



Recent Updates

Centralized Aid Programs

Regarding Centralized Aid Programs And ...
Click here to view poll

Registration Form

Trinifer Rogers * - (Mississippi)

Selection by State

Selection by High School and Public School...
Michael Solomon - ISAC (Illinois)

Update Summer 2016

Michael Solomon - ISAC (Illinois)

2-2014

14 update to bylaws...changed definiti...
Mitchie Morrow * - CCPE (Nebraska)

Help

Polls

Statistics

Repository

Custom Queries

Events

Membership

Directory

Add a new access area called Membership
(or something) to the desktop

① Membership Area

View and Change
Agency Paid Status
TO ②

Manage Agency
Membership
Renewals
TO ④

Manage individual member
details
TO ⑦

- Treasurer needs a place to record payment status by agency and year
- Membership Chair needs tools to manage agency renewals and review individual member information

② View Paid STATUS Screen

Agency	2014	2015	2016	2017	2018
Alabama	✓	✓			
Alaska	✓	✓	✓		
Arizona		✓			
California	✓	✓	✓	✓	

agency name
↓

EDIT PAID STATUS
TO ③

- Years displayed could be 3 before and 3 after current year as example
- EDIT PAID STATUS takes user to essentially an editable version of this screen w/ boxes to check and uncheck
- Data for this built from ②A

(2A)

Would need a payment and notice table

Agency id (fk)

year date

paid y/n

noticedate date

notice type TEXT

Agency id	year	paid	noticedate	notice type
13	2015	X		
13	2016	X		
13	2017		9/1/16	First
13	2017		11/9/16	second
287	2016		4/1/15	First
287	2016		6/1/15	special
12	2015		5/2/14	Final
12	2015	X		
12	2016		4/1/15	First
12	2016	X		
12	2017		9/1/16	First
287	2016	X		
13	2017	X		

③ Edit Paid STATUS Screen

Selected Years

Agency	2014	2015	2016	2017	2018
↓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Same as view paid STATUS screen
but with checkable boxes

- When Treasurer receives a check for dues from Agency XYZ, s/he can come to this screen, find the agency, find the year, and check the box to indicate paid STATUS

- Treasurer would need to be able to generate a paid STATUS report for a given year. An area with a drop down and a button might work.

Select year

2014
2015
2016
2017

Generate paid STATUS report

③A

(3A)

PAID STAT'S REPORT would
need to be Excel exportable

Maybe the result comes up on
a screen with an option to
EXPORT to excel or maybe
they just open as excel
directly

- EDIT screens are separated from
VIEW screens only because an edit
screen can make someone who
only wants to view data nervous
and it can help with understanding.
These may be able to be combined.

(4)

View Agency Notices Sent
(5)

Send Agency Membership
Notices (6)

-
- Want tools so membership chair can see what has already been sent and decide to send a notice to a member or selected group of members

5

View Agency Notices Sent

Select year

2014
2015
2016
2017

- Show all
- Show only unpaid for selected year

Agency	Notice Date	Notice Type
Alabama	6/1/16	First
Alabama	7/2/16	Second
Alabama	8/3/16	Third
California	6/1/16	First
Mississippi	6/1/16	First
Mississippi	7/15/16	Special

6 Send Agency Membership Notices

Select year:

2015
2016
2017
2018

Select agency:

Alabama Agency
California Student
Kentucky Higher
Iowa Student Aid
Wyoming

Enter notice text:

Go to www.nassgap.org/jennifer
to renew your membership now!

would need to include membership chair cc. as a choice

Send

9

Enter notice note:

first, second, special, etc

- select state allows for multiple discontinuous selections
- Notice is sent to NOTING member address for each agency. Will need to be an entry for each agency. Populates from existing agency database.
- Notice text is whatever is entered. Becomes body of email (6A)

(6A)

A serious issue with a sending page is e mail bounces and non delivery.

If "From" address was

Nassgap-membership-chair or something there would need to be a mechanism to allow bounces or non delivery notifications to go to membership chair. Also needs to be a way to handle people replying to the email address used.

membership @ nassgap.org could be created and used

⑦ Review Individual Member Information

- Filter to show only voting
 only full member agencies
 ⑦A only list serve
 only listed on web site

⑦B

STATE	Agency	Member	Voting	ASSOCIATE shown on web site	LISTSERV
Maine	FAME	Claude Roy	✓	✓	✓
Maine	GBPI	Mike Alto		✓	✓
Louisiana	LOSFA	Melanie Ambin			
LOUISIANA	LOSFA	Susan Boupitt	✓		✓
California	CSFA	Cheryl Kenz			✓
Illinois	ISAC	Erz Zornikaw	✓		✓
Illinois	ISAC	Mike Solomon		✓	✓

+ users email as a field

- ⑧ Edit this info. Export as Excel

- Clickable to sort by each heading
- One line per record

(7A)

- VOTING would be determined by y/n on voting field in users table
- ASSOCIATE would be determined by content of agency type field in agency table
- LISTSERVE would be determined by y/n on listserve field in users table
- shown on web site would be determined by y/n in active field in users table

(7B)

When creating a new member using the existing process if the "use agency address" drop down is selected the STATE field in the member record of the users table is not populated. There are valid users with no state in the user table. The state designation for each member may need to come from state of the agency they are associated with in the agency table.

⑧ EDIT Individual Member Information

Same as view member info

but checkable boxes to edit

Need to be able to turn

John Doe from XYZ agency

into a voting or list serve member

based on received information

Again Edit is separate from

view only as a design choice

(9) People receiving a membership renewal notice would be instructed to come to a Web address to enter information in order to generate a membership invoice.

The information collection screen (10) will need to be behind a login - it can't just be open to the public. This means there will need to be "dummy" inactive voting member records for states like AR, DE, HI, NH, OH, WI, and WY that can be activated as needed so those states can use the renewal/joining process.

(10) Renewal/Join data collection screen

Please select your agency

Illinois Student Assistance
Mississippi Financial Aid
Montana Office of
New Jersey Higher

Please review information each agency member so make sure it is correct

Name	Title	<input type="checkbox"/> Correct?
Address	CTC	<input type="checkbox"/> Edit?
Phone	fax	<input type="checkbox"/> Delete?
email		
<input type="checkbox"/> voting member?		
<input type="checkbox"/> Be on the list serve?		

Add new member

- Repeating box prepopulated as many times as needed based on agency selected in dropdown

10 A

Year renewing for
current year is _____

- 2016
- 2017
- 2018

Send payment to

NASSGAP Treasurer
123 any street

INVOICE will be sent to the agency's
voting member

Generate INVOICE (12)

- Year drop down could be populated by current year minus one through current year plus two or by some other method
- Current year is just calendar year
- NASSGAP Treasurer name and address can be hard coded and manually changed

10 B

Data from collection screen is coming from the user table and changes made are going directly back into the users table

This may mean there needs to be some screening, an approval process, or a change log to help track what occurs.

- The generate invoice button could require a "correct" check for each member listed on the screen before allowing user to proceed.

(11)

Idea would be to use the current Users Table in the data base as the universal people list - all web site people, all list serve people. Inactive users cannot login the web site.

Member: active = 1 agency id is not null

Listserve member: listserve = 1

Use the existing "add member" process to be able to add members of all types; active/inactive, listserve y/n

A member from an inactive unpaid agency like Hawaii would need to be entered as inactive but as a voting member so they would populate the membership renewal screens

(11A)

- Member record would need a new "LISTSERV" Y/N field. Not null. Not exclusive - can be a listserv member independent of status of any other member or field
- Member record would need a new "VOTING" Y/N field. Data integrity is an issue here: There can be only one voting member per agency. Enforcing this automatically through all the various interfaces may be too difficult - this may need to be a periodic manual check

(11 B)

- In the current directory, the option for the unlogged in public to see inactive members should be removed
- In the logged in version of the directory the member record should display
VOTING checked or not
On listserve checked or not
- VOTING and listserve would need to be fields changable in the member record, modified by the existing directory interface.

(12)

Generate Invoice

- Invoice would be a user supplied email body sent to the voting member email address for a renewing agency.
- May need a screen to enter/edit invoice TEXT or a place to upload preentered TEXT
- Would need to be able to handle non deliveries just like renewal notifications