



Quick Instructions for Experienced Users – Online System 1.2

CHAPTER ROSTER APPROVAL

Menu Path: Membership System>Process>Chapter Roster Approval

1. FFA Chapter number should be filled in (if not, enter your Chapter number)
2. Click on yellow SEARCH button
 - a. A listing of all members that have been renewed or added will be displayed.
3. To approve each Member or Staff & Partner either:
 - a. Click on the “Select All Students” button if you want the whole list
 - b. Or check each box separately under Select for Batch on the row by the student member or staff & partner name.

NOTE: If there are duplicates or individuals you do not wish to approve, do not click on the box by their name. If they are approved you will be billed for them!

(See below for instructions on how to expire duplicate entries)

4. Click yellow SAVE button. Once the process saves, you will see the batch number for that submission appear on the upper right hand side of the screen. You will need this batch number if you need to print a billing roster later. If you would like a copy of your billing roster emailed to you, enter your email address in the “Email this report” box and click on “Print New Roster”. This will send a billing roster to your email address from ffa.org. If you click on “Print New Roster” without entering an email address your roster will appear under List in the Report Manager on your menu .

NOTE – SAVE automatically submits the checked members and staff & partner records on to your State for approval. There is no longer a second processing step necessary for your roster submission.

EXPIRING A DUPLICATE RECORD

Menu Path: Membership System>Use>Student Rapid Entry Screen

1. At the Student Rapid Entry search screen enter the duplicate student member number under Student ID or search by the student’s name (when the correct name comes up on your search screen click on the name itself to get into the student record).
2. When the member record comes up that you want to expire, click on the + (plus) button on the right side of your screen in the section marked Membership (it’s located just above the box marked with the Membership Type). You cannot do this on the same day that you entered the member originally.
3. In the box for the Membership Type enter “X” for expired.
4. Click SAVE at the bottom of the screen when done. This will expire the duplicate record.

PRINTING A CHAPTER ROSTER

Menu Path: Membership System>Reports>Chapter Roster

The **first** time that you run a chapter roster, you may need to create a Run Control ID (a “name”) to identify the process you will be using. On the initial Chapter Roster search screen click the “Add a New Value” tab. On the next screen type “roster” in the blank box and then click ADD. On the next screen click SAVE. This action will name the “roster” process and take you to # 2 below.

1. If you already set up a Run Control ID at the Chapter Roster screen, enter “roster” and click on SEARCH.
2. If not pre-filled, enter your chapter number.



3. Leave the batch number blank to generate a roster of all your active members and staff & partners for the current year. Enter the batch number if you are running a billing roster. (See “Creating Documentation for Chapter Membership Billing” below)
4. Click yellow RUN button in the upper right corner.
5. When new screen appears, make sure the CHAPTER ROSTER LIST has a check mark in the preceding box and the TYPE is Web and FORMAT is PDF. To generate a roster in Excel use CVS as the format.
6. Click OK.
7. Once returned to the previous screen, click the blue link PROCESS MONITOR in the upper right corner.
8. Click yellow REFRESH button until SUCCESS appears under RUN STATUS.
9. Click the blue DETAILS link next to SUCCESS.
10. Once the new screen appears, click the blue VIEW LOG TRACE link.
11. When the next screen appears, click the blue FFA3005_?????.pdf link.*

A PDF report of your current roster should appear shortly. This can be saved and printed. Use the print icon on the PDF screen to print the roster.

NOTE – 2 right columns on roster show Batch Number and Batch Status (codes below)

AA – Advisor Approved

SA – State Approved

NA – National Approved

0 - Not yet submitted for Advisor Approval or a paid multi-year member

*If you are generating a roster using the CVS format, click on the link ending with cvs.

A screen showing the roster will open. Go to file>save as on this screen. Pick where you want to save the file (desktop, C drive location, etc...) and save the type as an Excel workbook. This will save the roster print out as an Excel file.

CREATING DOCUMENTATION FOR CHAPTER MEMBERSHIP BILLING

Menu Path: Membership System>Reports>Chapter Roster

1. Follow steps 1 and 2 above.
2. Enter BATCH NUMBER from your roster approval screen.
3. Follow steps 4 through 11 above.

A PDF report of your current roster should appear shortly. This can be saved and printed. This report contains summary billing information for National and State dues owed for the Members/Staff & Partners in that particular batch. This is the page that you will print and send to your STATE office with your dues check.

NOTE – Each group/roster of names that are SAVED in the Chapter Roster Approval process will produce an individualized batch number.