

## Quick Reference Guide for SFFMA Portal Administrators

IF YOU HAVE BEEN ESTABLISHED AS AN ADMINISTRATOR FOR AN ORGANIZATION IN THE SYSTEM:

- First, **make sure you have registered** your SFFMA Portal account.
- Once registered and you **log in**, you will be directed to your **personal dashboard**. Here you can manage your own SFFMA account as needed.
- Also on your dashboard, you will see the **name(s) of any organization(s)** for which you are recognized in the system as an administrator.
- **Click the organization you wish to manage**. You can also click your initials in the upper right corner of the screen to open a menu that will show those organizations for which you have administrative authorizations, and also other portals if you are an SFFMA board member (executive, certification, or industrial boards).
- When you click the organization to manage, you will be directed to the **organization's dashboard** and will no longer be on your personal dashboard. **IMPORTANT: Once on the dashboard, click Administration > Edit Profile on the left-hand menu and MAKE SURE all editable information is filled out. Missing information here may hinder things like creating invoices, making payments, etc.**
- Depending upon your level of authorization, you can:
  - **Pay existing invoices.**
  - **Manage the organization's roster –**
    - View the roster.
    - Add individuals (a search feature is available to find someone in the system if needed).
    - Remove a person from the roster.
    - Create a basic profile for someone not yet in the system and add them to your roster.
  - **Manage the SFFMA membership** of both your **organization**, and of the **individuals** on your roster:
    - **View** membership records for your organization and personnel for the past 5 years.
    - **Pay** for the organization and the individuals for the upcoming year.
    - **Pay** for individual members' previous years as needed or applicable.
    - Obtain additional **optional VFIS insurance** for SFFMA members.
    - Obtain **optional NVFC membership** (includes insurance) for SFFMA members.

**NOTE: It is strongly recommended that you reconcile your organization's roster prior to handling the renewal process.**

*The modules to manage TRAINING, TESTING, and CERTIFICATION are not yet active. The anticipated launch for these will be early 2023. Entry of completed training, or applications for testing and/or certification should be held until the launch of these modules.*

# Step by Step Instructions for Roster Management and Department Renewal

## Once logged in, you will be on your personal dashboard:

- Click the department you wish to manage. If you are an administrator for multiple departments, select the department you want to manage:
    - Either click the department if it displays on your dashboard or click “Manage Different Entity” to see other departments for which you are an administrator.
- Note: Clicking the round button containing your initials in upper right of the screen will open a menu and you can also select the department there.

## Once on the department’s dashboard page:

- Click “View Roster”.
- Review the individuals on the department’s roster.
  - To add a person to the roster, click the “Add to Roster” button.
    - Use the “Search Options” window to filter and select the individual you are looking for.
    - When found, click the “Show Options” button and click “Add to Roster”.
    - Click the “Back to Roster” button to view roster and confirm the person has been added.
    - Add any other individuals as needed using the same procedure.
  - If the individual cannot be found using the “Search Options” window:
    - Click the “Create Person” button on the left menu and enter the required information to register the individual. NOTE: YOU WILL NEED THE FULL LEGAL NAME, LAST FOUR DIGITS OF THE PERSON’S SS# AND THEIR BIRTH DATE TO CREATE THEM IN THE SYSTEM.
    - Once the individual is entered in the system, they will automatically be added to your department roster. Return to the department roster so you can view and confirm that the individual has been added.
  - To remove an individual from the department roster:
    - Click the “Show Details” button beside the individual’s information.
    - Click the “Remove from Roster” button (you will be required to confirm the removal).
    - The system will automatically return you to the department roster where you can view and confirm that the individual has been removed.

## Once the department roster is established as you need it:

- Return to the **dashboard**:
  - Click the “Add/Renew Membership” button to begin the renewal process for the department.
  - Review the instructions on the first page. When ready to continue, click the “Start ” button at the bottom of the page to proceed to the first step in the process.
  - Follow the instructions on each page, selecting those membership items and optional insurance you wish to purchase.
  - When you are finished on a page, click the “Next” button in lower right corner of the page.
  - If you need to return to a previous page, click “Previous” in lower left corner of the page.
  - When finished, you will arrive at a Summary page. Click “Done” if all looks correct.
  - The final steps in the process will allow you to finalize your selections (view cart), create an invoice, and select payment method.