

Allowing NEA MB Program Access to NEA & Affiliate Employees

NEA and Affiliate employees (non-member staff) are eligible for NEA Member Benefit Programs. The eligibility is determined using the assigned role of “**STAFF – NEA MB ELIGIBLE**” in NEA 360. If you have any questions regarding these instructions, please call your membership contact at the NEA.

Step 1: Create a “STAFF – NEA MB ELIGIBLE” role in NEA 360

Create Role by CLICKING NEW and entering the following information:

1. Originating Org ----- NEA MEMBER BENEFITS
2. Role Name ----- STAFF - NEA MB ELIGIBLE
3. Alt Role Name ----- Optional (leave blank)
4. Start Date ----- Defaults to today’s date but may be changed
5. End Date ----- Leave blank (until staff leaves association)
6. Default Role ----- Leave blank
7. VIP Role ----- Leave blank
8. Address ----- Defaults to Indv Primary, may be changed
9. Phone ----- Defaults to Indv Primary, may be changed
10. Email ----- Defaults to Indv Primary, may be changed
11. Represented Org ----- State, Local or UniServ Affiliate where staff works

Step 2: Adding the role for NEA & Affiliate employees

Once the role has been established, you can add the “**STAFF – NEA MB ELIGIBLE**” role to any non-member staff.



It is important that the individual’s record shows their home address. Home address is a primary matching key when logging into NEAMB.com. If NEAMB.com cannot match to the NEA 360 record, the individual will not be granted access to the NEA MB products.



Job Aid (v2.2) Individuals Management

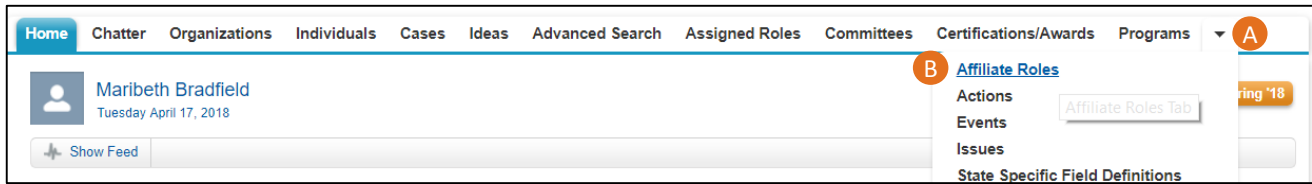
Assign Affiliate Roles – IM.JA.02

PURPOSE: You will be able to assign an Affiliate role to an individual.

CONSIDERATIONS:

- Chatter notifications can be sent to a staff contact when a role assignment is about to expire or when a role assignment is automatically cancelled, such as due to a change in membership or state affiliation.

Step A: Select the down arrow to display all tabs.



Affiliate Roles Tab

Step B: Select **Affiliate Roles**.

Note: You can also assign

affiliate roles starting from the individual’s record, via the Role Assignments related list.

Step C: Select the Affiliate role name that you want to assign.

Affiliate Role Name	Affiliate State	Standard Role Name	Role Level Attribute	Assignment Type	Represented Org Required
Accounting	CO	Test Assoc Role	Local	Appointed	<input type="checkbox"/>
Associate Director-VIP 2	CO	Associate Director-VIP 2	State Affiliate		<input type="checkbox"/>
Associate Leader-VIP2	CO	Associate Director-VIP 2	State Affiliate		<input type="checkbox"/>
Association Representative	CO	Association Representative	Worksite	Appointed	<input type="checkbox"/>
Colorado Awesome Chair	CO	Celebration Chair	State Affiliate	Elected	<input type="checkbox"/>

Affiliate Roles Screen

Step D: Hover over the Assigned Roles Quick Link and select **New Assigned Role**. The New Assigned Role screen is displayed.

Action	Assigned Role ID	Individual Name	Alternate Role Name	Originating Org	Represented Organization	Start Date	End Date	Role in Effect
Edit	AR ID - 000000131	POTENTIAL M MEMBER3		ASPEN HIGH SCHOOL	JEFF CTY ASSN OF EDUC & OFFICE PROS	5/10/2017		✓
Edit	AR ID - 000000151	KORI ELIZABETH CONTADELUCI		MONTESSORI EDUCATION CENTER OF THE ROCKIES		5/29/2017		✓
Edit	AR ID - 000000061	ADRIANA ADAMS		SLATER ELEM SCHOOL	JEFF CTY CLASSIFIED SCHOOL EMP ASSN (JCCSEA)	9/6/2016		✓
Edit	AR ID - 000000062	KELLY L ALMER		CENTENNIAL ELEM SCHOOL	LITTLETON EDUC ASSN	10/31/2016		✓
Edit	AR ID - 000000063	PRISCILLA J BJORSETH		COWELL	DCTA	11/22/2016		✓

Affiliate Role Record Details Screen

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Step E: Use the lookup to select the individual's name.

Note: The fields marked in red are required.

F – The Affiliate Role Name field is prepopulated.

G – You can use the *Alternate Role Name* field to record additional detail about the role.

New Assigned Role Screen

Step H: Select the originating organization.

Step I: Select the organization that the individual is representing, if different from the originating organization.

Step J: Selecting a staff contact will enable Chatter notifications to that person when a role assignment is scheduled to end within 7 days, and when a role assignment is automatically cancelled. First, select the type of user (*User* = Admin user, *Partner User* = Standard user, *Customer Portal User* = edCommunities of NEA360 Portal user). Then, select the individual using the lookup.

Step K: Indicate if the role is in effect.

Step L: Enter a starting date (required) and end date (optional) for the assignment.

Note: It is recommended that you enter an end date to keep your records free from expired appointments.

Step M: Update contact preferences, if desired.

Step N: Select **Save**, or **Save & New** to assign additional roles.

RELATED JOB AIDS:

- Locate a Record for Editing
- Links and Quick Links