

## memberplanet Checklist for Early August 2020

Here are the key things you will want to confirm/complete upon (re)activation of your database account. Thorough explanations of each step are below.

<b>1. Confirm Admins</b>	<input type="checkbox"/>
a. Add new admins and remove old admins	
b. Ensure all admin permissions are correct	
<b>2. Confirm Group Billing Info</b>	<input type="checkbox"/>
a. Familiarize yourself with the Group Billing page	
b. Enable/Disable Autopay	
c. Designate the recipients of invoice emails	
<b>3. Confirm Membership Levels</b>	<input type="checkbox"/>
a. Ensure prices are accurate for online join	
b. Set family/bundled memberships (if applicable)	
<b>4. Confirm Executive Board/Officers</b>	<input type="checkbox"/>
a. Report officers using the Committees tab	
<b>5. Confirm Group Info</b>	<input type="checkbox"/>
a. Ensure all contact info is up to date	

### 1. Confirm Admins

Each PTA should grant database access to multiple officers. WSPTA recommends that, at minimum, both the president and treasurer have full access. Each PTA can customize admin privileges; you can learn how by following [this guide](#).

Here is how to ensure that your PTA's admin settings are correct and current:

- Click the ADMINS button in the left navigation menu. You will see your PTA's current admin roles. Does this align with how you want your admins to be organized? If not, you can follow [this guide](#) to tinker with things. Note: Smaller PTAs would probably be best served keeping things simple by avoiding multiple customized roles.

- To see who is assigned to each role, click the gear icon to the right, then select VIEW LEADERS. You can remove admins who are no longer active. You can also add new admins by following the instructions in [this guide](#).

## 2. Confirm Group Billing Info

The Group Billing menu is where invoices and billing are handled. It is also where PTAs manage their autopay settings and designate recipients of invoice emails. If you DON'T see the GROUP BILLING button on the left navigation menu, then your admin privileges need to be adjusted. Contact either your primary group admin or WSPTA support.

- Visit the GROUP BILLING page via the button in the navigation menu on the left of the screen. You will see your PTA's current balance due to WSPTA (and to your local council, if applicable). You can click the blue "View Invoices" link to access a full billing/payment history dating back to September 2019. Familiarize yourself with this menu.
- On the main GROUP BILLING page, you will see a button that either reads "Autopay Enabled" or "Autopay Disabled." Click on the button to manage your PTA's autopay settings. WSPTA recommends each PTA enroll in autopay.
- Likewise, on the main GROUP BILLING page: You can click a button that reads "Manage Invoice Settings." Follow the prompts in the subsequent menus to designate the email addresses to whom the monthly invoice emails will be sent. It is recommended that – at minimum - these emails go to the president and treasurer.

## 3. Confirm Membership Levels

Each PTA can customize the price of membership, as well as offer various tiers of membership. Your PTA's settings from the previous fiscal year will have carried over, so you will want to confirm that things are correct for this current fiscal year.

- From the MEMBERSHIP page, click MANAGE MEMBERSHIP LEVELS & AUTOMATED ACTIONS. You will see a list of your currently active membership levels. You can edit them using the gear icon to the right.
  - **An important note:** If your PTA uses memberplanet simply to report the names of members (i.e. you do not have online member join and are using a separate method for tracking payments), then you only need one membership level and the price does not matter.
- If your PTA wants to offer a family or bundled membership for online join, you will want to utilize the new "scaled pricing" feature. Click the gear icon to edit any membership level, then select "Paid - Scaling" from the pricing dropdown menu. Follow the instructions on the page to create a family membership level with a built-in discount for multiple members of the same household.

#### 4. Confirm Executive Board/Officers

memberplanet introduced the new COMMITTEES feature this year. It is through this menu that we would like PTAs to report their elected officers.

- Visit the COMMITTEES page via the button in the navigation menu on the left of the screen. Click the card that reads LOCAL PTA OFFICERS. You will see ten default positions listed. Click any of these to generate a list of all names in the group's database, from which you may select the appropriate person for the position. Be sure to focus on the responsibilities of each position rather than the title itself. For example, there are default categories for VICE PRESIDENT and MEMBERSHIP. If you have multiple vice presidents, and one of them is Vice President of Membership, you will want to categorize that person under MEMBERSHIP.
  - If applicable, your PTA may select multiple people for one position, assign one person to multiple positions, add additional positions, and/or change the name of each position.
  - While it is not required to report an officer for each of the listed positions, each PTA should at the very least report a President, Vice President, Treasurer, and Secretary.
- If you DON'T see the COMMITTEES button on the left navigation menu, then your admin privileges need to be adjusted. Contact either your primary group admin or WSPTA support.

#### 5. Confirm Group Info

Each PTA's database contains contact information that will need to be confirmed. This includes primary contact information and mailing address.

- Click the GROUP INFO button the left navigation menu. Ensure all the information on the menu is correct. If anything needs updating, do so and then click "Save."
- A note on Primary Contact: WSPTA generally recommends that this be a PTA email address – something that is passed down from officer to officer, e.g. [president@lincolnpta.com](mailto:president@lincolnpta.com) or [mickeymousepta@gmail.com](mailto:mickeymousepta@gmail.com). If your PTA does not have this, then the primary contact email should be the president's. Be aware that this email address will sometimes serve as the default for several functions, including the sending of online join email invites.