

WASB

WASB Working for You

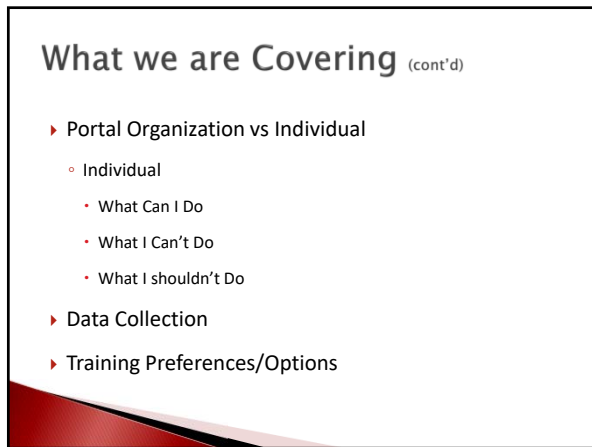
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What we are Covering

- ▶ Introduction
- ▶ Our Membership
- ▶ Navigating the New website
- ▶ Portal: Organization vs Individual
 - Organization
 - Editing a Contact
 - Changing a Relationship
 - Adding a Contact
 - Register Board and Staff
(we will review the process at the end, if time allows)
 - My Account





What we are Covering (cont'd)

- ▶ Portal Organization vs Individual
 - Individual
 - What Can I Do
 - What I Can't Do
 - What I shouldn't Do
- ▶ Data Collection
- ▶ Training Preferences/Options

Introduction

- ▶ Non-Profit organization
- ▶ Founded in 1921
- ▶ Supporting, Promoting & Advancing Public Education
- ▶ Supporting School Board
 - Members Consist of WI School Districts and CESAs
 - Your District pays dues to the WASB

Our Membership

- ▶ The WASB Provides Services to our Members
 - Provide Legal and Policy Information
 - Provide Election Information
 - Sending Legislative Advocacy Updates/Notifications
 - Sending Publications
 - Provide an Online Process to Register for Events
 - Ability to Pay Invoices Online through the Portal

Navigating the New Web Site

- ▶ What do you look for frequently?
 - Legal and Election Information
 - Employee Handbook
 - Policy Information
 - PRG
 - FOCUS
 - Events
 - We will cover Registrations in the Portal section if time allows
 - Certificates/Awards
 - Paperless Meetings

Navigating the Website (cont'd)

- ▶ Are you finding the information you need?
 - Search Feature
- ▶ Latest design is Mobile friendly
- ▶ Logging into the website also logs you into the online Portal
- ▶ Do you have any suggestions on how we can improve our website?
 - Please use the **WASB Working for You** Survey to Provide suggestions

Portal

- ▶ IE is no longer supported and crashes
- ▶ Organization vs Individual
 -  Sample School District
 -  Jude Law
 - Check at the top who you are logged in as
 - Bottom of the **My Profile** section to
 - Switch between your Organization and Yourself

Portal: Organization

- ▶ What can I do
 - Manage Organization Contacts
 - View/Print/Pay Invoices
 - Details of orders include who was registered for an event
 - Register staff and board members for events
 - View Membership Dues
 - Order Subscriptions for your district

Portal: Organization or Individual

- ▶ What can I not do?
 - View Board Member's Member Recognition Points
 - Cancel Events (registrations) or Sessions
 - Contact
 - events@wasb.org
- 608-512-1731 Registrations line
920-582-4443 Winneconne office

Portal: Organization Manage Contacts

- ▶ Edit
 - Update Contact information for district contacts
 - Basic Information
 - Phone number
 - Allow for multiple phone numbers
 - Only one is preferred

Portal: Organization Manage Contacts

(cont'd)

- ▶ Address Information
 - Mailing address - Please enter address here
 - Physical Address, may be entered under "*Street Address if different*"
 - Address Preferences should be set to Mailing
- ▶ Board Member Other Information
(Demographic Questions) are subject to change

Portal: Change a Relationship

- ▶ We're working through this process
- ▶ Change a person's relationship (position)
- ▶ For now
 - Chose Relationship Type (position) from drop-down
 - Leave the Start Date:
 - Could be the date they started with your district
 - End Date
 - If left blank, they will be in this position until a date is entered
 - Notes/Description
 - Relay information about this person and or change

Portal: Organization Manage Contacts (cont'd)

- ▶ Delete
 - Please **DO NOT** delete a contact
 - If you click on Delete, a popup comes up



- Click Cancel
- Instead use the Change Relationship link
- Enter an end date
- Use the Notes field

Portal: Organization Add a Contact (cont'd)

- ▶ Under Tasks
- ▶ Add a Contact
 - Enter the individuals email address (Required)
 - Contact Type (Required)
 - Choose Relationship with the district from the dropdown

Portal: Add a contact

- ▶ Enter required fields
 - First Name
 - Last Name
- ▶ Click “Continue” to go to the next screen
- ▶ Click “Add Contact” moves to the next screen
- ▶ Find Contact in the list
- ▶ Click Edit

Portal: Edit New Contact

- ▶ Basic Information
 - Phone number
 - Allow for multiple phone numbers
 - Only one is preferred

Portal: Edit New Contact (cont'd)

- Address Information
 - Mailing address - Please enter address here
 - Physical Address, may be entered under “Street Address if different”
 - Address Preferences should be set to Mailing
- Address preference
 - Mailing
- Save Changes

My Account

- ▶ Make a Payment
 - Select an open invoice
 - Enter amount to pay
 - Continue to billing information
 - Enter Credit Card
 - Select option with your address
 - Ignore Apply Discount/Promo Code
 - Process Payment

Manage Save Payment Options

- ▶ Add a Credit Card
- ▶ Add an eCheck Account
 - We are working to get this enabled

View Account History (Orders)

- ▶ Click on an order
- ▶ The print icon prepares the page for printing
 - Use CTRL+P or your browser print feature
- ▶ The Description lists who the order is for

Order/View Subscripitons

- ▶ Check that you are Logged in as the District
- ▶ View My Subscriptions
- ▶ Order Subscription

Portal: Individual

- ▶ What Can I do
 - Update your personal profile
 - View orders invoiced to you
 - *All orders should be invoiced to the district
 - Orders not paid can be switched to the district
 - View Events you personally are attending

Portal: Individual What Can I do

(cont'd)

- View your subscriptions
 - Any fee based subscription will be invoiced to you instead of the district
 - Switch to the district or
 - We will change it to the district, if you do not pay
- Order subscriptions for yourself

Portal: Individual

- ▶ What can't I do when logged in as myself
 - Manage Contacts for the district
 - View/pay invoices for the district

- ▶ What Shouldn't I do when logged in as myself
 - Register staff or board members for events
 - This should only be done under the district
 - Doing so, will cause the invoice to be under your name instead of the district

Data Collected and When

- ▶ Candidates have never served on a board
 - Following the Primary (3rd Tuesday in February)
- ▶ New School Board Members
 - Following the Spring election (1st Tuesday in April)
- ▶ Board Member Positions
 - Following Board Reorganization Meetings

Data Collected and When (cont'd)

- ▶ District Staff Changes
 - In the Spring
- ▶ Names of Delegates and Alternate Delegates (for the State Education Convention)
 - In the fall
- ▶ District Demographic information
 - Board Member Salaries
 - Board Committees
 - Your Annual District Meeting Date

Communicating Data Requests

- ▶ In the past we have sent out several emails
 - Trying to catch districts that have yet to respond
- ▶ Set up an Administrative Assistant – WASB Contact
 - Sending data requests to just one person
- ▶ Sending Personalized emails
 - Detailing what is needed specific to their district
- ▶ Calling those who have not responded

Training Preferences/Options

- ▶ How can we work with you
 - Communicating Data Requests
 - Training
 - Getting Data in an Expedited Manner
 - Update the DPI with the Name of your Board Clerk
- ▶ Please use the **WASB Working for You** Survey to Provide Suggestions

State Education Convention

- ▶ Each district
 - One Free Administrative Assistant Registration
- ▶ Wednesday there will be a room for Administrative Assistants
- ▶ If you have suggestions of topics
Please contact
Ann Stettbacher
DeForest Area School District
Administrative Assistant – WASB Contact
Primary: (608) 842-6582
astettbacher@deforestschoools.org

Registering my Board and Staff

- ▶ Make sure you are logged in as your district
Sample School District
- ▶ Under Events
 - Browse Events
 - Select an Event
 - Under Next Steps
 - Manage Group Registration for **Sample School District**

Registering my Board and Staff

(cont'd)

- ▶ Click on "*Add a Registration*"
 - Select an individual from the drop-down
 - Continue
- ▶ Choose the "*Sessions & Workshops*"
 - Continue
- ▶ Add another registration
- ▶ Or
- ▶ Complete Group Registration

Registering my Board and Staff

(cont'd)

- ▶ Select your Payment option
 - Select your saved Payment Option
 - Pay With a New Credit/Debit Card
 - Send me an Invoice
 - Check that you are logged into the district
 - The invoice will be sent to your district's billing contact

Registering my Board and Staff

(cont'd)

- ▶ By default the checked option is to enter a new address
 - Check the option with your organization's address
 - Ignore the **Apply Discount/Promo Code**
 - Continue
- ▶ Confirm your Order
 - Submit your Order at the bottom

Need Help

- ▶ Contact

- ▶ Delta Smith
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- ▶ Paula Osburn
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