


NARFE Online Activities Module (OAM) and Configuration Advisory Board (CAB)

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Online Activities Module(OAM)

- NARFE HQ provides 2 member reporting systems you may access with your computer:
 - Old: Online Report Module (ORM)
 - Batch, not quite current
 - Like your mailed bank statement
 - New: Online Activities Module (OAM)
 - Current, up to the minute
 - Like checking your balance at an ATM
 - Increased functionality




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OAM: Goals

- Interactive application
- Information is real time, no lag
- Multiple levels of information:
 - chapters, federations and regions
- Toolkit to successfully recruit and retain members
- Simplify tasks to save you time and money


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OAM: Who has Access?


- Full Access (Update F7 Chapter / F7A Federation)
 - President
 - Secretary
 - Secretary/Treasurer
 - Membership Chair
- Read Only Access (View)
 - All officers listed on:
 - F7 (Chapter Officer Roster) for chapter data
 - F7A (Federation Officer Roster) for federation data


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Logging On

- Log in (first time create an account)
- Click Officer Resources
- First time, create OAM account. Requires e-mail on file at NARFE.

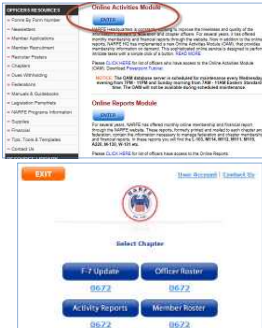




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OAM: Accessing




Note:
Your screens may look slightly different (if no chapter number appears, click on the button). Federation officers have more choices.

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OAM: Officer Roster Update

- Maintain up-to-date Officer Roster "F-7"
- Dues changes, note meeting time and place
- Monitor all roster activities



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OAM: Officer Roster


Choose View:

View Officers
Email Officer


Result:




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OAM: Officer Roster, E-mail



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OAM: Member Roster

- Up-to-date Membership Rosters

- Selection options ->
- Sequence options ->
- Output options ->


Voting Status: ☒ All Members (Voting & Non-voting)
☐ Chapter Members (Voting)
☐ National Life Members (Non-voting)
☐ National Only Members (Non-voting)

Sorted By: ☒ Last Name ☐ Dues Cat
☐ ID ☐ Expire Date
☐ Zip Code ☐ Membership Type

SAVE IN EXCEL SAVE IN TEXT PRINT VERSION MAILING LABELS

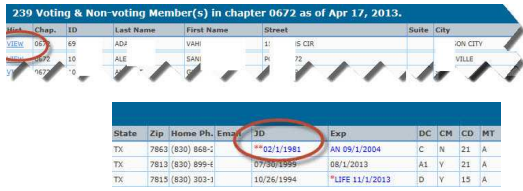
- Mailing labels (Avery 5160 – 30/page) may be:
 - for all, or those without e-mail,
 - output as Portable Document Format (PDF), or Microsoft Word file.

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OAM: Member Roster

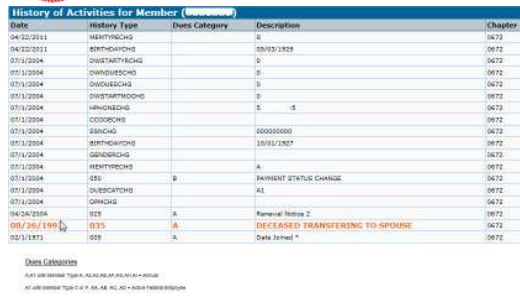
- Access to history in chapter
- More information including join date (JD)
- Distinguished member eligibility flag **



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OAM: Member Roster History



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OAM: Member Activity


EXIT [User Account](#) [Contact Us](#)

Membership Activities in chapter 0672

(Click on each button to access the records)

New Member(s)	Reinstatement	Dropped for Non-renewal
Transferred Into Chapter	Transferred Out of Chapter	Deceased Not Transferred
Voluntary Cancellations	Sent Second Notice	Deceased Transferring Membership to Spouse
New Prospective	Payment Status Changes	Deceased Archive

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OAM: Activities

Member(s) Transferred Into Chapter 0672

Date and sequence choices:

Between: Mar 01 2013
And: Apr 01 2013
Sorted By: * Last Name
☐ ID ☐ Dues Cat ☐ Join Date

Results:


EXIT [SEARCH AGAIN](#) [SAVE IN EXCEL](#) [MAILING LABELS](#)

30 Member(s) Transferred-In between Mar/01/2013 & Apr/01/2013


Chap.	ID	Last Name	First Name	Street	City
0672	20	ALE	IR	SAP L L	PO E
0672	20	ALB	IR	HAH DE L	CON AVE
0672	20	ALL			SE

State	Zip	Home Ph.	Email	CD	CM	MT	DC	AR	JD	ED	AD
TX	76102	(817)	10	Y	A	AL	04/22/2005	05/1/2014	03/9/2013		
TX	76102	(817)	10	Y	A	AL	04/24/1993	06/1/2013	03/9/2013		
TX	76102	(817)	10	Y	A	AL	10/26/1994	11/1/2013	03/9/2013		


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OAM: Mailing Labels




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Configuration Advisory Board (CAB)

- The objective of the CAB is to make recommendations that:
 - increase operational efficiency and
 - Increase usefulness of the NARFE Information Technology infrastructure and management
- CAB is a planning / advisory group
- The amount of work will require years
- Priority to items that aid recruitment and retention
- Major upgrades to computers and software must wait for increased membership
- CAB may be monitored via the website


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CAB Basics

- Established Fall of 2011
- Reports to the National Vice President, Paul Carew
- Monthly conference "call" meetings since December, 2011
 - CAB Members, one for each of the ten regions
 - National Vice President
 - National Treasurer
 - Headquarters IT Staff
- Dorothy Creswell is Region VI Representative (Region VI includes Arkansas, Louisiana, Oklahoma, Republic of Panama and Texas)

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CAB Activities

- General Activities**
 - Continue to work with HQ on the Online Activity Module (OAM)
 - Discuss the general direction of NARFE IT
 - Change Management
- 2012 Activities**
 - Charter
 - Recommendation on Access to NARFE data
 - Position Code Recommendations and Documentation
- 2013 Activities**
 - Usability
 - Long Term Recommendations

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Change Management

- CAB solicits and manages proposals for change to IT
 - Evaluates proposed changes
 - Makes recommendations to headquarters
- Process
 - You can submit change requests directly to your regional CAB Member or via the NARFE Website

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The CAB is not...

- Not a “Help Desk”.
If you encounter errors or problems using the system, to get a faster response:
 - Call Member Records at 1-800-456-8410 (business hours, ET), or
 - E-mail webmaster@narfe.org
- Not a contact to change member data
 - Call Member Records at 1-800-456-8410 (business hours, ET), or
 - E-mail memberrecords@narfe.org

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Getting to the CAB Web Site

1. Log onto the NARFE website
2. Click the “Officer Resources” button
3. Go to the bottom of the Officer Resources Page
4. Click on “CAB Activities”

Here you will find:

- Meeting summaries
- Pending and final proposals
- Documents
 - Working documents
 - Training



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The CAB Home Page



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Thank You

The best resource for using the OAM is the
“Going Paperless Handbook”
available from the TFC website:

www.txnarfe.org

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CRESWELD@SBCGLOBAL.NET (preferred)

(830)620-0344

www.narfe.org/chapter672 for a copy of this presentation

Questions?

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