



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.

csba
California School Boards Association

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Username stest

Password ●●●● Login

Remember my username and password on this computer

[Forgot your password?](#)

Tutorial

Overview

(TOP HALF OF SCREEN)

The screenshot displays the CSBA website interface. At the top, the CSBA logo and navigation menu are visible. The main content area is divided into two primary sections: "District Information" and "Check List".

District Information: This section is titled "Not Reviewed" and contains a list of fields for "Apple USD". A red arrow points from the "District Information" callout box to the "Not Reviewed" header.

Name:	Apple USD
Address:	123 ABC St.
City:	Fruit Tree
State:	CA
Zip:	91111
Phone:	(916) 111-2222
Fax:	(916) 333-4444
Board Size:	5
Long-Term ADA:	Stable
Board Election Month:	November
District Type:	Unified
District Character:	Suburban
Trustee Election Type:	
Term Limit:	None
Web Address:	www.appleusd.org
Have Student Board Members:	No
Student Election Month:	
Meetings Per Month:	
Meeting Days:	

Check List: This section shows a list of items with their completion status. A red arrow points from the "Check List" callout box to the "PIO" item.

District Information	Incomplete
Board President	Incomplete
Board Members	4 of 5
Superintendent	Incomplete
Assistant Superintendent	Incomplete
CBO	Incomplete
PIO	Incomplete
District Staff	Incomplete

Color Legend: A legend at the bottom explains the status colors: Red for "Required to submit", Yellow for "Optional", and Green for "Ready to submit". A red arrow points from the "Color Legend" callout box to the legend text.


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)

Roster Members: Lists the leadership team, key staff members and tracks your progress according to the color legend below.

Roster Members 

		Name	Title	Reviewed
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	John Doe	Board President	<input type="button" value="NOT REVIEWED"/>
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	Jenny Appleseed	Board Member	<input type="button" value="NOT REVIEWED"/>
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	Ana Blossom	Board Member	<input type="button" value="NOT REVIEWED"/>
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	Steve Greenleaf	Board Member	<input type="button" value="NOT REVIEWED"/>
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	Victor Tree	Superintendent	<input type="button" value="NOT REVIEWED"/>
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	Rhonda Dewdrop	Assistant Superintendent	<input type="button" value="NOT REVIEWED"/>
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	Rhonda Dewdrop	Chief Business Officer	<input type="button" value="NOT REVIEWED"/>
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	Frank Littletree	Public Information Officer	<input type="button" value="NOT REVIEWED"/>
<input type="button" value="Review"/>	<input type="button" value="Remove"/>	Suzy Test	Executive Assistant	<input type="button" value="NOT REVIEWED"/>

The reviewed column of the member roster list displays the information on who still needs to be reviewed before the roster can be submitted. When complete, the "**Submit Final Roster**" buttons, at the top and bottom of the page, will become active, allowing you to submit. You can view the **Roster Check List** on what still needs to be reviewed.

- = Required to submit.
- = Optional.
- = Ready to submit.

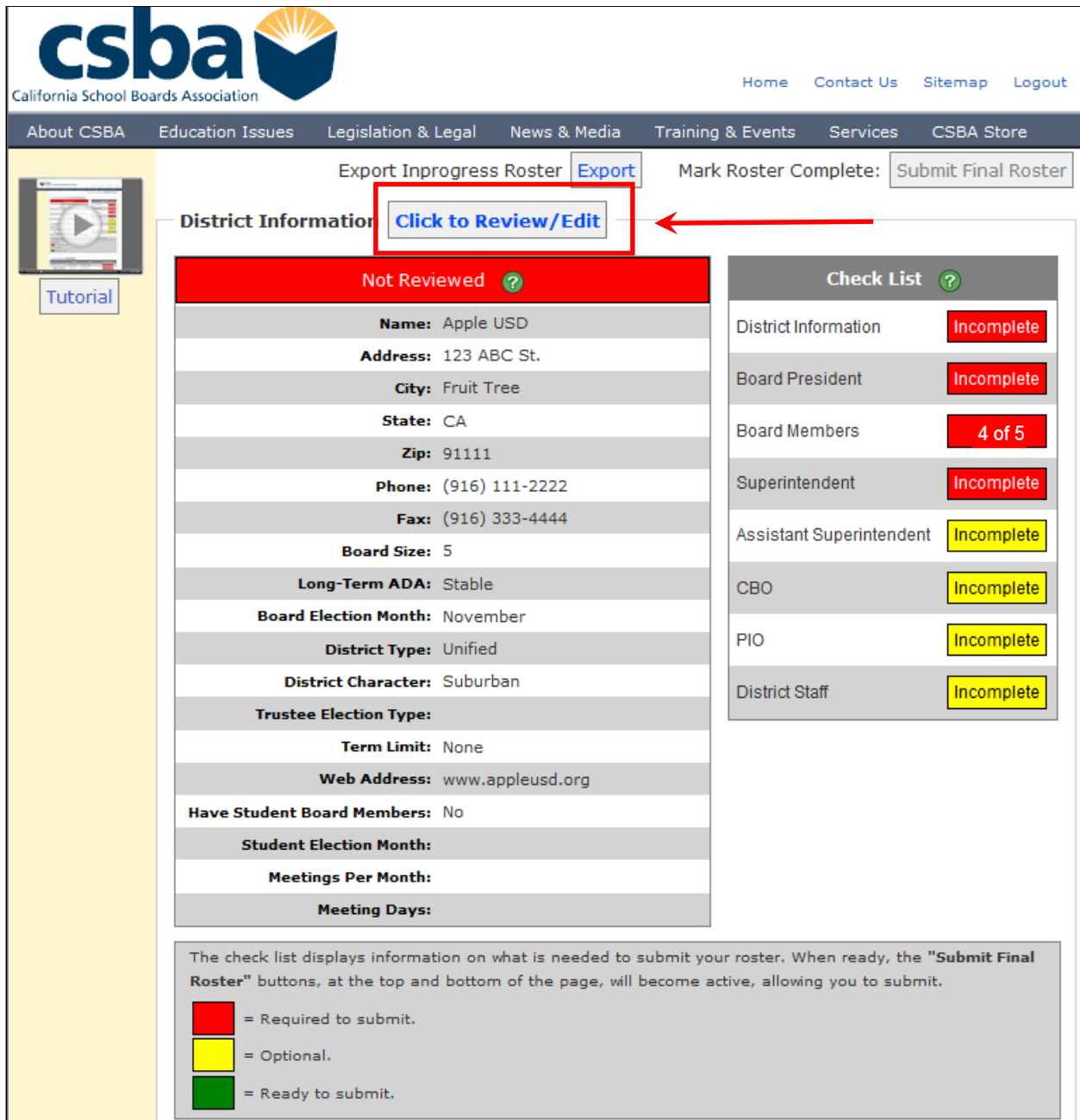
Color Legend: Indicates the status of each person listed in the Roster Members section

Mark Roster Complete:

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 these steps.



The screenshot displays the CSBA website interface. At the top, the CSBA logo and navigation links are visible. The main content area is titled 'District Information' and features a red 'Not Reviewed' header. A red box highlights the 'Click to Review/Edit' button, with a red arrow pointing to it. Below the header, a table lists district details for Apple USD. To the right, a 'Check List' table shows various items marked as 'Incomplete'. A legend at the bottom explains the color coding for the check list items.

Not Reviewed ⓘ

Name:	Apple USD
Address:	123 ABC St.
City:	Fruit Tree
State:	CA
Zip:	91111
Phone:	(916) 111-2222
Fax:	(916) 333-4444
Board Size:	5
Long-Term ADA:	Stable
Board Election Month:	November
District Type:	Unified
District Character:	Suburban
Trustee Election Type:	
Term Limit:	None
Web Address:	www.appleusd.org
Have Student Board Members:	No
Student Election Month:	
Meetings Per Month:	
Meeting Days:	

Check List ⓘ

District Information	Incomplete
Board President	Incomplete
Board Members	4 of 5
Superintendent	Incomplete
Assistant Superintendent	Incomplete
CBO	Incomplete
PIO	Incomplete
District Staff	Incomplete

The check list displays information on what is needed to submit your roster. When ready, the "Submit Final Roster" buttons, at the top and bottom of the page, will become active, allowing you to submit.

- = Required to submit.
- = Optional.
- = Ready to submit.

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.

[Back to List](#)

District Information

Not Reviewed Reviewed

District:
Apple USD

Web Address:

Mailing Address

Address:

City:

State:
CA

Zip:

Long-Term ADA:

Board Election Month:

Board Size:

District Type:

District Character:

Trustee Election Type: ?

Meetings Per Month:

Meeting Days:

Have Student Board Members:

Student Election Month:

Phone:

Fax:

Board Member Term Limit:


Note to CSBA (Optional):

[Save](#)

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

The screenshot displays the CSBA website interface. At the top, the CSBA logo and navigation links (Home, Contact Us, Sitemap, Logout) are visible. Below the logo, a menu bar contains links for About CSBA, Education Issues, Legislation & Legal, News & Media, Training & Events, Services, and CSBA Store. The main content area features a header with 'Export Inprogress Roster' and 'Export' buttons, and a 'Mark Roster Complete: Submit Final Roster' button. The 'District Information' section is highlighted with a green bar and labeled 'Reviewed' with a question mark icon. A red box and arrow point to this green bar. Below this, a form displays various fields for 'Apple USD', including Name, Address, City, State, Zip, Phone, Fax, Board Size, Long-Term ADA, Board Election Month, District Type, District Character, Trustee Election Type, Term Limit, Web Address, Have Student Board Members, Student Election Month, Meetings Per Month, and Meeting Days. To the right, a 'Check List' section is also highlighted with a green bar and labeled 'Complete' with a question mark icon. A red box and arrow point to the 'Complete' button in the 'Check List' section. The 'Check List' includes items like District Information, Board President, Board Members (3 of 4), Superintendent, Assistant Superintendent, CBO, PIO, and District Staff, each with a corresponding status button (Complete, Incomplete, or 3 of 4).

Review Roster




According to the checklist, these positions still need to be reviewed. Scroll down to the **Roster Members** section to begin the roster update.

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Export
Complete: [Submit Final Roster](#)



[Tutorial](#)

District Information [Click to Review/Edit](#)

Reviewed ?
Name: Apple USD
Address: 123 ABC St.
City: Fruit Tree
State: CA
Zip: 91111
Phone: (916) 111-2222
Fax: (916) 744-5555
Board Size: 5
Long-Term ADA: Growing
Board Election Month: November
District Type: Unified
District Character: urban
Trustee Election Type: Trustee area at-large elections
Term Limit: 4 Years
Web Address: http://www.appleusd.org

Check List ?

District Information	Complete
Board President	Incomplete
Board Members	3 of 4
Superintendent	Incomplete
Assistant Superintendent	Incomplete
CBO	Incomplete
PIO	Incomplete
District Staff	Incomplete

Roster Members [Add Person](#) ?

	Name	Title	Reviewed
Review Remove	John Doe	Board President	NOT REVIEWED
Review Remove	Jenny Appleseed	Board Member	NOT REVIEWED
Review Remove	Ana Blossom	Board Member	NOT REVIEWED
Review Remove	Steve Greenleaf	Board Member	NOT REVIEWED
Review Remove	Victor Tree	Superintendent	NOT REVIEWED
Review Remove	Rhonda Dewdrop	Assistant Superintendent	NOT REVIEWED
Review Remove	Rhonda Dewdrop	Chief Business Officer	NOT REVIEWED
Review Remove	Frank Littletree	Public Information Officer	NOT REVIEWED
Review Remove	Suzy Test	Executive Assistant	NOT REVIEWED

The reviewed column of the member roster list displays the information on who still needs to be reviewed before the roster can be submitted. When complete, the **"Submit Final Roster"** buttons, at the top and bottom of the page, will become active, allowing you to submit. You can view the **Roster Check List** on what still needs to be reviewed.

- = Required to submit.
- = Optional.
- = Ready to submit.

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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)."

<< Prev & SaveBack to List SaveNext & Save >>

Not Reviewed

Reviewed

Member Position: *

Title(optional):

Prefix:

First: *

Last: *

MI:

Informal Name:

EMail: * Decline ?

Gender: *
 Decline

Ethnicity:

Decline

Daytime Phone: ?
 Home Work Cell

Original Election/Appointment Date: * ?

Appointed:

Current Board Term Begin Date: * ?

Current Board Term End Date: * ?

Home Mailing Address:

Address: *

City: *

State:

Zip: *

Profession:

Party Affiliation:
 Decline

Alt Phone: ?

Home Work Cell

Note to CSBA (Optional):

If the board term has been renewed or changed, enter new board term dates.

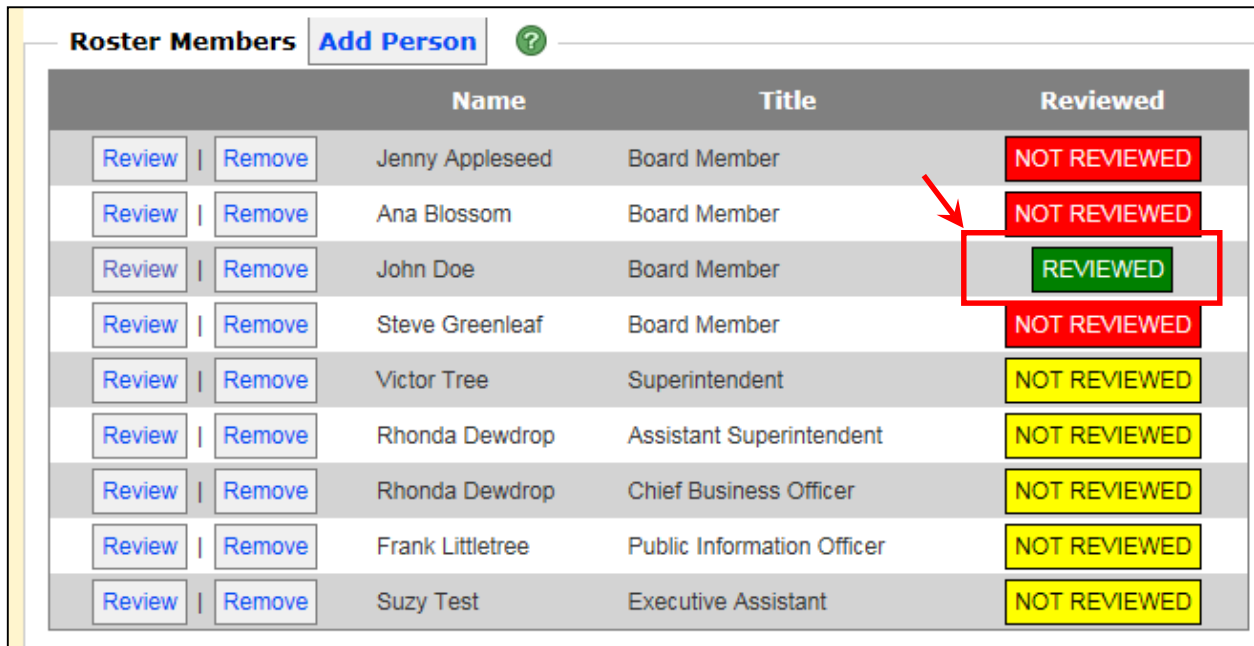
10 | Page

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**.

The screenshot shows a web form for a member profile. At the top, there are navigation buttons: '<< Prev & Save', 'Back to List', 'Save' (highlighted with a red box), and 'Next & Save >>'. A red banner at the top left says 'Not Reviewed', and a 'Reviewed' checkbox is on the top right. The form contains various fields: Member Position (Board Member), Title (Board Member), Prefix, First (John), Last (Doe), MI, Informal Name (John), EMail (jdoe@noemail.com), Gender (Male), Ethnicity (Other), Daytime Phone (Home checked, (916) 111-2222), Original Election/Appointment Date (11/4/2014), Appointed (checkbox), Current Board Term Begin Date (11/4/2014), Current Board Term End Date, Profession (Business), Party Affiliation (Democrat), and Alt Phone. A 'Warning!' dialog box is overlaid in the center, asking 'Do you want this record marked as reviewed?' with 'No' and 'Yes' buttons (the 'Yes' button is highlighted with a red box). A 'Save' button is also visible at the bottom left of the form, and a 'Note to CSBA (Optional):' text area is at the bottom right.

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.



		Name	Title	Reviewed
Review	Remove	Jenny Appleseed	Board Member	NOT REVIEWED
Review	Remove	Ana Blossom	Board Member	NOT REVIEWED
Review	Remove	John Doe	Board Member	REVIEWED
Review	Remove	Steve Greenleaf	Board Member	NOT REVIEWED
Review	Remove	Victor Tree	Superintendent	NOT REVIEWED
Review	Remove	Rhonda Dewdrop	Assistant Superintendent	NOT REVIEWED
Review	Remove	Rhonda Dewdrop	Chief Business Officer	NOT REVIEWED
Review	Remove	Frank Littletree	Public Information Officer	NOT REVIEWED
Review	Remove	Suzy Test	Executive Assistant	NOT REVIEWED

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.

Roster Members		Add Person	?	
		Name	Title	Reviewed
Review	Remove	Jenny Appleseed	Board Member	NOT REVIEWED
Review	Remove	Ana Blossom	Board Member	NOT REVIEWED
Review	Remove	John Doe	Board Member	REVIEWED
Review	Remove	Steve Greenleaf	Board Member	NOT REVIEWED
Review	Remove	Victor Tree	Superintendent	NOT REVIEWED
Review	Remove	Rhonda Dewdrop	Assistant Superintendent	NOT REVIEWED
Review	Remove	Rhonda Dewdrop	Chief Business Officer	NOT REVIEWED
Review	Remove	Frank Littletree	Public Information Officer	NOT REVIEWED
Review	Remove	Suzy Test	Executive Assistant	NOT REVIEWED

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.

<< Prev & SaveBack to ListSaveNext & Save >>

Not Reviewed

Reviewed

Member Position:* **Hire Date:*** ?

Superintendent 7/1/2015

Title(optional):

Superintendent **Appointed:**

Prefix:

First: ?

Victor

Last: ?

Tree

MI:

Informal Name:

Victor

E-Mail:* Decline ?

vtree@noemail.com

Gender:*

Male Decline

Ethnicity:

Please Select Decline

Daytime Phone: ?

Home Work Cell

(916) 111-2222

Save

Note to CSBA (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**.

The screenshot shows a web form for a member record. At the top, there are navigation buttons: '<< Prev & Save', 'Back to List', 'Save' (highlighted with a red box), and 'Next & Save >>'. A red banner across the top reads 'Not Reviewed'. To the right of the banner is a 'Reviewed' checkbox, which is currently unchecked. The form fields include:

- Member Position: * (Superintendent)
- Hire Date: * (7/1/2015)
- Title (optional): (Superintendent)
- Appointed:
- Prefix: (dropdown)
- First: (Victor)
- Last: (Tree)
- MI: (empty)
- Informal Name: (Victor)
- E-Mail: * (vtree@noemail.com) with a 'Decline' checkbox and a help icon.
- Gender: * (Male) with a 'Decline' checkbox.
- Ethnicity: (Please Select) with a 'Decline' checkbox.
- Daytime Phone: * (916) 111-2222 with checkboxes for Home, Work, and Cell.

A 'Warning' pop-up dialog is overlaid on the form. The dialog has a blue header with the text 'Warning!' and a close button. The main text of the dialog reads 'Warning' followed by 'Do you want this record marked as reviewed?'. At the bottom right of the dialog are two buttons: 'No' and 'Yes' (highlighted with a red box).

At the bottom of the form, there is a 'Save' button and a text area labeled 'Note to CSBA (Optional):'.

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.

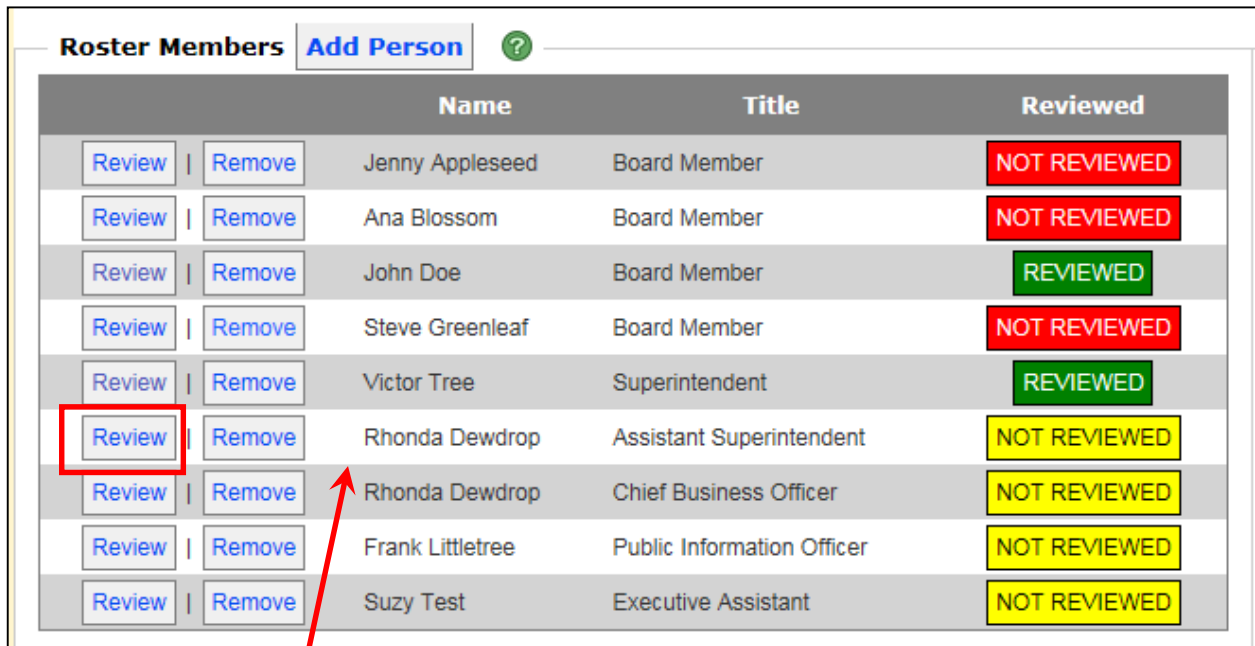
		Name	Title	Reviewed
Review	Remove	Jenny Appleseed	Board Member	NOT REVIEWED
Review	Remove	Ana Blossom	Board Member	NOT REVIEWED
Review	Remove	John Doe	Board Member	REVIEWED
Review	Remove	Steve Greenleaf	Board Member	NOT REVIEWED
Review	Remove	Victor Tree	Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Assistant Superintendent	NOT REVIEWED
Review	Remove	Rhonda Dewdrop	Chief Business Officer	NOT REVIEWED
Review	Remove	Frank Littletree	Public Information Officer	NOT REVIEWED
Review	Remove	Suzy Test	Executive Assistant	NOT REVIEWED

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.



		Name	Title	Reviewed
Review	Remove	Jenny Appleseed	Board Member	NOT REVIEWED
Review	Remove	Ana Blossom	Board Member	NOT REVIEWED
Review	Remove	John Doe	Board Member	REVIEWED
Review	Remove	Steve Greenleaf	Board Member	NOT REVIEWED
Review	Remove	Victor Tree	Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Assistant Superintendent	NOT REVIEWED
Review	Remove	Rhonda Dewdrop	Chief Business Officer	NOT REVIEWED
Review	Remove	Frank Littletree	Public Information Officer	NOT REVIEWED
Review	Remove	Suzy Test	Executive Assistant	NOT REVIEWED

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.

Roster Information

<< Prev & Save Back to List Save Next & Save >>

Not Reviewed Reviewed

Member Position:*
Assistant Superintendent

Title(optional):
Assistant Superintendent, Business

Prefix:
▼

First: ?
Rhonda

Last: ?
Dewdrop

MI:

Informal Name:
Rhonda

EMail:* Decline ?
rdewdrop@noemail.com

Gender:*
Female ▼ Decline

Ethnicity:
Please Select ▼ Decline

Daytime Phone: ?
 Home Work Cell
(916) 111-2222

Save

Note to CSBA (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**.

Roster Information

<< Prev & Save Back to List **Save** Next & Save >>

Not Reviewed Reviewed

Member Position: *
Assistant Superintendent

Title(optional):
Assistant Superintendent, Business

Prefix:
[Dropdown]

First: ?
Rhonda

Last: ?
Dewdrop

MI:
[Text]

Informal Name:
Rhonda

E-Mail: * Decline ?
rdewdrop@noemail.com

Gender: *
Female [Dropdown] Decline

Ethnicity:
Please Select [Dropdown] Decline

Daytime Phone: ?
 Home Work Cell
(916) 111-2222

Save Note to CSBA (Optional):
[Text Area]

Warning! [Close]

Warning

Do you want this record marked as reviewed?

No **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 .

Roster Members [Add Person](#) ?

		Name	Title	Reviewed
Review	Remove	Jenny Appleseed	Board Member	NOT REVIEWED
Review	Remove	Ana Blossom	Board Member	NOT REVIEWED
Review	Remove	John Doe	Board Member	REVIEWED
Review	Remove	Steve Greenleaf	Board Member	NOT REVIEWED
Review	Remove	Victor Tree	Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Assistant Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Chief Business Officer	NOT REVIEWED
Review	Remove	Frank Littletree	Public Information Officer	NOT REVIEWED
Review	Remove	Suzy Test	Executive Assistant	NOT REVIEWED

The reviewed column of the member roster list displays the information on who still needs to be reviewed before the roster can be submitted. When complete, the **"Submit Final Roster"** buttons, at the top and bottom of the page, will become active, allowing you to submit. You can view the **Roster Check List** on what still needs to be reviewed.

- = Required to submit.
- = Optional.
- = Ready to submit.

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**.

– Roster Members **Add Person** ?

		Name	Title	Reviewed
Review	Remove	Jenny Appleseed	Board President	REVIEWED
Review	Remove	Ana Blossom	Board Member	REVIEWED
Review	Remove	John Doe	Board Member	REVIEWED
Review	Remove	Steve Greenleaf	Board Member	REVIEWED
Review	Remove	Victor Tree	Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Assistant Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Chief Business Officer	REVIEWED
Activate		Frank Littletree	Public Information Officer	
Review	Remove	Suzy Test	Executive Assistant	REVIEWED

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.

Roster Information


[Back to List](#) [Save](#)

Member Position:*

- Assistant Superintendent
- Assistant Superintendent
- Associate Superintendent
- Board Member
- Board President
- Chief Business Officer
- Curriculum Director
- Deputy Superintendent
- Energy/Sustainability Manager
- Executive Assistant
- Facility Manager
- HR Director
- Interim Superintendent
- IT Contact
- Pending Board Member
- Public Information Officer
- Purchasing Manager
- School Nurse
- Special Ed Director
- Special Education Director
- Student Representative


MI:

Informal Name:

E-Mail: * Decline 

Gender: * Decline

Ethnicity: * Decline

Daytime Phone: 

Home Work Cell

Note to CSBA (Optional):

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**.

Roster Information

[Back to List](#) [Save](#)

Member Position: *	<input type="text" value="Board Member"/>	Election/Appointment Date: *	<input type="text"/>
Alternate Title(optional):	<input type="text"/>	Appointed:	<input type="checkbox"/>
Vacant Position: ?	<input type="checkbox"/>	Current Board Term Begin Date: *	<input type="text"/>
Prefix:	<input type="text"/>	Current Board Term End Date: *	<input type="text"/>
First: *	<input type="text"/>	Home Mailing Address: ?	
Last: *	<input type="text"/>	Address: *	<input type="text"/>
MI:	<input type="text"/>	City: *	<input type="text"/>
Informal Name:	<input type="text"/>	State:	<input type="text" value="CA"/>
E-Mail: *	<input type="checkbox"/> Decline ?	Zip: *	<input type="text"/>
Gender: *	<input type="text" value="Please Select"/> Decline	Profession:	<input type="text" value="Please Select"/>
Ethnicity: *	<input type="text" value="Please Select"/> Decline	Party Affiliation: *	<input type="text" value="Please Select"/> Decline
Daytime Phone: ?	<input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell	Alt Phone: ?	<input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Cell
Note to CSBA (Optional):			

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 change as shown below. Please add a **note in the "Note to CSBA" section** to inform us when the vacancy is expected to be filled and we will follow-up accordingly when the time comes. After you are finished, select **Save**.

Roster Information

[Back to List](#) [Save](#)

Member Position:*
Board Member

Alternate Title(optional):

Vacant Position:

Prefix:

First

Last

MI:

Info

EMa

Gen

plea

Ethn

plea

Da

Roster Information

[Back to List](#) [Save](#)

Member Position:*
Board Member

Alternate Title(optional):

Vacant Position:

Note to CSBA (Optional):
Board vacancy - expected to appoint a new board member by 3/1/16.

[Save](#)

Note to CSBA (Optional):

- The vacant board member position will be listed as shown below when taken back to the main screen.

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

Roster Members [Add Person](#) ?

	Name	Title	Reviewed
Review Remove	Jenny Appleseed	Board President	REVIEWED
Review Remove	Ana Blossom	Board Member	REVIEWED
Review Remove	John Doe	Board Member	REVIEWED
Review Remove	Steve Greenleaf	Board Member	REVIEWED
Remove	VACANT POSITION	Board Member	REVIEWED
Review Remove	Victor Tree	Superintendent	REVIEWED
Review Remove	Rhonda Dewdrop	Assistant Superintendent	REVIEWED
Review Remove	Rhonda Dewdrop	Chief Business Officer	REVIEWED
Activate	Frank Littletree	Public Information Officer	
Review Remove	Suzy Test	Executive Assistant	REVIEWED

Adding a Pending Board Member

If you have a pending board member that will be sworn in later, and you would like to add him/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**.

Roster Information

[Back to List](#) [Save](#)

Member Position:*
Pending Board Member

Alternate Title (optional):

Vacant Position: ?

Prefix:

First:*
Stanley

Last:*
Danes

MI:

Informal Name:
Stan

E-Mail:* Decline ?
sdanes@noemail.com

Gender:*
Male Decline


Ethnicity:*
Caucasian Decline

Daytime Phone: ?
 Home Work Cell
(916) 787-8899

Note to CSBA (Optional):
Stanley Danes will be sworn in on 2/12/16. Please contact us at that time for additional contact information.

- The pending board member position will be listed as shown below when taken back to the main screen.

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

Roster Members [Add Person](#) 

	Name	Title	Reviewed
Review Remove	Jenny Appleseed	Board President	REVIEWED
Review Remove	Ana Blossom	Board Member	REVIEWED
Review Remove	John Doe	Board Member	REVIEWED
Review Remove	Steve Greenleaf	Board Member	REVIEWED
Review Remove	Victor Tree	Superintendent	REVIEWED
Review Remove	Rhonda Dewdrop	Assistant Superintendent	REVIEWED
Review Remove	Rhonda Dewdrop	Chief Business Officer	REVIEWED
Activate	Frank Littletree	Public Information Officer	
Review Remove	Suzy Test	Executive Assistant	REVIEWED
Review Remove	Stanley Danes	Pending Board Member	REVIEWED

How to Remove a Person

1. Select **Remove** next to the person's name.
 - a. The pop-up appears as shown below – select **Yes**.

The check list displays the "Roster" buttons, at

When ready, the "Submit Final" button is available, giving you to submit.

Warning!

Notice

Are you sure you want to remove this person from the roster?

No Yes

		Name	Title	Reviewed
Review	Remove	John Doe	Board President	REVIEWED
Review	Remove	Jenny Appleseed	Board Member	NOT REVIEWED

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

Roster Members [Add Person](#) ?

		Name	Title	Reviewed
Review	Remove	Jenny Appleseed	Board Member	REVIEWED
Review	Remove	Ana Blossom	Board Member	REVIEWED
Review	Remove	John Doe	Board Member	REVIEWED
Review	Remove	Steve Greenleaf	Board Member	REVIEWED
Review	Remove	Victor Tree	Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Assistant Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Chief Business Officer	REVIEWED
Activate		Frank Littletree	Public Information Officer	
Review	Remove	Suzy Test	Executive Assistant	REVIEWED

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**

- District Information [Click to Review/Edit](#)

Reviewed ?	
Name:	Apple USD
Address:	123 ABC St.
City:	Fruit Tree
State:	CA
Zip:	91111
Phone:	(916) 111-2222
Fax:	(916) 744-5555
Board Size:	5
Long-Term ADA:	Growing
Board Election Month:	November
District Type:	Unified
District Character:	urban
Trustee Election Type:	Trustee area at-large elections
Term Limit:	4 Years
Web Address:	http://www.appleusd.org
Have Student Board Members:	No
Student Election Month:	
Meetings Per Month:	0
Meeting Days:	

Check List ?	
District Information	Complete
Board President	Complete
Board Members	Complete
Superintendent	Complete
Assistant Superintendent	Complete
CBO	Complete
PIO	Missing
District Staff	Complete

The check list displays information on what is needed to submit your roster. When "Roster" buttons, at the top and bottom of the page, will become active, allowing you to submit your roster.

- = Required to submit.
- = Optional.
- = Ready to submit.

Positions listed in Yellow marked "Missing" are not required. If it is in "Missing" status and you do not have such a position, then there is no further action needed.

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 .

District Information [Click to Review/Edit](#)

Reviewed ?	
Name:	Apple USD
Address:	123 ABC St.
City:	Fruit Tree
State:	CA
Zip:	91111
Phone:	(916) 111-2222
Fax:	(916) 744-5555
Board Size:	5
Long-Term ADA:	Growing
Board Election Month:	November
District Type:	Unified
District Character:	urban
Trustee Election Type:	Trustee area at-large elections


Check List ?	
District Information	Complete
Board President	Complete
Board Members	3 of 4
Superintendent	Complete
Assistant Superintendent	Complete
CBO	Complete
PIO	Missing
District Staff	Complete

Roster Members [Add Person](#) ?

	Name	Title	Reviewed
Review Remove	Jenny Appleseed	Board President	REVIEWED
Review Remove	Ana Blossom	Board Member	REVIEWED
Review Remove	John Doe	Board Member	REVIEWED
Review Remove	Steve Greenleaf	Board Member	REVIEWED
Review Remove	Victor Tree	Superintendent	REVIEWED
Review Remove	Rhonda Dewdrop	Assistant Superintendent	REVIEWED
Review Remove	Rhonda Dewdrop	Chief Business Officer	REVIEWED
Activate	Frank Littletree	Public Information Officer	

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 review and save the record.

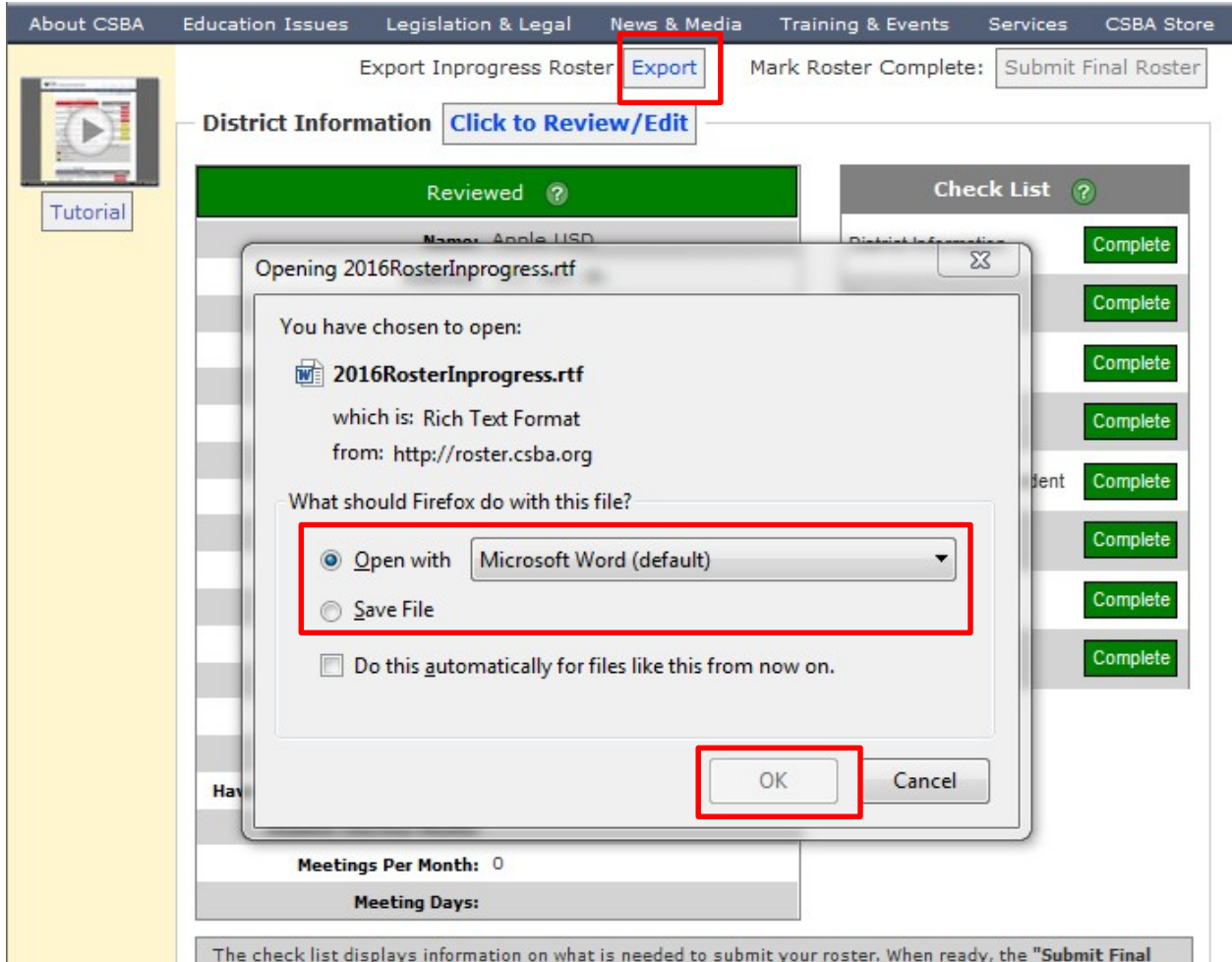
Roster Members [Add Person](#) 

		Name	Title	Reviewed
Review	Remove	Jenny Appleseed	Board President	REVIEWED
Review	Remove	Ana Blossom	Board Member	REVIEWED
Review	Remove	John Doe	Board Member	REVIEWED
Review	Remove	Steve Greenleaf	Board Member	REVIEWED
Review	Remove	Victor Tree	Superintendent	NOT REVIEWED
Review	Remove	Rhonda Dewdrop	Assistant Superintendent	REVIEWED
Review	Remove	Rhonda Dewdrop	Chief Business Officer	REVIEWED
Activate		Frank Littletree	Public Information Officer	
Review	Remove	Suzy Test	Executive Assistant	REVIEWED

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 an email to rosterupdate@csba.org and we will make the changes manually.

The screenshot shows a web interface for submitting a final roster. At the top, there are two buttons: "Export Inprogress Roster" and "Export", followed by "Mark Roster Complete:" and a highlighted "Submit Final Roster" button. Below this is a "District Information" section with a "Click to Review/Edit" button. The district information is presented in a table with a green header "Reviewed" and a question mark icon. The fields include Name (Apple USD), Address (123 ABC St.), City (Fruit Tree), State (CA), Zip (91111), Phone, Fax, Board Size (5), Long-Term ADA, Board Election Month, District Type, District Character, Trustee Election Type, Term Limit, Web Address, Have Student Board Members, Student Election Month, Meetings Per Month, and Meeting Days. To the right is a "Check List" section with a question mark icon, listing District Information, Board President, Board Members, and other items, each with a green "Complete" button. A blue pop-up window titled "Warning!" is overlaid on the form. It contains the text: "Notice: Are you sure? By authenticating your roster you are confirming the information is uptodate and correct. The roster will no longer be editable." At the bottom of the pop-up are two buttons: "No" and "Yes", with the "Yes" button highlighted by a red box.

**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