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 ELIGIBILE**" 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 ELIGIBILE" 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 ELIGIBILE**" 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.*

Assign Affiliate Roles – IM.JA.02

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

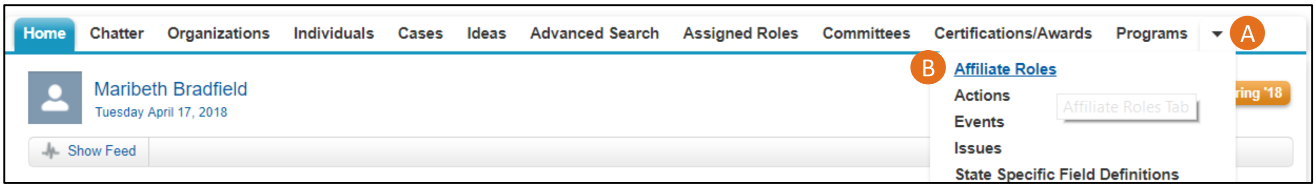
CONSIDERATIONS:

- 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.

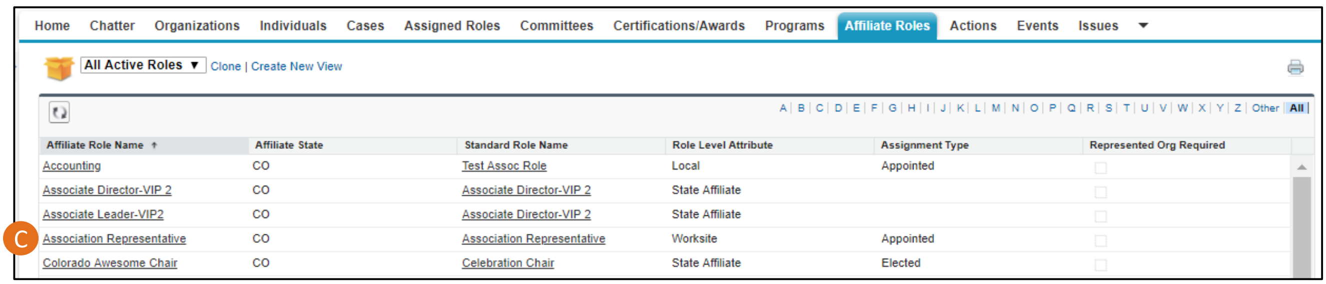
Step B: Select **Affiliate Roles**.

Note: You can also assign Affiliate roles starting from the individual's record, via the Role Assignments related list.



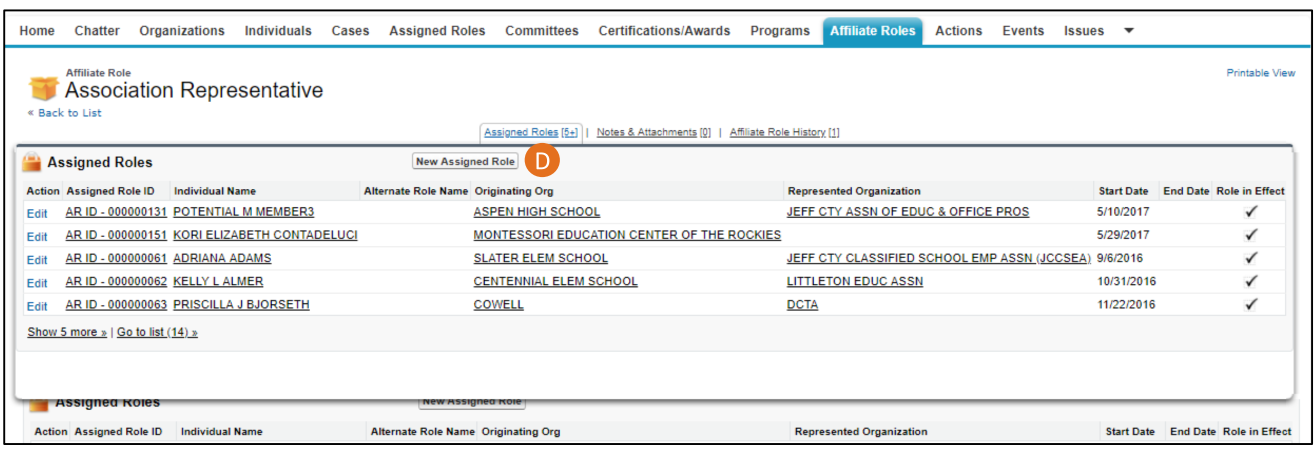
Affiliate Roles Tab

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



Affiliate Roles Screen

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



Affiliate Role Record Details Screen

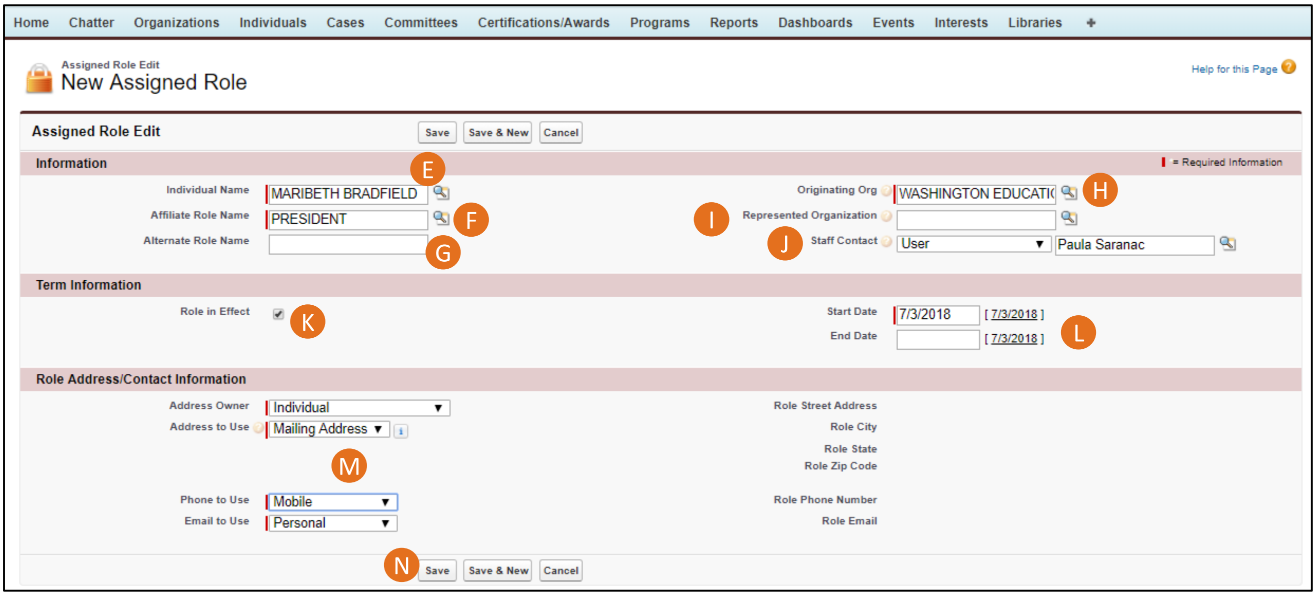
Job Aid (v2.2)
Individuals Management

Assign Affiliate Roles – IM.JA.02

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