



FAQ: Community Roster Tool

1. What is the Community Roster Tool?

The Community Roster tool allows ASSP community leaders to pull member lists for community operations including tracking new and lost members, finding members to volunteer, or communicating with small groups of members. The Community Roster tool is a great tool to learn about your community members in ways that can help you provide a personalized welcome and deepen connections with them.

IMPORTANT NOTE: The community roster tool is not a mass distribution email list. When communicating with all members communities should use current ASSP email channels and processes.

2. How do I know how many members are currently in my community?

1. You can look at the number of rows used on the spreadsheet. Be sure to subtract for the number of rows used at the top of the report for the report title and header row.
2. If you are pulling for more than one community, download your roster and use the Excel filter tool for each community. Excel will show you the number of members at the bottom left-hand corner of the page.

3. What kind of roster reports are available?

Different reports are available to support different aspects of your community operations. You may see all the following reports listed in the community reports portal, only the reports that pertain to your role will display information.

- **ASSP PSP/CIG Leadership Report:** Displays information about your practice specialty or common interest group's current leadership team. This report will not display information for communities that do not have any leaders reported.
- **ASSP PSP/CIG Roster:** Displays all active and grace members in your practice specialty or common interest group.
- **ASSP Chapter Leadership Report:** Displays information about your chapter or section's current leadership team. This report will not display information for communities that do not have any leaders reported.
- **ASSP Community Leaders Report:** Displays how many leaders have been reported for chapters, sections, regions, practice specialties and common interest groups (as applicable to your community). Use this report to confirm the right number of leaders have been reported and see if there are any sections or chapters your community supports that have not reported any leaders.
- **ASSP Chapter MBR Transfer Last 30 Days:** Displays members who have transferred into or out of your chapter within the last 30 days.
- **ASSP Chapter Roster Active & Grace:** Displays all active and grace members in your chapter.
- **ASSP Chapter Roster Expired Last 30 Days:** Displays members whose ASSP membership expired more than 3 months prior to the last 30 days.
- **ASSP Chapter Roster New MBRs Last 30 Days:** Displays members who have joined ASSP within the last 30 days.



4. What kind of information is in the roster reports?

Some of the column names that may not be self-explanatory:

- **Parent Account: Account Name:** Displays the name of the community
- **Person Account: [...]:** Column details refer to an individual member
- **Primary Affiliation Name:** Employer
- **Membership Status:** Let's you know where a member is in their membership renewal cycle.
 - **Current:** An active member current in their dues and in good standing
 - **Future:** An active member who has paid for their renewal ahead of their current expiration date
 - **Grace:** If a member has not renewed their membership by their renewal date, they enter "grace" for three months. If you notice members have entered grace, it's a great time to reach out to them with a personal connection to remind them about the value your community provides and how to renew their membership. The process for members to renew is easier before their renewal date or during grace than after their membership has expired entirely and they need to reinstate.
- **Membership Years:** Displays the number of years the member has been a member of ASSP.
- **Join on and Member Thru:** Displays the dates of their ASSP membership
- **Member Type:** Let's you know the level of membership, such as Member, Professional Member, Emeritus, or Student
- **Referrer:** Displays the name of the member who referred them to ASSP.
- **Virtual communities columns:** Each common interest group or practice specialty is listed in a separate column across the spread sheet. A check mark appears in the column of each CIG or PS that the member currently belongs to.
- **Start Date / End Date:** In PS/CIG rosters, this is the date the member joined your community and the date their current membership in your community will end.
- **MidYear Chapter Join:** In PS/CIG rosters, TRUE in this column indicates the individual has added membership in your community sometime during their year other than their initial join or renewal.
- If there are any other column names you have questions about, please email communities@assp.org.

5. Is there a certain browser I should use to access rosters?

Microsoft Edge in IE Mode or Google Chrome version 110.0.5481.100 or higher would be the preferred browser to access the rosters.

6. How do I access rosters if I am a leader of more than one community?

If you're a leader for multiple ASSP member communities, you will need to log into the community reports portal for each community separately to see the roster information for each respective community.

7. How do I export the report to an Excel Format?

Please refer to the Community Roster Usage Tips for detailed instructions.

8. What can the Community Roster Tool be used for?

Please refer to the Terms of Use for detailed instructions.

9. Who has access to the Community Roster Tool?

The following community leadership positions have access to use this tool and view reports:

To access a chapter roster, you must hold one of the following leadership positions with ASSP:

Regional Vice President
Area Director

Chapter President
Chapter President-Elect

Chapter Vice President
Chapter Secretary
Chapter Treasurer
Chapter Awards & Honors Chair
Chapter Membership Chair
Chapter Communications Chair
Chapter Newsletter Editor
Chapter Nominations & Elections Chair
Chapter Program Chair
Chapter Student Affairs Chair
Chapter Awards and Honors Chair

Section Chair
Section Vice Chair
Section Treasurer
Section Secretary

Student Section Faculty Advisor
Student Section President
Student Section Vice President
Student Section Secretary
Student Section Treasurer

To Access a CIG or PS roster, you must hold one of the following leadership positions with ASSP:

Administrator
Assistant Administrator
Secretary
Awards & Honors Chair
Membership Chair
Professional Development Chair
Nominations and Elections Chair
Mentoring Committee
Awards and Honors Chair

10. What happens if I misuse the Communities Roster Tool?

The protection of ASSP member data will drive all policies and processes and is of the highest priority and importance. All ASSP leaders have a responsibility to protect ASSP member data and abide by all ASSP privacy policies. All leaders with access to the roster tool must abide to the Terms of Use and Privacy Policy. <https://www.assp.org/terms-of-use-and-privacy-policy>. Failure to abide to the policy will result in revocation of access.

11. What polices are in place to protect member data?

Data privacy and protection laws are becoming increasingly strict, ASSP will implement policies & procedures to protect the organization and members, according to these laws. This may result in changes in policies, features, or access rights. Leaders will be informed of any changes.

12. Who do I contact if I have questions about the tool or data?

Having trouble? Please email communities@assp.org and the Membership & Communities Team will assist.