

# AFGE New Leader Resources

## Contents

- Local Officer Resources..... 4
  - AFGE: Take Action Initiatives ..... 4
  - Local Officer Toolkit ..... 4
  - Official Time ..... 5
  - Stay Safe this Election Season: A Hatch Act Primer ..... 5
  - Leadership Meeting Resources ..... 5
  - AFGE and Government Employee News..... 5
  - AFGE Event Calendar..... 5
  - Union Leader Benefits..... 5
- Communication Training and Resources ..... 6
  - Communications Guide to Mobilize Members ..... 6
  - How to Improve Member Outreach ..... 6
  - Communications Training Courses..... 6
  - Communication Presentations..... 6
  - Engaging Your Community: Media Tips ..... 6
  - Engaging Online: Social Media Activism ..... 7
  - How to Setup Digital Communication Tools ..... 7
  - Communication References and Templates ..... 7
  - AFGE Branding..... 8
- Organizing Resources..... 8
  - AFGE.org Organizing home page ..... 8
  - Membership & Organizing Forms ..... 8
  - Organizing Flyers ..... 8
  - Organizing Brochures ..... 10
  - Organizing Campaigns..... 11
  - AFGE Application Form Assistance..... 11
  - Organizing Videos..... 11
  - AFGE Member Benefits..... 11
- Legislative and Political Action..... 13
  - Legislative Political Coordinator (LPC) Dashboard ..... 13
  - Legislative Political Coordinator (LPC) Resources ..... 13

Issues: AFGE Supports/Opposes ..... 13

Lobbying Tips..... 13

Legislative Action Fund (LAF) ..... 14

AFGE Political Action Committee (PAC) ..... 14

Local Union Administration..... 15

    Labor Management Forums..... 15

    Collective Bargaining..... 15

Fiduciary Compliance Resources..... 16

    Procedures Policies and QuickBooks ..... 16

    Financial Officer Forms ..... 16

    National Secretary Treasurer FAQ ..... 16

Worksite Representation ..... 17

    AFGE Steward Checklist and Resources ..... 17

    New Stewards Orientation Webinar Schedule ..... 17

    Worksite Representation: Steward Essentials Self-Paced Course ..... 17

Women's and Fair Practices (WFP) ..... 18

    WFP Department Programs ..... 18

    National Fair Practices Affirmative Action Coordinators ..... 18

    National Women’s Advisory Coordinators..... 18

    WFP Local Coordinator's Toolkit ..... 18

Health & Safety ..... 19

Workers Compensation ..... 19

AFGE Case Track..... 20

    AFGE Member Legal Assistance/Representation..... 20

    Case Tracking System ..... 20

MyLocal3 for Locals (MyAFGE for Staff) ..... 21

    OKTA/MyAFGE Single Sign-On Portal..... 21

    MyLocal3 Introduction ..... 21

    Local Officer Positions..... 21

    Local Union Addresses ..... 21

    Finance and AutoPay..... 22

    Add and Edit a Member in MyLocal..... 22

    Dashboard Summary and Performance Reports ..... 22

    Upload and Edit Member Documents ..... 23

    Local Union Profile ..... 23

Mailing Labels and Data Export..... 23

Employee Technology Use Guides ..... 25

    SharePoint Online ..... 25

    Accessing the National Representative Weekly Report..... 25

    OKTA/MyAFGE Single Sign-On Portal..... 25

    Outlook & Outlook Web Access ..... 25

    Online Security Awareness Training..... 26

    Duo Security Two Factor Authentication ..... 26

    iPhone and iPad..... 26

    Office 365 Online Training ..... 26

    Concur Expense Reporting ..... 27

    8X8 Virtual Office ..... 27

    AT&T Teleconferencing..... 27

    Skype for Business..... 27

    Personify..... 28

Glossaries ..... 28

## Local Officer Resources

### AFGE: Take Action Initiatives

#### **Campaigns**

<https://www.afge.org/take-action/campaigns/>

#### **Big Enough to Win**

<https://www.afge.org/leaders-activists/Win/>

#### **Current Actions**

<https://www.afge.org/leaders-activists/Win/current-actions/>

#### **Committee for the Future**

<https://www.afge.org/leaders-activists/Win/the-afge-committee-for-the-future/>

#### **AFGE History Timeline**

<http://educationtraining.afge.org/AFGETimeline/index.html>

## Local Officer Toolkit

<https://www.afge.org/leaders-activists/education/local-officers-toolkit/>

- AFGE Constitution
- Local Officers Resource Guide
- Election Manual
- Committee of Investigation Guide
- Official Time Booklet
- NST Resources (local secretary-treasurer's resources including samples and forms)

#### **AFGE Constitution**

<https://www.afge.org/globalassets/documents/afge-national-constitution.pdf>

#### **Local Officers Resource Guide**

<https://www.afge.org/globalassets/documents/education/local-officers-manual-web-2.pdf>

#### **Election Manual**

<https://www.afge.org/globalassets/documents/manuals/Electionmanual.pdf>

#### **Committee of Investigation Guide**

<https://www.afge.org/globalassets/documents/manuals/2004-09-29investigationmanual.pdf>

#### **Official Time Booklet**

<https://www.afge.org/globalassets/documents/official-time/official-time---time-well-spent-booklet.pdf>

**NST Resources for local-secretary treasurers**

<https://www.afge.org/leaders-activists/financial-officers-training/class-resources/>

**Official Time**

<https://www.afge.org/take-action/campaigns/official-time/>

**Official Time: Time Well Spent**

<https://www.afge.org/globalassets/documents/official-time/official-time---time-well-spent-booklet.pdf>

**Official Time Q & A**

<https://www.afge.org/take-action/campaigns/official-time/official-time-q--a/>

**Stay Safe this Election Season: A Hatch Act Primer**

<https://www.afge.org/article/stay-safe-this-election-season-a-hatch-act-primer/>

**Leadership Meeting Resources**

<https://www.afge.org/leaders-activists/Win/leadership-conference-resources/>

**AFGE and Government Employee News**

<https://www.afge.org/media-center/publications/>

**AFGE Event Calendar**

<https://www.afge.org/events/>

**Union Leader Benefits**

<https://www.afge.org/member-benefits/union-leader/>

## Communication Training and Resources

<https://www.afge.org/leaders-activists/education/communications-training/>

### Communications Guide to Mobilize Members

<https://www.afge.org/globalassets/documents/comms-training/telling-our-story-guide.pdf>

### How to Improve Member Outreach

<https://www.afge.org/leaders-activists/education/communications-training/how-to-improve-member-outreach/>

- Newsletter tips
- Digital Activism tips
- Storytelling tips
- Interviewing tips
- Email tips
- Facebook tips

### Communications Training Courses

<https://www.afge.org/leaders-activists/education/communications-training/courses/>

- Representation in the Social Media Environment
- Hands-On Training with Facebook & Twitter
- Creating Content for the Social Web

### Communication Presentations

<https://www.afge.org/leaders-activists/education/communications-training/resources/>

- Cyber Unions Training
- Utilizing Tools and Reaching Audiences
- Social Media Network
- Storytelling
- Creating Effective Newsletters
- Mobilizing in the Digital Age

### Engaging Your Community: Media Tips

<https://www.afge.org/leaders-activists/education/communications-training/engaging-your-community-media-tips/>

- Interviews with the Press
- Media Advisories
- Press Releases
- Letters to the Editor
- Print, Radio and Online Advertising
- AFGE News Alerts

## Engaging Online: Social Media Activism

<https://www.afge.org/leaders-activists/education/communications-training/social-media-activism/>

- Facebook
- Twitter
- Social Media at AFGE
- Flickr

## How to Setup Digital Communication Tools

<https://www.afge.org/leaders-activists/education/communications-training/getting-started/digital-communications-tools/>

To have the AFGE Communications Department contact you about the services, email [post@afge.org](mailto:post@afge.org).

- Websites
- Facebook
- Digital Newsletters
- Email accounts

## Communication References and Templates

<https://www.afge.org/leaders-activists/education/communications-training/resources/>

- Sample Content Calendar
- AFGE Words that Work
- Sample Newsletter Template
- Sample Article Template
- Writing Tips
- Mobile Photography Tips
- Email Collection Campaign & Surveying Membership
- Union Communications Analysis Worksheet
- Communications Plan Outline Template

## AFGE Branding

### **AFGE Brand Book**

<https://www.afge.org/globalassets/documents/afge-brand-guidelines.pdf>

### **AFGE logos**

<https://www.afge.org/media-center/publications/afge-logos/>

## Organizing Resources

### AFGE.org Organizing home page

<https://www.afge.org/leaders-activists/organizing/>

### Membership & Organizing Forms

<https://www.afge.org/leaders-activists/organizing/organizing-forms/>

- Agency Collective Bargaining Agreements (CBAs)
- 1187 Federal Employee Request for Payroll Deductions for Labor Organization Dues
- 1158 TSA Form
- D.C. Membership Form
- Merchandise Transfer Form
- METRO Transfer Form

### Organizing Flyers

<https://www.afge.org/leaders-activists/organizing/flyers/>

Contact the Services Department to have materials printed.

#### **General Organizing flyers**

- Pay Cuts flyer
- flyer for H.R.1461
- Bulletin board kit
- AFGE facts + 1187
- Monthly Telephone Town Hall
- Know Your Rights at Work flyer
- Hands Off Our Retirement (FERS) flyer
- Retirement flyer
- Membership Benefits flyer
- Student Loan flyer
- Veterans Make Your Voice Heard flyer
- Tips for Meeting Congress flyer



- 182 Billion Federal Workforce Contribution flyer
- Meeting Sign-in Sheet
- Lunch & Learn flyer (editable template)

**Bureau of Prisons**

- Budget Cuts Make Prisons Less Safe flyer
- Federal vs Private flyer

**Department of Defense (DoD)**

- 3000 Jobs Saved by AFGE
- Firefighter flyer

**DOI**

- Are You Ready to Lose this View flyer
- More Opportunities Than Ever Before flyer

**DOT**

- FAA Privatization Workplace flyer
- Privatization Won't Work flyer

**EPA**

- Pay Cuts flyer

**HUD**

- Pay Cuts flyer

**LEO**

- Hands Off Our Retirement (FERS) flyer
- Hands Off Our Retirement (FERS) flyer (1187)
- You Protect Us, Who's Protecting You flyer

**SSA**

- Pay Cuts flyer
- It's Time to Save Our Social Security flyer

**TSA**

- Title 5 flyer
- Staff TSA flyer
- Staff TSA L&L flyer
- TSA 5 Reasons flyer

**VA**

- VA AFGE Has Your Back flyer
- IT Specialist flyer

## Organizing Brochures

<https://www.afge.org/leaders-activists/organizing/brochures/>

Contact the Service Department to have materials printed.

### **DoD Workplace Brochures:**

- DoD Professional Brochure
- Fire Fighters Steering Committee Brochure
- Depot & Arsenal Workers Brochure
- New Member Orientation Brochure
- Generic Professional Brochure
- Health Care Professional Brochure
- IT Professional Brochure
- Research Professional Brochure
- Scientist Professional Brochure

### **VA:**

- VA Doctors Brochure
- VA Nurses Brochure
- VA Pharmacists Brochure

### **DoD Workplace Brochures:**

- DoD Professional Brochure
- Fire Fighters Steering Committee Brochure
- Depot & Arsenal Workers Brochure

### **TSA:**

- TSO Brochure

### **BOP:**

- AFGE: The Union for Correctional Workers

### **CDC:**

- NIOSH Employees Brochure
- A Powerful Voice for CDC Employees

### **EPA:**

- A Powerful Voice for EPA Employees

### **LEO:**

- Law Enforcement Brochure

### **AFGE Veterans:**

- AFGE Veterans Pocket Brochure

### **AFGE Retirees:**

- AFGE Retiree Brochure

## Organizing Campaigns

<https://www.afge.org/leaders-activists/organizing/organizing-campaigns/>

Contact the Service Department to have materials printed.

### Current Rebate Campaigns

- Big Enough To Win Campaign
- BOP Organizing Campaign
- DEFCON Organizing Campaign
- C.H.A.M.P. - D5 Organizing Initiative
- NVAC Campaign
- Social Security Administration (SSA)

## AFGE Application Form Assistance

### Federal Employees (except TSA) How to fill out an 1187

[https://youtu.be/cLYJj\\_MnC2M](https://youtu.be/cLYJj_MnC2M)

### TSA Employees How to fill out an 1158

<https://youtu.be/EhE9sQQRbKE>

## Organizing Videos

### AFGE Generic Orientation Video: A Strong Voice for Government Workers

<https://youtu.be/dQd5jnZCvHI>

### AFGE VA Orientation Video: Proud to Keep the Promise to America's Veterans

<https://youtu.be/pFDcE-U8dwc>

### AFGE: A Strong Voice for Defense Workers

<https://youtu.be/LGUPNrgeUoM>

### AFGE: A Strong Voice for TSA Workers

<https://youtu.be/O8XKDCr-WQ>

## AFGE Member Benefits

<https://www.afge.org/member-benefits/>

### Benefit Programs available only to AFGE members

- Travel Benefits
- Technology Benefits

- Financial Benefits
- Home Benefits
- Entertainment Benefits
- Education Benefits
- Consumer Benefits
- Health Benefits
- Auto Benefits
- Insurance Benefits
- Moving Benefits
- Retiree Benefits
- Union Leader Benefits
- Your Career Benefits
- Legal Benefits
- Local Coordinator Resources

**AFGE Member Benefit flyer**

<https://www.afge.org/globalassets/documents/flyers/afge-membership-flyer.pdf>

Toll-free Benefits Line:

(888) 844-2343; In DC: (202) 639-6941

## Legislative and Political Action

### Legislative Political Coordinator (LPC) Dashboard

<https://www.afge.org/take-action/lpc-dashboard/>

### Legislative Political Coordinator (LPC) Resources

<https://www.afge.org/take-action/lpc-dashboard/>

- Find out about the roles and responsibilities of an LPC.
- Make sure to keep up to date with the Congressional Calendar.
- Sign up for AFGE Email and Text Action Alerts.
- Nominate someone who would make an outstanding LPC

### Issues: AFGE Supports/Opposes

<https://www.afge.org/take-action/lpc-dashboard/>

### Lobbying Tips

<https://www.afge.org/take-action/lpc-dashboard/lobbying-tips/>

#### **Materials for your Meeting**

- Talking Points 115<sup>th</sup> Congress
- 2017 Legislative Conference Fast Facts

#### **Refining your Message**

- Elements of an Effective Message
- Meeting with Lawmakers Toolkit
- Knowing your Lawmaker's Voting Record
- Understanding how Congress works
- Lobbying Do's and Don'ts

#### **Training Materials**

- LPC Presentation at AFGE National Convention 2015
- Pocket Guide to Political Activity

## Legislative Action Fund (LAF)

<https://www.afge.org/leaders-activists/legislative-action-fund-laf/>

- Why do we need LAF funds?
- What is LAF Used for?
- How can your Local contribute to LAF?

## AFGE Political Action Committee (PAC)

<https://www.afge.org/take-action/pac/>

### **Information and PAC Rules**

<https://www.afge.org/take-action/pac/about-afge-pac/>

### **AFGE PAC FAQ's**

<https://www.afge.org/take-action/pac/about-afge-pac/afge-pacs-faqs/>

# Local Union Administration

## Labor Management Forums

<https://www.afge.org/leaders-activists/local-union-administration/labor-management-forums/>

### Introduction

Is your Agency active in the Management Forum?

### Tools to use

- DHS Labor-Management Forum Charter - November 4, 2010
- FAQs for Labor/Management Forums
- Charter of the Department of Commerce Labor-Management Forum
- Department of Homeland Security Federal Law Enforcement Training Center Labor-Management Forum
- Federal Bureau of Prisons Labor-Management Forum
- DHS Labor-Management Forum Charter

### FAQs for Labor/Management Forums

<https://www.afge.org/leaders-activists/local-union-administration/labor-management-forums/faqs-for-labormanagement-forums/>

## Collective Bargaining

<https://www.afge.org/leaders-activists/local-union-administration/collective-bargaining/>

### What is Collective Bargaining?

[https://youtu.be/SV\\_yd3iUcXA](https://youtu.be/SV_yd3iUcXA)

### Types of Bargaining

<https://youtu.be/-nUqPoZETCU>

### Advanced Notice

<https://youtu.be/ajMSO6tA27A>

### Impact and Implementation

<https://youtu.be/iNeSZ-cPolg>

### Management Rights

<https://youtu.be/NQNRaIBLPX0>

### Service Model Versus Organizing Model

[https://youtu.be/1gv0sDG\\_ztE](https://youtu.be/1gv0sDG_ztE)

## Fiduciary Compliance Resources

### Procedures Policies and QuickBooks

<https://www.afge.org/leaders-activists/financial-officers-training/class-resources/>

- Local and Council QuickBooks Data File
- Financial Officers Resource Guide
- Official Time – 38 FLR No 107
- DOL 10-Step Audit Guide
- Financial Policies and Procedures Manual

### Financial Officer Forms

<https://www.afge.org/leaders-activists/financial-officers-training/class-resources/>

- Meeting Sign In Sheet
- Meeting Minutes Fillable Form
- Sample Budget (Excel Format)
- Checklist to Conduct Internal Audit
- AFGE's annual audit form 41 (Non-DC Government)
- AFGE's annual audit form 41 (DC Government)
- Help sheet to fill in IRS & DOL forms
- AFGE's Guide to Official Time

### National Secretary Treasurer FAQ

<https://www.afge.org/leaders-activists/financial-officers-training/nst-faq/>

- About MyLocal
- Member Requests
- AFGE Constitution
- Membership Dues
- Per Capita Taxes
- Managing Local Finances
- My Local's Charter



# Worksite Representation

## AFGE Steward Checklist and Resources

<https://www.afge.org/leaders-activists/education/afge-stewards/>

- Stewards Checklist
- Weingarten Rights
- Steward Essentials
- AFGE Stewards Handbook
- Health & Safety Resources
- AFGE Labor History Timeline
- Stewards Glossary (Mobile)
- Stewards Glossary (Print)
- Representation (Stewards) Jeopardy
- The Statute Federal Labor Relations Authority (FLRA)
- Educational tools and online resources for Stewards
- 5 USC Chapter 71
- Communication Log
- Designation Letter
- Douglas Factors
- Example Demand to Bargain
- Example of Council Grievance
- Example ULP from Council 222
- FLRA 22 ULP Form
- Grievance Disciplinary Example
- Grievance Folder Cover Sheets
- Grievance Intake Form
- Info Request (Short)
- New Employee Orientation Leaders Guide

## New Stewards Orientation Webinar Schedule

<https://www.afge.org/leaders-activists/education/afge-stewards/new-stewards-orientation-webinar/>

## Worksite Representation: Steward Essentials Self-Paced Course

<https://afgelearn.moonami.com/course/view.php?id=14>

## Women's and Fair Practices (WFP)

<https://www.afge.org/leaders-activists/womens-fair-practices/>

### WFP Department Programs

<https://www.afge.org/leaders-activists/womens-fair-practices/wfp-department-programs/>

- Voter Protection
- AFGE Pride (LGBT & Allies)
- AFGE Conflict Resolution Program
- Pictures from WFP Events
- HISCO
- AFGE YOUNG

### National Fair Practices Affirmative Action Coordinators

<https://www.afge.org/leaders-activists/womens-fair-practices/national-fair-practices-affirmative-action-coordinators-nfpaac/>

### National Women's Advisory Coordinators

<https://www.afge.org/leaders-activists/womens-fair-practices/national-womens-advisory-coordinators-nwac/>

### WFP Local Coordinator's Toolkit

<https://www.afge.org/leaders-activists/womens-fair-practices/local-coordinator-toolkit/>

## Health & Safety

<https://www.afge.org/member-benefits/health-and-safety/>

### **AFGE Health & Safety Online Training**

[http://educationtraining.afge.org/Health\\_and\\_Safety\\_Essentials/story\\_flash.html](http://educationtraining.afge.org/Health_and_Safety_Essentials/story_flash.html)

### **Joint Occupational Health & Safety Committee Resource Tool**

<http://innovation.ghrp.ubc.ca/JOHSC/>

### **Your Rights as a Federal Employee**

<https://www.afge.org/member-benefits/health-and-safety/your-rights-as-a-federal-employee/>

### **Bargaining for Health and Safety**

<https://www.afge.org/member-benefits/health-and-safety/bargaining-for-health-and-safety/>

## Workers Compensation

<https://www.afge.org/member-benefits/health-and-safety/>

### **Workers Compensation Video Tips**

<https://youtu.be/ou8NDYj9xMw>

<https://youtu.be/RaKN3U2u6T4>

<https://youtu.be/ICBHsAifxTQ>

### **Forms you need to file a worker's compensation claim**

- CA -1 Federal Employee's Notice of Traumatic Injury and Claim for Continuation of Pay/Compensation
- CA-2 Notice of Occupational Disease and Claim for Compensation
- CA-2a Notice of Recurrence
- CA-7 Claim for Compensation
- CA-7a Time Analysis Form
- CA-7b Leave Buy Back (LBB) Worksheet/Certification and Election
- CA-16 Authorization for Examination and/or Treatment
- CA-17 Duty Status Report
- CA-20 Attending Physician's Report

### **OWCP Booklet: What a Federal Employee Should Do When Injured at Work**

<https://www.afge.org/globalassets/documents/health--safety/ca-10.pdf>

### **Claimant Query System (CQS)**

<https://www.afge.org/globalassets/documents/health--safety/claimantquerysystem-cqs.pdf>

# AFGE Case Track

## AFGE Member Legal Assistance/Representation

<https://www.afge.org/leaders-activists/government-employee-resources/legal-assistance/>

### **Structure of AFGE Legal Representation**

- Field Support Group
- Council Support Group
- Attorney-of-the Day

### **Requests for Attorneys to Handle Cases**

## Case Tracking System

### **Registering for AFGE Case Track**

<https://afge.zendesk.com/hc/en-us/articles/200125199-Registering-for-AFGE-CaseTrack>

### **Logging into AFGE Case Track**

<https://afge.zendesk.com/hc/en-us/articles/200542184-Logging-into-AFGE-CaseTrack>

## MyLocal3 for Locals (MyAFGE for Staff)

### OKTA/MyAFGE Single Sign-On Portal

#### **Getting Started with Your AFGE Okta Dashboard (myafge.org)**

<https://afge.zendesk.com/hc/en-us/articles/203375330-Getting-Started-with-Your-AFGE-Okta-Dashboard-my-afge-org->

### MyLocal3 Introduction

#### **MyLocal/MyCouncil Intro Video**

<https://afge.zendesk.com/hc/en-us/articles/205301580-MyLocal-MyCouncil-Intro-Video>

#### **Accessing Reports in MyLocal3 and MyAFGE**

<https://afge.zendesk.com/hc/en-us/articles/204424434-Accessing-Reports-in-MyLocal3-and-MyAFGE>

#### **Editing Membership in MyAFGE for Trustees (video)**

<https://afge.zendesk.com/hc/en-us/articles/212144083-Editing-Membership-in-MyAFGE-for-Trustees-video->

#### **Support Contact Information**

<https://afge.zendesk.com/hc/en-us/articles/204425054-Contact-Information>

### Local Officer Positions

#### **Local Profile: Viewing and Managing Officer Positions**

<https://afge.zendesk.com/hc/en-us/articles/209762923-Local-Profile-Viewing-and-Managing-Officer-Positions>

#### **Adding Officer Position by Editing Membership Information**

<https://afge.zendesk.com/hc/en-us/articles/203606674-Adding-Officer-Position-by-editing-membership-information>

### Local Union Addresses

<https://afge.zendesk.com/hc/en-us/sections/200649530-Local-Address>

#### **Mark Good Address/Bad Address**

<https://afge.zendesk.com/hc/en-us/articles/204345570-Mark-Good-address-Mark-Bad-Address>

**Change Local Address**

<https://afge.zendesk.com/hc/en-us/articles/203302284-Change-Local-Address>

**Finance and AutoPay****Requesting a DOL Electronic Filing System (EFS) PIN for LM-2 and LM-3 Filing**

<https://afge.zendesk.com/hc/en-us/articles/207696416-Requesting-a-DOL-Electronic-Filing-System-EFS-PIN-for-LM-2-and-LM-3-Filing>

**Add and Edit a Member in MyLocal**

<https://afge.zendesk.com/hc/en-us/sections/200622080-Add-Member>

**Adding a Member**

<https://afge.zendesk.com/hc/en-us/articles/203064224-Adding-a-Member>

**Add Other Information On Member Screen**

<https://afge.zendesk.com/hc/en-us/articles/204787010-Add-Other-Information-On-Member-Screen>

**How to Add Documents (Form 1187/1158/1188)**

<https://afge.zendesk.com/hc/en-us/articles/204383720-How-to-add-documents>

**Description of Various Fields in the Member Form**

<https://afge.zendesk.com/hc/en-us/articles/203073194-Description-of-various-fields-in-the-member-form>

**Mandatory / Optional Fields**

<https://afge.zendesk.com/hc/en-us/articles/203305050-Mandatory-Optional-fields->

**Transfer a Member**

<https://afge.zendesk.com/hc/en-us/articles/203061214-Transfer-a-member>

**Drop a Member**

<https://afge.zendesk.com/hc/en-us/articles/203084624-Dropping-a-member>

**Reinstate a Member**

<https://afge.zendesk.com/hc/en-us/sections/200627170-Reinstate-member>

**Member Search**

<https://afge.zendesk.com/hc/en-us/articles/204448364-Search-Overview>

**Dashboard Summary and Performance Reports**

<https://afge.zendesk.com/hc/en-us/sections/200625844-Dashboard-Reports>

### **Summary Report**

<https://afge.zendesk.com/hc/en-us/articles/203327930-Summary-Report>

### **Performance Report**

<https://afge.zendesk.com/hc/en-us/articles/203327870-Performance-Report>

### **Local List Report**

<https://afge.zendesk.com/hc/en-us/articles/203328130-Local-List-Report>

## Upload and Edit Member Documents

<https://afge.zendesk.com/hc/en-us/sections/200630914-Documents>

- Upload Member Documents
- Open Member Documents
- Editing Member Document
- Save Member Notes
- Editing Member Notes
- Upload Local Documents

## Local Union Profile

<https://afge.zendesk.com/hc/en-us/sections/200632590-Local-Profile>

- Officer Information
- Adding an Officer
- Removing an Officer
- History
- Affiliations
- Election and Financial Details

### **Display charts and reports of AFGE Districts, Councils and Locals**

<https://afge.zendesk.com/hc/en-us/sections/200634120-Dashboard>

- Dashboard
- Summary Section
- Chart Section
- Dashboard Filtering

## Mailing Labels and Data Export

<https://afge.zendesk.com/hc/en-us/sections/200609454-Mailing-Labels-and-Data-Export>

**Print Member Labels**

<https://afge.zendesk.com/hc/en-us/articles/203243890-Print-Member-Labels>

- Export Results List
- Sign Sheet
- Printable Roster
- Election Mailing Labels
- Print a Temporary Membership Card

**MyLocal3 and MyAFGE FAQ**

<https://afge.zendesk.com/hc/en-us/sections/201622266-FAQ>

- How can I change the bank account info for my local's dues deduction?
- How do I enter Social Security Number for service fee members?
- How can I update a member's record to "Retired"?
- Where can I see the balance due for my local?
- How can I find members with "bad addresses"?



# Employee Technology Use Guides

## SharePoint Online

<https://afge.zendesk.com/hc/en-us/sections/200549320-SharePoint-Online>

### **Accessing SharePoint Online**

<https://afge.zendesk.com/hc/en-us/articles/202824660-Accessing-SharePoint-Online>

## Accessing the National Representative Weekly Report

<https://afge.zendesk.com/hc/en-us/articles/202508944-Accessing-the-National-Representative-Weekly-Report>

### **Add, Edit, and Delete Items in the National Representative Weekly Report**

<https://afge.zendesk.com/hc/en-us/articles/202824670-Add-Edit-and-Delete-Items-in-the-National-Representative-Weekly-Report>

### **Sorting and Filtering Data on the National Representative Weekly Report**

<https://afge.zendesk.com/hc/en-us/articles/202508964-Sorting-and-Filtering-Data-on-National-Representative-Weekly-Report>

## OKTA/MyAFGE Single Sign-On Portal

### **Getting Started with Your AFGE Okta Dashboard (myafge.org)**

<https://afge.zendesk.com/hc/en-us/articles/203375330-Getting-Started-with-Your-AFGE-Okta-Dashboard-my-afge-org>

### **Adding an App from the OKTA Browser Plugin**

<https://afge.zendesk.com/hc/en-us/articles/207433696-Adding-an-App-from-the-OKTA-Browser-Plugin>

## Outlook & Outlook Web Access

<https://afge.zendesk.com/hc/en-us/sections/200047345-Outlook-Outlook-Web-Access>

### **Setting Automatic Replies in Outlook Web App (“AFGE Webmail”)**

<https://afge.zendesk.com/hc/en-us/articles/200226579-Setting-Automatic-Replies-in-Outlook-Web-App-Webmail>

### **Accessing Outlook Web Access (AFGE Webmail”)**

<https://afge.zendesk.com/hc/en-us/articles/200281355-Accessing-Outlook-Web-Access-AFGE-Webmail>

**Open a Shared Mailbox in Outlook Web App**

<https://afge.zendesk.com/hc/en-us/articles/203275384-Open-a-Shared-Mailbox-in-Outlook-Web-App-Webmail->

**Open a Shared Calendar in Outlook 2013**

<https://afge.zendesk.com/hc/en-us/articles/200281345-Open-a-Shared-Calendar-in-Outlook-2013>

**Online Security Awareness Training**

<https://afge.zendesk.com/hc/en-us/sections/115000135604-Online-Security-Awareness-Training>

**Duo Security Two Factor Authentication**

<https://afge.zendesk.com/hc/en-us/sections/200669600-Duo-Security-Two-Factor-Authentication>

**How to Log In to Microsoft Windows with Duo Security**

<https://afge.zendesk.com/hc/en-us/articles/203636640-How-to-Log-In-to-Microsoft-Windows-with-Duo-Security>

**Duo Mobile App on iPhone**

<https://afge.zendesk.com/hc/en-us/articles/203636650-Duo-Mobile-App-on-iPhone>

**Duo Mobile App on Android**

<https://afge.zendesk.com/hc/en-us/articles/203636670-Duo-Mobile-App-on-Android>

**Manage Your Duo Security Linked Devices**

<https://afge.zendesk.com/hc/en-us/articles/204641870-Manage-Your-Duo-Security-Linked-Devices>

**iPhone and iPad**

<https://afge.zendesk.com/hc/en-us/sections/200047315-iPhone-and-iPad>

**Update the iOS software on your iPhone, iPad, and iPod touch**

<https://afge.zendesk.com/hc/en-us/articles/204395590-Update-the-iOS-software-on-your-iPhone-iPad-and-iPod-touch>

**Office 365 Online Training**

<https://afge.zendesk.com/hc/en-us/articles/208214553-Office-365-Online-Training>

**Get to know Office 365: Welcome to Office 365**

<https://afge.zendesk.com/hc/en-us/articles/200281245-Get-to-know-Office-365-Welcome-to-Office-365>

**iPhone Email Setup for Office 365**

<https://afge.zendesk.com/hc/en-us/articles/200432730-iPhone-Email-Setup-for-Office-365>

**Office 2016 Quick Start Guides**

<https://afge.zendesk.com/hc/en-us/articles/206118966-Office-2016-Quick-Start-Guides>

**Excel 2013 Tutorial for Beginners**

<https://afge.zendesk.com/hc/en-us/articles/202655520-Excel-2013-Tutorial-for-Beginners>

## Concur Expense Reporting

<https://afge.zendesk.com/hc/en-us/sections/200047245-Concur>

Concur Account Creation

<https://afge.zendesk.com/hc/en-us/articles/115000161524-Concur-Account-Creation>

Concur Mobile Instructions:

<https://afge.zendesk.com/hc/en-us/articles/200280935-Concur-Mobile-Instructions>

Concur Web Login Instructions

<https://afge.zendesk.com/hc/en-us/articles/200280945-Concur-Web-Login-Instructions>

## 8X8 Virtual Office

<https://afge.zendesk.com/hc/en-us/sections/115000709784-8x8-Virtual-Office>

**8x8 Telephone Service**

<https://afge.zendesk.com/hc/en-us/sections/200738470-8x8-Telephone-Service>

**Polycom VVX500 Telephone Quick Start and User Guides**

<https://afge.zendesk.com/hc/en-us/articles/208349063-Polycom-VVX500-Telephone-Quick-Start-and-User-Guides>

## AT&T Teleconferencing

<https://afge.zendesk.com/hc/en-us/sections/200046239-AT-T-Teleconferencing>

## Skype for Business

<https://afge.zendesk.com/hc/en-us/sections/200047325-Skype-for-Business>

**Skype for Business Quick Intro**

<https://afge.zendesk.com/hc/en-us/articles/204383604-Skype-for-Business-Quick-Intro>

**Skype for Business: Step-by-step guide for new users**

<https://afge.zendesk.com/hc/en-us/articles/204624580-Skype-for-Business-Step-by-step-guide-for-new-users>

**Personify**

<https://afge.zendesk.com/hc/en-us/sections/200124764-Personify>

## Glossaries

**AFGE Steward Glossary Mobile**

<http://educationtraining.afge.org/StewardGlossary/index.html>

**Glossary of Federal Sector Labor-Management Relations Terms**

<http://www.afge1309.org/librarycontract/opmglossary.html>