

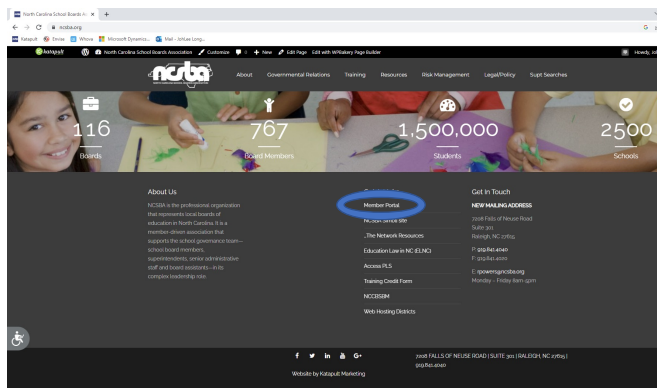


NCSBA Membership Portal

STEP BY STEP

1

Step 1: How do I access the membership portal?



- Go to our website (www.ncsba.org)
- Scroll to the bottom, click on ***Member Portal***

2

Step 2: Logging In

Enter your member login information

- **password123** is always the default password
- Use the forgotten password link to change your password after logging in
- Once you change your password, there is nothing we can do on OUR end to reset your password. You will have to use the forgotten password link.

If you haven't received this information, please email Ms. JohLee Long at jlong@ncsba.org

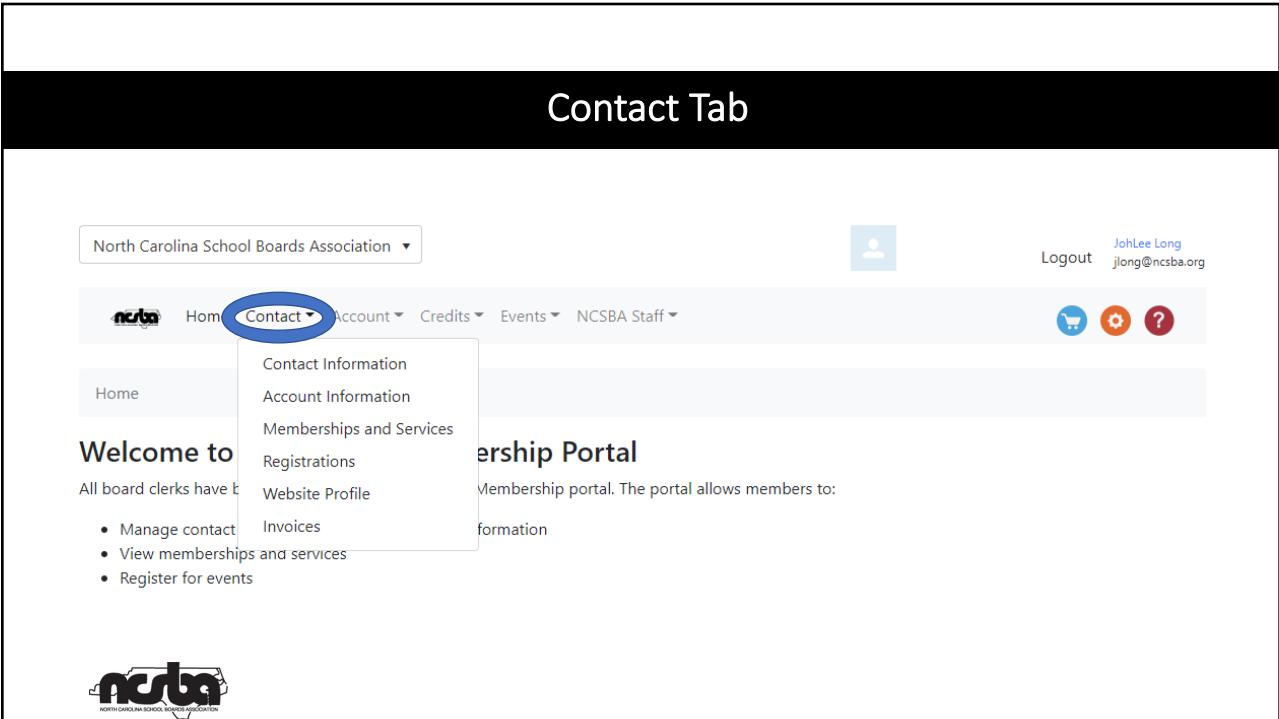
3

Step 2: Logging In

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 shown:

1. You will also see off to the right a blue icon with a shopping cart. This is your shopping cart and will show you any items and registrations you have in your cart.
2. The orange gear will allow you to update your portal profile. This is where you can change your password, add a picture, and change your email address.
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.

4



5

Contact Tab

The screenshot shows the 'Contact Information' form on the NCSBA website. The form is titled 'General Contact Information' and contains several input fields. The 'First Name' field is filled with 'Ramona' and the 'Last Name' field is filled with 'Powers'. Below this, there are fields for 'Business Phone', 'Home Phone', and 'Mobile Phone'. The 'Email' field is filled with 'rpowers@ncsba.org'. There are also fields for 'Twitter', 'Facebook', and 'Website'. Below the 'General Contact Information' section, there is a section titled 'Contact Mailing Address Information' with fields for 'Street or P.O. Box' and 'Suite, Apt. or Office'.

Contact Information Dropdown

- Click on "Contact" and then select "Contact Information"
- On this page you will see your contact information, including general contact information, mailing and email addresses, and demographics.
- If you need to make changes to anything on this page, simply make your changes and hit "submit" at the bottom of this page.
- Once you hit "submit" your changes are saved to the NCSBA database. There is no longer a request for change; your information automatically changes what we have listed.

6

Contact Tab

North Carolina School Boards Association

Logout Ramona Powers
rpowers@ncsba.org

Home Contact Account Credits Events SBANCPS NCSBA Staff NCCOSA

Home / Account Information

General Account Information

Account	Member Id	Region
North Carolina School Boards Association	10123	

Primary Contact

Website	Main Phone
www.ncsba.org	919-841-4040
Twitter	Other Phone
Facebook	Fax
	919-841-4020

Account Address Information

Account Information Dropdown

- Click on "Contact" and then select "Account Information"
- 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.

7

Contact Tab

North Carolina School Boards Association

Logout Ramona Powers
rpowers@ncsba.org

Home Contact Account Credits Events SBANCPS NCSBA Staff NCCOSA

Home / Memberships and Services

Current Memberships and Services

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

Customer	Membership	Start Date	End Date
Ramona Powers	Department Heads		
Ramona Powers	Legislative Alerts		
Ramona Powers	Newsletter subscribers		

Membership and Services Dropdown

- Click on "Contact" and then select "Memberships and Services"
- This page displays any individual current subscriptions, committees, and memberships you currently have. (At this time, NCSBA has very few individual memberships so don't be alarmed if nothing shows on this page).

8

North Carolina School Boards Association

Logout JohLee Long
jlong@ncsba.org

Home Contact Account Credits Events NCSBA Staff

Home

Welcome to

All board clerks have

- Manage contact
- View memberships and services
- Register for events

Membership Portal

Membership portal. The portal allows members to:

formation

Registrations Dropdown

- Click on “Contact” and then select “Registrations”
- This page displays all individual “Event Registrations.” You can export to excel by simply click on “Export to Excel.”

Contact Tab

9

Contact Tab

Home / Website Profile

Member Portal Profile

First name
Ramona

Last name
Powers

Nickname
Ramona Powers

About

Email
rpowers@ncsba.org

Change password

Save changes

- **Website Profile Dropdown**
- Click on “Contact” and then select “Website Profile”
- This page displays your website 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***
- You can also change your password on this page by simply clicking on “change password” highlighted in blue. Once you’ve updated your password click the “Save changes” button.

10

North Carolina School Boards Association

Logout JoshLee Long jlong@ncsba.org

Home Contact **Account** Credits Events NCSBA Staff

Home Account Information Contacts Memberships and Services Invoices

Welcome to the NC Portal

All board clerks have been given account access to the Membership portal. The portal allows members to:

- Manage contact information and school district information
- View memberships and services
- Register for events

If you need help navigating through the system, please click the question mark in the upper right-hand corner of the screen.

Contact the NCSBA office at 919-841-4040 with any questions.

Event Registration

All board members should contact their board clerk to register for an event. **Board clerks must use their login** to register members of the district for an activity. If you need to register for an event but do not have a login, please contact us at jlong@ncsba.org.

You are already logged in

Account Tab

11

Account Information Dropdown

- Click on "Account" and then select "Account Information"
- This page displays all the general, school, board meeting and legislative information.
- 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.
 - If you need to make changes to a phone number, please enter as xxx-xxx-xxxx.
- **Please note that some fields are not editable.**
- 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.

Home / Account Information

General Account Information

Account	Member Id	Region
North Carolina School Boards Association	10123	

Primary Contact

Website: Main Phone:

Twitter: Other Phone:

Facebook: Fax:

Account Address Information

Physical Address: Street 1 City

Mailing Address: Street 1 City

Account Tab

12

Contacts Dropdown

- Click on "Account" and then select "Contacts" and then select "contacts"
- This will populate in all your contacts for your school district.
- If you are not able to see a listing of all the contacts for your school district, please let us know.
- The pencil mark icon to the left of each of your contacts names allows you to update the account contact by simply clicking on that icon.
- A new screen will pop up for you to make changes and scroll down to the bottom and hit "submit" when you are done.
- Notice you can make changes to their "Position Title", "Board Office" and "Begin Date" by using the drop-down menu.

Account Contacts

Select a contact below to modify the contact information for that contact.

Add Export to Excel							
Drag a column header and drop it here to group by that column							
	Contact	Board Sea...	Board Offi...	Position N...	Title	Begin Date	Portal ad...
<input type="checkbox"/>	Madison Skeens			Governmental Relations - Madison Skeens	Governmental Relations		No
<input type="checkbox"/>	Angela Hunter			Board Development - Angela Hunter	Board Development		
<input type="checkbox"/>	McKenna Osborn			Legal/Policy - McKenna Osborn	Legal/Policy		
<input type="checkbox"/>	Justice Warren			Legal/Policy - Justice Warren	Legal/Policy		

105 items per page 1 - 54 of 54 items

Account Tab



13

Account Tab

Contacts Dropdown

- Click on "Account" and then select "Contacts" and then select "contacts"
- This will populate in all your contacts for your school district.
- If you are not able to see a listing of all the contacts for your school district, please let us know.
- The pencil mark icon to the left of each of your contacts names allows you to update the account contact by simply clicking on that icon.
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- Notice you can make changes to their "Position Title", "Board Office" and "Begin Date" by using the drop-down menu.

Home Contact Account Credits Events SBANCP5 NCSBA Staff NCCOSA

Account Information
Contacts
Memberships and Services
Invoices

Contacts
Remove Contact

Welcome to the NC

All board clerks have been given account access to the Membership portal. The portal allows members to:

- Manage contact information and school district information
- View memberships and services
- Register for events

If you need help navigating through the system, please click the question mark in the upper right-hand corner of the screen.

Contact the NCSBA office at 919-841-4040 with any questions.

Event Registration

All board members should contact their board clerk to register for an event. **Board clerks must use their login** to register members of the district for an activity. If you need to register for an event but do not have a login, please contact us at jjong@ncsba.org.

You are already logged in

14

Account Tab

North Carolina School Boards Association

Logout John Lee Long jong@ncsba.org

Home Contact Account Credits Events NCSBA Staff

Home / Contacts

Account Contacts
Select a contact below to modify the contact information for that contact.

Add Export to Excel

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

Contact	Board Seat	Board Office	Position No.	Title	Begin Date	Portal ad...
		Governmental				

New Contact

General Contact Information

Contact Type: [Dropdown]

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

Position Title: [Dropdown] Begin Date (for board members, please enter date of election/appointment): [Text]

Board Office: [Dropdown] Board Seat Number: [Text]

Election Status: [Dropdown]

IMPORTANT: If you select "No" 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 "Yes" the newly created user will only have access to updating their own information and registering only themselves for events.

Account Administrator: Yes No

Account Contacts

- You can also export these contacts into excel by clicking on "Export to Excel".
- This page is where you can also add new contacts. Simply click on "Add".
- A new screen will populate to input all your information for the new contact.
- You will see that you must select from the drop-down menu "Contact Type" and "Position Type". All other fields are text fields. Hit "submit" at the bottom and you will now see that your new contact has populated into your list of contacts for your school district.
- Please note any fields marked with an * are required fields.

15

North Carolina School Boards Association

Logout John Lee Long jong@ncsba.org

Home Contact **Account** Credits Events NCSBA Staff

Home

Account Information
Contacts
Memberships and Services
Invoices

Welcome to the NCSBA Portal

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Event Registration

All board members should contact their board clerk to register for an event. **Board clerks must use their login** to register members of the district for an activity. If you need to register for an event but do not have a login, please contact us at jljong@ncsba.org.

You are already logged in

Memberships & Services Dropdown

- Click on "Account" and then select "Memberships and Services" from the dropdown.
- This brings up a listing of all your district memberships, services, etc.
- You have the option to "Export to Excel".

Invoices Dropdown

- Click on "Account" and the select "Invoices" from the drop down.
- This will bring up a listing of your district invoices.
- You have the option to "Export to Excel."

Account Tab



16

Credits Tab

Home Contact Account Credits Events SBANCPS NCSBA Staff NCCOSA

Home District Credits

Welcome to the NCSBA Membership Portal

All board clerks have been given account access to the Membership portal. The portal allows members to:

- Manage contact information and school district information
- View memberships and services
- Register for events

If you need help navigating through the system, please click the question mark in the upper right-hand corner of the screen.

Contact the NCSBA office at 919-841-4040 with any questions.

Event Registration

All board members should contact their board clerk to register for an event. **Board clerks must use their login** to register members of the district for an activity. If you need to register for an event but do not have a login, please contact us at jljong@ncsba.org.

You are already logged in

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17

Credits Tab

Contact	Description	Point Period	Date Earned	Points
Carroll Ippock, Past President	Carroll Ippock, Past President - 2022 NCSBA Annual Conference - Full Registration	2023	11/16/2022	20
Carroll Ippock, Past President	Carroll Ippock, Past President - Craven County Board Retreat - Session	2023	9/13/2022	5
Carroll Ippock, Past President	Carroll Ippock, Past President - 2022 Risk Management Conference - Session	2022	5/6/2022	11
Carroll Ippock, Past President	Carroll Ippock, Past President - Legal NC Open Meetings Law for School Board Members	2022	4/10/2022	1
Carroll Ippock, Past President	Carroll Ippock, Past President - Craven - Continuous Improvement Training - Session	2022	3/24/2022	3
Carroll Ippock, Past President	Carroll Ippock, Past President - 2022 Spring Law Conference - Day 2	2022	3/4/2022	3

District Credits

- Click on “Credits” and then select “District Credits.”
- This page contains a table of credits for all of a district’s board members. The table can be exported to Excel.
- 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.

18

Credits Tab

district-points

Training - Session				
Carroll Ippock, Past President	Carroll Ippock, Past President - 2022 Spring Law Conference - Day 2 (March 04)	2022	3/4/2022	3
Carroll Ippock, Past President	Carroll Ippock, Past President - 2022 Spring Law Conference - Day 1 (March 03)	2022	3/3/2022	3

1 - 100 of 387 items

Chart

Year	Credits
1993	56
1994	545
1995	219
1996	50
1997	65
1998	57
1999	44
2000	88
2001	130
2002	71
2003	40
2004	85
2005	96
2006	99
2007	245
2008	74
2009	105
2010	79
2011	41
2012	79
2013	66
2014	106
2015	119
2016	84
2017	155
2018	107
2019	79
2020	84
2021	64
2022	99
2023	25

District Credits

- Click on "Credits" and then select "District Credits."
- This page contains a table of credits for all of a district's board members. The table can be exported to Excel.
- 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.

19

Request for Non-NCSBA Activity Credit

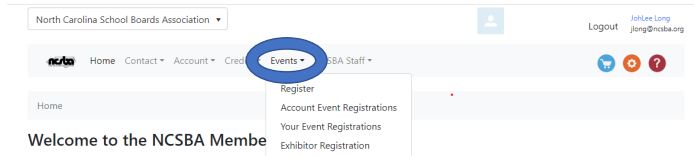
*If you have any additional questions or concerns, please contact **JohLee Long** (jlong@ncsba.org) for further assistance.

The screenshot shows the NCSBA website with the following elements:

- Navigation menu: About, Governmental Relations, Training, Resources, Risk Management, Legal/Policy, Supt Searches
- Statistics: 767 Board Members, 1,500,000 Students, 2500 Schools
- Quick Links: Member Portal, NCSBA Search, The Network Resources, Education Law in NC-ELNC, **Request for Non-NCSBA Activity Credit** (circled in red), Access PLS, NCSBA, Web Hosting Districts
- Get In Touch: NEW MAILING ADDRESS, 7208 Falls of Neuse Road, Suite 301, Raleigh, NC 27615, P: 919-841-0400, F: 919-841-0000, E: spowers@ncsba.org, Monday - Friday 8am-5pm

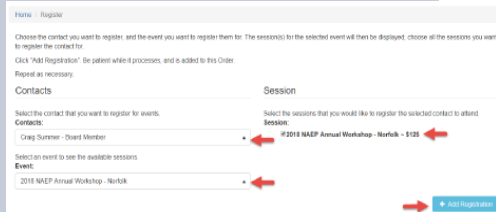
20

Events Tab



21

Events Tab



Register Dropdown

- Click on "Events" and then select "Register"
- 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.
- 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."
- 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.
- Continue this process for each member you need to register.
- 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."
- If you choose "Bill Me Later," you will receive a Thank You message and that is all you need to do.

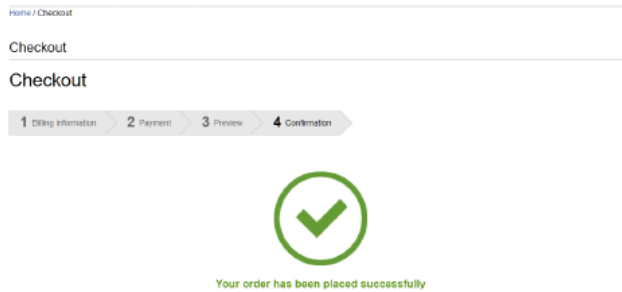


22

Events Tab

Register Dropdown

- 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.
- Once you have verified your information, click "Checkout." This will take you to the next screen to enter your billing information and payment.
- Once you get to the payment tab, verify your information, and then click "Place Order."
- You should receive the following message: "Your order has been placed successfully."



23

Events Tab

Account Event Registration Dropdown

- Click on "Events" and then select "Account Event Registrations."
- This page will display all your contacts that registered for an event.
- You can "Export to Excel" and seen above and you can also drag the column headings again to group by "Event", "Attendee", etc.

Your Event Registration Dropdown

- Click on "Events" and then select "Your Event Registrations."
- This brings up a listing of your current registrations that you are registered for.

Event Registrations

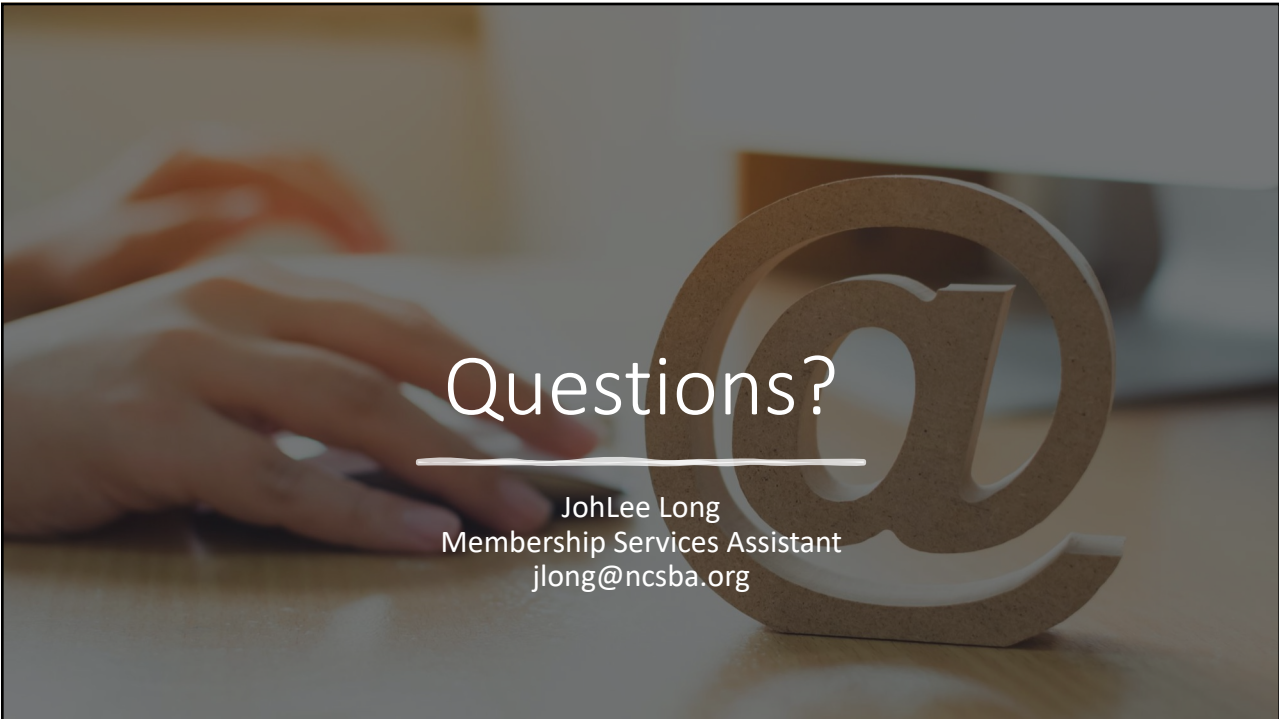
Export to Excel

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

Attendee	Event	Venue	Registered	Start Date	Attended	
<input checked="" type="checkbox"/>	Craig Sumner	2018 NAEP Annual Workshop - Norfolk	Dwight Conference Center	6/13/2018 2:35 PM	7/19/2018 8:15 AM	No
<input checked="" type="checkbox"/>	Bob Bob	2018 NAEP Annual Workshop - Norfolk	Dwight Conference Center	5/22/2018 3:26 PM	7/19/2018 8:15 AM	No
<input checked="" type="checkbox"/>	Bob Bob	2018 NAEP Annual Workshop - Norfolk	Dwight Conference Center	5/22/2018 3:25 PM	7/19/2018 8:15 AM	No
<input checked="" type="checkbox"/>	Bob Bob	2018 NAEP Annual Workshop - Norfolk	Dwight Conference Center	5/22/2018 3:45 PM	7/19/2018 8:15 AM	No
<input checked="" type="checkbox"/>	Bob Bob	2018 NAEP Annual Workshop - Norfolk	Dwight Conference Center	5/22/2018 3:46 PM	7/19/2018 8:15 AM	No
<input checked="" type="checkbox"/>	Jimmy John	2018 NAEP Annual Workshop - Norfolk	Dwight Conference Center	5/23/2018 10:10 AM	7/19/2018 8:15 AM	No
<input checked="" type="checkbox"/>	Kate Perry	2018 NAEP Annual Workshop - Norfolk	Dwight Conference Center	5/23/2018 10:13 AM	7/19/2018 8:15 AM	No

100 items per page 1 - 85 of 85 items

24



Questions?

JohLee Long
Membership Services Assistant
jlong@ncsba.org