CSBA Annual Roster Update User Guide

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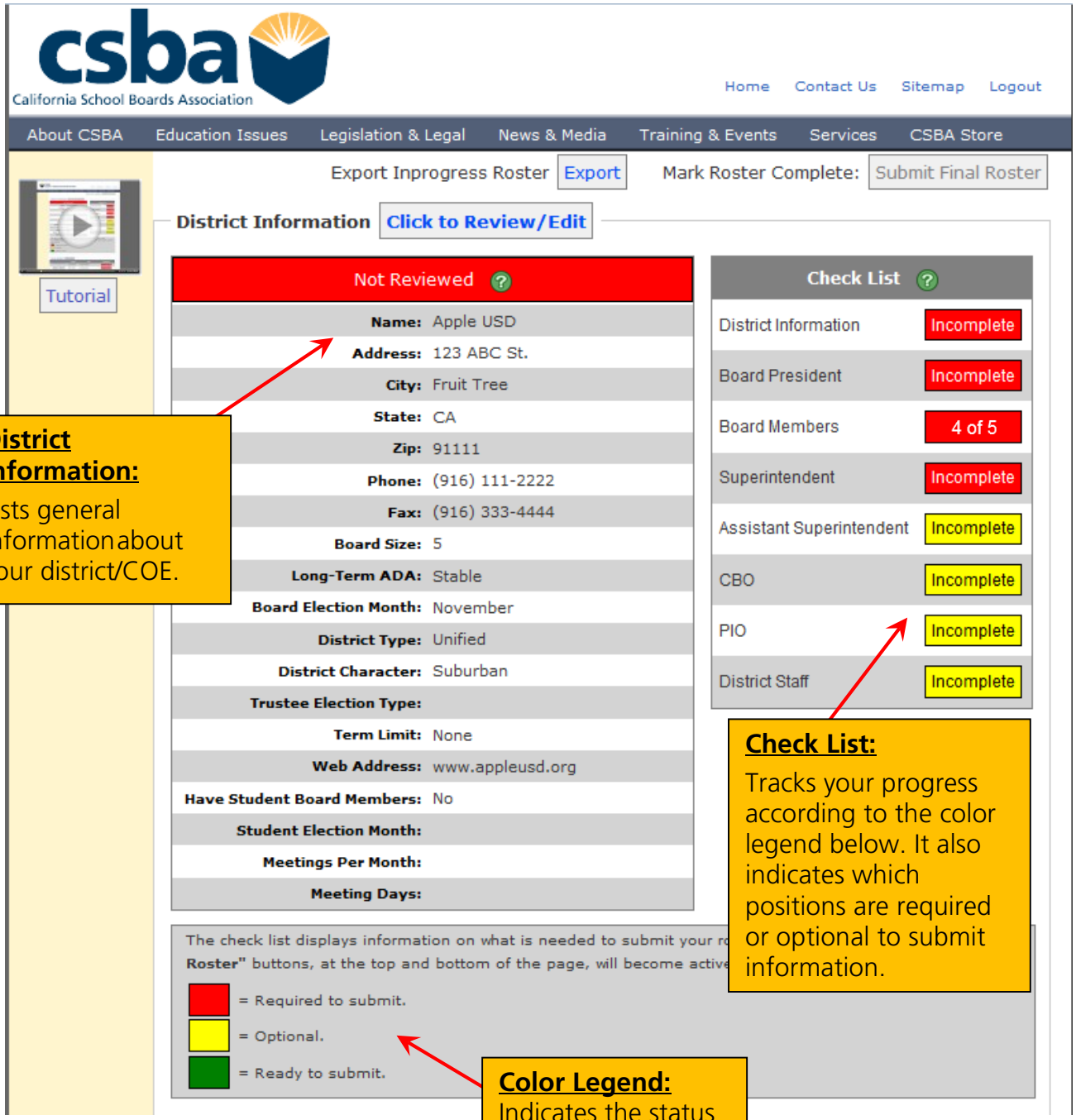
Logging In

1. Go to: **http://roster.csba.org**

    a. Enter your My CSBA **username and password**
    b. Select **Login**
    c. Your username is the email address where you receive CSBA communications – click Forgot your password if you need to establish a new password or reset an existing password.

Overview

(TOP HALF OF SCREEN)

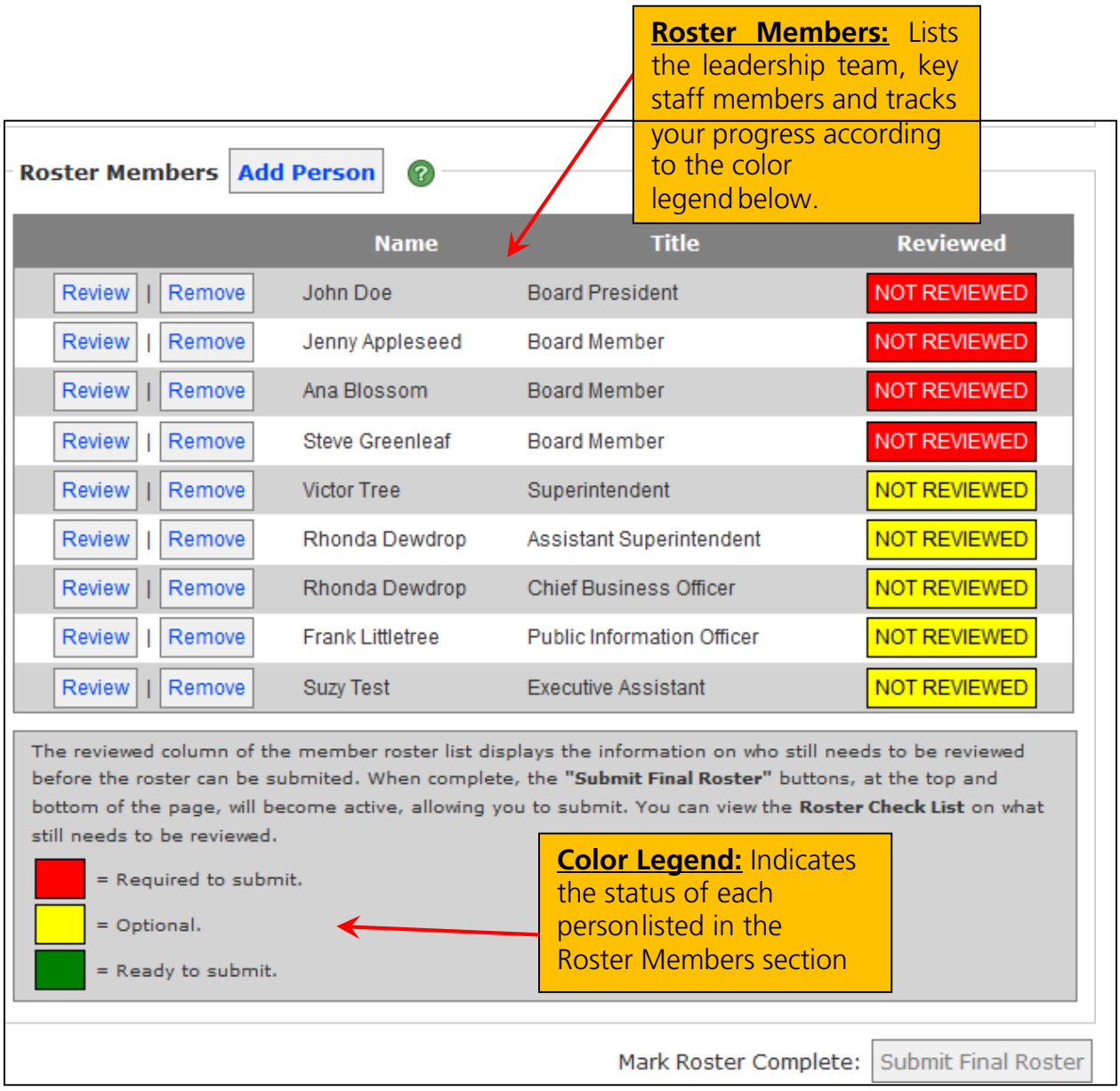


District Information:
Lists general information about your district/COE.

Check List:
Tracks your progress according to the color legend below. It also indicates which positions are required or optional to submit information.

Color Legend:
Indicates the status of each item listed in the Check List section above.

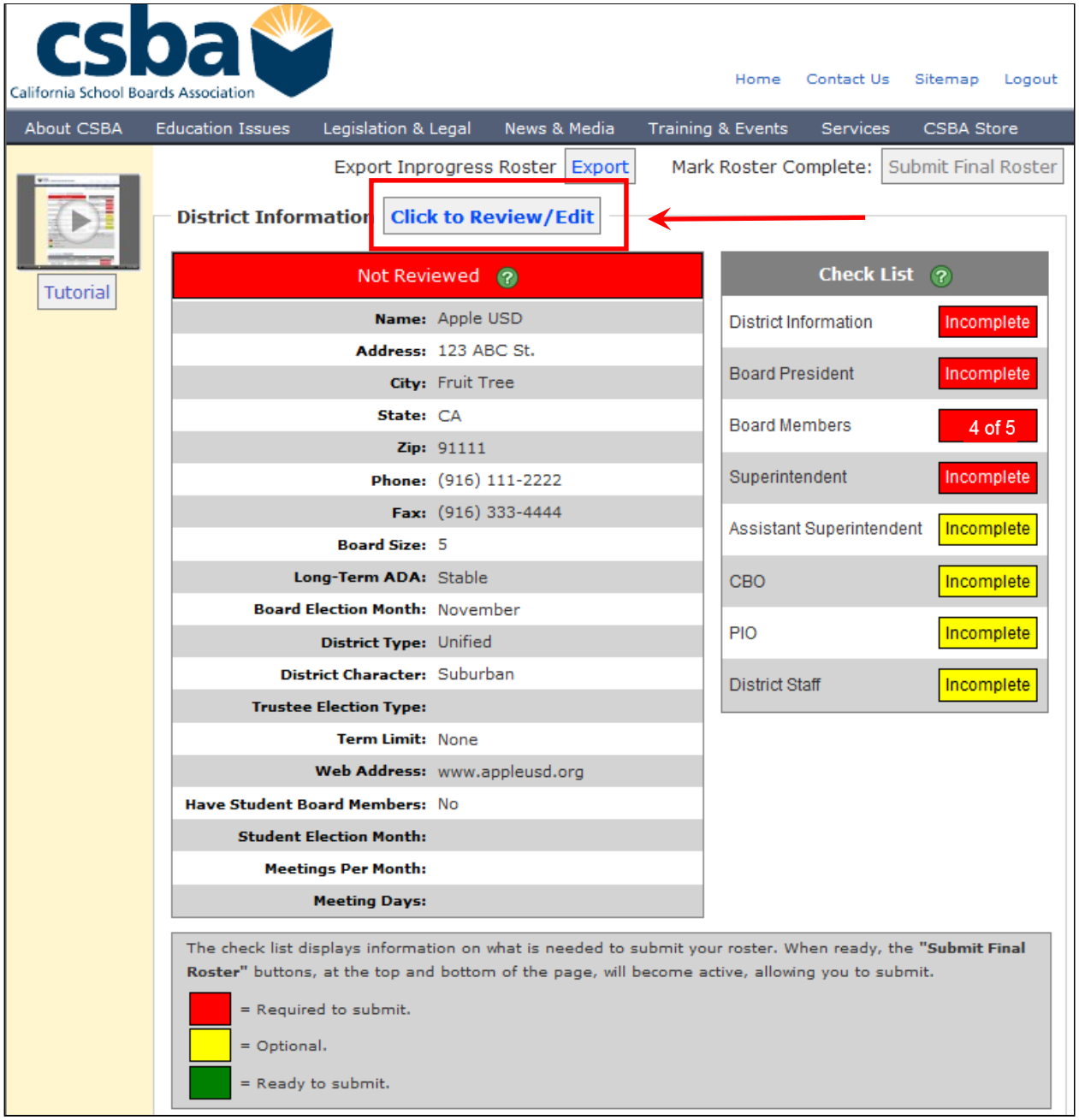
(BOTTOM HALF OF SCREEN)



Review District Information

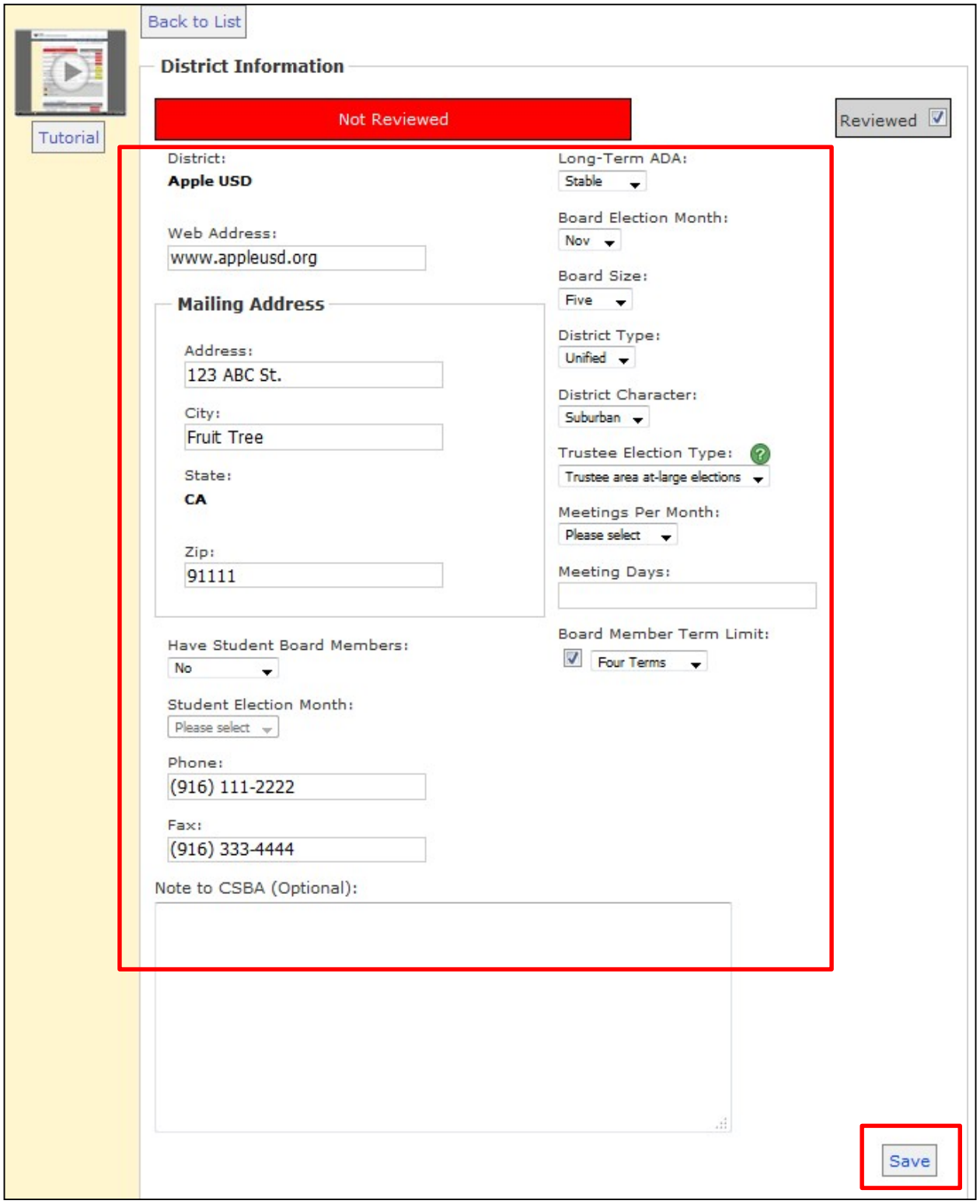
1. Next to **District Information**, select **Click to Review/Edit**.

   NOTE: Even if there are no changes in this section, you must continue and complete thesesteps.

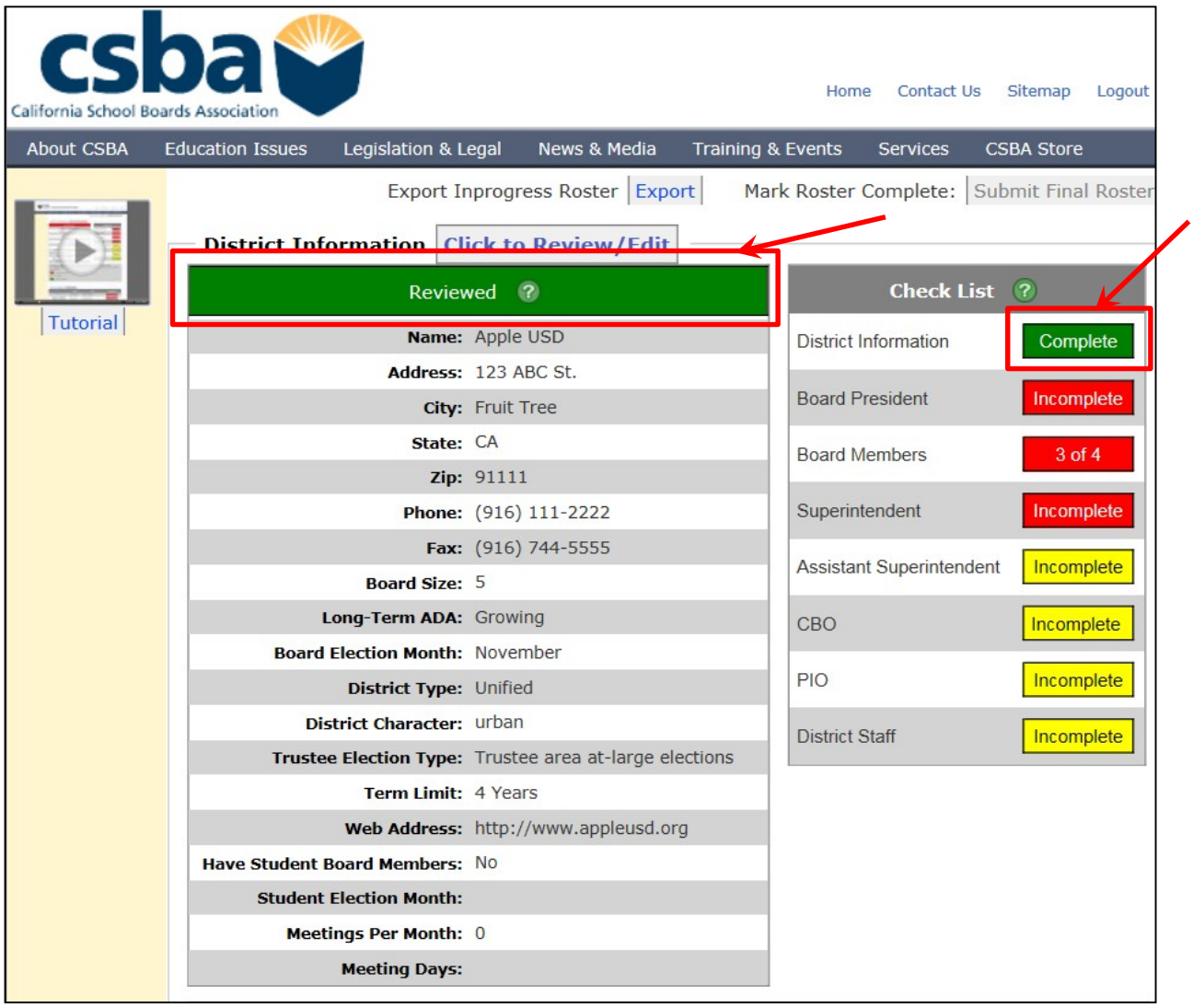


2. **Review all pieces of information below and edit if needed.** If there is additional information you would like us to know, please enter it in the "Note to CSBA" textbox.

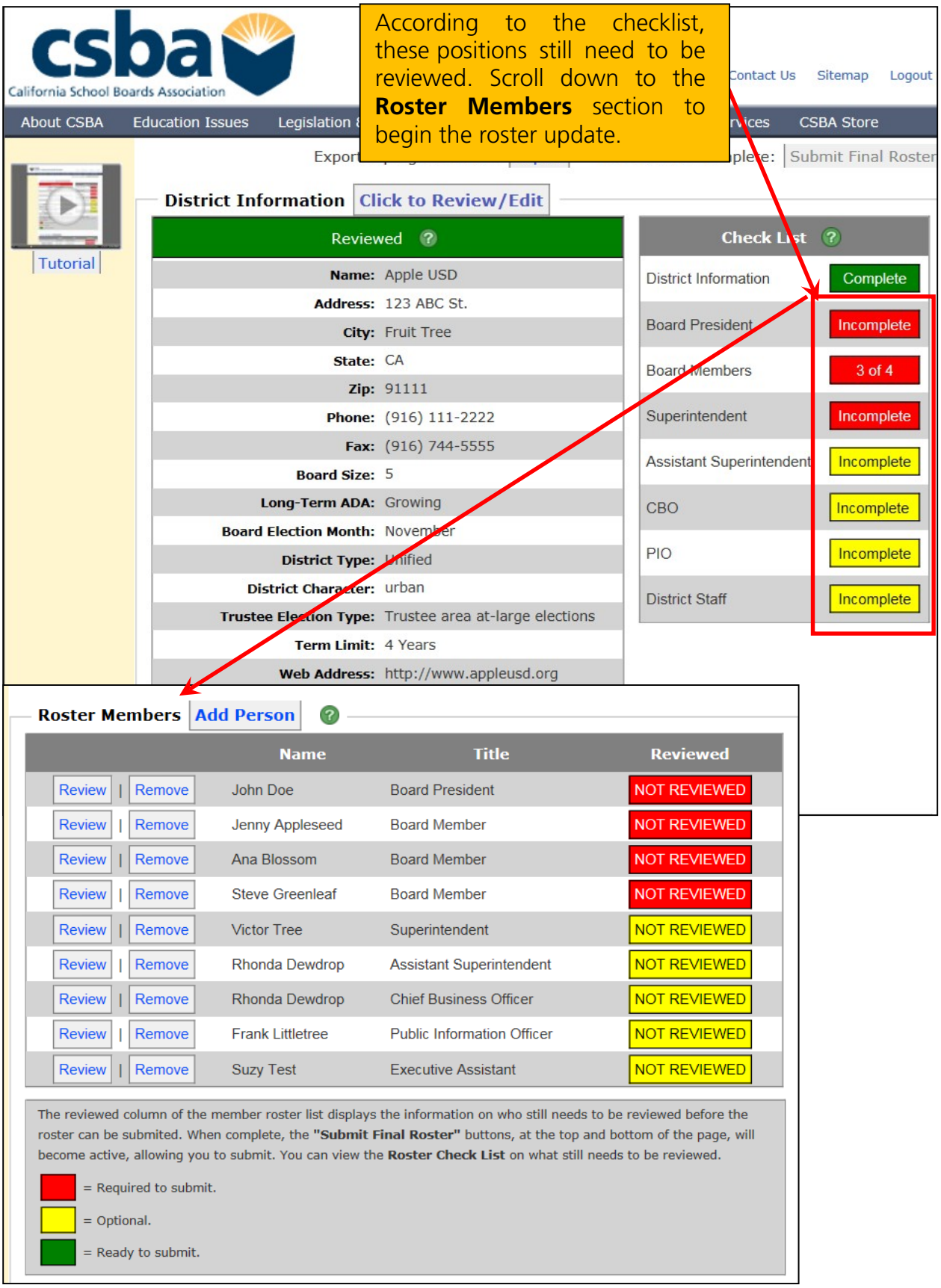
    a. After all information has been reviewed and/or edited, select **Save** at the bottom.



b. After completing "Step a" in the previous page, you will be taken back to the main page. **The sections outlined below should now be green and the status is "Reviewed" and "Complete".**



Review Roster



How to Review / Edit Board President and Board Members

In order to change an individual from **Board Member to Board President** or from **Board President to Board Member**, that individual must be removed from your roster and re-added with their corresponding position.

Please see *Adding a New Board President or Board Member* and/or *How to Remove a Person* sections in this document

If a current Board President is serving an additional year as Board President:
Make any necessary changes to that individual's information, Save and proceed.

If a current Board Member is elected Board President for the coming year:
Select **Remove** to remove the **Board Member** from your roster, and create a new record with the position of **Board President** along with that individual's current information.

(see *Adding a New Board President or Board Member*).

If a current Board Member is no longer President but remains on the board for the coming year:
Select **Remove** to remove the **Board President** from your roster, and create a new record with the position of **Board Member** along with that individual's current information.

(see *Adding a New Board President or Board Member*).

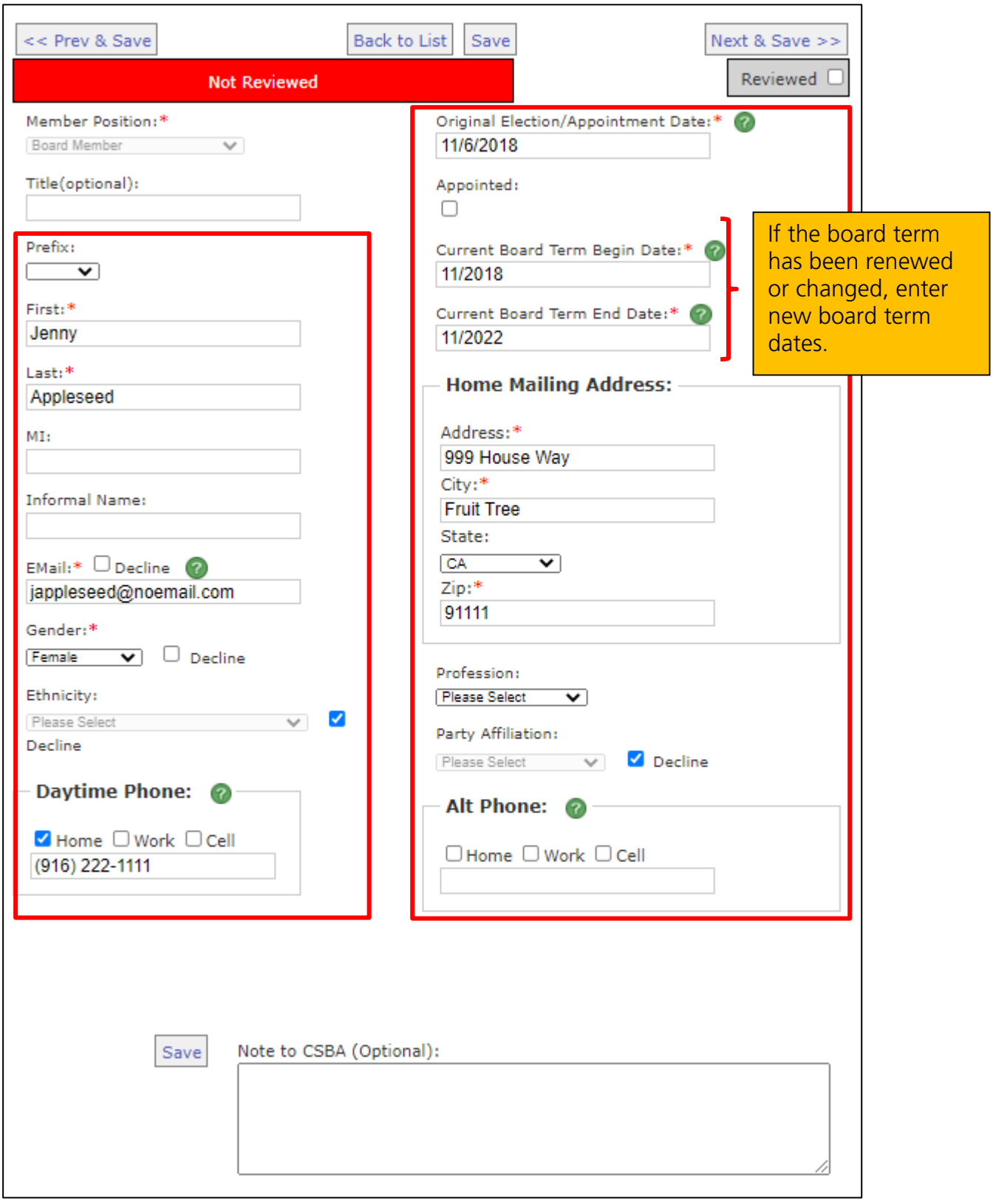
IMPORTANT NOTE:

For a three (3) member board, your roster will need to show one (1) completed **Board President** position and two (2) completed **Board Member** positions (or any applicable vacancies) in order to submit your final roster update.

For a five (5) member board, your roster will need to show one (1) completed **Board President** position and four (4) completed **Board Member** positions (or any applicable vacancies) in order to submit your final roster update.

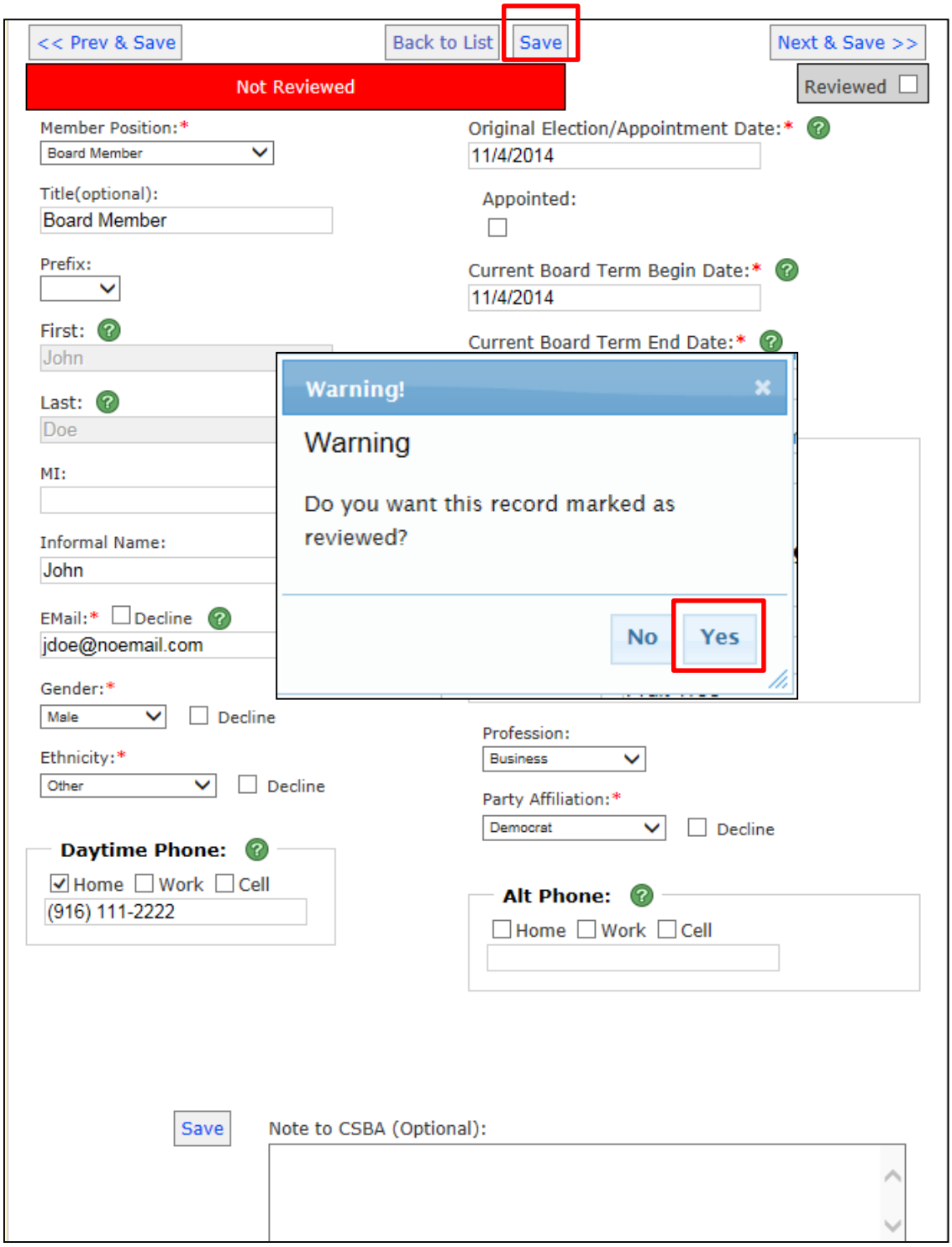
For a seven (7) member board, your roster will need to show one (1) **Board President** position and six (6) completed **Board Member** positions (or any applicable vacancies) in order to submit your final roster update.

NOTE: In adding a new position or editing an existing position, if there is additional information that we need to be aware of, please enter this in the "Note to CSBA" section. Specific position titles can also be entered under "Title (optional)."

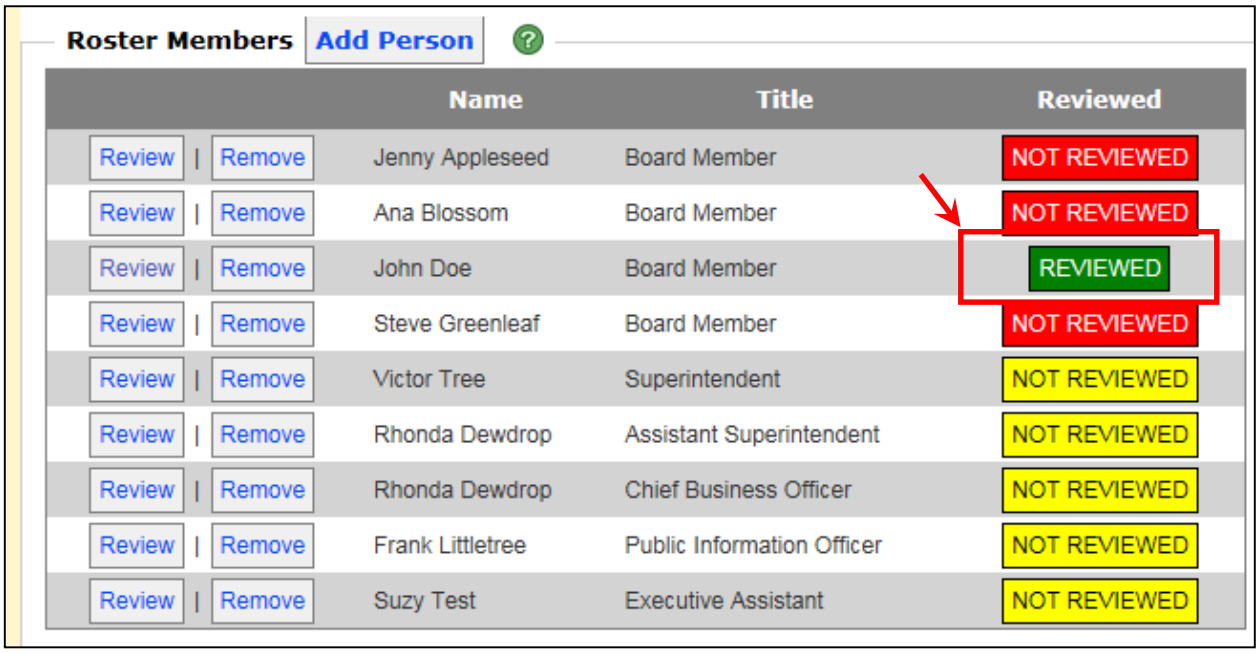


When all the information has been reviewed and/or edited, select **Save** (at the top or at the bottom).

The pop-up box below will appear – select **Yes**.



1. You will be taken back to the main screen and you will now see that the record is marked in green and "Reviewed" status.

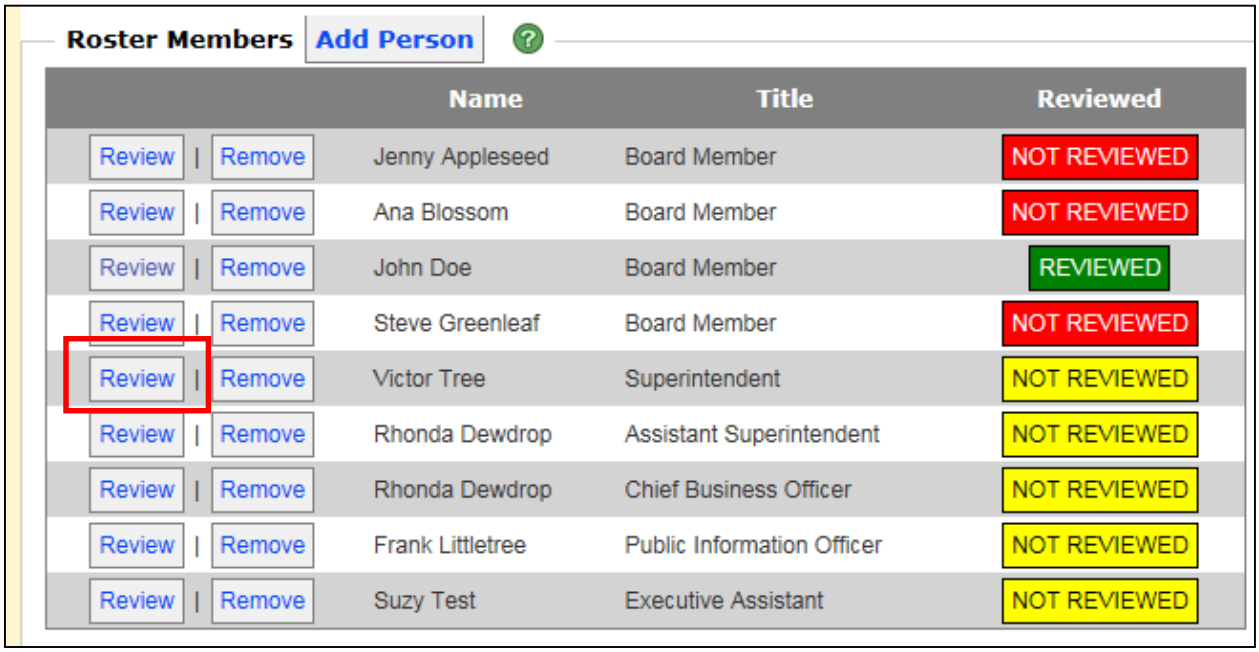


2. Repeat to review / edit all the rest of the Board Members.

   a. If a person needs to be **added**, refer to section **"How to Add a Person"**.
   b. If a person needs to be **removed**, refer to section **"How to Remove a Person"**.

How to Review / Edit a Superintendent

1. Select **Review** next to the person's name.



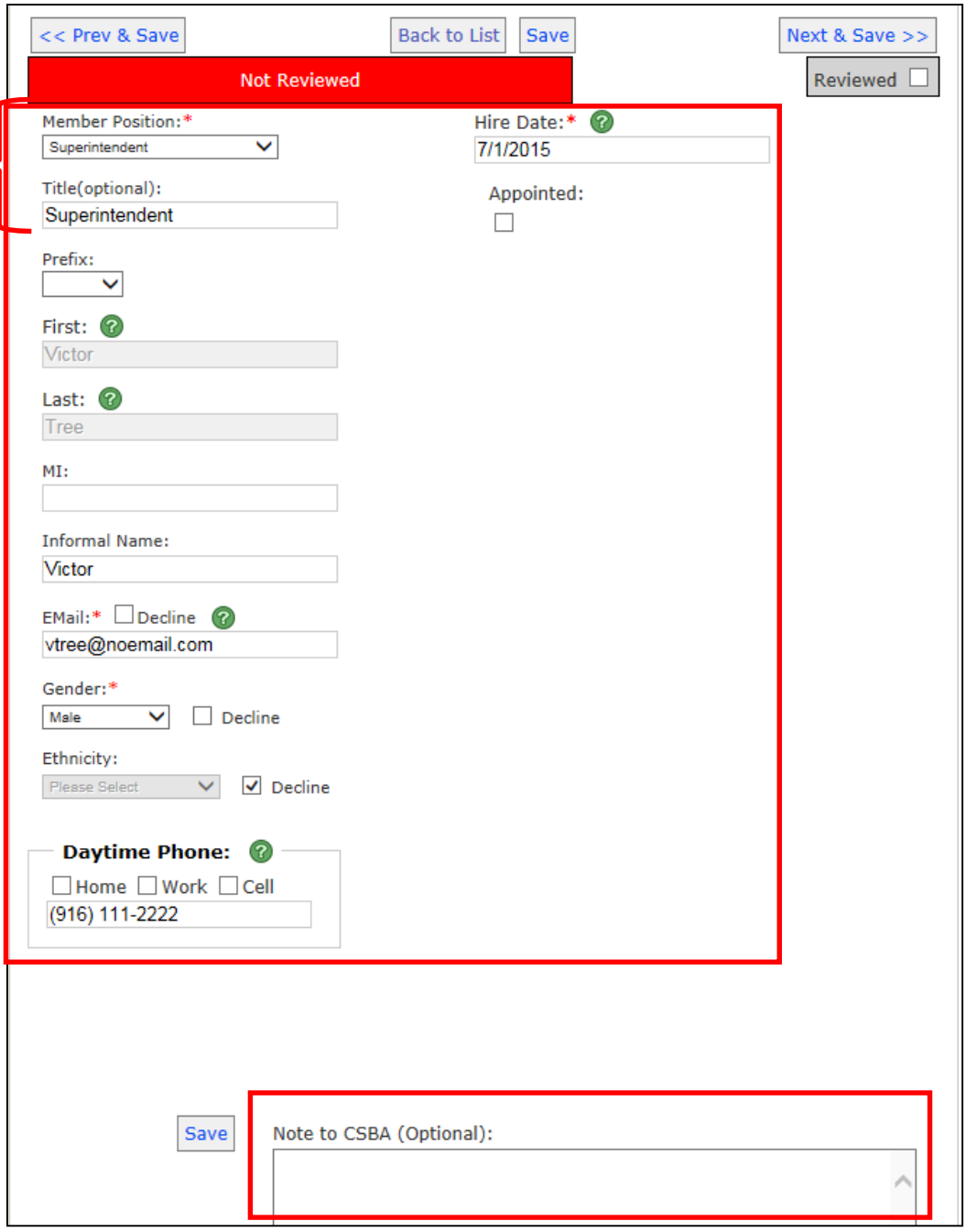
2. **Review and/or edit the information below** and proceed to the next step.

   NOTE: If there is additional information that we need to be aware of (i.e. name changes), please enter this in the "Note to CSBA" section.

If you have an Interim Superintendent:

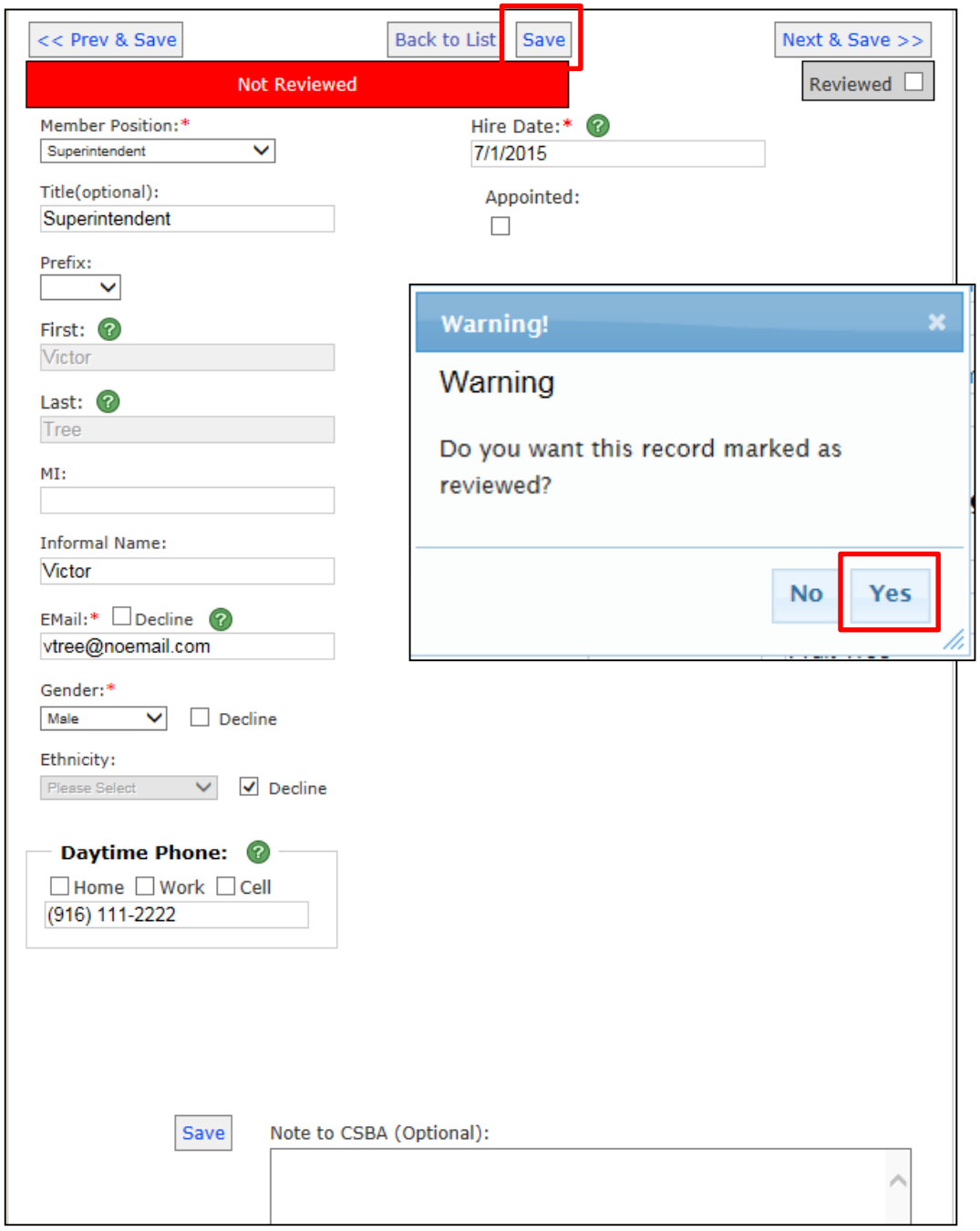
Create a new record with the Member Position of "Interim Superintendent."

Please let us know in the "Note to CSBA" section the timeline that the Board plans to select a new Superintendent.

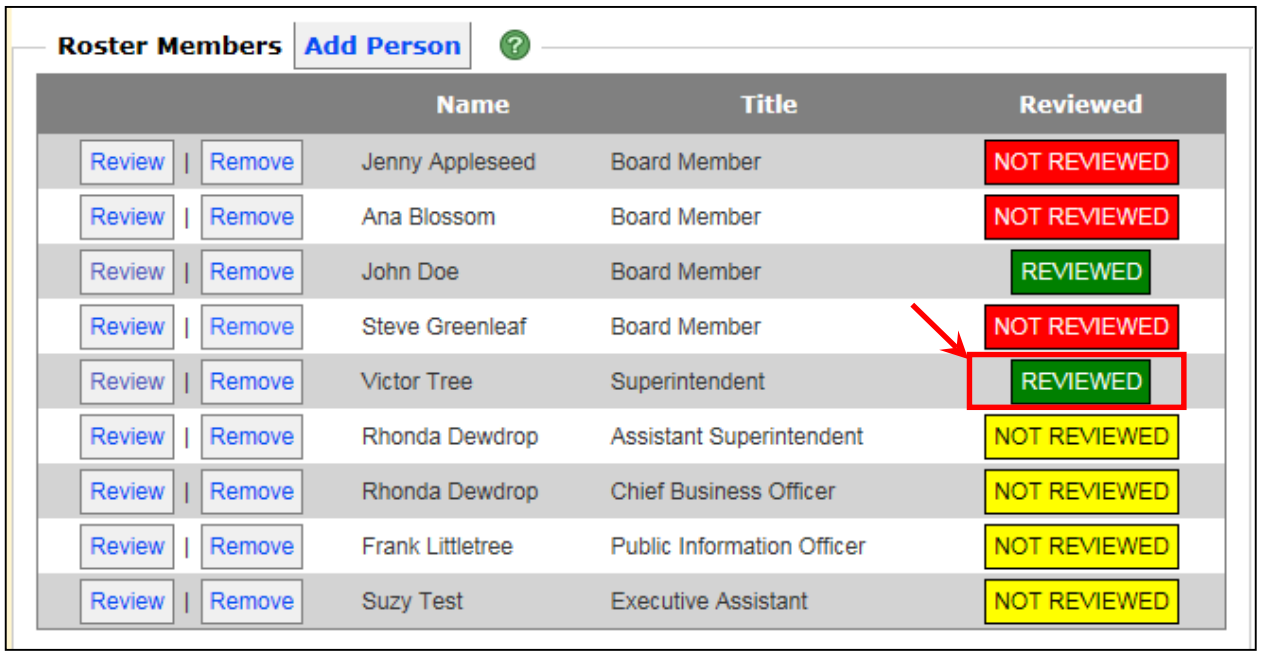


3. When all the information has been reviewed and/or edited, select **Save (at the top or atthe bottom)**.

   The pop-up box below will appear – select **Yes**.



4. You will be taken back to the main screen and you will now see that the record is markedin green and "Reviewed" status.

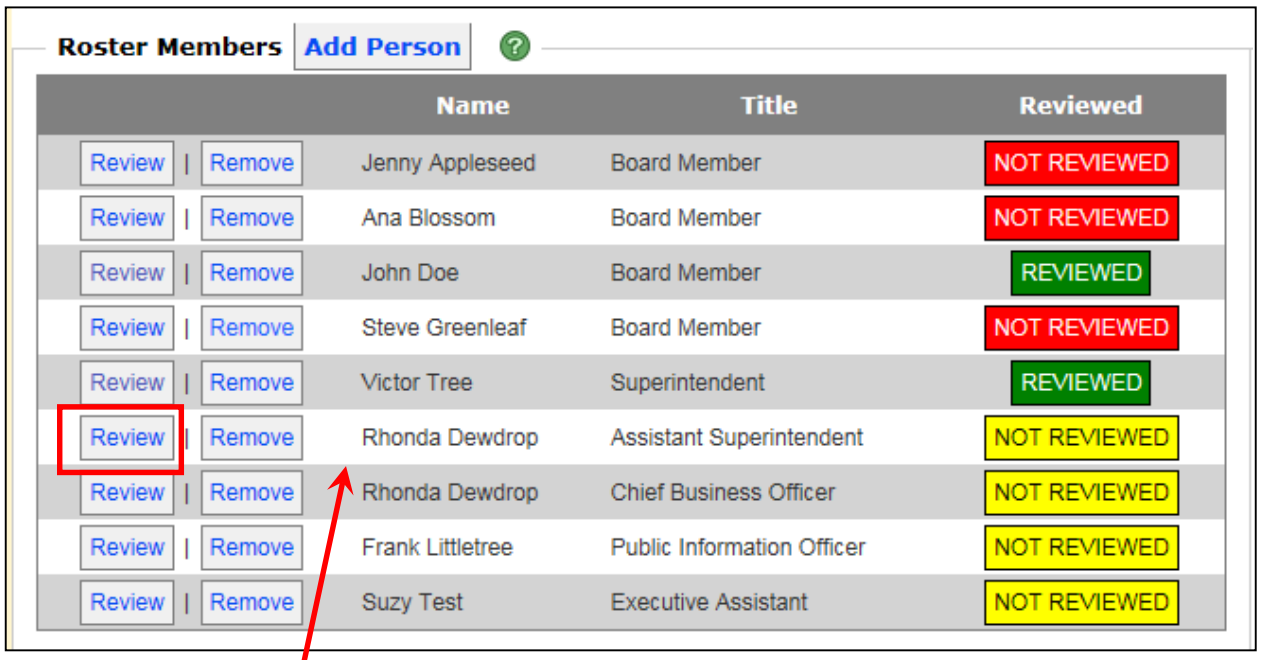


How to Review / Edit Key Staff Members

Key staff members that are typically listed on the roster:

- Assistant / Deputy Superintendent
- Chief Business Officer
- Executive Assistant
- Facility Manager
- Public Information Officer

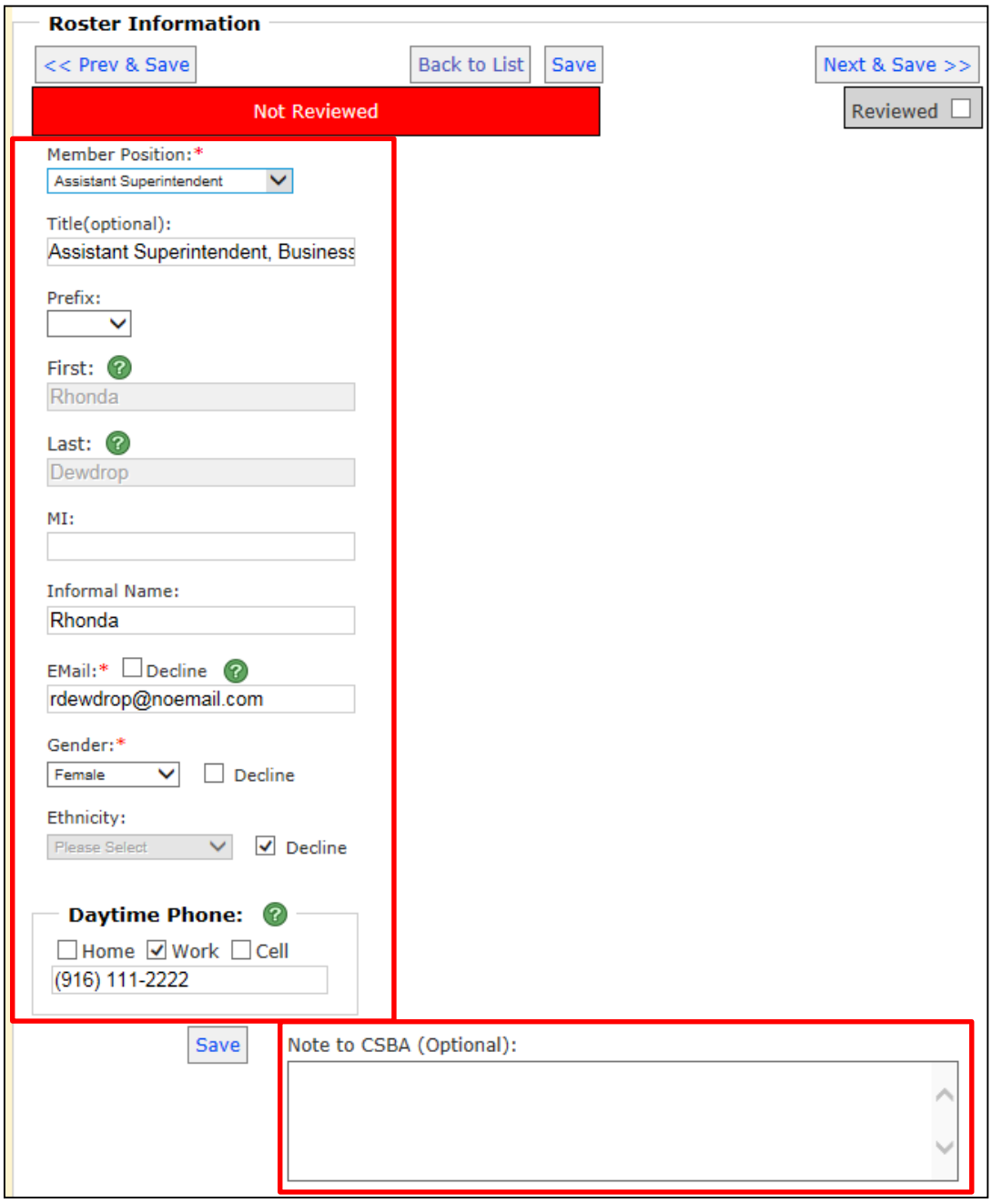
1. Select **Review** next to the person's name.



NOTE: Notice that Rhonda Dewdrop appears twice – as Assistant Superintendent and Chief Business Officer. In some cases, this may occur if a person holds the capacity of two positions (i.e. Assistant Superintendent of Business Services, or a Superintendent that is also the Facility Manager). If this instance occurs and is correct, continue with reviewing and/or editing both records. If this person does not serve in both capacities anymore, follow the steps in section "How to Remove a Person".

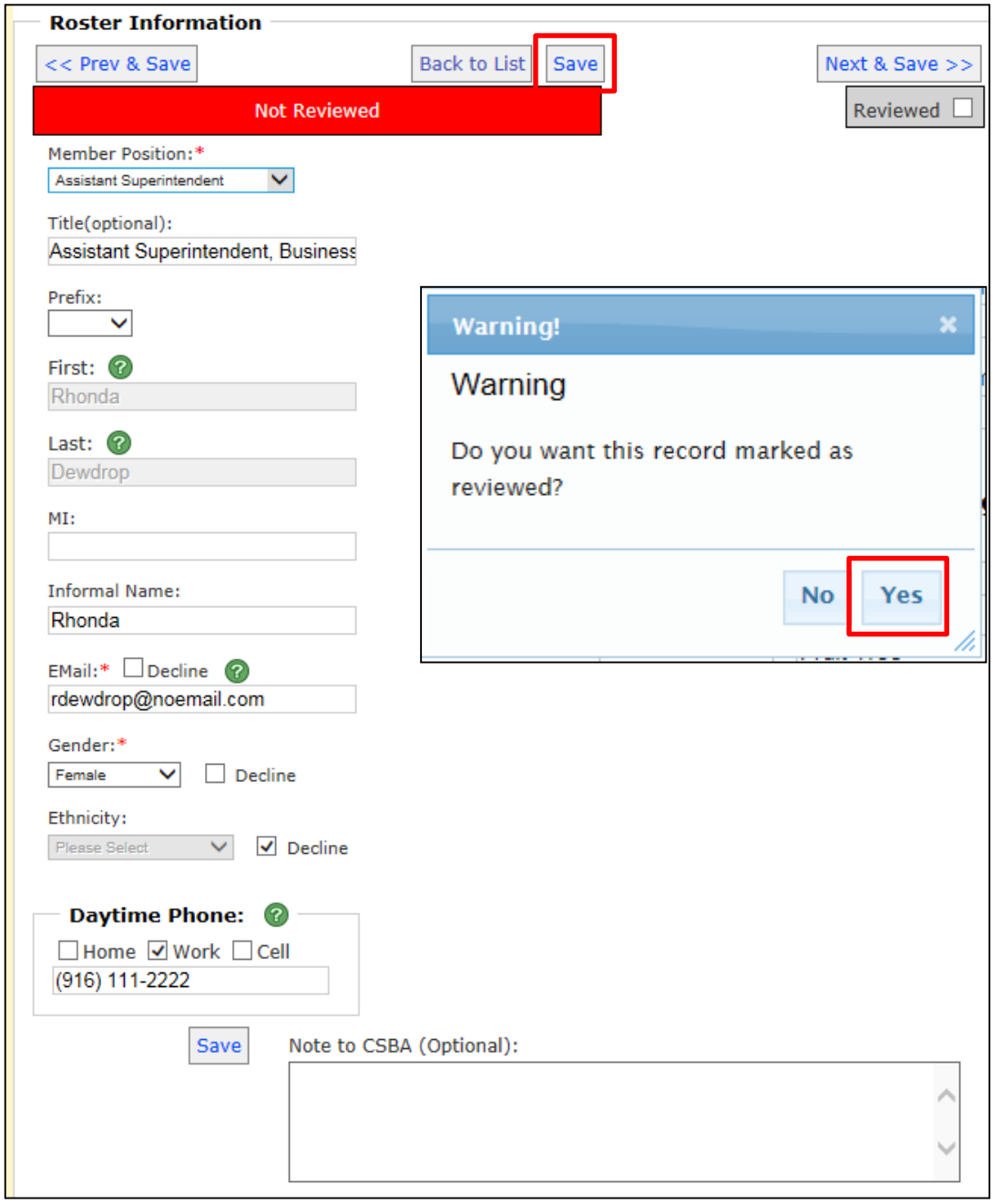
2. **Review and/or edit the information below** and proceed to the next step.

NOTE: If there is additional information that we need to be aware of (i.e. name changes), please enter this in the "Note to CSBA" section.

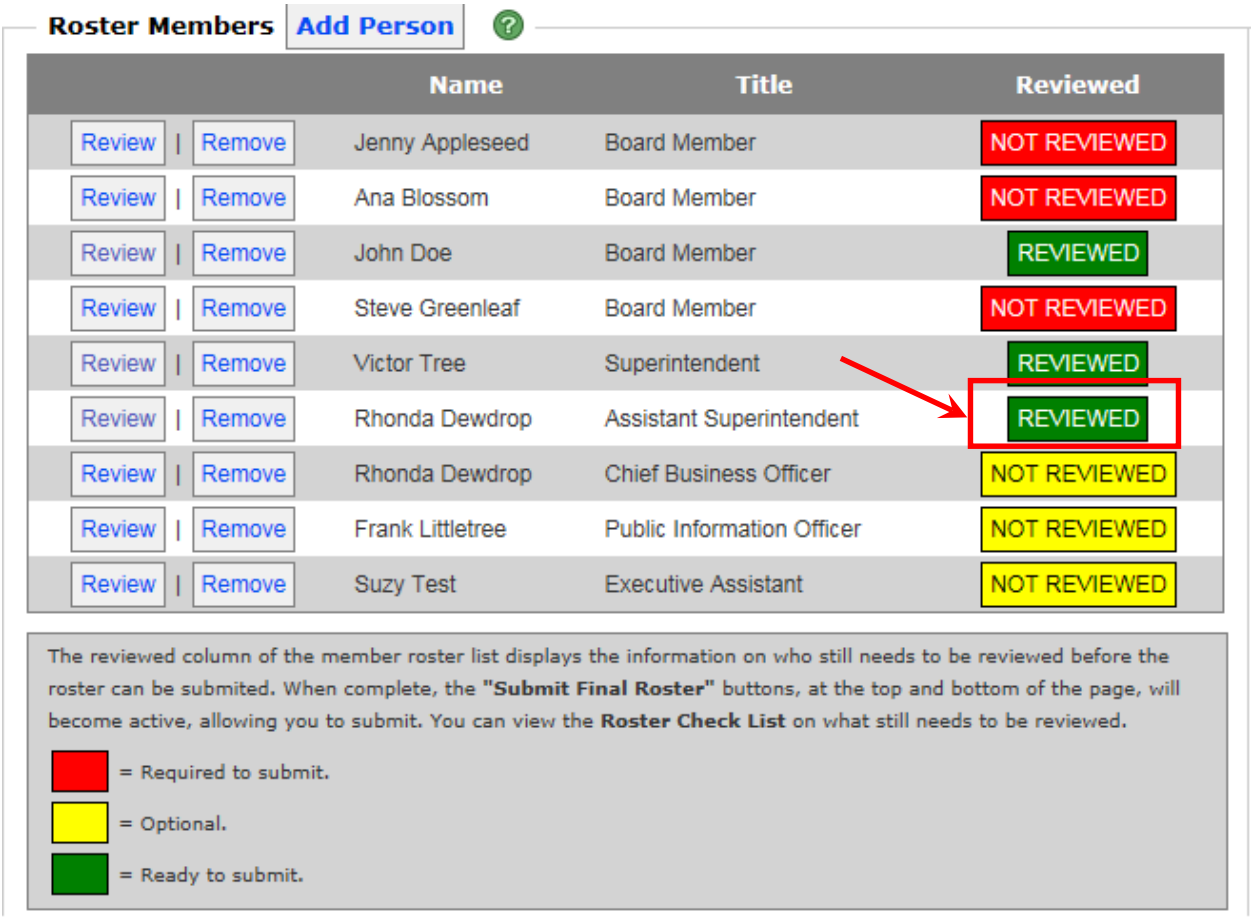


3. When all the information has been reviewed and/or edited, select **Save (at the top or atthe bottom)**.

   The pop-up box below will appear – select **Yes**.



4. You will be taken back to the main screen and you will now see that the record is marked in green and "Reviewed" status .

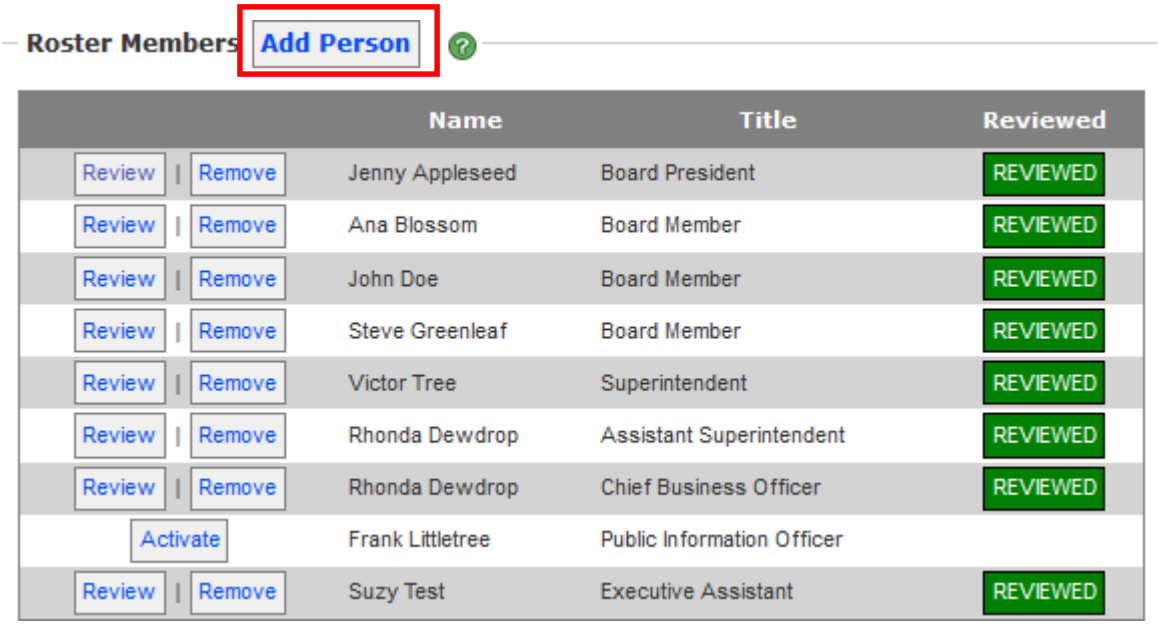


5. Repeat from Step 1 to review / edit all the rest of the key staff members.

   a. If a person needs to be **added**, refer to section **"How to Add a Person"**.
   b. If a person needs to be **removed**, refer to section **"How to Remove a Person"**.

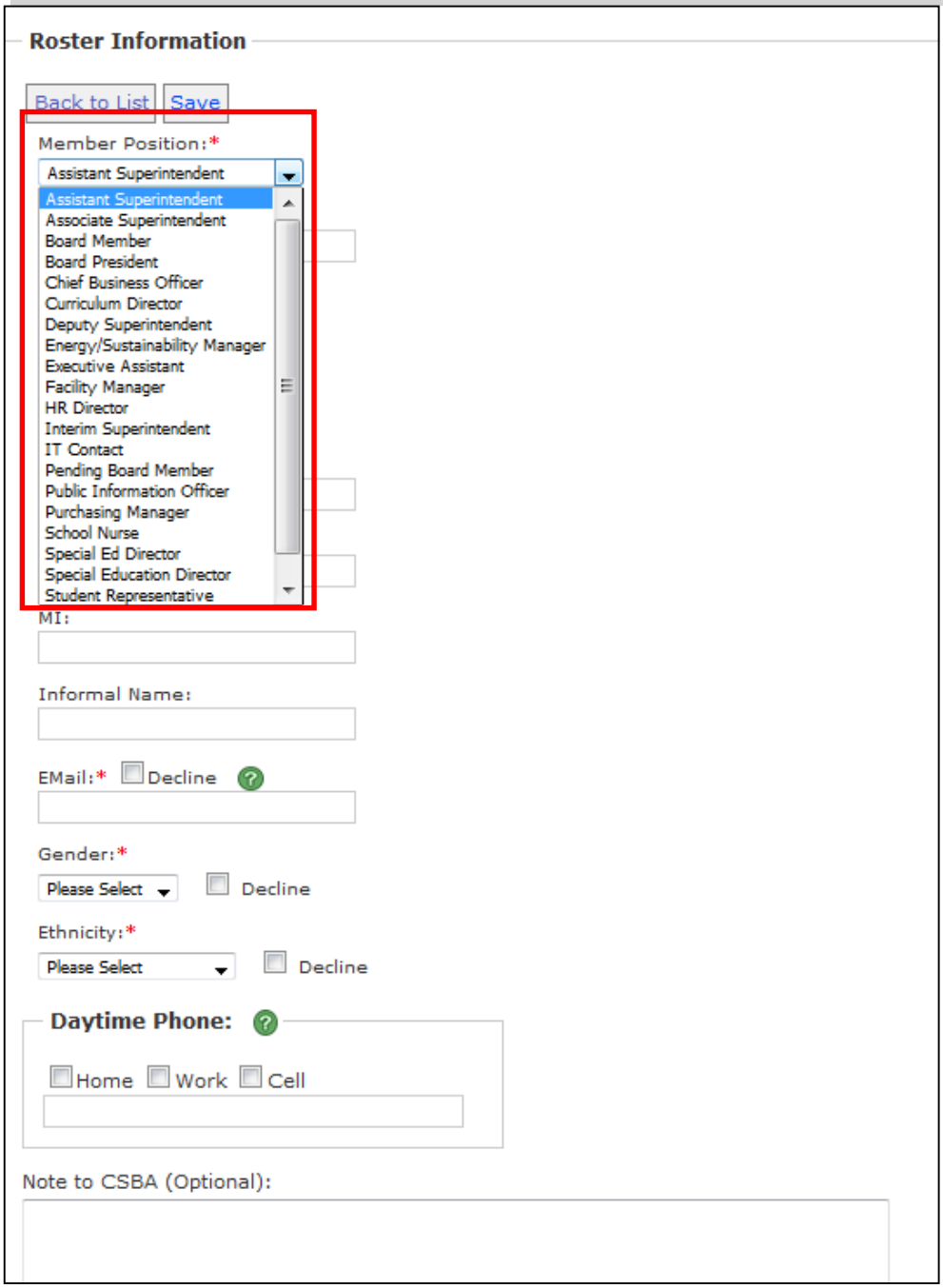
How to Add a Person

1. In the **Roster Members** section select **Add Person**.



2. A blank form will appear as shown below.

Begin by selecting a position under the Member Position drop-down list. Depending on your selection, the form may reveal additional fields. For example, if adding a Board Member, additional fields will appear requesting information such as board term dates.) Complete the fields that are revealed on the form for each type of position you are adding.

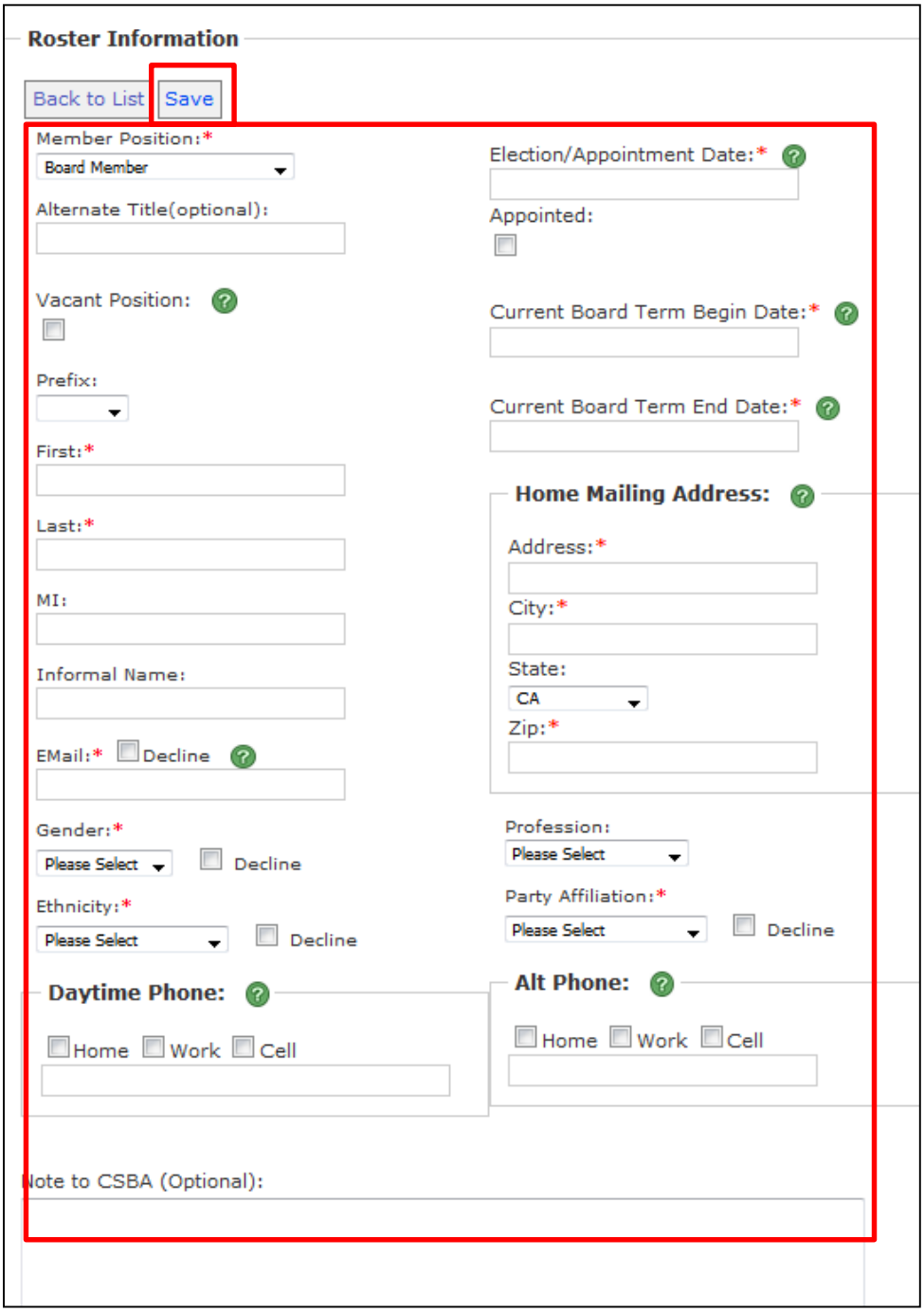


Adding a New Board President or Board Member

1. Under **Member Position**, select **Board Member or Board President**.

   ***NOTE:** Board Members who are elected as Board President for the new year, or Board Presidents who remain on the board following their term as Board President, will need to be removed and readded. Please see "How to Review / Edit Board President and Board Member."*

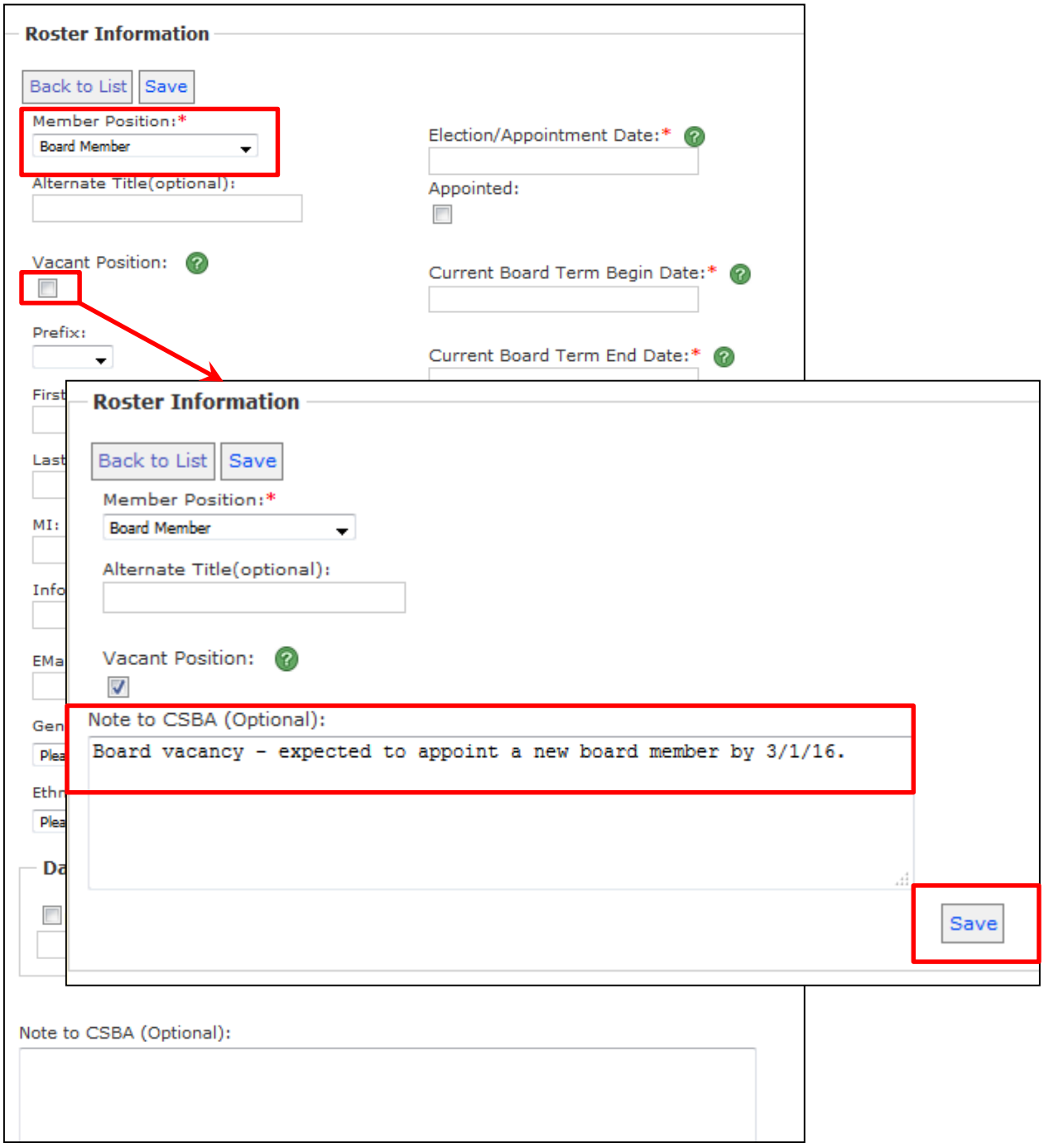
2. Complete as many fields as possible in the screen below. Items marked with an asterisk * are required fields. When completed, select **Save**.



Adding a Board Vacancy

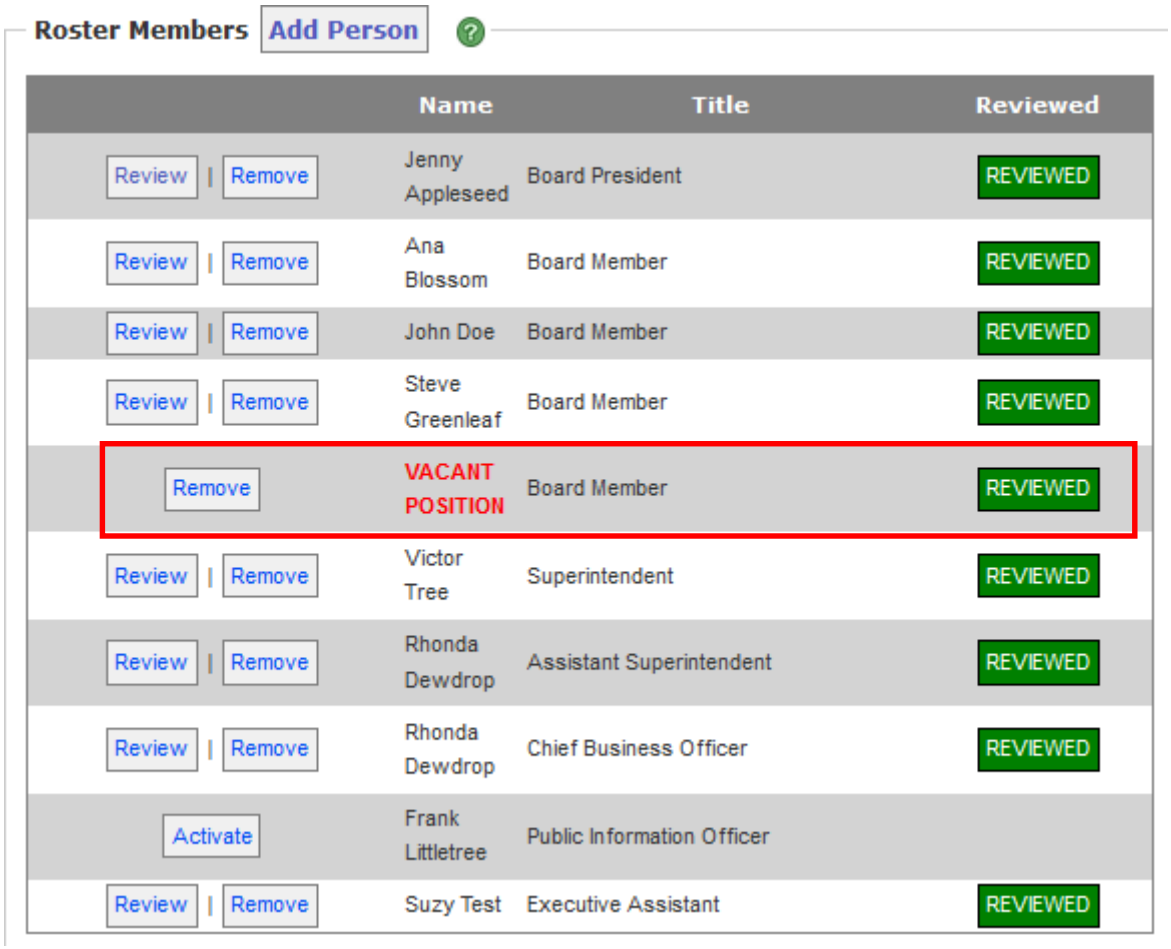
If you have a board vacancy, please add a record to indicate this by following these steps.

1. Under **Member Position**, select **Board Member**.
2. Next, **check the box under Vacant Position**. After checking this box, the form will changeas shown below. Please add a **note in the "Note to CSBA" section** to inform us when thevacancy is expected to be filled and we will follow-up accordingly when the time comes. After you are finished, select **Save.**



3. The vacant board member position will be listed as shown below when taken back to themain screen.

   If the vacant position was added in error, simply select the Remove button.

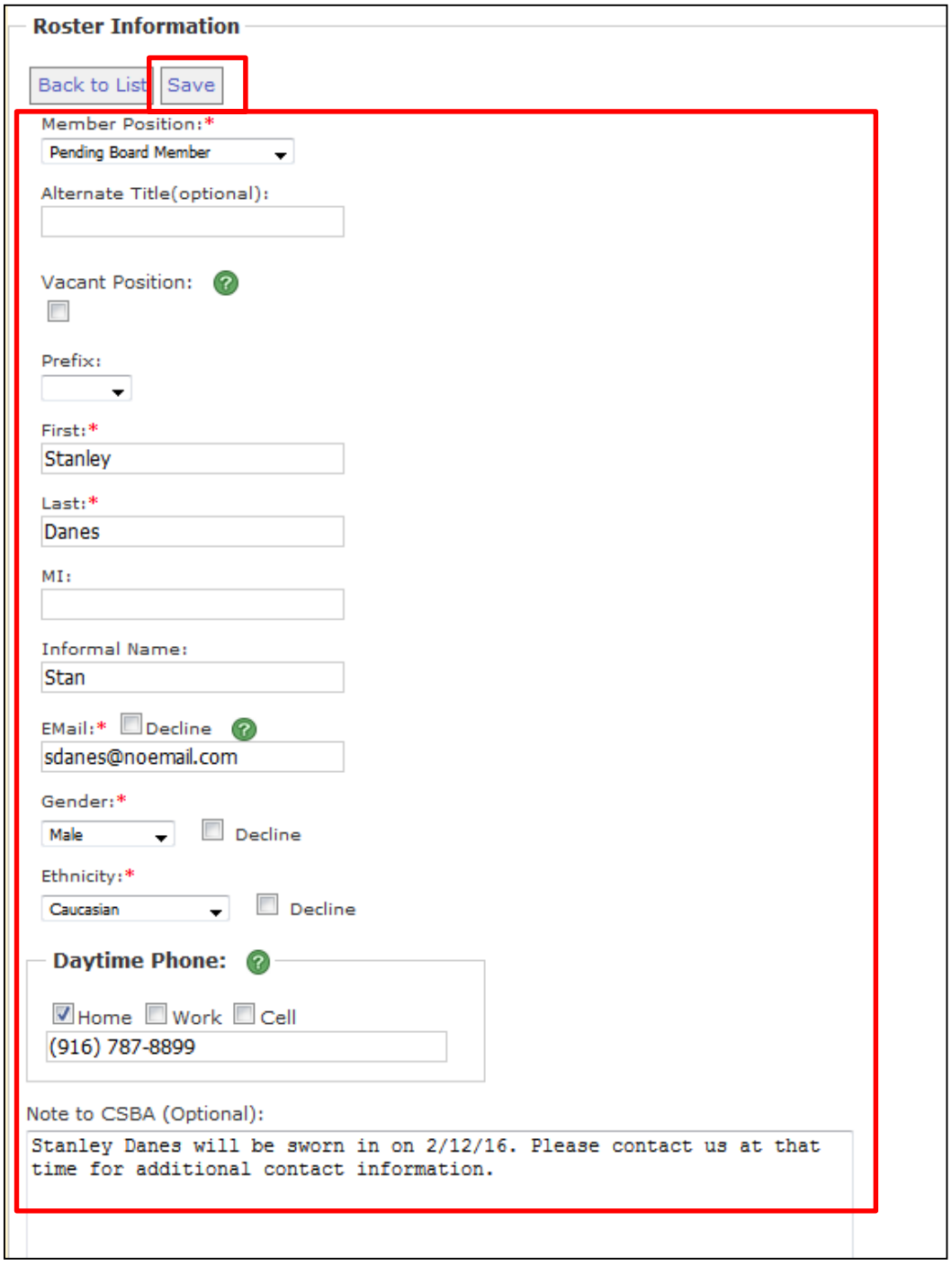


Adding a Pending Board Member

If you have a pending board member that will be sworn in later, and you would like to addhim/her to your roster, please follow the steps below.

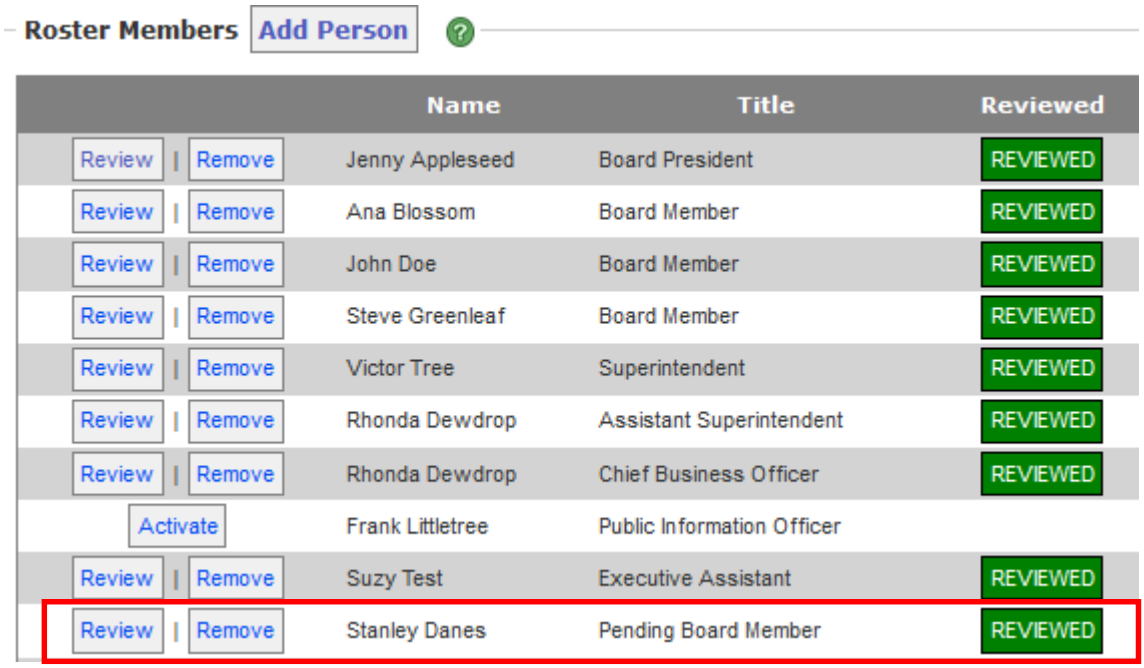
1. Under **Member Position**, select **Pending Board Member**.

2. Complete all of the fields below. Please add a **note in the "Note to CSBA" section** to inform us when the pending board member is expected to be sworn in and we will follow-up accordingly when the time comes. After you are finished, select **Save.**



3. The pending board member position will be listed as shown below when taken back to themain screen.

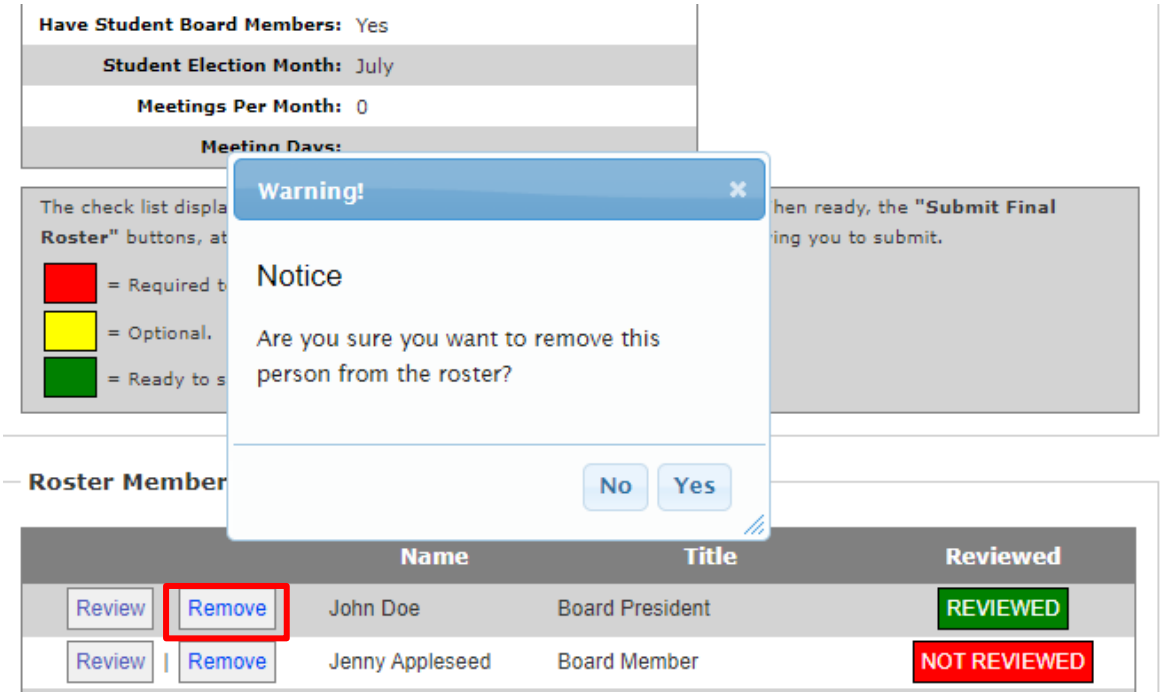
   If the pending board member position was added in error, simply select the Removebutton.



How to Remove a Person

1. Select **Remove** next to the person's name.

    a. The pop-up appears as shown below – select **Yes**.

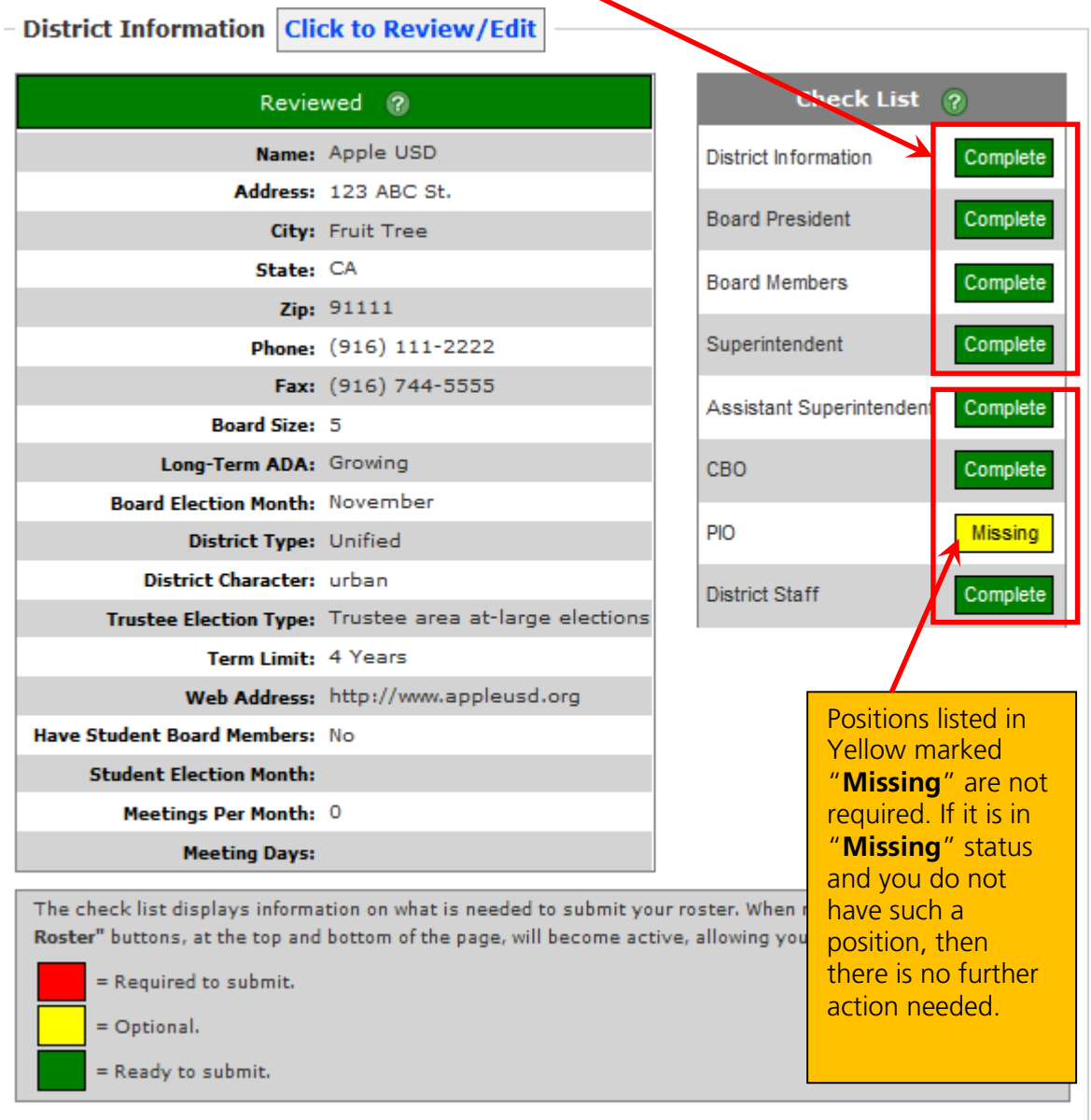


2. The screen will refresh. Notice that the "Review" and "Remove" buttons are now replacedwith the **"Activate"** button, which means that the person is now marked to be removed**. Ifyou removed a person in error, you may select the "Activate" button to reinstate the record and complete the review steps as needed.**

Check Before You Submit

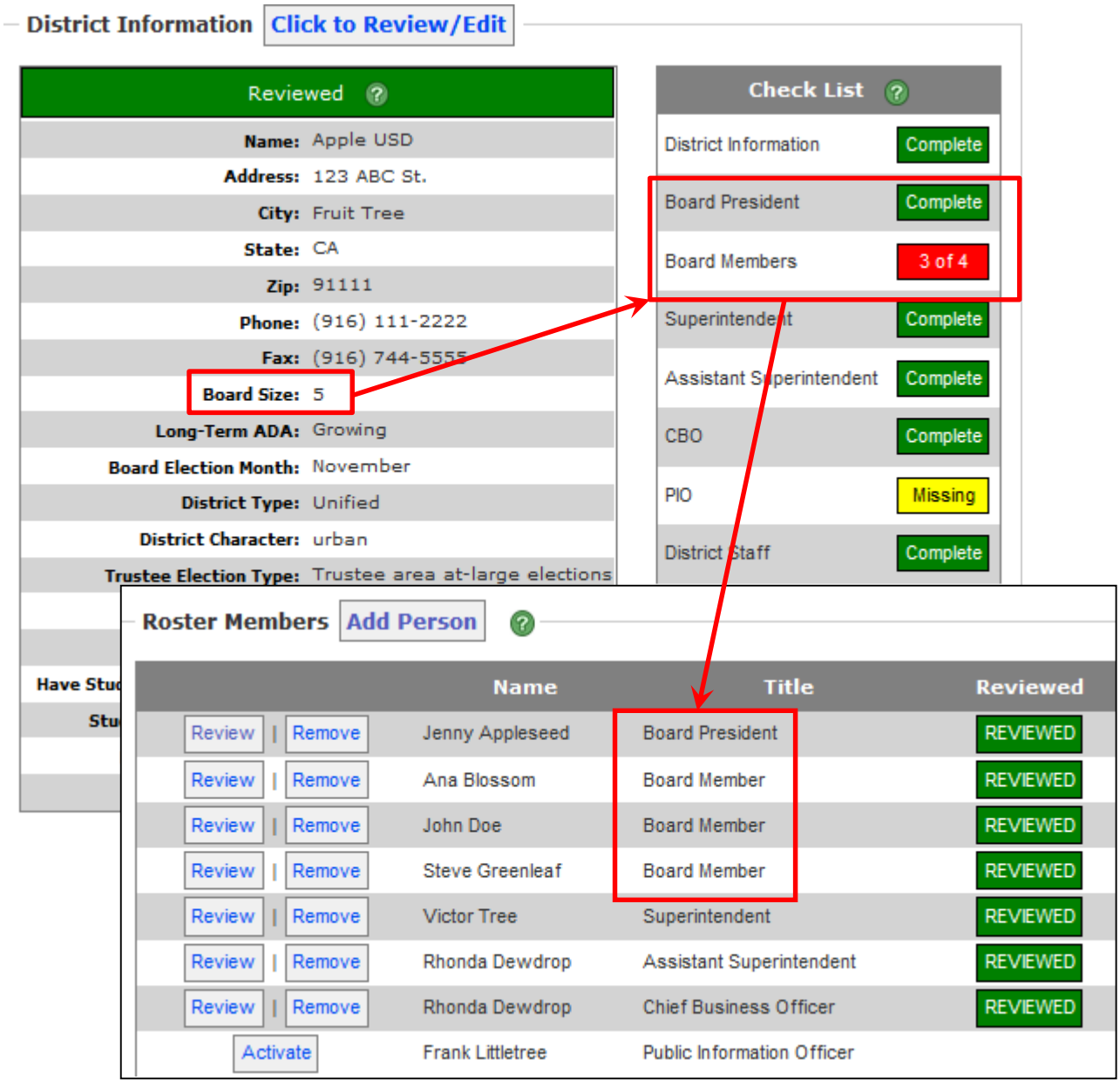
Things to check before you submit your final roster update.

1. Check List: Verify that the following sections are marked in green and show as "Complete."
   - **District Information**
   - **Board President**
   - **Board Members**
   - **Superintendent**



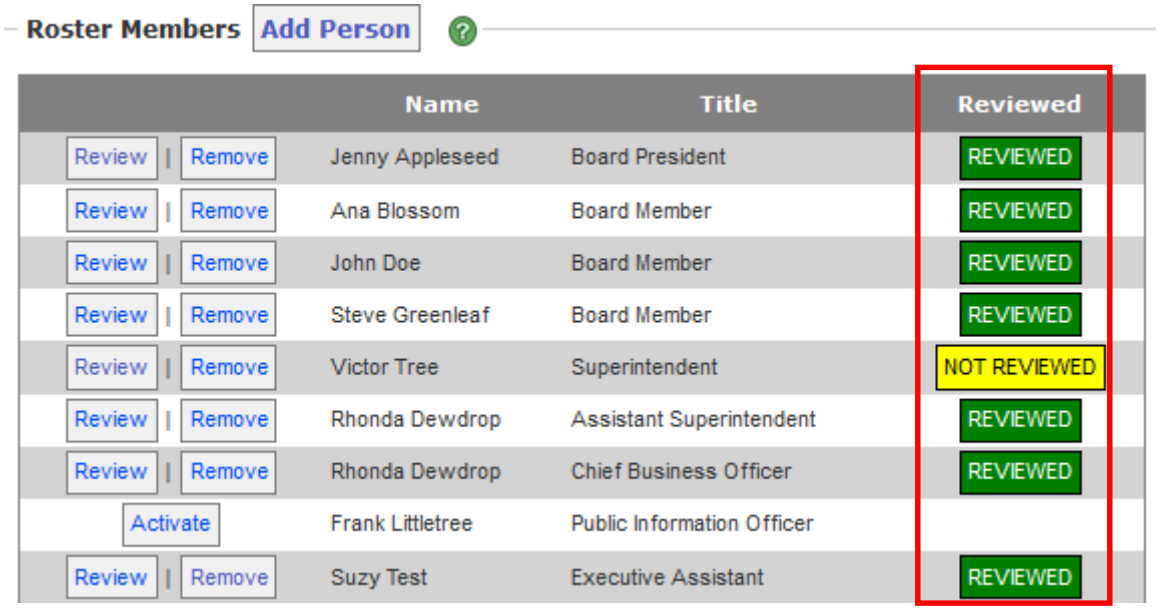
2. Ensure that the **total number of Board Members (including your Board President) matches the Board Size** (i.e., for a 5 member board, your roster should show 4 Board Members and 1 Board President). This should also include vacant and pending board member positions.

   The red box will indicate if you have a missing Board Member / Board President. If so, scroll back down to the **Roster Members** section to check if a record needs to be added or removed to rectify this .



3. In the **Roster Members** section, ensure that all records are Green and in "Reviewed" status.

   If any are Yellow and in "Not Reviewed" status, you will need to select "Review" to reviewand save the record.

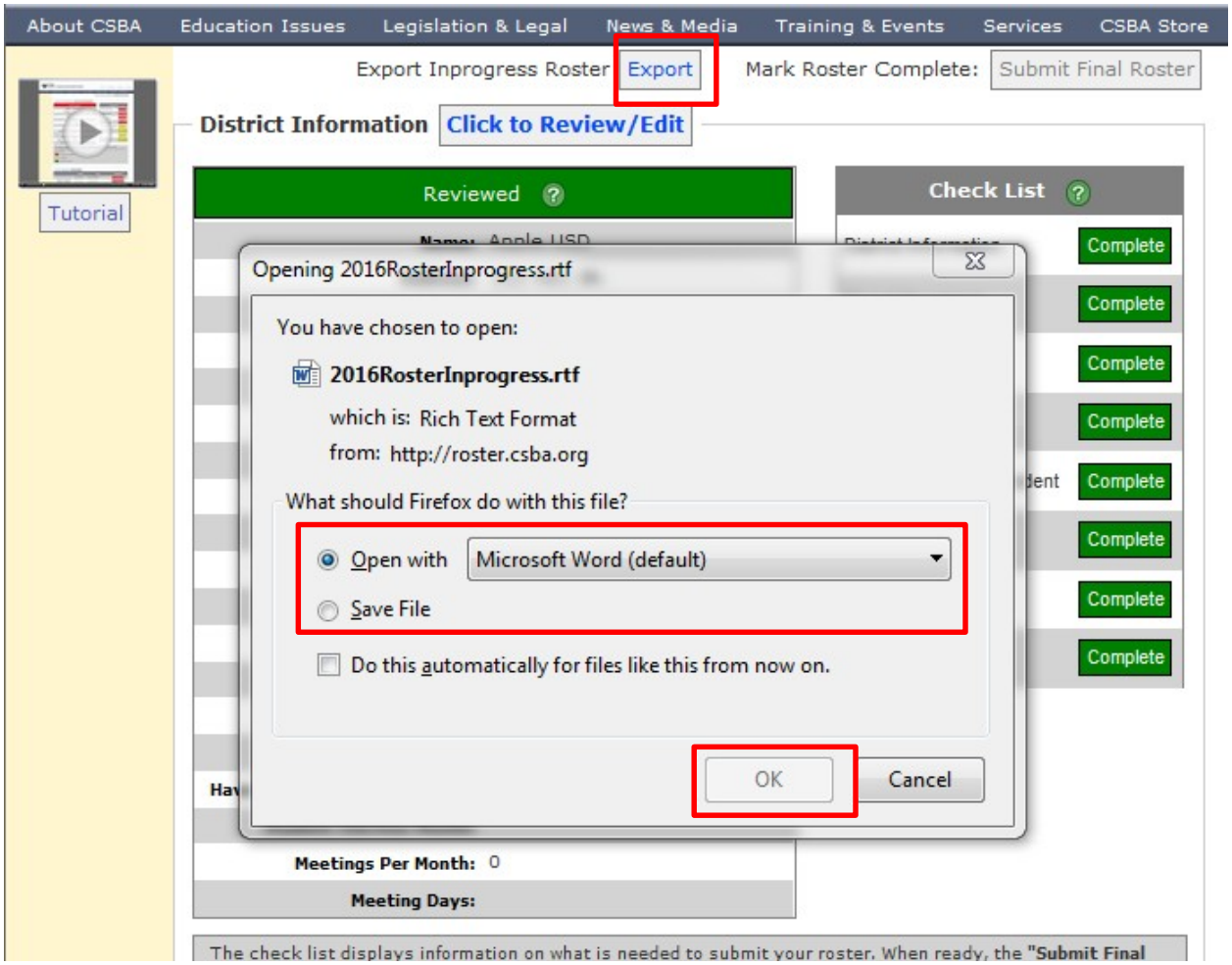


Exporting your Roster (Optional)

If desired, you may export your roster changes and save/print for your records.

1. At the top, select **Export.**

    - Select either **"Open with" or "Save File"**, and then select **"Ok."**



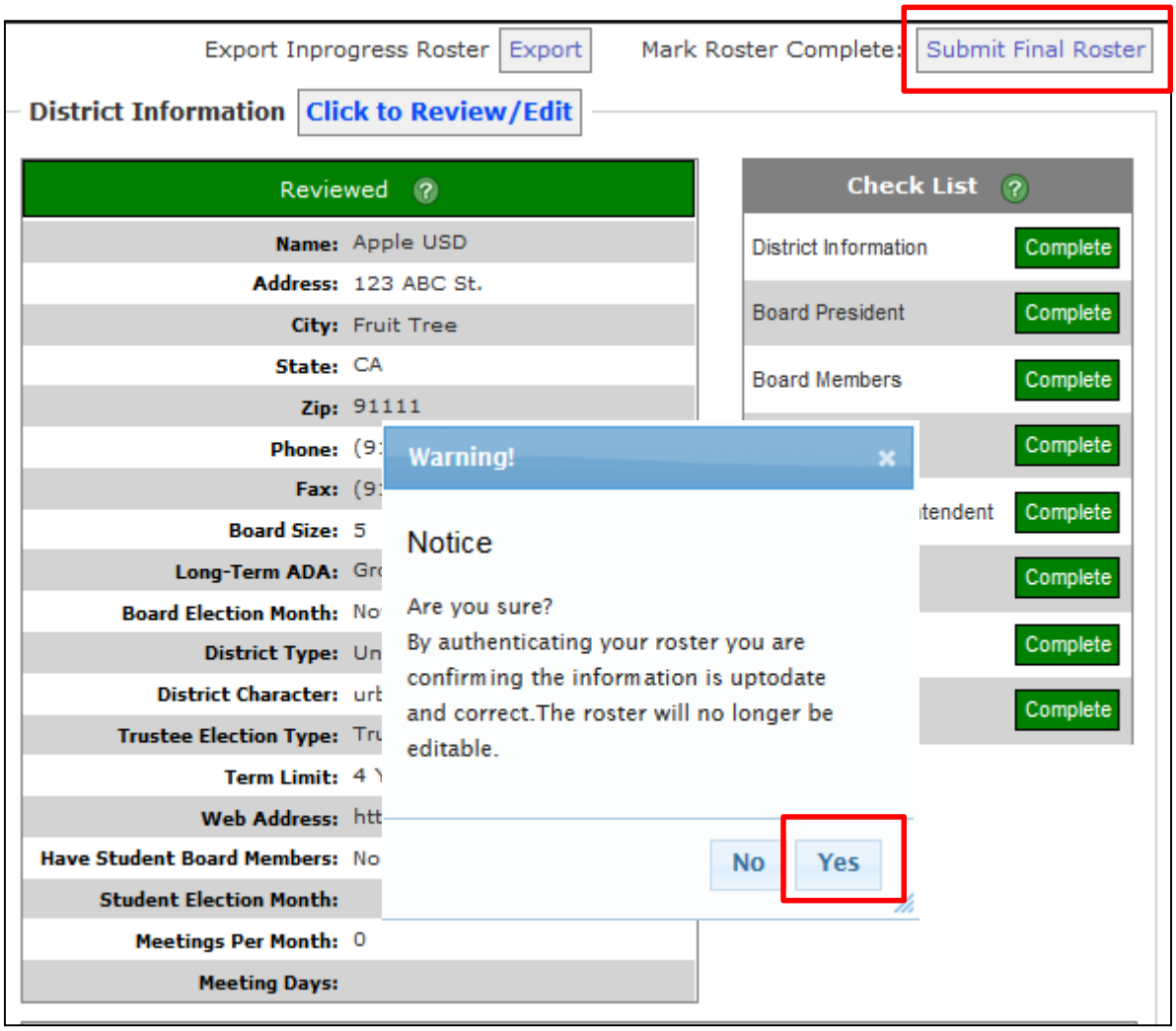
Submit your Final Roster

It is important to complete this step. Otherwise, your roster will not be reported as "submitted" on our report.

After all of the required sections are marked in Green as "Complete" (or in Yellow as Missing –but not required), the **Submit Final Roster** button will be lit up. Select this button if you are ready to submit your final roster.

When the pop-up below appears, select **Yes**.

PLEASE NOTE: Once you have submitted your roster, you will not be able to log back in and make changes. If you require additional changes after submitting your roster, please send anemail to rosterupdate@csba.org and we will make the changes manually.



CSBA Contact Information

Thank you for taking the time to submit your annual rosterupdate!

Questions?

Please contact

rosterupdate@csba.org

(800) 266-3382

or Aaron Davis, Director of Membership

adavis@csba.org