CALIFORNIA SCHOOLS VEBA

ADMINISTRATOR HANDBOOK

Site Administration & Content Guide

A practical reference for managing the CalVEBA website — content types, menus, forms, the MyVEBA member portal, WellnessLiving classes, search, and personalization.

Prepared for the CalVEBA content & benefits team
calveba.org

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INSIDE THIS GUIDE

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Thirteen sections, grouped from everyday content editing to the systems that power the member portal and classes.

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HOW TO USE THIS GUIDE

Each section is written for a site editor working in **wp-admin**. Menu paths are shown as **Dashboard → Section → Item**. Blue `code` marks a field, setting, or file name. Grey italic notes flag anything that needs care or a developer's help.

SECTION 1

Platform & critical plugins

The site is a custom WordPress theme (`calveba`) hosted on WP Engine, with production at calveba.org and a separate staging environment.

The stack at a glance

Platform	WordPress, custom theme `calveba` (no page-builder — layouts are template-driven)
Hosting	WP Engine — production (calveba.org) + staging; content and code deploy separately
Content model	Custom post types + Advanced Custom Fields (ACF) drive nearly all page content
Forms	Gravity Forms (contact + others), with reCAPTCHA and SMTP delivery
Members	ARES member API → the MyVEBA portal; WellnessLiving powers Classes & Events

Critical plugins

Plugin	Version	Purpose	Reference
Advanced Custom Fields PRO	6.8.7	Powers editable content on every page & custom post type	advancedcustomfields.com
Gravity Forms	3.1.1	Contact form and all site forms + notifications	gravityforms.com / docs.gravityforms.com
Gravity Forms — reCAPTCHA	2.2.2	Spam protection on forms	gravityforms.com
Gravity Forms — SendGrid / Salesforce / Constant Contact	—	Email delivery & CRM routing add-ons	gravityforms.com
Yoast SEO	28.2	SEO titles, meta, sitemaps	yoast.com
WP All Import Pro (+ User add-on)	4.10.0	Bulk content/user imports from CSV/XML	wpallimport.com
WP Mail SMTP	4.9.0	Reliable transactional email delivery	wpmailsmtp.com
Members	3.2.26	WordPress user roles & capabilities	members-plugin.com
Akismet · Limit Login Attempts	—	Comment spam · brute-force login protection	—

ADVANCED CUSTOM FIELDS

Product & docs:

advancedcustomfields.com/pro
Docs & field reference

GRAVITY FORMS

Product & docs:

gravityforms.com
docs.gravityforms.com

*Plugin versions listed are those installed at the time of writing; check **Dashboard → Plugins** for current versions before updating.*

SECTION 2

Content types

Beyond standard Pages, the site has six kinds of content. Each has its own menu in wp-admin and its own set of fields.

Type	wp-admin menu	Edited through	Notes
Articles	Posts	Title, Content, Category + the "Article" fields	Labeled "Articles" on News
Press	Press	Title, Content + the "Article" fields	Uses Press Categories
Recipes	Recipes	The "Recipe" fields	Category, Difficulty, Prep time
Videos	Videos	"Video details" + YouTube sync	See Section 3
Member Benefits	Member Benefits	The "Member Benefit" fields	Sections & Categories
Programs	Programs	The "Program template" fields	Lives under `/programs/`

Adding or editing any content item

1. Open its menu in **Dashboard** (e.g. **Posts**, **Recipes**, **Member Benefits**).
2. Click **Add New** or open an existing item.
3. Fill the Title, and the item's field group below the editor; set its Category/taxonomy in the sidebar; add a Featured image where supported.
4. **Publish** (or Update).

ARTICLES & PRESS

Both use the shared **"Article"** field group on top of the normal Title / Content / Featured image / Category:

Deck (standfirst) · Key takeaways · Author name · Author role · Author avatar · Read time.

Press has its own **Press Categories** taxonomy and gets a branded card treatment on the News page.

RECIPES

The **"Recipe"** group carries the full recipe layout:

Category · Difficulty · Prep time · Servings · Nutrition facts (repeater) · Equipment · Ingredients (repeater) · Directions (steps) · Video · PDF.

All six types are defined in the theme, so their fields are identical on every environment — you only edit content, never rebuild the fields.

Member Benefits, Programs & the News page

MEMBER BENEFITS

Menu: **Member Benefits**. The **"Member Benefit"** group:

Description · Eligibility · CTA link + label · Photo · Location · Tag.

Organized by two taxonomies: **Sections** and **Categories**. Surfaced on the Member Benefits page and the coverage modals.

PROGRAMS

Menu: **Programs** (archive at `/programs/`). The tabbed **"Program template"** group:

Hero (heading, intro, button, testimonial) · About (badge, heading, body, image) · "What's included" · and more, organized in tabs.

Empty fields fall back to bundled default content.

The News & Media page

The News page aggregates **Articles, Press, Recipes, and Videos** into one filterable grid. Which types appear is controlled on the page's **"News page"** field group (a "Content to show" checkbox; default is all).

Type filter	Top-level filter picks one content type (`?type=`)
Category filter	A second dropdown filters within that type by its own taxonomy
Sort & paging	Newest/oldest and page size (set by `news_per_page`, default 10)
Personalized order	Signed-in surveyed members get a relevance-ranked "newest" view (Section 10)

Cards show each item's publish date; single Article/Press/Recipe pages show an "Updated {date}". Videos are the exception — see Section 3.

SECTION 3

Managing Videos

Videos are their own content type, and most are brought in automatically from a YouTube channel — so day-to-day you rarely add one by hand.

The "Video details" fields

Each video (menu: **Videos**) has a Title, an optional description in the editor, a Featured image, and the **"Video details"** group:

Link	The YouTube URL
Length	Runtime label
Description & Tag	Short summary and a tag
Date added	`video_added` — when the video was published on YouTube; drives ordering & the "Added" label

Videos are grouped by a **Video Categories** taxonomy.

YouTube sync

Under **Site Settings → YouTube Sync** the site imports videos from a configured channel automatically and keeps them updated.

Sync runs
"Sync now" button, or the schedule (Off / Daily / Weekly / Monthly)

→

Videos upserted
New videos created, existing ones updated (deduped by YouTube ID)

→

"Date added" set
Filled from YouTube's publish date automatically

CONTROLS ON THAT PAGE

- **Sync now** — run an import immediately.
- **Automatic sync frequency** — Off, Daily, Weekly, or Monthly.
- **Channel ID override** — point at a different YouTube channel.

"ADDED" VS "UPDATED"

On the News page and single templates, **videos show "Added {date}"** from their YouTube publish date, and the videos-only view is ordered newest-first by that date. Articles, Press, and Recipes instead show **"Updated {date}"** (their last-modified date). This keeps the video library reading in true release order.

You can still add a video manually (Videos → Add New) and fill the fields yourself; the sync will not overwrite items it didn't import.

SECTION 4

Pages & ACF content

Most pages are laid out by the theme, and their words and images are edited through Advanced Custom Fields — not the block editor.

How page editing works here

Each key page (Home, About, Coverage, the hubs, MyVEBA, Help Center, and so on) has a matching **ACF field group** that appears below the editor when you open that page. You fill in headings, intro copy, cards, and images in labelled fields; the theme renders them into the designed layout. This keeps every page on-brand and consistent.

WHERE THE FIELDS COME FROM

Field groups are defined in the theme's code (34 groups under `inc/acf-fields/`, one per template) and mirrored as JSON in `acf-json/`. Because they're code-defined, the field *structure* is the same on staging and production automatically — you don't rebuild fields per environment. You only edit the *values* (the actual words and images) in wp-admin.

Editing a page

1. Go to **Dashboard → Pages** and open the page (e.g. "About").
2. Scroll below the main editor to the page's field group (e.g. "About page"). Fields are grouped into tabs where a page is long.
3. Edit text, swap images, add/remove repeatable rows (cards, list items) as the fields allow.
4. Click **Update**. Preview to confirm the layout looks right.

Site-wide content — "Site Settings"

Content that appears on every page lives under the **Site Settings** menu (an ACF Options page), with sub-pages for:

Sub-page	Controls
Header & Mega Menus	The mega-dropdown panels' columns, icons, featured cards, and "View all" links
Footer	Footer intro, join-CalVEBA block, and column content
Pop-ups & Announcements	Site-wide banners and modals
Session & Security	Member session behavior settings
Partners	The partner logo strip
YouTube Sync	The Videos import controls (see Section 3)

Field group structure is developer-managed. To add a brand-new field, a developer edits the theme's field-group file so it deploys to every environment — see Section 5.

SECTION 5

Import & export ACF

"ACF export" moves field *definitions* (the structure of a field group) between sites. It does **not** move the content values authors type in — those travel with a database migration or an importer.

Two tools, two jobs

JSON AUTO-SYNC (DAY-TO-DAY)

Whenever a field group is saved in wp-admin, ACF writes a file into the theme's `acf-json/` folder. Deploy that file to another environment and ACF shows **"Sync available"** under Custom Fields → Field Groups — click **Sync** to apply. This is how field changes move staging → production.

TOOLS → EXPORT (PORTABLE)

Under Custom Fields → Tools you can **Export as JSON** (a file to import elsewhere) or **Generate PHP** (code a developer pastes into the theme). Use **Import Field Groups** to load a JSON file into a site.

Moving a field change from staging to production

1. On **staging**, edit the field group in Custom Fields → Field Groups and Save — ACF updates the `acf-json/` file automatically.
2. Deploy the changed `acf-json/*.json` file (and any code) to **production** with the theme.
3. On **production**, open Custom Fields → Field Groups; the changed group shows **"Sync available."**
4. Click **Sync** to import the change into production.

IMPORTANT: STRUCTURE VS. CONTENT

ACF export/sync carries the **shape** of fields, never the **values**. To move actual content (post/page field values a member of staff typed), use a database migration or the site's **WP All Import Pro** plugin — see the appendix.

Exporting for a backup or hand-off

1. Custom Fields → Tools → Export Field Groups.
2. Select the group(s) to export.
3. Choose **Export as JSON** to download a file, or **Generate PHP** to copy code for a developer.

Because this theme registers its field groups in code, groups may appear read-only in the UI. Structural edits are made by a developer in the theme and deployed; the JSON sync keeps everything else aligned.

SECTION 6

Navigation menus

Header and footer menus are managed in **Appearance → Menus**. The theme has five menu "locations" you assign a menu to.

Menu locations

Location (in the Menus screen)	Where it shows	Region
Primary navigation (mega-dropdown)	Main header nav bar with mega panels	Header
Utility bar (above main nav)	Small links row above the header	Header
Mobile primary navigation	Mobile menu (falls back to Primary if empty)	Header
Footer columns	Footer link columns (each top item = a column)	Footer
Footer legal row	Bottom legal links (Privacy, Terms…)	Footer

Assigning & editing a menu

1. **Appearance → Menus**. Pick a menu to edit, or create a new one.
2. Add Pages, Custom Links, etc. from the left; drag to reorder. Drag an item slightly right to make it a **sub-item**.
3. In **Menu Settings** (bottom) or the **Manage Locations** tab, tick the location this menu should fill.
4. **Save Menu**.

MEGA-MENU PANELS

A top-level Primary item becomes a mega dropdown when you give it a CSS class (enable the **CSS Classes** field via *Screen Options*):

`has-mega-benefits` · `has-mega-resources` · `has-mega-members` · `has-mega-employers` · `has-mega-about`

The panel's *content* (columns, cards, links) is edited under **Site Settings → Header → Mega Menus**, not in the Menus screen.

THE MYVEBA SIGN-IN LINK

To make a menu item open the on-page sign-in panel instead of navigating, add the CSS class `js-mv-login-trigger`. A mega-panel item titled exactly **"MyVEBA Portal"** gets this behavior automatically.

FOOTER COLUMNS — HOW THEY'RE BUILT

In the **Footer columns** menu, each **top-level** item is a *column heading* (its own link is ignored — use a Custom Link with URL `#`), and its **sub-items** are the links inside that column. The **Footer legal row** is a separate flat menu.

SECTION 7

MyVEBA portal & ARES

The MyVEBA portal lets members sign in and see their real benefits. It is powered by the **ARES Member API** — the CalVEBA system of record for members, employers, and plans.

How a member signs in

Sign in
Member enters PIN or email + password in the on-page panel

→

ARES verifies
Credentials checked against the ARES member API

→

Session starts
A secure 60-min session cookie is set

→

Dashboard
MyVEBA shows their plans, coverage, ID cards

What members see when signed in

- **Dashboard** — greeting, plan details, and quick tiles (coverage, advocate contact).
- **My Coverage** — live plan & carrier information and downloadable plan documents, pulled from ARES.
- **My Profile / ID Cards** — member details and printable ID cards.
- **Open Enrollment banner** — appears automatically for employees during their active enrollment window; "Enroll Now" hands them off to the ARES portal.
- **Personalized resources & survey** — see Section 10.

KEY IDEA: NO DATA IS STORED IN WORDPRESS

Member data (plans, coverage, documents) is fetched live from ARES on each visit and shown only to the signed-in member. WordPress holds no member health data — it's a secure window onto ARES, not a copy of it.

Editor notes

- Portal **page content** (headings, tiles, help copy) is editable via ACF like any other page; the *member data* is not editable — it comes from ARES.
- Signed-out visitors to a portal URL see a locked shell and the sign-in panel — never another member's data.
- ARES connection settings (API keys, environment) are configured by a developer in server settings, not in wp-admin.

The portal currently runs as theme-bundled code on staging; production is completing the same migration. Environment endpoints differ (test vs. live ARES) and are set per environment.

SECTION 8

Classes & Events

The Classes & Events page and the wellness-hub "Upcoming" sliders are driven live by **WellnessLiving (WL)** — CalVEBA's class-scheduling platform. Editors don't hand-enter classes.

Where the schedule comes from

The page pulls a rolling **60-day** window of classes and events from the WellnessLiving API and shows them in **List** and **Calendar** views (Calendar is the default). Results are cached briefly for speed and refresh on their own. If WL is ever unreachable, an ACF fallback list keeps the page populated.

Virtual classes	Shown to everyone, signed in or not
In-person classes	Shown to signed-in, WL-linked members (and the hubs list virtual-only when signed out)
Filters	Class type, location, day, and time of day
Registration notice	A banner prompts sign-up; it hides automatically once a member is signed in

How booking works

Member clicks a class
"View details" opens a slide-in panel with the class info

→

Reserve
Virtual → the WL class link. In-person → the WL sign-in, in a new tab

→

WellnessLiving
The member books on WL, which handles their account & spot

WHAT AN EDITOR CONTROLS

- The page's headings, intro, and the registration-notice copy (via ACF).
- The fallback class list used only if WL is temporarily unavailable.
- *Not* the classes themselves — those are managed in WellnessLiving by the wellness team.

WellnessLiving business/location IDs and the site-level scheduling account are configured per environment by a developer. A "refresh" control clears the class cache after schedule changes.

SECTION 9

Contact form & notifications

The Contact page form is built with **Gravity Forms**. You edit its fields and its notification emails in the Gravity Forms admin — not in code.

Where things live

THE FORM

Built & edited in Forms → "Contact — CalVEBA". It's connected to the Contact page by a **Form ID** set in the page's *Contact form* tab (an ACF field). Clear that field and the page shows a phone-number fallback instead.

ITS EMAILS

Recipients, subjects, and the thank-you message are all in Forms → Contact — CalVEBA → Settings → **Notifications** and **Confirmations**. Nothing about who-gets-the-email is in theme code.

How enquiries are routed

The first question — **"How would you describe yourself?"** — routes the enquiry to the right team using three conditional notifications:

If the sender is…	The enquiry emails…
A member, benefit/HR admin, employer/union leader, or general	Advocacy@calveba.org
A wellness team member	wellbeing@calveba.org
A prospect	VEBASales@calveba.org

Each notification replies to the sender's own email, with subject "New contact enquiry — {their answer}". These recipient addresses live in the Gravity Forms settings (the running site is authoritative); update them there.

Editing the form

1. Forms → Contact — CalVEBA → Edit to add/reorder fields, change required flags, or edit the role choices and their follow-up questions.
2. Settings → Notifications to change who receives an enquiry, the subject, or the routing rule.
3. Settings → Confirmations to change the on-screen thank-you message.

GOOD TO KNOW

- Required fields include name, email, date of birth, and a consent checkbox; **reCAPTCHA** guards against spam.
- Submission is AJAX (no page reload) and shows an inline confirmation.
- The "Send Message" button style, the pre-select via `?inquiry=` links, and the date-picker styling are theme-controlled; everything else is in the Gravity Forms UI.
- Delivery is handled by **WP Mail SMTP** — if emails aren't arriving, check its logs first.

SECTION 10

Smart Search & personalization

Two features quietly tailor the site to each member: a smart search that ranks the best results, and a short survey that personalizes the resources they see.

Smart Search

The site's search runs against an external **live search service** that returns the best-matching articles, videos, recipes, pages, and PDFs — grouped by type. If a member is signed in and has taken the survey, their interests are included so the most relevant results rise to the top. If the service is off, unreachable, or returns nothing, search **automatically falls back** to WordPress's built-in search with the same layout — so it never breaks.

ON / OFF

Live search is on by default and controlled by a site option; the search endpoint is set per environment. Turning it off simply reverts to local WordPress search.

PRIVACY

Only numeric interest-tag IDs are sent to the search service — never a member's name or personal details.

The member personalization survey

Signed-in members are invited to a short **6-question survey** (a pop-up on the MyVEBA dashboard) about their health interests — overall health, mental health, weight, chronic conditions, women's/men's health, and family/caregiving. Progress saves to the server as they go, so it remembers where they left off across devices. "Skip" only hides it for that visit.

Member answers
Taps interest chips across 6 steps

→

Saved to profile
Interests stored against their member ID

→

Resources re-rank
Dashboard "Resources" slider favors their topics — live, no reload

→

Search tunes
Relevant results rise in Smart Search

WHAT AN EDITOR CAN CONTROL

On the MyVEBA dashboard page settings you can override personalization: hand-pick specific resource posts, switch to a plain category list, or set categories/limit/order. Survey results are viewable and exportable (CSV) under Site Settings → Member Surveys.

Survey answers are stored securely against the member's ID; the modal reassures members the information is HIPAA-secure.

SECTION 11

Technical appendix

A quick reference for developers and advanced admins. Everyday editing does not require anything on this page.

Integrations & endpoints

System	Detail
ARES member API	Live `member-api.myaresonline.com` · Test `test-member-api.myaresonline.com` · REST namespace `ares/v1/` (login, logout, me, oe-login-hint) · session cookie `wordpress_ares_portal_sid` (60 min)
WellnessLiving	Schedule + events via WL API; caches ~10 min (schedule) / 30 min (virtual) / 60 min (catalog); business/location + site UID set in `wp-config`
Smart Search	Constant `CALVEBA_SEARCH_API` in `wp-config` (per environment) · POST `{ q, preferredTags[] }` · option `calveba_search_live` toggles it
Member survey	Table `wp_calveba_member_survey` (one row per member PIN) · REST `calveba/v1/member-survey` , `member-resources`
Open Enrollment	Driven by ARES `hasActiveOe` ; CTA uses the ARES login-hint hand-off

Environment-specific settings (wp-config, per environment)

These differ between staging and production and are **never** copied between them: `CALVEBA_SEARCH_API` , WellnessLiving `WL_*` credentials/IDs, `MEDPOINT_API_BASE` , ARES keys. A file deploy carries the theme but not another environment's `wp-config.php` .

Plugin references

Plugin	Link
Advanced Custom Fields PRO	advancedcustomfields.com/pro · /resources (docs)
Gravity Forms	gravityforms.com · docs.gravityforms.com
Yoast SEO	yoast.com/wordpress/plugins/seo
WP All Import Pro	wpallimport.com · (moves content values, not ACF structure)
WP Mail SMTP	wpmailsmtp.com
Members (roles)	members-plugin.com

GOLDEN RULES

- Content *values* are edited in wp-admin; field *structure* and integrations are code/config and deploy with the theme.
- ACF export moves field structure, not content — use a DB migration or WP All Import for values.
- Per-environment secrets live in each site's `wp-config.php` and are never pushed between environments.