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HOW TO ENTER PTA OFFICERS IN PT AVENUE

Your PTA will maintain your list of officers in PT Avenue during the year, and at end of year when you record the officers elected for the next year.

If an officer resigns during the year before their term expires, you should delete that officer from the board roster. When a new officer is elected during the year, you should add them to the board roster. If a current officer has a second position, you should add a second record to the board roster for that person (don't use the "Future Position" fields for a current year position).

The board member profile in PT Avenue allows both a current and future position, so you don't have to wait for the new year to enter officers elected to serve the next year. You can (and should) do this as soon as they are elected, and they will be added to the email list for Leadership News. Don't manually delete the current year officers when their replacements are elected – this will be done automatically by the PT Avenue end of year process, after you download the board roster to keep with your PTA historical records.

Maintaining Your Board Roster

To work with Board officers in PT Avenue, select Profile and then select Board. You'll see the list of officers currently in PT Avenue – something like this:

The screenshot shows the PT Avenue web interface. At the top, there is a navigation bar with 'PT AVENUE', 'Head Admin - Mount Baker (TEST) 2017-2018', and buttons for 'HELP', 'LIVE CHAT', and 'EXIT'. Below this is a secondary navigation bar with 'PROFILE', 'MEMBERS', 'WHAT ELSE IS IN THE FULL VERSION?', and 'TRY FULL & FINANCIAL VERSION'. A 'Select Language' dropdown is also present.

The main content area is titled 'Work With Board Members' and includes a 'How to Add/Update Board Members' link, 'List', and 'Add' buttons. A green notification banner reads 'Board Member Updated'. Below this is a tip: 'You can prepare a private list for your board with all the information, and a public list with only the approved information. You can email your board members from this screen as well. Click their picture to modify their information.'

The 'Board Members Entered' section, last updated on 09/25/2017, displays a grid of member profiles:

Name	Position	Term	Contact Info
James Baker	Principal	(2017-2018)	paul.brown@dorianbusiness.com
Denise Hines	President	(2017-2018)	dhines@wastatepta.org
George Jetsone	Treasurer	(2017-2018)	support@wastatepta.org
Pauline Twelfthman	Secretary	(2017-2018)	example@example.com
Jason Kronwica	Vice-President	(2017-2018)	MBVicePres@dorianbusiness.com
Money Bags	Committee Chair Fundraising	(2017-2018)	pbrown@charmsmusic.com

Maintain Officers

Remember to delete from the Board roster an officer who resigns or is removed from office during the year before their term expires (and delete their Helper access if they have one), and enter new officers as they are elected.

If you become aware of an email address change for an officer, please update the email address in their board profile.

Entering A New Officer

To enter a new officer, not on the current board roster, click Add in the upper right of the screen.

The screenshot shows the 'Work With Board Members' interface. At the top, there is a navigation bar with 'PT AVENUE', 'Head Admin - Mount Baker (TEST) 2017-2018', and buttons for 'HELP', 'LIVE CHAT', and 'EXIT'. Below this is a menu with 'PROFILE', 'MEMBERS', 'WHAT ELSE IS IN THE FULL VERSION?', and 'TRY FULL & FINANCIAL VERSION'. The main content area has a 'Work With Board Members' header with a 'How to Add/Update Board Members' link and 'List' and 'Add' buttons. A message box states: 'You can prepare a private list for your board with all the information, and a public list with only the approved information. You can email your board members from this screen as well. Click their picture to modify their information.' Below this is a 'Board Members Entered' section with a 'Last Updated 08/03/2017' timestamp. Two member cards are visible: 'James Baker' (Principal (2017-2018)) and 'Denise Hines' (President (2017-2018)).

You'll see a screen like this:

The screenshot shows the 'Add Board Members' form. The top navigation bar is identical to the previous screenshot. The main content area has an 'Add Board Members' header with 'List' and 'Add' buttons. A message box states: 'You can enter all your board member information on this screen and create new positions as needed by clicking the "Add" button.' The form fields are: 'Term of Office' (Current Year - 2017-2018), 'Position' (Select Position), 'Name' (First and Last), 'Email' (with 'Show Email to Public?' YES/NO), 'Address' (with 'Show Address to Public?' YES/NO), 'City, St, Zip' (three separate fields), 'Home Phone' (with 'Show Home Phone to Public?' YES/NO), 'Cell Phone' (with 'Show Cell Phone to Public?' YES/NO), 'Work Phone' (with 'Show Work Phone to Public?' YES/NO), 'Display Sequence' (text input), and 'Create Helper Login?' (NO). There is an 'Add Board Member' button and an 'Upload Picture?' (NO) button. A yellow note box at the bottom states: 'Note: To create a login for this person, click "Create Helper Login?" to YES before adding them.'

The steps to enter an officer are as follows:

- For “Term of Office” select either current year or next year as applicable.
- On the “Position” line select their position from the drop down box.
- If they are a Vice President, Secretary, or Committee Chair you will then see a box where you can select their duty, if applicable. This field is used to group officers for email, so it is important to identify your officers responsible for membership, legislative/advocacy, Reflections, family engagement, and to use the list of duties provided so they are included in the right group.
- Enter their first and last name.
 - IMPORTANT: The name should match exactly as entered on their membership entry in the members section.
 - Remember: All board members must be in the members section as a paid member of your PTA for the year of their term of office. For the new year, enter officers as paid members after you complete the end of year and begin the new year.
- Enter their current email address.
 - Note: you can use a position email address (like MBTreasurer@gmail.com) on their board record, and a personal email address on their member record. Do not use the position email address on an officer’s membership record, because you’ll have to find their record and change the email address when their term ends. Also, **do not use a WSPTA email address (any @wastatepta.org) on either the PTA board or member record.** We recommend that you do not use a work or school district email address.
- If they are president or treasurer, enter their address, city, state, and zip. (You may choose to enter the address for all officers for your use.)
- Enter their Cell Phone number (or 000 if you don’t need their cell phone number)
- The five “Show…” options (i.e. Show Email to Public) allow you to select whether you want to include that data (Yes) on a roster that you can print and provide to all members, etc., or to limit (No) so the data is only available to board members.
- (Optional) Set a “Sequence Number” to control the order officers are shown on the Board List screen.
- In a “Basic” membership-data-only version, if you want to add a Helper login for this person click to toggle the “Create Helper Login?” From No to Yes, and enter a unique


user name for this helper. (Other versions of PT Avenue require you to go to PROFILE>HELPERS to create or modify logins and access areas.)

- You may choose to upload a photo - if so, toggle this to YES.
- Click Add Board Member. If you are uploading a photo, you are taken to that screen, to complete the process. If you are not, the entry process is now complete.

An Officer This Year and Next Year:

If someone is a current officer and has been elected to serve as an officer next year, you should enter the positions for both years on one board member profile.

The screenshot shows the 'Work With Board Members' interface in PT Avenue. The page title is 'PT AVENUE Head Admin - Mount Baker (TEST) 2017-2018'. The navigation bar includes 'PROFILE', 'MEMBERS', 'WHAT ELSE IS IN THE FULL VERSION?', and 'TRY FULL & FINANCIAL VERSION'. The main content area is titled 'Work With Board Members' and contains a form for editing a board member's profile. The form has the following fields:

Current Position (for 2017-2018)	Treasurer
Future Position (for 2018-2019)	Select Position
Change Name	First: George Last: Jetsone
Picture	 Upload/Modify Picture
Email	support@wastatepta.org Show Email? <input checked="" type="checkbox"/>
Address	11001 Fifth Level Show Address? <input type="checkbox"/>
City, St, Zip	Spacestation WA 99999
Home Phone	Show Home Phone? <input checked="" type="checkbox"/>
Cell Phone	(435) 542-3532 Show Cell Phone? <input type="checkbox"/>
Work Phone	Show Work Phone? <input checked="" type="checkbox"/>
Display Sequence	2

At the bottom of the form are two buttons: 'Modify Board Member' and 'Delete Board Member'. A red arrow points to the 'Future Position' field.

The steps to enter next year's position are as follows:

- Their current position is listed on the first line of the board member profile.
 - Leave the current position as is. This will be used during the end of year process to produce the final board roster download, and there will be a step during end of year that automatically updates from future to current position, and deletes board members without a position in the new year.
- On the "Future Position" line select their position from the first drop down box.
- If they are a Vice President, Secretary, or Committee Chair you will then see a box where you can select their duty, if applicable. This field is used to group officers for

email, so it is important to identify your officers responsible for membership, legislative/advocacy, Reflections, family engagement, and to use the list of duties provided so they are included in the right group.

- Confirm the email address is their current email.
- If they are president or treasurer enter their address, city, state, and zip. (You may choose to enter the address for all officers for your use.)
- Enter their Cell Phone number if it is not included (or 000 if you don't need their cell phone number).
- Click Modify Board Member.

A current officer elected to serve next year will look something like this:

The screenshot shows the 'Work With Board Members' interface in PT Avenue. The 'Future Position (for 2018-2019)' field is highlighted with a red box, showing 'Committee Chair' and 'Membership' as options. Other fields include 'Current Position (for 2017-2018)' as 'Treasurer', 'Change Name' with 'First: George' and 'Last: Jetsone', 'Email' as 'support@wastatepta.org', 'Address' as '11001 Fifth Level', 'City, St, Zip' as 'Spacestation WA 99999', 'Cell Phone' as '(435) 542-3532', and 'Display Sequence' as '2'. Buttons for 'Modify Board Member' and 'Delete Board Member' are at the bottom.

Note: If you have a President Elect, after end of year you will need to change their position to President at the start of their term as president.

Administrative “Helper” Logins

During the end of year, you will see a step to mark for deletion any Helper access - you'll want to delete any who are no longer on the board. If your PT Avenue account is the Finance or Full version, you may want to modify access for a Helper whose Board position changes from one year to the next.