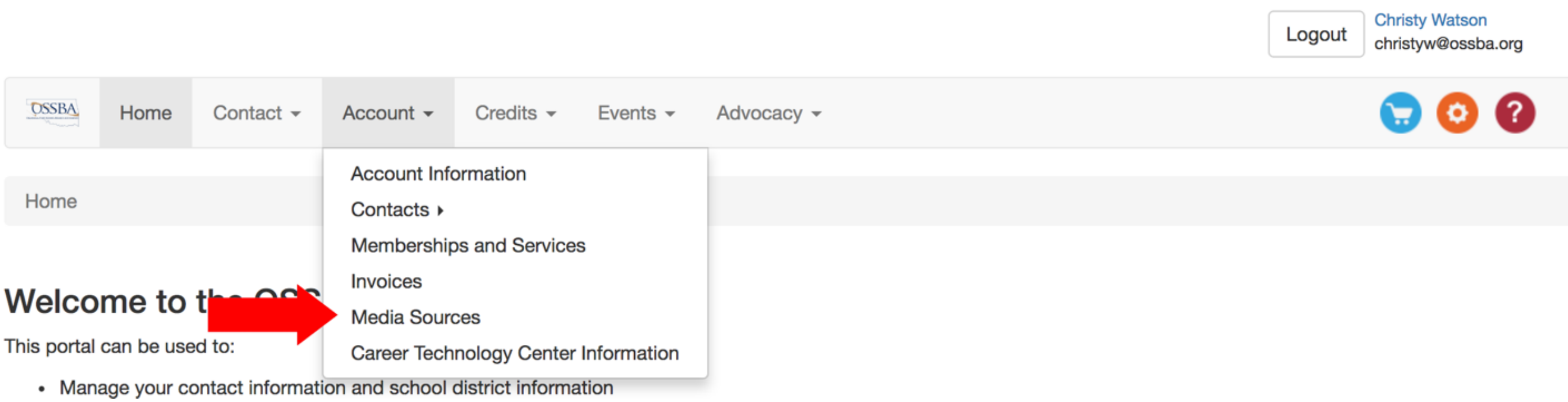


Features on the Invoices Dropdown

1. This will bring up a listing of your district invoices.
2. You have the option to "Export to Excel."

Media Sources Dropdown

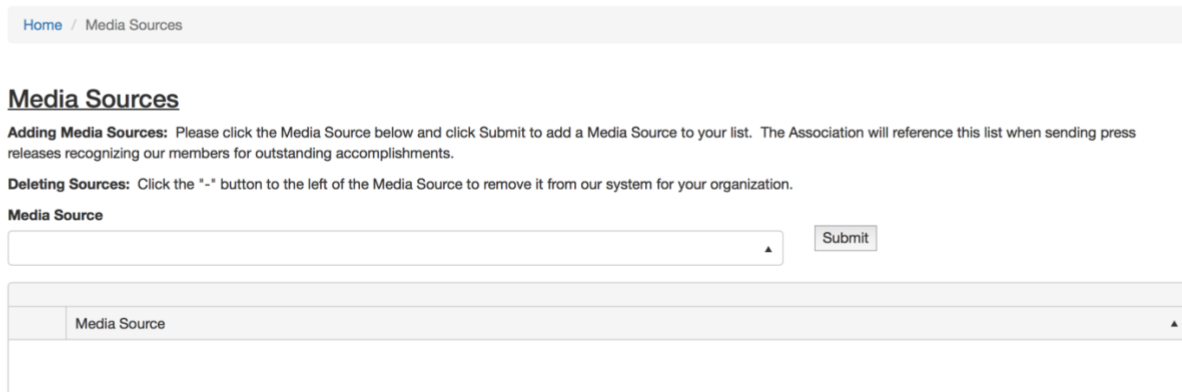
- Click on “Account” and then select “Media Sources”



Features on the Media Sources Dropdown

1. This is a new field in the portal that allows OSSBA to know which media organizations are in your area. This helps us know where to send press releases.
2. To Add a Media Source: click on the drop-down menu under “Media Source” and scroll through the listing of Media Sources and hit “Submit” when you have selected the Media Source you would like to add.
   a. The new Media Source will now be populated in your current list.
3. To Delete a Media Source: click on the “- “button to the left of the Media Source you want to delete.

a. A message will popup stating – “Are you sure you want to delete this record?” Click “OK” and now your media source will no longer be populated in your list.



Credits Tab

Credits Tab

- Click on “Credits” and then select “Credits.” This will show the election, term and credit information of school board members. Please note that the 15-month and term total fields are based on the term dates and election information we have on file. Incorrect information could affect the accuracy of these calculations. On this page, board members also can download detailed credit information to Excel.

Tester Valley

Logout | Billy Forester
gdorn@sparqdata.com

OSSBA | Home | Contact | Account | Credits | Events | Advocacy

Credits
District Credits
Request Credit Change

Home

Tester Valley

Logout | Billy Forester
gdorn@sparqdata.com

OSSBA | Home | Contact | Account | Credits | Events | Advocacy

Home / Credits

Credits

Board Member
Billy Forester

CEU Total
4

Appointed Or Elected
N/A

Term Start Date
Wednesday, January 1, 2014

Term End Date
Monday, January 1, 2018

Term Length
3 years

15-Month Date
Wednesday, April 1, 2015

Required Ethics
No

Current 15 Month Credits
2

Required Finance
Yes

15 Month Credits Complete
No

Required OMA
Yes

Current Term Credits
4

Current Term Credits Met
No

Export to Excel

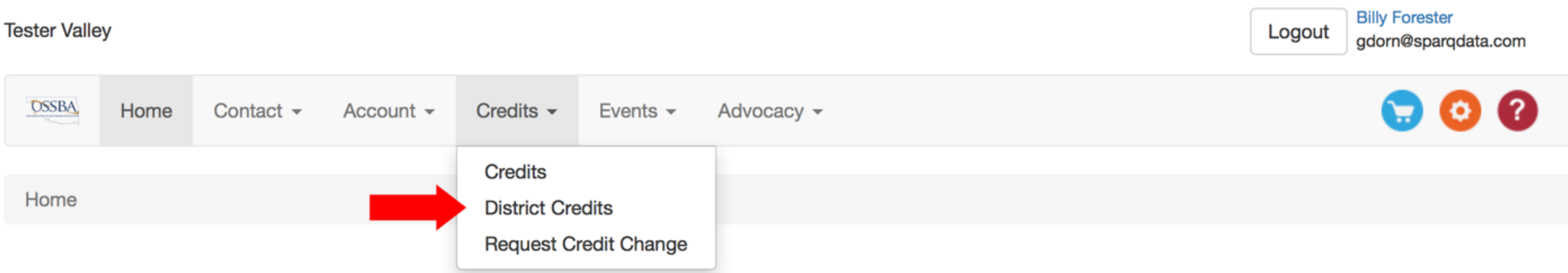
Drag a column header and drop it here to group by that column

Contact	Point Type	Points	Date Earned	Event	Session
Billy Forester	Continuing Education	2	04-12-2016		
Billy Forester	Finance	1	07-12-2014		
Billy Forester	OMA	1	02-01-2014		

1   100 items per page   1 - 3 of 3 items

District Credits (viewable only by designated district administrators)

- Click on “Credits” and then select “District Credits.”



1. This page contains a table of credits for all of a district’s board members. The table can be exported to Excel.

District Credits

Export to Excel

Drag a column header and drop it here to group by that column

	Name	Term S...	ETH	FIN	O...	15 Month Cre...	15 Month Re...	Current Term ...	Current Term ...
	Billy Forester	1/1/2014	No	Yes	Yes	2	No		4
	Garth Brooks	1/1/2017	No	No	No		No		
	Jen Goetz	7/1/2016	No	No	No		No		
	John Doe	8/15/2016	No	No	No		No		

2. Clicking on the pencil icon next to the name will open a page with full election, term and credit information for the individual board members.

Account Contact Points

Board Member
Billy Forester

CEU Total
4

Appointed Or Elected
N/A

Term Start Date
Wednesday, January 1, 2014

Term End Date
Monday, January 1, 2018

Term Length
3 years

15-Month Date
Wednesday, April 1, 2015

Required Ethics
No

Current 15 Month CEUs
2

Required Finance
Yes

15 Month CEUs Requirements Complete
No

Required OMA
Yes

Current Term Ceus Requirement Met
No

Current Term CEUs
4

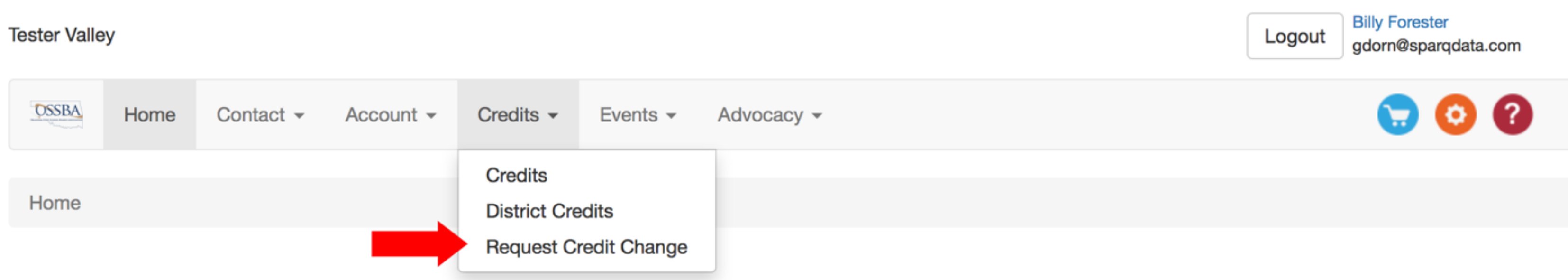
Export to Excel

Drag a column header and drop it here to group by that column

Contact	Point Type	Points	Date Earned	Event	Session
Billy Forester	Continuing Education	2	04-12-2016		
Billy Forester	Finance	1	07-12-2014		

Request Credits Change Dropdown

Click on “Credits” and then select “Request Credit Change.” This tab is where you can request point changes and attach any supporting documentation. You have the option to upload more than one file as well. Once you are done, hit “Submit” at the bottom of the page and your submission will be submitted to OSSBA.



Events Tab

Register Dropdown

1. Click on “Events” and then select “Register”
2. Please select the contact you need to register under the “Contacts” drop down menu and then select which event you need to register your contact for from the “Events” drop down menu.
3. You will see the session popup on the right-hand side under “Session.” Please select the session you want to register for and then hit “Add Registration.”
4. You will notice your registration populates down below with a total amount and what session and event you choose. If you need to delete your registration and start over, just select the “Delete” button and this will delete your registration.
5. Continue this process for each member you need to register.
6. Once you’re done registering your contacts, select your payment method, “Credit Card” or “Bill Me Later.” Click print registrations to and then click “Continue.” You will not have a print option after clicking “Continue.”

Event Registration

Choose the contact you want to register, and the event you want to register them for. The session(s) for the selected event will then be displayed; choose all the sessions you want to register the contact for.

Click "Add Registration". Be patient while it processes, and is added to this Order.

Repeat as necessary.

Contacts

Select the contact that you want to register for events.

Contacts:

Karen Shuey

Select an event to see the available sessions.

Event Type:

Workshop

Event:

2018 - CEO Workshop - OKC - 9/26/2018

Enter any Special Requests(if applicable) such as food allergies or other accommodations.

Special Requests:

Special Requests

Session

Select the sessions that you would like to register the selected contact to attend.

Session:

(Registered) 2018 - CEO Workshop - OKC - Session ~ $250

+ Add Registration

− Cancel Order

Registrations on this Order:

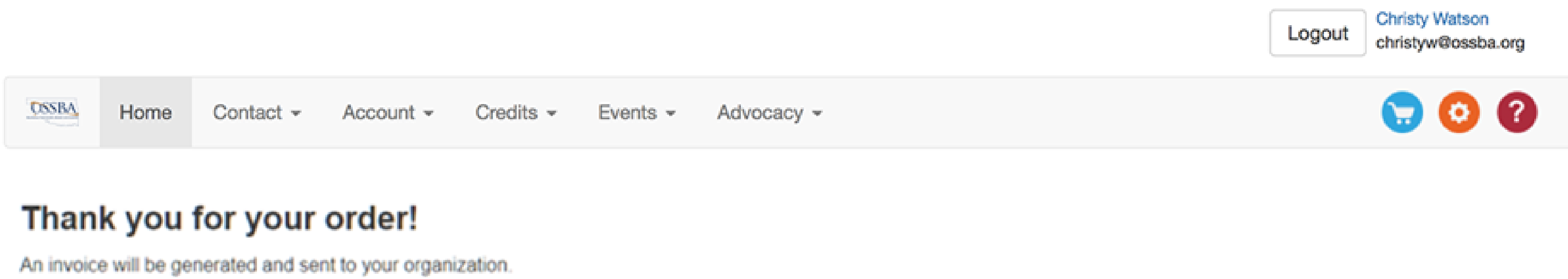
Name	Event	Session	Cost	
2018 - CEO Workshop - OKC - Session - Karen Shuey	2018 - CEO Workshop - OKC	2018 - CEO Workshop - OKC - Session	$250.00	Delete
			Total: $250.00	

Print Registrations

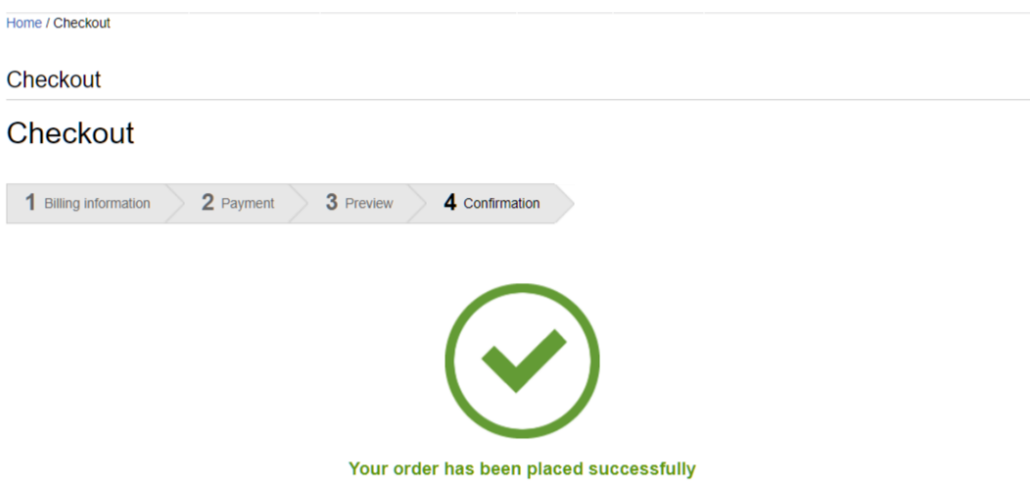
Select your payment type and click continue.

- Bill Me Later
- Credit Card

Continue

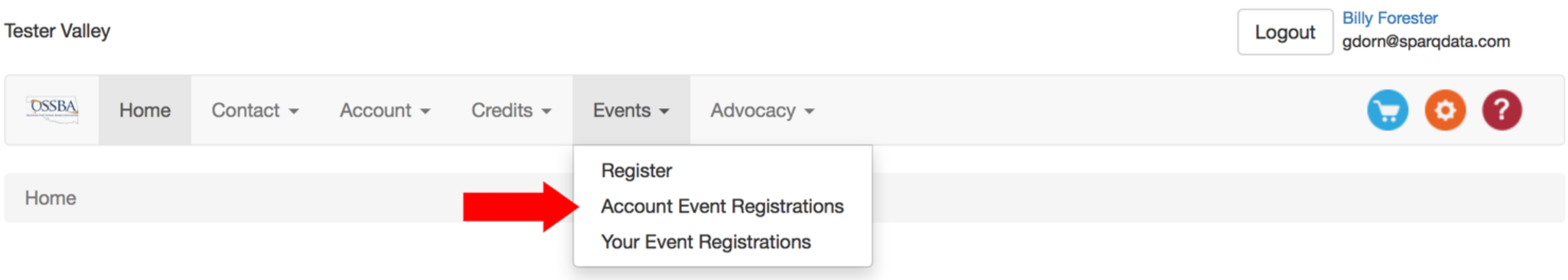


1. If you choose "Credit Card," you will now be directed to our shopping cart and you will see an event registration in your shopping cart with an invoice number.
2. Once you have verified your information, click "Checkout." This will take you to the next screen to enter your billing information and payment.
3. Once you get to the payment tab, verify your information, and then click "Place Order."
4. You should receive the following message: "Your order has been placed successfully."



Account Event Registration Dropdown

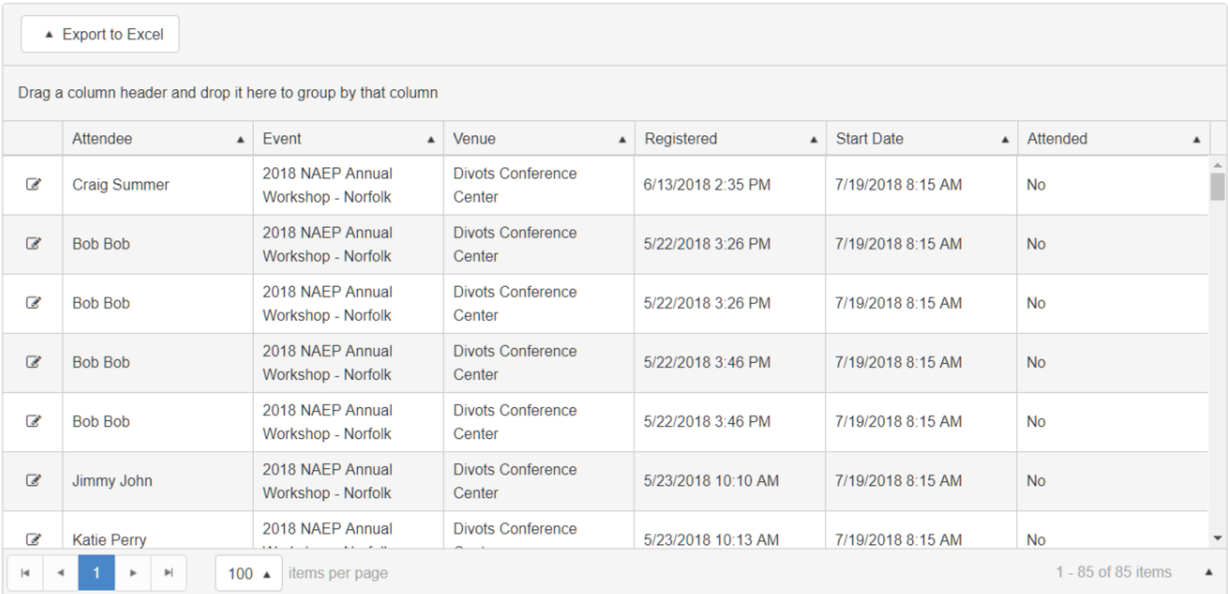
- Click on “Events” and then select “Account Event Registrations.”



Features on the Account Event Registration Dropdown

1. This page will display all your contacts that are registered for an event.
2. You can “Export to Excel” and seen above and you can also drag the column headings again to group by “Event”, “Attendee”, etc.

Event Registrations


Export to Excel

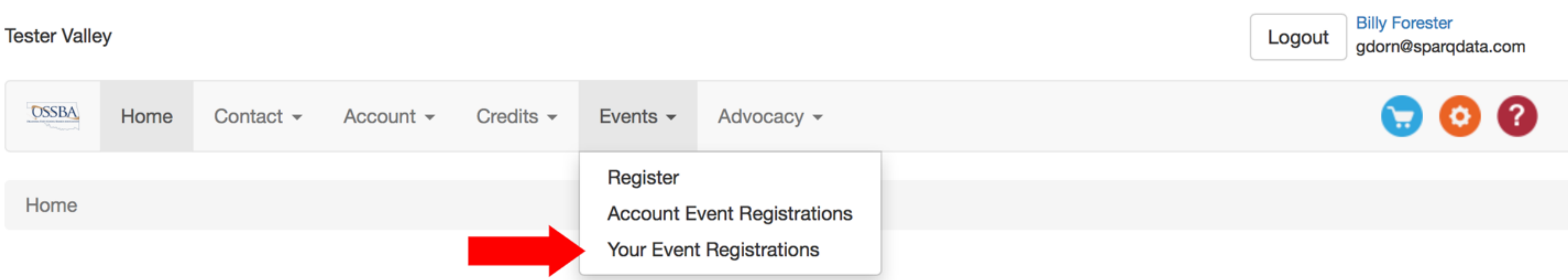
Drag a column header and drop it here to group by that column

	Attendee	Event	Venue	Registered	Start Date	Attended
	Craig Summer	2018 NAEP Annual Workshop - Norfolk	Divots Conference Center	6/13/2018 2:35 PM	7/19/2018 8:15 AM	No
	Bob Bob	2018 NAEP Annual Workshop - Norfolk	Divots Conference Center	5/22/2018 3:26 PM	7/19/2018 8:15 AM	No
	Bob Bob	2018 NAEP Annual Workshop - Norfolk	Divots Conference Center	5/22/2018 3:26 PM	7/19/2018 8:15 AM	No
	Bob Bob	2018 NAEP Annual Workshop - Norfolk	Divots Conference Center	5/22/2018 3:46 PM	7/19/2018 8:15 AM	No
	Bob Bob	2018 NAEP Annual Workshop - Norfolk	Divots Conference Center	5/22/2018 3:46 PM	7/19/2018 8:15 AM	No
	Jimmy John	2018 NAEP Annual Workshop - Norfolk	Divots Conference Center	5/23/2018 10:10 AM	7/19/2018 8:15 AM	No
	Katie Perry	2018 NAEP Annual	Divots Conference	5/23/2018 10:13 AM	7/19/2018 8:15 AM	No

1 | 100 items per page | 1 - 85 of 85 items

Your Event Registration Dropdown

- Click on “Events” and then select “Your Event Registrations.”



Features on the Account Event Registration Dropdown

1. This brings up a listing of your current registrations that you are registered for.

Home / Registrations

Event Registrations

Export to Excel

	Event	Date Registered	Start Date	Venue	Attended
	2018 NAEP Annual Workshop - Lincoln	06-13-2018	7/17/2018 8:15 AM	NASB Conference Room	No
	2018 NAEP Annual Workshop - Kearney	06-13-2018	7/12/2018 8:15 AM	Holiday Inn - Kearney	No
	2018 School Law Seminar - Kearney	06-13-2018	6/15/2018 8:30 AM	Holiday Inn - Kearney	No
	2018 Education Forum	05-04-2018	2/21/2018 1:00 PM	Younes Conference Center	No

Advocacy

Advocacy Feedback Form

Please use this form to share interactions with your state legislators. This helps OSSBA with its advocacy efforts.

School Board Advocacy Feedback

After contacting a legislator, please complete this form.

This information is important to OSSBA's ongoing advocacy efforts.

First Name *

Last Name *

Email Address

Organization

Legislator Contacted

Contact Date