



# OSBA ROSTER UPDATE INSTRUCTIONS

## **HOW TO EDIT Superintendent, Treasurer, Transportation Manager, Staff, Board Member (No. 1-5 on OSBA Roster Update Checklist) See Video timestamp 0:03**

1. Login to the OSBA website and click on “MY ACCOUNT”.
2. Scroll over the card “MY DISTRICT” and click on the “EDIT ROSTER” button.
3. Scroll down to the section you want to edit – ADMINISTRATION, BOARD or STAFF.
4. Find the person’s card you wish to edit and scroll over it. Click on the “EDIT” button to update Name, to update/add Email Address, Phone, Mailing Address, District Role and Demographics.
5. Click the “Submit” button at the bottom of the box to save your changes.
6. Click the “Cancel” button at the bottom of the box to exit the edit box without saving changes.

## **HOW TO REPLACE Superintendent, Treasurer, Transportation Manager (No. 1-3 on OSBA Roster Update Checklist) See Video timestamp 1:22**

### **The steps below apply to all titles listed above. The Superintendent is an example to use for all.**

1. Login to the OSBA website and click on “MY ACCOUNT”.
  2. Scroll over the card “MY DISTRICT” and click on the “EDIT ROSTER” button.
  3. Scroll down to the “ADMINISTRATION” section.
  4. Find the Superintendent’s card and scroll over it. Click on the “REPLACE” button to change to a new superintendent.
  5. In the “Change Superintendent” pop-up box click the appropriate response to the question  
IS THE NEW SUPERINTENDENT CURRENTLY IN THE DISTRICT? Choosing the response:
    - “Replacement is in the district” provides you with a drop-down list of people in the district to choose from. You are also able to enter the “Effective Date” of the new person. The last question you need to respond to is  
“IS THE FORMER OFFICE HOLDER STAYING IN THE DISTRICT? Choosing the response:
      - “Yes” will provide you with fields to enter a “New Role” and “New Title” for the former Superintendent.
      - “No” will allow you to go to the next steps.
- (continued on next page)

Click the “Submit” button at the bottom of the box to save your changes.  
Click the “Cancel” button at the bottom of the change box to exit without saving changes.

- “Replacement is not in the district” provides you with fields to add a new Superintendent and “Effective Date”. The last question you need to respond to is “IS THE FORMER OFFICE HOLDER STAYING IN THE DISTRICT? Choosing the response: “Yes” will provide you with fields to enter a “New Role” and “New Title” for the former Superintendent.  
“No” will allow you to go to the next steps.  
Click the “Submit” button at the bottom of the box to save your changes.  
Click the “Cancel” button at the bottom of the change box to exit without saving changes.
- “A replacement has not yet been named” provides you with a field to enter the “Effective Date”. The last question you need to respond to is “IS THE FORMER OFFICE HOLDER STAYING IN THE DISTRICT? Choosing the response: “Yes” will provide you with fields to enter a “New Role” and “New Title” for the former Superintendent.  
“No” will allow you to go to the next steps.  
Click the “Submit” button at the bottom of the box to save your changes.  
Click the “Cancel” button at the bottom of the change box to exit without saving changes.

#### **HOW TO ADD Staff**

**(No. 4 on OSBA Roster Update Checklist) See Video timestamp 3:04**

1. Login to the OSBA website and click on “MY ACCOUNT”.
2. Scroll over the card “MY DISTRICT” and click on the “EDIT ROSTER” button.
3. Click on the “Add new contact” link just above ADMINISTRATION.
4. Enter Name, Email Address, Phone, Mailing Address, District Role and Demographics.
5. Click the “Submit” button at the bottom of the box to save your changes.
6. Click the “Cancel” button at the bottom of the box to exit the edit box without saving changes.

#### **HOW TO REMOVE Staff**

**(No. 4 on OSBA Roster Update Checklist) See Video timestamp 3:50**

1. Login to the OSBA website and click on “MY ACCOUNT”.
2. Scroll over the card “MY DISTRICT” and click on the “EDIT ROSTER” button.
3. Scroll down to the STAFF section.
4. Find the person’s card you wish to remove and scroll over it. Click on the “REMOVE” button.
5. Follow the instructions in the “Edit” pop-up box.

## HOW TO REPLACE Board Member

(No. 5 on OSBA Roster Update Checklist) See Video timestamp 4:27

1. Login to the OSBA website and click on “MY ACCOUNT”.
2. Scroll over the card “MY DISTRICT” and click on the “EDIT ROSTER” button.
3. Scroll down to the “BOARD” section.
4. Find the card you wish to replace and scroll over it. Click on the “REPLACE” button to change to a different board member.
5. In the “Change Board Member” pop-up box click the appropriate response to the question  
IS THE NEW BOARD MEMBER A FORMER MEMBER OF YOUR BOARD? Choosing the response:
  - “Yes” provides you with a drop-down list of people to choose from. You are also able to enter the “Effective Date” of the new person. The last question you need to respond to is  
“IS THE FORMER OFFICE HOLDER STAYING IN THE DISTRICT? Choosing the response:  
“Yes” will provide you with fields to enter a “New Role” and “New Title” for the former board member.  
“No” will allow you to go to the next steps.  
Click the “Submit” button at the bottom of the box to save your changes.  
Click the “Cancel” button at the bottom of the change box to exit without saving changes.
  - “No” provides you with fields to add a new board member and “Effective Date”. The last question you need to respond to is  
“IS THE FORMER OFFICE HOLDER STAYING IN THE DISTRICT? Choosing the response:  
“Yes” will provide you with fields to enter a “New Role” and “New Title” for the former Board Member.  
“No” will allow you to go to the next steps.  
Click the “Submit” button at the bottom of the box to save your changes.  
Click the “Cancel” button at the bottom of the change box to exit without saving changes.
  - “A replacement has not yet been named” provides you with a field to enter the “Effective Date”. The last question you need to respond to is  
“IS THE FORMER OFFICE HOLDER STAYING IN THE DISTRICT? Choosing the response:  
“Yes” will provide you with fields to enter a “New Role” and “New Title” for the former Board Member.  
“No” will allow you to go to the next steps.  
Click the “Submit” button at the bottom of the box to save your changes.  
Click the “Cancel” button at the bottom of the change box to exit without saving changes.

**HOW TO UPDATE Board Member Roles**  
(No. 6 on OSBA Roster Update Checklist) See Video timestamp 5:57

**This should be updated in January after the Board's Organizational Meeting.**

1. Login to the OSBA website and click on "MY ACCOUNT".
2. Scroll over the card "MY DISTRICT" and click on the "EDIT ROSTER" button.
3. Click on the "Assign board member roles" link just above ADMINISTRATION.
4. Use the drop-down boxes to choose a person for each of the following roles:
  - Board President
  - Board Vice President
  - Legislative Liaison
  - Student Achievement Liaison

Click the "Submit" button at the bottom of the box to save your changes.

Click the "Cancel" button at the bottom of the box to exit the edit box without saving changes.

**HOW TO CHECK District Information**  
(No. 7 on OSBA Roster Update Checklist) See Video timestamp 6:48

1. Login to the OSBA website and click on "MY ACCOUNT".
2. Scroll over the card "MY DISTRICT" and click on the "EDIT ROSTER" button.
3. Scroll over the top card with the district name in it click on the "EDIT" button to update Board Meeting Day, Mailing Address, Phone and Website Address.
4. Click the "Submit" button at the bottom of the box to save your changes.
5. Click the "Cancel" button at the bottom of the box to exit the edit box without saving changes.

**HOW TO CHECK Add/Remove Staff from subscriptions**  
(No. 8 on OSBA Roster Update Checklist) See Video timestamp 7:32

1. Login to the OSBA website and click on "MY ACCOUNT".
2. Scroll over the card "MY DISTRICT" and click on the "EDIT ROSTER" button.
3. Scroll down to the STAFF section.
4. Find the person's card you wish to change and scroll over it. Click on the "SUBSCRIPTIONS" button.
5. In the "Edit" pop-up box you will see "Subscription", "Status" and "Address" fields.
6. To add a subscription, click on the "Status" field and click on "Subscribed".
7. An address will populate in the "Address" field. Use the drop-down list to choose an address.
8. To remove a subscription, click on the "Status" field and click on "Removed".
9. Click the "Submit" button at the bottom of the box to save your changes.
10. Click the "Cancel" button at the bottom of the box to exit the edit box without saving changes.

## HOW TO CHECK Access Permissions

(No. 9 on OSBA Roster Update Checklist) See Video timestamp 8:35

1. Login to the OSBA website and click on “MY ACCOUNT”.
2. Scroll over the card “MY DISTRICT” and click on the “EDIT ROSTER” button.
3. Click on the “Manage permissions” link just above ADMINISTRATION.
4. In the “Edit” pop-up box you will see a list of staff in your roster and a row of permissions available across the top.
5. Click on the check boxes to give staff permission to access certain areas through the OSBA website.
6. Click the “Submit” button at the bottom of the box to save your changes.
7. Click the “Cancel” button at the bottom of the box to exit the edit box without saving changes.