

# Frequently Asked Questions (FAQ) from Chapters and Federations

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## Frequently Asked Questions (FAQ) about NARFE Reports

### First things first

Where is this documentation the answer referred to?

The NARFE Configuration Advisory Board has developed documentation modules as both downloadable Portable Document Format “PDF” files, and also as YouTube videos. Many of the answers that follow refer to some of these modules.

To always get the most current version, log into the NARFE webpage at [www.narfe.org](http://www.narfe.org) then click the “Officer Resources” button. On the “OAM Home Screen” below the button to enter the Online Activities Module (OAM) you will see a link to the documentation. Note: Just after the link to the documentation and training is a link showing which chapter and federation positions have access to the OAM and which services they may use.

Here is a direct link: “[Online Activity Module \(OAM\) Overview](#)”

### What is the “CAB”?

The NARFE Configuration Advisory Board (CAB) serves as a liaison between NARFE field organizations (chapters and federations) and NARFE Headquarters Information Technology regarding the software and systems used to deliver NARFE membership information to the field, and other NARFE technology services. The CAB consists of regional representatives appointed by their respective Region Vice President (currently 10). The typical CAB member is technically capable, allowing each to translate the needs of leaders in the field into meaningful requests to NARFE’s technical staff. In addition, CAB members are experienced NARFE leaders who understand many of the systems field organization leaders are using.

### What is the Online Activities Module (OAM)?

The OAM is a real time online system with your member data. That means that as soon as information is changed at NARFE Headquarters you will see it on a report you create. The OAM provides reports on member data, and provides services that use member data. With the OAM you may

- Get a member roster for all members in your organization (chapter or federation).
- Get an officer roster for all officers in your organization (chapter or federation).
- Find out activity in your organization (new, drop, transfers, deaths, prospects, etc.)
- Maintain an up-to-date chapter or federation officer roster (F-7 or F-7A).
- Update chapter member information like mailing address, phone or email.
- Report a chapter member’s death.
- See a member’s transaction history and recruiting success.
- Communicate through direct email with chapter or federation members, and with certain member activities such as: new members, dropped members and prospective members.
- Create and maintain a professional-looking, NARFE-branded webpage with a minimum of technical skill and effort.

The objective of the OAM is to provide tools to promote success in the operations of each chapter and federation.

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Why do I need the OAM, all the reports are in the Online Reports Module (ORM), right?

The names of the two online report systems provide by NARFE sound similar, but they are very different. Some reports are available in both modules, such as the officer roster, member roster and activity reports. It's easiest to compare the same report in both systems, such as the member roster. In the OAM, when you request a report, all the date is current as of the moment you requested it. In the ORM, when you select your chapter's M114 Member Roster, the information could be up to three months out of date. That's because it is only run quarterly around the 20th of the month in January, April, July and October. If you're looking at an ORM member roster on July 10, it's likely dated in mid April.

Feature	ORM	OAM
How current is the report data?	<b>Rosters</b> could be three months out of date (quarterly, around mid-month in January, April, July and October). <b>Activities</b> up to a month out of date (around mid-month).	Current as of the moment when you run the report.
Can I configure the report output?	No	Yes. Most OAM reports allow you to select the type of data, order of output and also which pieces of data to include
What output formats are available?	HTML, Excel CSV ("comma-separated values"), Text and PDF	Excel, Excel CSV, text, print and mailing labels
Is Email supported?	No	Yes. Key officers may send individual emails from various reports. The NARFE Email System (NES) provides an easy way to build mailing lists for group mailings and use templates for standard messages.
Member Roster (chapter and federation)	M-114 Semi-Annual Membership roster (quarterly)	Member Roster (always current)
Officer Roster (chapter and federation)	M-111 Officer Roster (quarterly)	Officer Roster (always current). Key chapter officers may choose their own chapter, other chapters in their federation, all chapters in their federation or federation officers.

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Feature	ORM	OAM
Activity Reports (chapter and federation)	M-112 Activity Report (monthly, around mid-month)	Activity reports (always up to date, you may pick any time frame)
F-7 (Chapter) or F-7A (Federation) Officer Roster Update	N/A	F-7 or F-7A Officer Update. Updates are processed when you press "SUBMIT" for each change.
Chapter financial reports	<p><b>Run monthly:</b>                      A-220 Chapter Dues Activity                      M-130 Recruiting Fee                      M-131 AFE Bonus Recruiting                      W-101 Chapter Dues Advance Payment (DW/H)</p> <p><b>Run monthly during special incentive programs:</b>                      M-131CI Bonus Recruiting</p>	Will be converted to OAM
Federation reports	<p><b>Run quarterly:</b>                      L-103 LSA Report by state and chapter (zip codes)                      L-104 Unassigned zip code</p> <p><b>Run monthly:</b>                      M-102 Ten Percent Fund Report                      M-110- Membership Summary Report                      M-112S Monthly Chapter Activity Summary                      M-260 Individual Recruiting Report Monthly.</p>	Will be converted to OAM

## Getting There

Am I authorized to access the OAM?

If you are on your chapter or federation's officer roster at NARFE you may access the respective OAM reports once you set up an OAM account.

For the most current and detailed list of officer access, log into the NARFE webpage at [www.narfe.org](http://www.narfe.org) and select "Officer Resources". In the description under the "Enter" button for the OAM is a link to authorized officers. Some of these FAQ refer to "Key Officers", who are chapter and federation officers with a greater level of access than others. There is a list also in the F-10 Chapter and Federation Guide in an Appendix.

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Currently key officers are:

## Chapter level:

- President,
- 1<sup>st</sup> Vice President
- Secretary
- Secretary/Treasurer
- Membership Chair.

## Federation level:

- President
- Executive Vice President
- Secretary
- Secretary/Treasurer
- Membership Chair

[How do I get into the OAM? How to find the OAM?](#)

First log into the NARFE webpage at [www.narfe.org](http://www.narfe.org) using “Secure Login”, select “Officer Resources” and then click the “Enter” button for “Online Activities Module (OAM)”.

For more information, view the documentation module “Getting to the OAM”.

## [Printing Reports](#)

[How do I print?](#)

Many of the OAM reports include a “Print” button, but if not, you may always use the print feature of your Internet browser, such as Microsoft Internet Explorer, Google Chrome, Firefox, Microsoft Edge, etc. Note, most browsers support a keyboard shortcut to print to the default printer. On a PC it is Control+P (hold down both the CTRL and P key at the same time, then release), and on a Macintosh it is Command+P (hold down the CMD and P key at the same time, then release).

For printing hints, please review the documentation module “Printing with the OAM”.

[How do I print OAM activities?](#)

Although there is no “Print” button for the OAM activities, you may print using your Internet browser’s “Print” feature. Note: A “Print” button has been requested.

For printing hints, please review the documentation module “Printing with the OAM”.

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[How do I print all the data I see in my report?](#)

Most OAM reports are too wide to print in portrait mode (tall and narrow). Set your printer to landscape mode instead (short and wide). You may need to change the print percentage using print preview.

The width of a report reflects the data columns you requested. If you don't need certain data columns, such as "AR" (automatic renewal code), make sure it is not selected.

For printing hints, please review the documentation module "Printing with the OAM".

[F-7 \(Chapter\) / F-7A \(Federation\) Officer Roster](#)

[How do I do the F-7 \(or F-7A\)? Where can I find the F-7?](#)

The Chapter Officer Roster Update (F-7) is found in the OAM chapter activities, and the Federation Officer Roster Update (F-7A) is found in the OAM federation activities. This is a key officer action. If you're not sure you're a key officer, see "Am I authorized to access the OAM?" under "Getting There".

A major advantage of submitting the officer roster update online is that you make changes as needed, you do not need to enter the entire officer roster like on the paper form. If you have ten officers and only three change, that saves a lot of time. The online version is more accurate since you can verify the correct officer was assigned. You also save the time and cost of making photocopies and postage to mail to at least three locations: NARFE Headquarters, Federation President and Federation Secretary.

When you submit the F-7 or F-7A in the OAM, copies are automatically sent to NARFE Headquarters, the Federation President and Federation Secretary. In some federations, you may need to forward a copy to an additional officer. The requirement varies from federation to federation.

If you do not have a computer or feel uncomfortable using the online system, order a copies of form F-7 or F-7A from NARFE (see the section "How do I order supplies?"), fill in all fields and then mail copies to NARFE, your Federation President, and Federation Secretary (or Secretary/Treasurer), plus any other officers your federation requires. Retain a copy for your records. If you still are having problems with the form, seek help from your federation.

For more information, please review the documentation module "F-7 Update".

[How do I order supplies?](#)

Many forms are instantly available to download from the NARFE website. After logging into the NARFE webpage, select "Officer Resources" and then "Forms by Form#" on the left. Note, Form F-18 "Requisition for Printed Supplies" is a nice directory of paper forms available to order from NARFE, but seldom-used forms such as the F-16 "Dues Transmittal Sheet – New Members" are only available for download. Once you locate the form of interest, just click on it and select download. Almost all NARFE forms are fillable PDF (see the section on PDF later).

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You can search for a particular form if you know the form number, such as "F-18", but you have to be very precise. For example, "F18" yields zero results.

If you need the actual printed forms or guides, log into NARFE, select "Officer Resources", then locate on the left "Order Forms/Supplies". This will open an interactive ordering form that will fill in your member information and let you select the paper forms and guides you need. Once you press "Submit" your order is on its way to being processed. Most items are available free of charge when ordered in a modest quantity. Fee-based items are clearly marked.

If you do not use a computer, contact one of your chapter officers to order for you, or obtain a form F-18 "Requisition for Printed Supplies". If no chapter officer can help you, contact the federation officer assigned to your chapter or your federation president or secretary. The contact varies by federation.

[Will you change my officer roster?](#)

Any key officer in your organization may change your officer roster, either online using the OAM or by using the paper F-7 or F-7A form. If no key officer in your organization is able to complete this task, please ask for help from your federation.

For more information, please review the documentation module "F-7 Update".

[Using Reports](#)

[What is "CM", what do the codes mean?](#)

Most reports have a legend at the bottom that explain the various field abbreviation and code values. "CM" stands for "Chapter Member". The values of CM may be "N" (national-only, joined before chapter membership was required), "S" (national-only life member) or "Y" (voting chapter member).

[Is Microsoft Excel Required?](#)

No. You do not need to have Microsoft Excel to use the OAM reports, but you get the greatest advantage by using Excel. The OAM "Save in Excel" file format works with many other applications that recognize that spreadsheet file format. Microsoft Works, Macintosh Numbers, Google Docs Sheets and OpenOffice Calc are among the more popular of those applications.

[Deceased Members and Related Topics](#)

[Why do I see a current member in the "Deceased Transferring Membership to Spouse" or "Deceased Archive?"](#)

When a NARFE member passes away, NARFE offers a short term membership to the surviving spouse. This appears on reports under the category of "Deceased Membership Transferred to Spouse." That means all members listed in this category are surviving spouses, not deceased. To determine the name of the deceased member, key officers may review the member history on the chapter member roster, or on the Deceased Archive activity report.

Today, August 23, 2016, when a deceased membership is transferred to a surviving spouse, the surviving spouse receives the deceased member's ID number and join date which is very confusing.

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The deceased member does not appear on the “Members Passed Away” or “Deceased Archive.” The only way to determine the deceased member’s name is for a key officer to view the surviving spouse’s history for changes of name. The NIAC committee that preceded the CAB and the CAB have asked NARFE to change this procedure. There is a resolution to the 2016 National Convention with a similar request. These requests ask that the surviving spouse be given a new member ID and join date, and that the deceased member appear on the “Members Passed Away” report.

For more information, please review the documentation module “Activity Reports, Deceased and Dropped”.

[My member is very much alive, but just appeared on the “Members Passed Away”. What do I do?](#) Sometimes strange things happen. When data is incorrect, the chapter president (or federation president) should work with NARFE Member Records.

[Why do some names appear in Deceased Archive, but not “Members Passed Away” or “Deceased Transferring Membership to Spouse?”](#)

The deceased archive contains all members listed under “Members Passed Away” and “Deceased Transferring Membership to Spouse” **plus** members who have been determined to be deceased for many years by comparison to records such as the “Social Security Death Index.” The latter group may have passed away many years ago: from one to as much as 10 or more years ago.

[How do I report a member death to NARFE?](#)

Key chapter officers may report a death in the OAM Chapter Member Roster. At the left of each member line are three links, one of which, “F-9”, collects the needed information for a member death. When using this link, the member’s current information is filled in automatically, such as member number, name, and mailing address. The reporting officer should provide the date of death ( if known), if there is a surviving spouse, the surviving spouse’s contact information, and whether the surviving spouse is a NARFE member. Note: “F-9” is the form number formerly used to report a member death to NARFE in the past. Deaths reported online are not processed instantaneously. NARFE staff review the request, and in some cases it may be several days or more before processing is complete.

If you do not use a computer, send a letter to Member Records at NARFE giving the deceased member’s ID number, name as it currently appears on the roster, date of death, if there is a surviving spouse with their contact information, and whether the surviving spouse is a NARFE member. In your letter, be sure to include your chapter number, name and chapter position, plus your contact information. You could also send the same information by email, but if you have email you could login to the OAM and report online, saving yourself a lot of time and typing.

For more information, please review the documentation module “Member Roster.”

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[Where do I find the F-9 form?](#)

See “How do I report a member death to NARFE?” above. The F-9 form is no longer available for ordering from NARFE, or on the “Forms by Form#” page.

[Member Roster](#)

[What is the “Update” link on the Chapter Member Roster?](#)

Key chapter officers may click on the update link to change a member’s contact information like address, phone numbers and email. After a change is submitted, it is reviewed by NARFE, so it does not take effect instantaneously, but usually in a day or two.

For more information, please review the documentation module “Member Roster.”

[What is the “History” link on the Chapter Member Roster?](#)

Key chapter officer may review the transaction history for individual members by clicking the “History” link. History reflects all transactions that occurred since the member was assigned to this chapter. Below the history transactions is a log of all members recruited by that member.

For more information, please review the documentation module “Member Roster.”

[What is “Optimize Mailing Address” and/or “VMA” on the Chapter Member Roster?](#)

When you make your report choices for the Chapter Member Roster, one choice is “Optimize Mailing Address”. Note there is a message that it may slow down your query, that is, your report will take longer to run. When this option is selected, the mailing address for each member is evaluated against the addressing standards and databases of the US Postal Service and UPS. Then a code is placed in a report column called “VMA” for “Validated Mailing Address.” VMA=“No” if the address does not comply, and VMA=“Yes” if it does. For members with VMA=“No”, you may select the “Update” link to see suggested changes to the address. If you agree with the suggestion, click “Submit”, otherwise close the dialog. If changes are suggested from both USPS and from UPS, select only one to process, do not submit both.

For more information, please review the documentation module “Member Roster.”

[What is “RE” on the Chapter Member Roster?](#)

“RE” is the column for “Receiving Email”. If RE=“Yes” the member allows email from the chapter. If RE=“No” the member has requested no email from the chapter. If you email to your members directly and don’t use the NARFE Email System (NES), please do not send to members who have requested no email from the chapter.

For more information, please review the documentation module “Member Roster.”

[What is “MZ? On the Chapter Member Roster?](#)

When you choose the column “Receiving Magazine” for your Chapter Member Roster report, the report will include an “MZ” column. The values are explained in the report legend at the bottom. A value of MZ=“Q” means an undeliverable address. A chapter officer should follow up with the member to get a good address.

For more information, please review the documentation module “Member Roster.”

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## Activity Reports

How can I find out who recruited a new member?

In the OAM Chapter Activity Reports, New Members report, key officers will see an “RB” link at the left of each new member line. Clicking this link will display the “Recruited By” information, such as whether the new member was recruited by a chapter, and if so, the member number and last name of the recruiter.

For more information, please review the documentation module “Activity Reports-Basic Layout.”

Why does the “second notice list” include members with expiration dates in the future?

The “Second Notice” report includes all members who were mailed a second notice. When one of those members renews, their expiration date is updated, so you do not need to contact them about renewing.

## PDF – Portable Document Format Forms and Files

How can I save a copy of a PDF form into which I’ve entered data?

The simple answer is, in your PDF reader software, to choose “File” and then “Save As” to a new filename. For example, if you are adding data to F-100.PDF (the electronic version of “Be Prepared for Life’s Events”), “Save As” to “F-100v2.PDF”. Note, it’s often better to download a copy of a form to your computer first, then fill that form out rather than trying to do online.

If for some reason your PDF reader does not allow you to do so, please update your PDF reader. Please download a free copy of the Adobe Reader at [www.get.adobe.com/reader](http://www.get.adobe.com/reader). The free version includes the ability to add answers to a fillable form and then “Save As” to a new filename for printing or emailing at no additional charge. Although Adobe offers an online service for a monthly fee with many additional features, you do not need to pay for this service to enter data into a fillable form and save it to a new filename.

How can I send my roster to someone without Excel?

Most recent versions of Microsoft Excel and other Office products (2010 and later) allow you in the “Save As” dialog to select a different “file type” of “PDF”. If you have an older version or use an alternative which does not have this feature, there are free utilities which let you create a PDF from any application that allows you to print. One example for Microsoft Windows computers may be found at [www.CutePDF.com](http://www.CutePDF.com)

## Email

I’m not getting NARFE emails

Periodically check your “spam” or “junk” email folder to see if the messages are there. Many Internet Service Providers (ISP) automatically delete messages in these folders after a period of time, usually 30 days. If you find messages you want to receive in the spam or junk folder, add the sender to your “safe sender” list. We recommend you read the following topic to see how your email might handle this.

What is a “safe sender” list, how do I do this?

Chapters and Federations encourage NARFE members to add email addresses to their “Safe Sender” list to assure they receive email messages. The way you do this varies based on what you use to read email, and even

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which version of the product you use. Generally, you need to add to your “Address book” or “Contacts” each email address from which you want to receive messages. For example, the NARFE Email System (NES) sends messages from [NOREPLY@NARFE.ORG](mailto:NOREPLY@NARFE.ORG) or [NOREPLY@NARFE.NET](mailto:NOREPLY@NARFE.NET)

In Gmail, create a contact record with each email you consider safe. For example, you could create a contact for NARFE NES with the email [NOREPLY@NARFE.ORG](mailto:NOREPLY@NARFE.ORG) and another NARFE NES Alternate [NOREPLY@NARFE.NET](mailto:NOREPLY@NARFE.NET)

If you are reading a message from a person or organization you want in your contact list, most email clients have a feature to add a contact from that message. These include Gmail, Yahoo! And others.

If you use Microsoft Outlook.com they have the means to add an email to the safe sender list and also a domain. A domain is the information to the right of the “@” sign. For example, you could add to your safe sender list the emails [NOREPLY@NARFE.ORG](mailto:NOREPLY@NARFE.ORG) and [LEG@NARFE.ORG](mailto:LEG@NARFE.ORG) or simply add the domain @NARFE.ORG to allow email from any email address that ends in @NARFE.ORG For more information, visit <http://www.windowcentral.com/how-set-and-manage-greylists-outlookcom>

Microsoft Outlook, the application (not the online mail service Outlook.com) also allows adding either email addresses or domains. This is found in Outlook’s “Junk Mail” dialog by selecting “Never block sender” or “Never block sender’s domain”.

## NARFE Web Hosting

What is NARFE Web Hosting? Do I need to be a programmer?

NARFE Web Hosting is an easy to use service that is NARFE branded and includes NARFE support. You do not need to be a programmer. If you can compose a simple email or word processing document you can have a simple web page up and running with minimal effort. If you want to get fancier and include pictures and files such as newsletters, this would be like attaching a file to an email, or including a picture in a word processing document. The system is very easy to use. The CAB is working on a tutorial for NARFE Web Hosting for future release.

What does NARFE Web Hosting Cost?

NARFE Web Hosting costs \$29.95 a year, billed to your chapter. There are no forms to fill out, just select the OAM option to “Create your chapter [nnnn] website with us” or “Create your Federation [SS] website with us” (where “nnnn” is your chapter number with no leading zeros, and “SS” is the two letter abbreviation for your state or territory) and you are ready to go. The page is initially “inactive”. To make it available for the public to see, just “activate” it. When you first activate your webpage, you have 30 days to explore using it and may take advantage of NARFE support. If, for some reason, you need more time to evaluate, please contact the NARFE webmaster.

What do I need before I can use NARFE Web Hosting?

NARFE takes care of setting up things like your web page, so you don’t need to fill out forms, and other details typically needed in this process. A chapter web is [www.narfe.org/site/chapternnnn](http://www.narfe.org/site/chapternnnn) where “nnnn” is the chapter number with no leading zeros, and a federation web page is [www.narfe.org/site/ss](http://www.narfe.org/site/ss) where “SS” is the two letter abbreviation for your state or territory.

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If this is for your chapter 1234, your web page will be [www.narfe.org/site/chapter1234](http://www.narfe.org/site/chapter1234) or if this is for your federation and your state is Texas, your web page will be [www.narfe.org/site/TX](http://www.narfe.org/site/TX)

You add the content. NARFE provides a lot of features automatically, like a “Join NARFE” button, a “Contact Us” form that lists current officers, and an attractive banner that is NARFE branded. Most chapters start with information about where they meet, upcoming meeting dates, etc. As you grow more comfortable using web hosting, you may add your newsletter, plus upload pictures and graphics to one or more photo albums.

[What does a NARFE hosted web site look like?](#)

You can look in the NARFE Chapter Locator for chapter websites that fit the above name format. Some chapter examples are 16, 91, 148, 242, 672, 1201, 828, 969, and 1874. Federation sites are listed after logging into NARFE, then selecting “Find us locally” near the top left of the home screen. Some example federations are AR, DC, IL, IN, and IA. There are many others not listed here.

[Other](#)

[Where can I go for help if I still have questions?](#)

Go to the Officer Resources page and then click on “Contact Us” in the upper right hand portion of the page. There is “Contact Us” information on other pages but the one on the Officer Resources page is best. OAM questions can be handled by the webmaster. If you have questions about a particular member’s data, that should be directed to NARFE Member Records.

Another option is to contact your CAB representative. After going to Officer Resources, look on the bottom left of the page for “Contact CAB Members”. Clicking on that will bring up the list of CAB members. You can send an email from that page. It also has telephone numbers. Please remember the CAB members are unpaid volunteers, not NARFE HQ employees.

[I need help using my computer!](#)

First, check the “Help” on your computer, and in the applications (like word processing) that you use. Check with your local library which may have classes, books and videos to help. YouTube at [www.YouTube.com](http://www.YouTube.com) has many helpful videos. Another valuable resource is offered by the Goodwill Community Foundation at [www.GCFLearnFree.org](http://www.GCFLearnFree.org) which offers over 750 free, online classes. You could ask your NARFE officers to have a program on this topic.

For more information, there are a many resources listed in the document “Training and Other Links”, which may be found on the Configuration Advisory Board page. First log into the NARFE website, select Officer Resources, then at the bottom left pick “Configuration Advisory Board,” “CAB Activities”.

[Give me a ready-to-use presentation for my \[chapter, area, federation\] convention.](#)

The OAM Overview has links to over a dozen presentations (both as downloadable PDF files and as YouTube videos) which you may use for NARFE meetings.