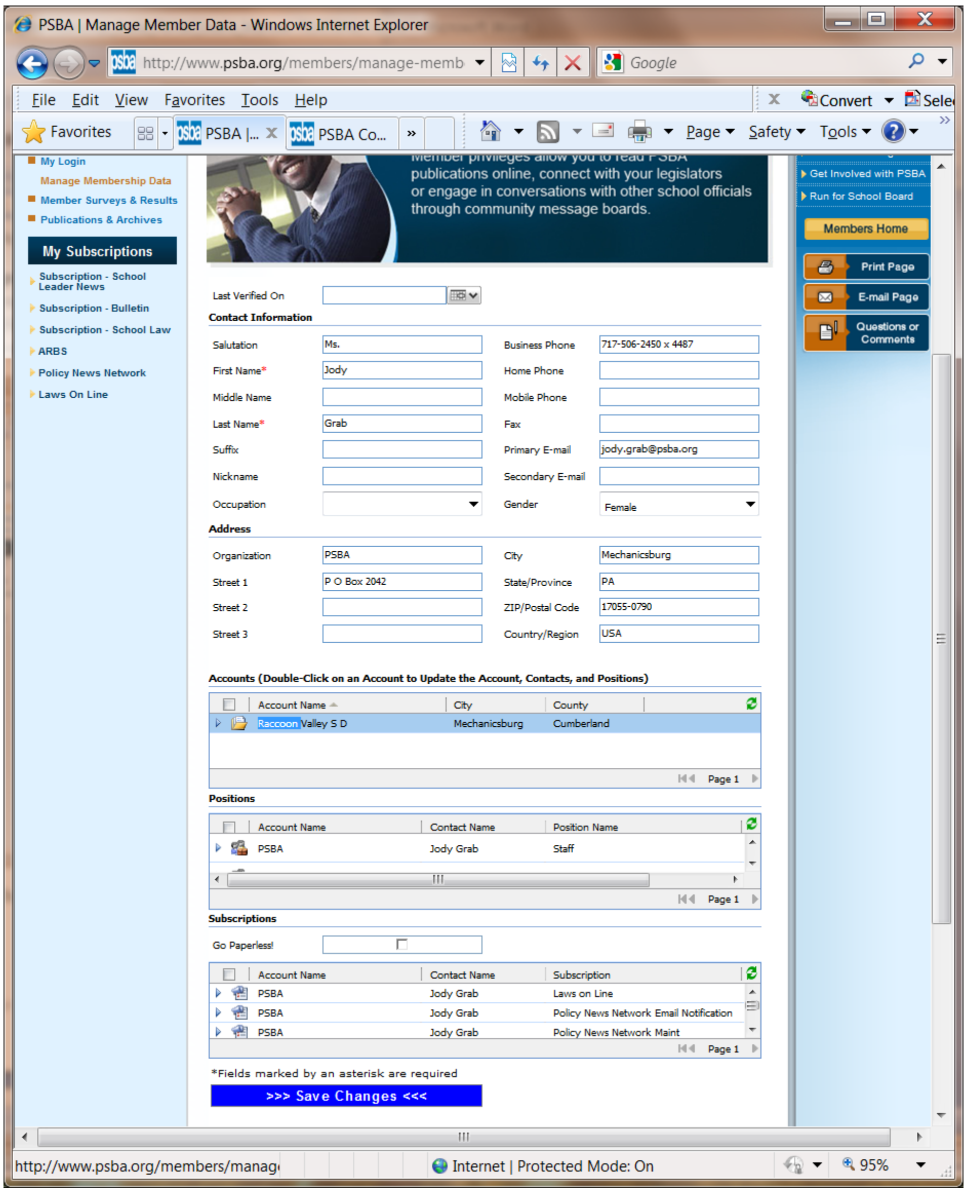
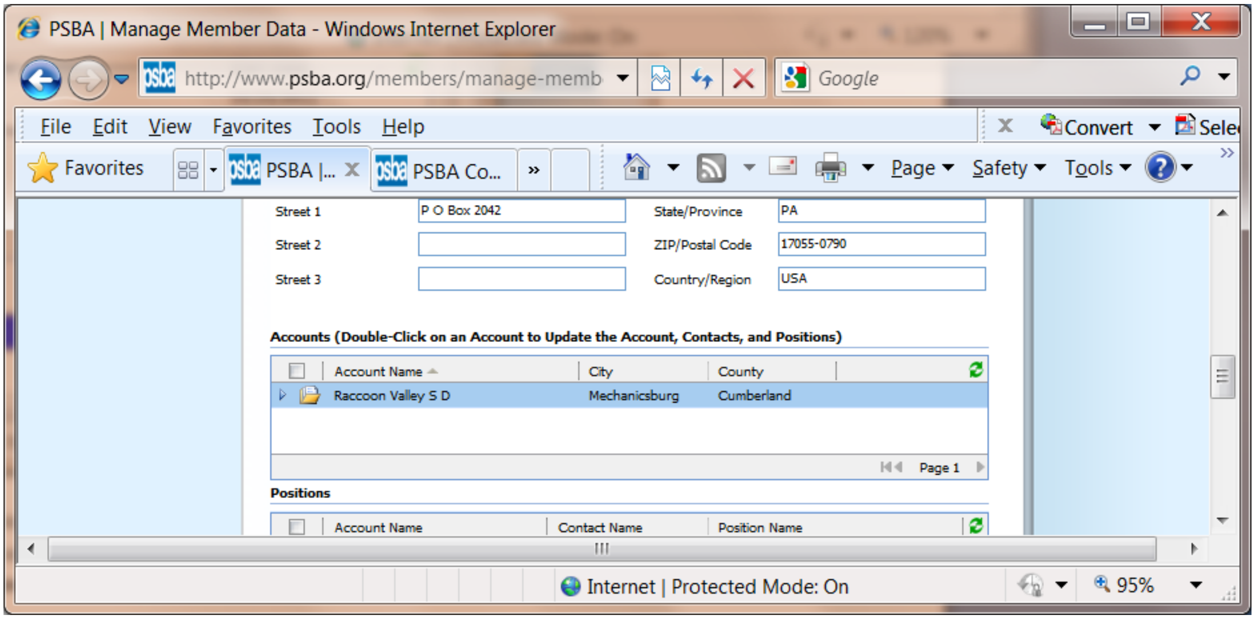
Managing your own contact Information

Login to PSBA Members Only are of www.psba.org using your current member login. (If you have forgotten your login, email webmaster@psba.org for assistance.)

Click the **Manage Membership Data** link in the left navigation menu. (It may take as long as 5-10 seconds for the screen to fill, so please wait before reloading or leaving the page.)



In the top section, you will see and be able to update your own personal data. Verify/update the contact information on the top portion of the screen (see sample screen above). Click the Save Changes button on the bottom of the screen. Note: Only **school board members** should select an **Occupation**.

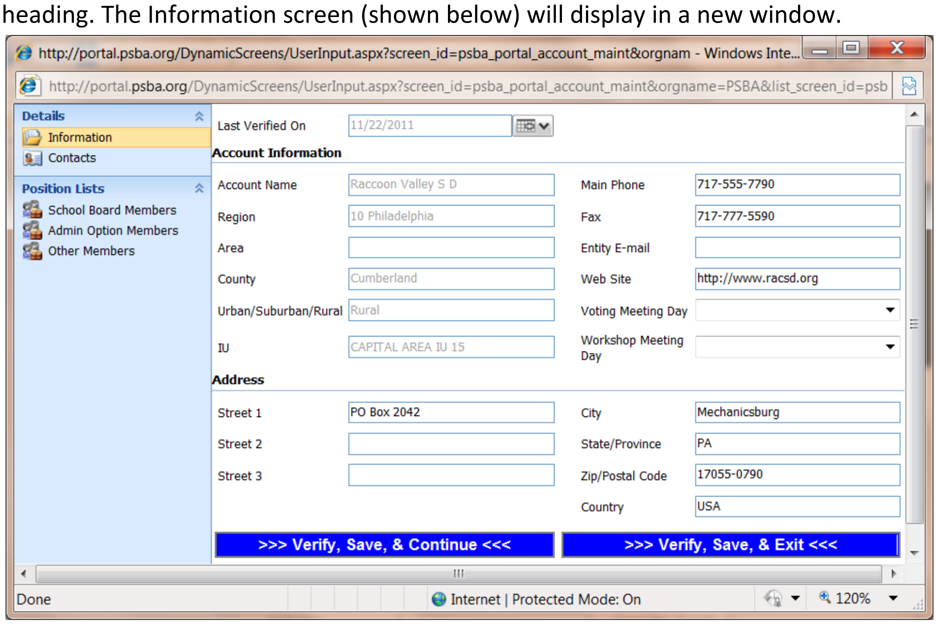


Account Administrators automatically include additional data sections and can view and update the Account information and Positions (see sample, above). **Board Secretaries** and **Business Administrators** have been designated **Account Administrators** for the school entity and are the only members who will view and have access.

Account Administrators: Manage your school entity's membership information

Change school entity basic information

Below your personal account information, double click on the name of the organization listed under the Accounts heading. The Information screen (shown below) will display in a new window.

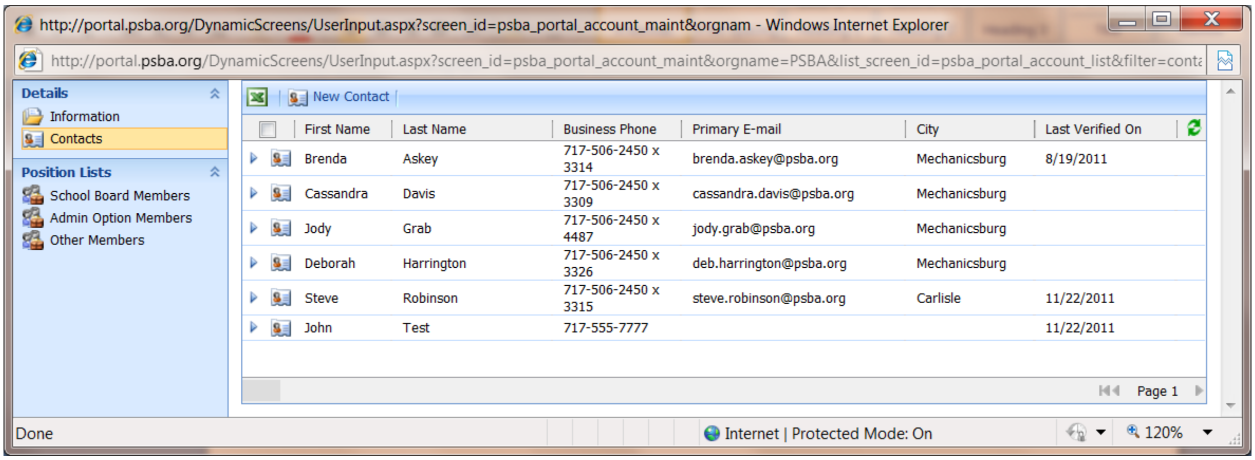


Update any new account information and save, or if no changes you will verify the account data is correct. Any fields displayed in light grey text are read-only and you must contact PSBA to change that information.

Click the **Verify, Save & Continue** button on the bottom of the screen after changes are made.

Managing your school entity's contacts

From the Contacts link on the left navigation panel, Account Administrators can view and update all of the school entity's membership. All members will display from the Contacts link.

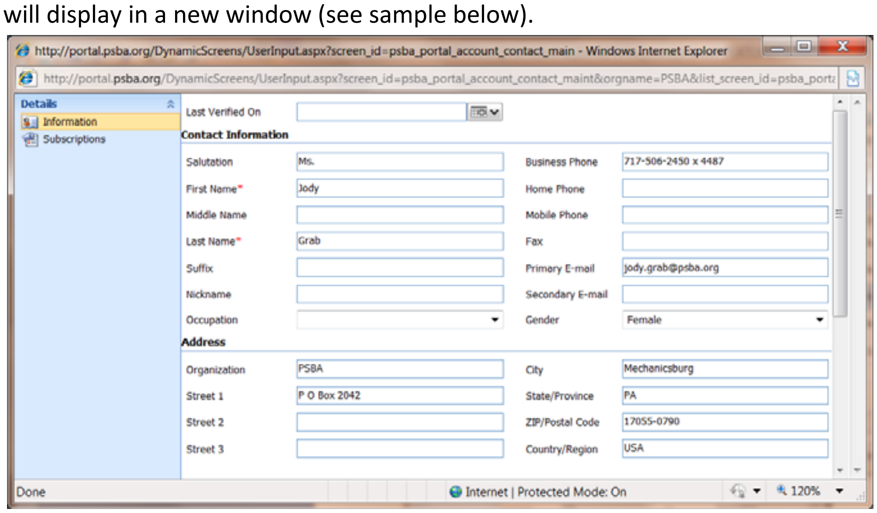


Contacts can be sorted and viewed by general membership categories: School Board, Admin Option and Other. Those categories are listed under the Positions link on the left under the Information and Contact links. Some contacts may appear more than once if they hold multiple positions or roles within the entity.

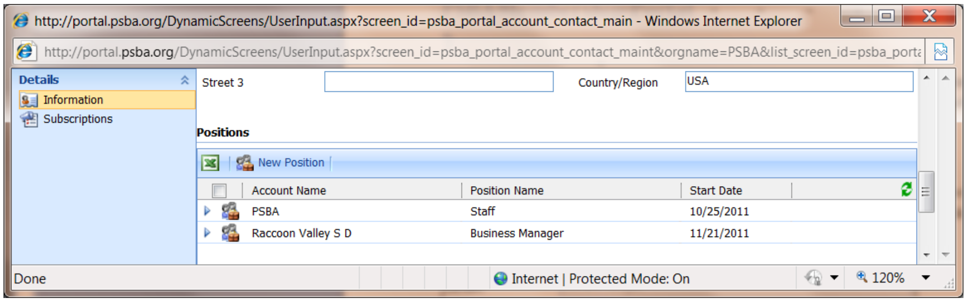
To return to the main Account information screen click the Information navigation menu.

Updating an individual contact's information and positions

To view or change an individual member's information, double-click the contact name. The individual's information will display in a new window (see sample below).



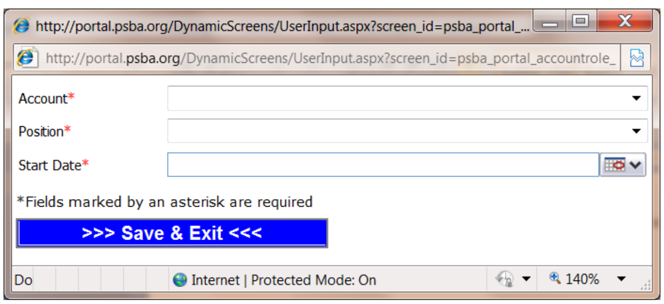
From this screen you may make changes to the contact information on the top portion of the screen, or make no changes and confirm the information is correct. Click the Verify, Save & Continue button on the bottom of the screen.



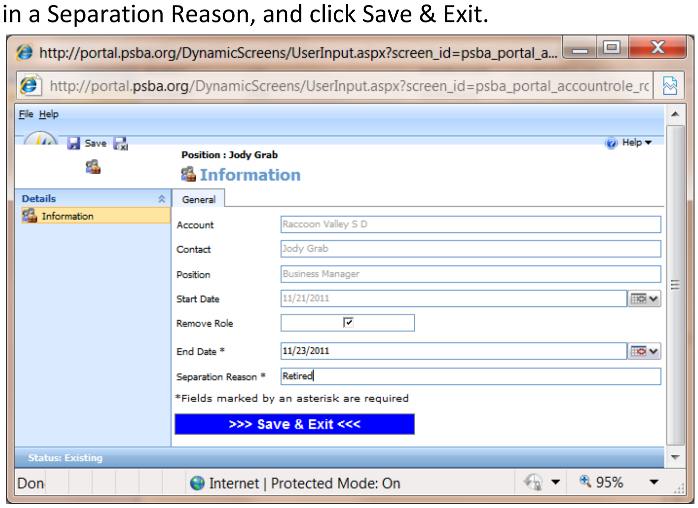
Review the list of Account Positions. Only **current, active positions** will be displayed. Any positions a contact may have served as in the past -- but does not currently hold -- are archived with PSBA and are not visible to online users.

IMPORTANT! You must **ADD** new positions first **before** removing positions no longer being held! In the event all positions are removed from a contact, that contact will be deactivated and can no longer be viewed online.

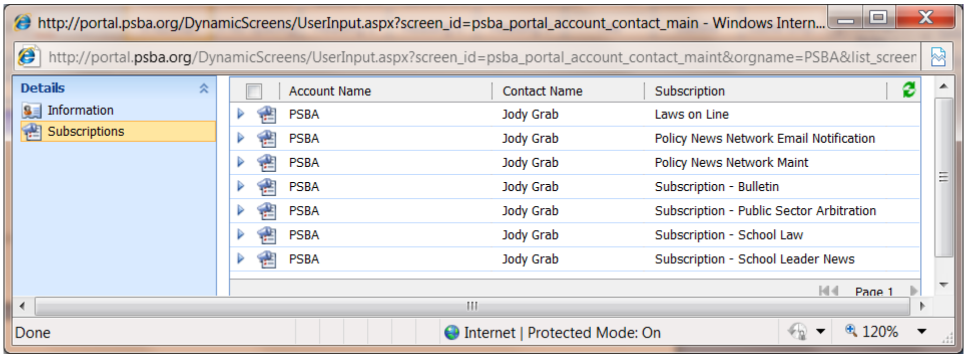
To **add** an Account Position click the **New Position** button, select the proper Account and Position from the pull-down lists, enter a Start Date, and click Save & Exit. Note: It is possible for a contact to have several accounts.



To **remove an Account Position,** double click on it, check the Remove Role checkbox, enter the End Date and type in a Separation Reason, and click Save & Exit.



To view a list of the contact's subscriptions click the Subscriptions navigation menu on the left hand side of the contact's screen. Subscription information is read-only and can be changed only by PSBA. Contact PSBA to change or update information.

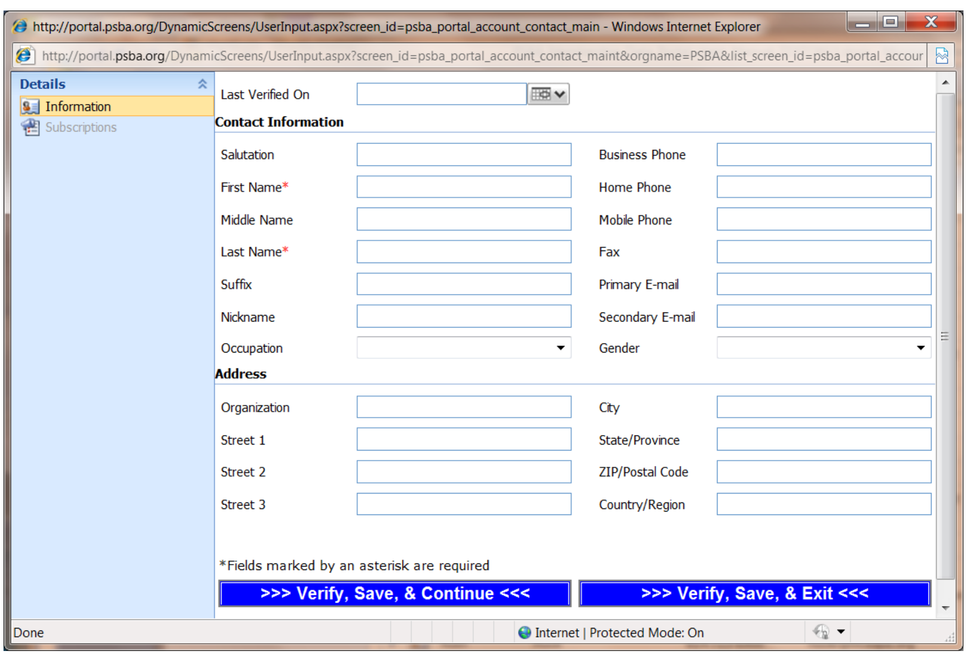


To return to the main Contact Information screen click the Information navigation menu.

After you have verified and updated the contact information you can close the contact window by clicking the X at the top right corner of your Internet browser window.

Adding a NEW contact to your school entity

First, from the Contact screen, select the **New Contact button** at the top of the page. A new window will open for you to enter the new member's basic information (see below). You may save your work as you go by clicking the Verify, Save & Continue button. When you have completed adding all the new contact's details, click the Verify, Save & Exit button, which will return you to the complete Contact list.

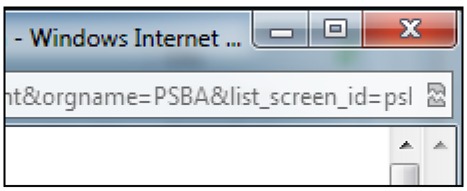


Next, select the new member's record to then add any **Positions** the contact will hold within the district.

Removing a contact from your school entity

To remove an employee or contact who is no longer associated with your school entity, you must **remove all the Positions** from that contact's record. Follow the instructions above for removing an Account Position. Once all positions are removed and confirmed by PSBA, that contact will be deactivated and no longer appears on your Contacts lists. However, PSBA continues to maintain all inactive contacts along with their basic information as is required for PSBA record-keeping.

Note: You may **close** a window at any time **without saving changes** by clicking on the **X** at the top right of any active screen.



Completing the Process: PSBA Confirmation

All changes made to your school entity's records must be viewed and confirmed by PSBA in order to permanently take effect. The confirmation process may take up to three full business days to complete. If you have questions or problems with your record maintenance at any time, contact **Sherri Houck,** Contact Services Assistant, at (717) 506-2450, ext. 3360) or sherri.houck@psba.org .

DEFINITIONS

Account – Your school entity.

Administrator Option -- An extra fee subscription for administrators identified by your school entity to have access to various PSBA publications, including *School Leader News* and the *PSBA Bulletin*. Admin Option does not include the district's nine board members and superintendent, who automatically receive PSBA publications as part of the school entity's membership.

Contact – Individual member of your school's management team, including board members, board secretary, business administrators, principals and any other individual designated to receive services and publications from PSBA.

Date of Separation – The date an individual or individual's position is no longer in effect, e.g. board member term expires, or a new person is hired to assume one of another contact's positions.

Position – A particular role or job a contact may hold in the district. An individual may hold several positions in a school entity.

Position List – Accounts sorted by general categories: Board, Admin Option, Other.

Separation Reason – The event or reason an individual contact no longer performs a particular position.

Subscription – PSBA publications, as well as those electronic publications or member services accessed through the PSBA members' website.

Verify – Confirm that the information listed is correct. Information can be changed and then verified, or if no changes are made, simply verified. PSBA will require verification of all account and member information annually following Board Reorganization.