

# CAB Recommendations on Position Codes

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## Introduction

This contains the current position codes and access to data plus CAB recommendations for changes in 2017.

The Chapter and Federation Officer Manual (F-10, update 09/16) contains details on position duties. Appendix I lists the different access modes and OAM access assignments.

### Purpose of Position Codes "PC":

1. If a position does not require access to Headquarters data, and does not need to be on a Headquarters distribution list for communication by postal mail or electronically, it does not need to be on this list.
2. PCs let NARFE Headquarters know whom to contact at the chapter and federation level.
  - A. Headquarters uses them for distribution lists (F-10 *Chapter and Federation Officers Manual*). They are used for surface-mailed documents and messages distributed via the NARFE Email System (NES).
  - B. Headquarters IT uses them to assign access to the Online Activities Module (OAM), which determines
    - who may change the F-7/F-7A Officer assignments,
    - who may see, update or download chapter/federation member data,
    - who may see or download National Division member data,
    - who may contact members and leaders with the NES, and
    - who may manage a NARFE-hosted website.
  - C. Headquarters IT uses them to assign who may create an account to access the Online Report Module (ORM) to access periodic membership and financial reports.
  - D. Some PCs are reserved for NARFE Headquarters and may not appear here.
3. The number and types of positions vary by chapter and federation depending on their size and structure. Duties described in the F-10 may overlap several positions, and may vary by chapter and federation. For example, often the 1<sup>st</sup> VP of a chapter may also serve another role such as Membership Chair. In this case, the officer should be assigned to both positions.

## What Has Changed Since the Last CAB Recommendation?

The following changes are implemented since the last recommendations dated April 27, 2015.

- NES access was added for chapter and federation National and State Legislative Chairs (PC=6, 17, 26, 28), and for Network and Social Media Coordinators (PC=16, 16B, 41, 41A, pending 41B).
- Federation National Legislative Chairs have access to the National Division member list for their federation to download or email.
- eNARFE members are now "National Division" members as a result of the 2016 Convention.
- The additional Network Coordinators (PC=16A and PC=41A) have Webhosting access.
- NES access for Federation Area Officers (PC=43A-S) is waiting for implementation and for Federation Presidents to report the chapter assignments to NARFE.
- Chapter Service Communication (or Committee) position (PC=10) was discontinued.

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## Proposal

Although a recommendation may suggest a PC, the final assignment is left to NARFE IT.

1. The CAB recommends **Chapter and Federation Treasurers have full access** to all OAM features. The Treasurer is an elected officer who may be required to provide a bond. The Treasurer's duties require easy access to member information and the means to communicate using the NES. If full access cannot be authorized, the Treasurer should have download and NES access at a minimum.
2. The CAB recommends the **addition of a chapter "Preparer" or "Proxy" position with full access**. A preparer would be a NARFE member of that chapter, or a federation president, area vice president, etc. This concept should require an authorization method, such as a signed letter from a key chapter officer or a form to NARFE Headquarters, to assure the chapter approves the appointment of the Preparer. The CAB continues to receive requests for various positions to be key officers with full access because a particular member in that position is the most computer literate. This is similar to the IRS which allows a preparer instead of an officer to file chapter or federation 990-N returns.
3. Implementation of 2 above would satisfy this request: The CAB **does not recommend F-7 OAM update by Federation Presidents**. The CAB has received and rejected multiple requests to allow the Federation President authority to submit a chapter's F-7 Officer Roster. Federation Presidents may submit a paper F-7 for a chapter. The concern is whether the chapter approves of the changes to their officer roster. An acceptable method might be for a federation officer to print out and mail the current officer roster and mail along with a blank F-7 form to the chapter in question. A key Chapter officer could mark up the Officer Roster report with needed changes, sign the F-7 form and forward to NARFE HQ for processing.
4. The CAB recommends a **"Search" function be added to the Member Roster** to allow the entry of a member's last name or the beginning portion and, based on the search results, be able to select and display a member's roster information. This would be especially helpful for those with Read Only access such as a Service Officer, but also could save time for those with full access.
5. The CAB recommends **for the geographically-based federation positions (Area Officer PC=43A-43S), access to member roster information should include the ability to select members in their geographically-assigned area and print mailing labels for all or only those without email**.
6. The CAB recommends **for the federation CDLs, access to member roster information should include the ability to select members in their Congressional District and print mailing labels for all or only those without email**. Similar to NES access, member access should include all NARFE members whose mailing address is in that state's assigned Congressional District.
7. The CAB recommends **that federation legislative (national) positions (PC=26 and PC=SL) access to member roster information should include the ability to select all in their federation or members in a specific Congressional District to print mailing labels for all or only those without email**. Similar to NES access, member access should include all NARFE members whose mailing address is in the federation's state or geographical area.
8. The CAB recommends integrated access to all members at the Federation level in order to implement "One Member One Vote". Currently only the Federation President, Legislative Chair (National) and Legislative Chair (State) have access to National members. In order to support voting, other officers such as the Federation Secretary (Secretary/Treasurer) need access to perform their duties.
9. NARFE IT should consider a **method to support field entry of an optional descriptive title for one or more "Other" officer (PC=15 and 38)**. That means rather than having up to 5 Chapter level "Other" and

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16 Federation "Other", there should be one or more unique codes (PC=15A-15E, and PC=38A-38P). This might satisfy requests to identify special positions such as:

a. Federation Historian.

b. A **second federation State Legislative Chair with the same access as the first (PC=28)**.

10. The CAB has received a request to provide the Service Officer with member roster download access and NES access. The search function may satisfy the download need. More information is needed to determine the need for NES access.

\*\*\* This needs to be decided or removed. Dick Giangerelli is checking with WV requester

## Position Code (PC) Chart, Status and Recommendations

The following chart documents NARFE PCs and access in the Online Activities Module (OAM). Currently there are three **modes of access**:

**Full** mode allows changing any F-7 (chapter officer) or F-7A (federation officer) position assignments, dues, etc. Only a very limited number of people in each organization have the need or authority to do this.

Positions with Full mode have access to the corresponding Officer Roster, Activity Reports and Member Roster which includes easy downloading of data into Microsoft Excel, text, or printing. Member data downloaded to Excel has the expiration date as a true date. It also allows updating member contact data such as address, phone and e-mail; and expanded views for new, dropped members; plus deceased archive and changes to contact information. These positions also have access to "Web Hosting" and the "NES."

**Download** mode allows access to and ability to save the corresponding Officer Roster, Activity Reports and Member Roster, including easy downloading of data into Microsoft Excel, text, mailing labels or printing.

**Read Only** mode allows the user to view or print Activity Reports, Officer Roster and Member Roster. There is no easy way to download the data into Excel or as text. The expiration date field includes letters such as "AN" or "\*LIFE" which interfere with Excel features such as filtering on date. The user may copy the data lines and then paste into another application such as Excel, Word, etc. "View" and "History" links in the Member Roster and Activity Reports are accessible by these users. The user may not update member contact data. Individual emails may be sent via any of the reports for members with email. In general, these positions do not have access to "Web Hosting" and the "NES," although there are some exceptions.

**Proposed: Extend Member Roster to include a Search function to allow an officer to enter a member last name (or the beginning), select from a returned list and display the selected member's roster information.**

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## Chart of NARFE Position Codes, Current OAM Access & Proposed Access

Pos. Code	Description	OAM F-7 Access	OAM Activities, Officer Roster & Member Roster Access	NES Access	Web Hosting Access	Access to Nat'l Division Mem-bers
1	Chapter President	Full	Full	Full	Full	
2	Chapter 1st Vice President	Full	Full	Full	Full	
2A-2C	Chapter Additional VPs (2 <sup>nd</sup> -4 <sup>th</sup> )		Read Only			
3	Chapter Secretary	Full	Full	Full	Full	
<b>4</b>	<b>Chapter Treasurer</b>	<b>Propose Full</b>	<b>Read-Only Propose Full</b>	<b>Propose Full</b>	<b>Propose Full</b>	
5	Chapter Secretary/Treasurer	Full	Full	Full	Full	
6	Chapter Legislative Chair (National)		Read Only	Full		
7	Chapter Membership Chair	Full	Full	Full	Full	
7A	Chapter Membership Retention Chair.		Read Only			
8	Chapter Public Relations Officer/Chair		Read Only			
9	Chapter Service Officer		Read Only			
<del>10</del>	<del>Chapter Service Committee</del>		<del>Read Only</del>			
11	Chapter Editor		Download	Full	Full	
12	Chapter Alzheimer Chair		Read Only			
13	Chapter NARFE/PAC Chair		Read Only			
14	Chapter Financial Secretary		Read Only			
15	Chapter Other (maximum of five) <b>Propose user assigned title for one or more</b>		Read Only			
16	Chapter Network Coordinator		Read Only	Full	Full	
16A	Chapter Network Coordinator Social Media		Read Only	Full	Full	
17	Chapter Legislative Chair (State)		Read Only	Full		
<b>Preparer</b>	<b>Chapter Designated Preparer</b>	<b>Full</b>	<b>Full</b>	<b>Full</b>	<b>Full</b>	

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Pos. Code	Description	OAM F-7A Access	OAM Activities, Officer Roster & Member Roster Access	NES Access	Web Hosting Access	Access to Natl Division Members
20	Federation President	Full	Full	Full	Full	Roster, labels, email
21	Federation Executive Vice President	Full	Full	Full	Full	
22	Federation First VP (not in F-10)		Read Only			
22A-D	Federation Additional VP (2 <sup>nd</sup> -5 <sup>th</sup> )		Read Only			
23	Federation Secretary	Full	Full	Full	Full	
<b>24</b>	<b>Federation Treasurer</b>	<b>Propose Full</b>	<b>Read-Only Propose Full</b>	<b>Propose Full</b>	<b>Propose Full</b>	
25	Federation Secretary/Treasurer	Full	Full	Full	Full	
26	Federation Legislative Chair (National) <sup>1</sup>		Read Only <b>Propose download, labels for all or select CD</b>	Full		Roster, labels, email for all or select CD <b>Propose labels for all or select CD:</b>
<del>27**</del>	<del>Federation eDivision Coordinator **Full access to eDivision member roster, eDivision email system and eDivision website management.</del>		<del>Read Only</del>			
28	Federation Legislative Chair (State)		Read Only	Full		
29	Federation Public Relations Officer/Chair		Read Only			
31	Federation Service Officer		Read Only			
33	Federation Membership Chair	Full	Full	Full	Full	
33A	Federation Membership Retention Ch		Read Only			
34	Federation Editor		Download	Full	Full	
35	Federation Alzheimer's Coordinator		Read Only			
36	Federation NARFE/PAC Coordinator		Read Only			
37	Federation Immediate Past President		Read Only			

<sup>1</sup> "CD" is "Congressional District". To include all NARFE members whose mailing address is in the federation's state or geographical area. For mailing labels, allow choice of "all" or those with no email.

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38	Federation Other (maximum of 16) <b>Propose user defined title for one or more</b>		Read Only			
41	Federation Network Coordinator		Read Only	Full	Full	
41A	Federation Network Coordinator 2 (if two are needed)		Read Only	Full	Full	
41B	Federation Network Coordinator Social Media		Read Only	Full	Full, pending impl.	
42	Federation FEEA Coordinator		Read Only			
43	Federation District Officer (District Officer / Area VP) (not in F-10		Read only			
43A-S	Federation District Officer (District Officer / Area VP) Maximum of 19.		Read Only <b>Propose labels for assigned federation area (all or those with no email).</b>	Full for assigned federatio n area. Pending implemen tation		
<b>Propose CDLnn</b>	<b>Congressional District Leaders, current maximum is 53 unique assignments.<sup>2</sup></b>		<b>Propose for assigned CD download, labels</b>	<b>Full, restricted to assigned CDs</b>		<b>Propose for assigned CD: Roster, email, labels</b>
<b>Propose: SL</b>	<b>Senatorial Leader Need access to all members whose mailing address is within the federation.</b>		<b>Propose download, labels for all or select CD</b>	<b>Proposed Full</b>		<b>Propose roster, email, labels for all or select CD:</b>

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<sup>2</sup>“CD” is “Congressional District”. To include all NARFE members whose mailing address is in the federation’s state or geographical area. For mailing labels, allow choice of “all” or those with no email.