

AN INTRODUCTORY MEMBERPLANET GUIDE FOR COUNCILS

Contents

Introduction	2
The Council Portal	2
The Navigational Dashboard	3
Roles & Admins	3
Group Info	4
Banks	4
Board & Committee Manager	5
Officer Reports	5
The Terms Report	6
The Position Holders Report	6
Contacting Local Officers	7
Group Billing	8
On the Local PTA Side	8
On the Council Side	9
How to Record a Check Payment in memberplanet	10
Reports	11
Group Profiles Report	11
All Payments	12
Additional Resources	13

Introduction

Hello Council Leaders!

This short guide will help familiarize you with the basics of the memberplanet database. The goal is to help you monitor and communicate with PTAs in your region, as well as to illustrate some differences between how local PTAs use MP and how councils use MP. Below, we'll run through the resources currently at your fingertips and how to get the most out of the system. We'll also touch upon improvements and upgrades we expect to see as our tech friends at Memberplanet work to expand the database's capabilities.

If anything in this document is unclear, or you have any additional questions or suggestions, please do not hesitate to let us know! Email us at support@wastatepta.org with any questions, comments, or feedback.

So, without further ado, let's get into it...

The Council Portal

You should be able to access your council's group portal immediately upon login. One thing to note is that if you are part of multiple groups, you will need to toggle back and forth between group portals. This can be accomplished by clicking the name of the group at the top of the page. This will generate a dropdown menu containing all your groups, as shown below. Click your council to access the portal.

There have been some instances where a PTA leader with login privileges for two separate groups are not able to toggle between the two. If this is the case, we recommend emailing support@memberplanet.com. Include a description of the issue, the PTAs involved, and the email address associated with your account.



The Navigational Dashboard

On the left side of the screen, you'll see a navigational dashboard with a list of features at your disposal. Some of these – such as **Members**, **Membership**, and **Directory** - are not tremendously relevant to the council MP experience. These are important features for local PTAs, as these relate to the management of their members within the database, but councils do not report members like PTAs do, so you can mostly ignore them. There is one current exception under the **Members** tab, which has to do with reporting your council officers. We'll cover that in the **Board/Committee Manager** section.

The most important features for councils are **Admins**, **Group Info**, **Banks**, **Committees**, **Group Billing**, and **Reports**.

Roles & Admins

During the initial rollout of the new Memberplanet database, local councils were limited in their ability to customize admin roles and to grant login privileges. This has been fixed for the 2020-2021 school year.

With the **Admins** feature, a council leader can grant login privileges to any other officer, as well as customize various administrative roles and privileges. For example, one may elect to limit access to the Group Billing and Banks feature to the president and treasurer. These different tiers of administrative power are completely optional. Feel free to set things to best fit the needs of your council leadership. The only recommendation we have is that multiple council officers have login access to the database.

You can find [a nifty guide](#) for managing Roles & Admins on the WSPTA Memberplanet Success Site. If you run into any trouble with administrative roles, please don't hesitate to reach out to us at support@wastatepta.org.

For the purposes of supporting your local PTAs, their Admins feature is the exact same as the Admins feature within the council version of Memberplanet. **Note:** We generally recommend that smaller PTAs *avoid* customized roles for admins, as there is a risk of things becoming needlessly complicated.

Role	Admin with role	
Communications Chair	1	
Full-Access Admin	3	
President	1	
Secretary	0	
Treasurer	0	
Vice President	1	

Group Info

This page features contact info as well as historical data for your council.

From the homepage, click the **Group Info** tab on the left dashboard. There are two tabs to toggle between: **Basic Info** and **Additional Info**.

Basic Info displays the council's primary point of contact, mailing address, and other contact information. When filling in information about the council's primary contact person, it's recommended – though not required – to use an email address permanently affiliated with the group (e.g. johnsonhighpta@gmail.com or president@johnsonpta.com).

Additional Info displays the council's historical, administrative, and legal data. This is a useful page to visit when looking for information such as the council's incorporation date, tax exempt status, EIN, and other similar data. This was also the tab where officer contact info was previously stored. This has changed with the July 2020 updates to the database and the creation of the **Committees** tab.

For both councils and local PTAs, the information stored in the **Group Info** menu is used to populate a report called the **Group Profiles Report**, which allows councils, regions, and WSPTA to aggregate data on all PTAs under our respective purviews.

Banks

The **Banks** page, which is identical in both the local PTA and council version, is where one should input the group's banking information for the purpose of receiving funds collected through Memberplanet. That includes payments received via online membership registration (for local PTAs), monthly dues payments (from local PTAs to councils), fundraising campaigns, and payment forms. Local PTAs and councils have the choice to have these funds transferred on a weekly or monthly basis. For security reasons, each local PTA and council must undergo a verification process when adding or editing this banking information.

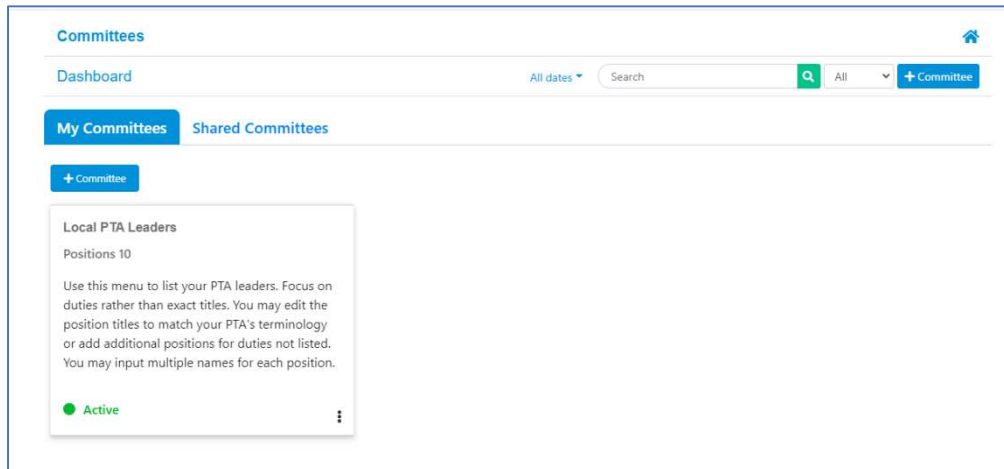
The full guide to the Banks page and for banking verification can be found at the Success Site, [here](#).

One common point of confusion for local PTAs is that authorizing an account to **receive** funds and authorizing an account to **pay** invoices are two separate processes. The **Banks** page is not where PTAs input banking information for the purposes of paying invoices; that is instead handled in the **Group Billing** menu.

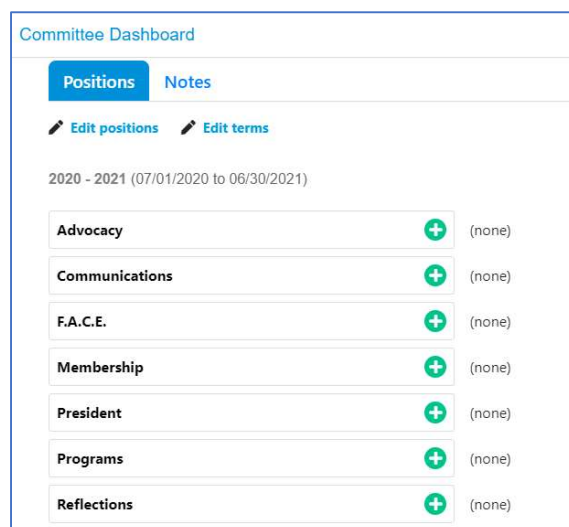
It is important to note that local PTAs that have elected to use Memberplanet only to report members (and are not collecting money for the PTA through Memberplanet) do not need to have a verified bank account under the **Banks** page. Local PTAs that *do* intend to use Memberplanet to collect money will need to follow the steps on this page.

Board & Committee Manager

This is a new feature introduced in July 2020. It can be accessed by clicking the **Committees** tab in the navigational dashboard. Doing so will launch a module that looks like this:



There are two tabs near the top of this module: **My Committees** and **Shared Committees**. The former is where you can input your council officers; it is identical to what a local PTA sees. The latter is where you can access reports about your local PTAs' reported officers. As the default view is the **My Committees** tab, we'll star there. Go ahead and click the box titled "Local PTA Leaders."



By default, there are ten positions/duties listed: **Advocacy, Communications, F.A.C.E., Membership, President, Programs, Reflections, Secretary, Treasurer, and Vice President**. Clicking any of these will generate a list of all names from the group's database, from which you can select the appropriate person for the position.

Each PTA and council may select multiple people for each position, assign one person to multiple positions, add additional positions, and/or change the name of each position.

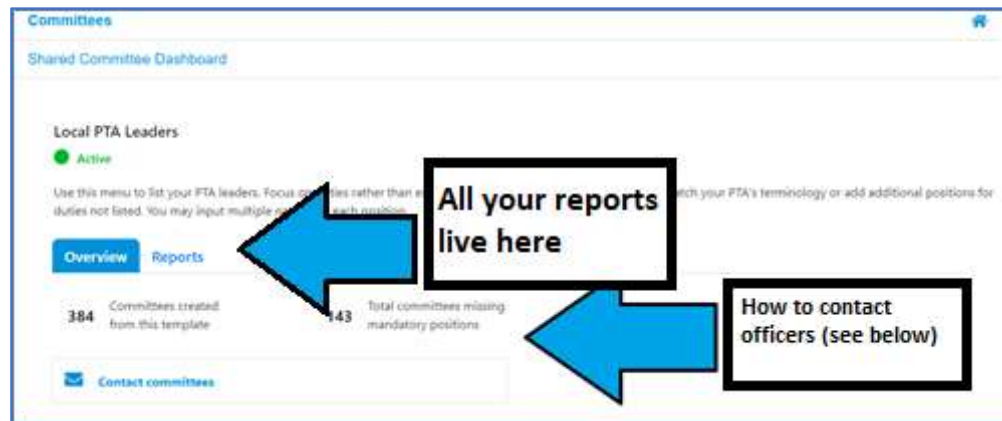
While it is not required to report an officer for each of the listed positions, each PTA and council should at the very least report a **President, Vice President, Treasurer, and Secretary**.

The **Board & Committee Manager** may also be used to organize and communicate between internal committees. A PTA may create a new independent committee by clicking the **+ Committee** icon on the **My Committees** tab.

Officer Reports

Back on the main page of the Committees module, click the **Shared Committees** tab, then click **Local PTA Officers**.

Here's the screen you'll see:



Let's bypass the **Contact Committees** function for now and instead click the **Reports** tab. Then, click **Terms**.

The Terms Report

The **Terms Report** lists each PTA within your council and lets you know which have completed the officer reporting process. You can export this report as a spreadsheet by clicking **Download Excel**.

The screenshot shows the 'Terms' report table. The table has columns: Group name, Group ID, Status, Term name, Total positions, and Mandatory positions empty. The data is filtered for 'Terms: 2020 - 2021'. The table shows 8 rows of data, with the first 4 rows having a status of 'Incomplete' and the last 4 rows having a status of 'Complete'.

Group name	Group ID	Status	Term name	Total positions	Mandatory positions empty
[Redacted]	[Redacted]	Incomplete	2020 - 2021	10	4
[Redacted]	[Redacted]	Incomplete	2020 - 2021	10	4
[Redacted]	[Redacted]	Incomplete	2020 - 2021	10	4
[Redacted]	[Redacted]	Complete	2020 - 2021	10	0
[Redacted] PTA	[Redacted]	Incomplete	2020 - 2021	10	4
[Redacted]	[Redacted]	Complete	2020 - 2021	10	0
[Redacted]	[Redacted]	Incomplete	2020 - 2021	10	4
[Redacted]	[Redacted]	Incomplete	2020 - 2021	10	4

The Position Holders Report

You can access a full report of all officers within your council by clicking the dropdown in the top right that reads "Terms" and select "Position Holders" to generate the **Position Holders** report.

The screenshot shows the 'Position Holders' report table. The table has columns: Group name, Group ID, Position, Term name, First name, Last name, Email, and Mobile phone. The data is filtered for 'Terms: 2020 - 2021'. The table shows 8 rows of data, with the first 4 rows having a position of 'President' and the last 4 rows having a position of 'Secretary'.

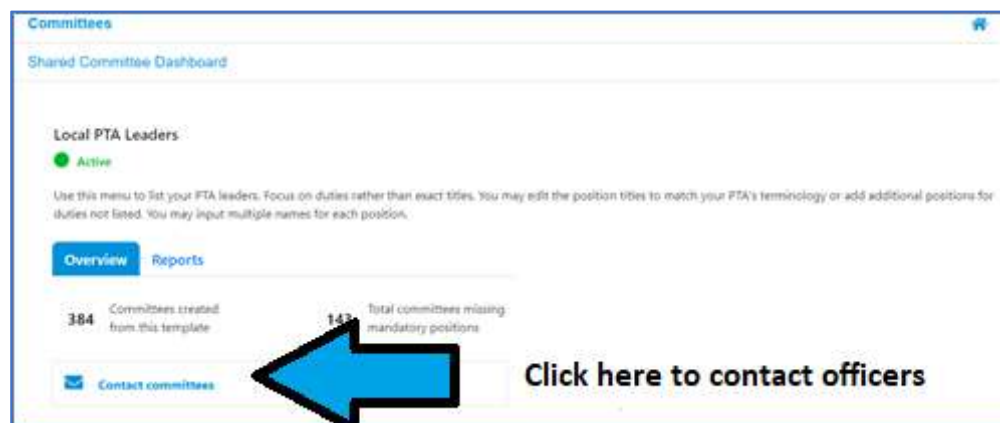
Group name	Group ID	Position	Term name	First name	Last name	Email	Mobile phone
[Redacted]	[Redacted]	President	2020 - 2021	Emily	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	Secretary	2020 - 2021	Jenny	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	Treasurer	2020 - 2021	Danielle	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	Vice President	2020 - 2021	Jennifer	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	President	2020 - 2021	Shannon	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	Secretary	2020 - 2021	Megan	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	Treasurer	2020 - 2021	Janae	[Redacted]	[Redacted]	[Redacted]

This report lists every reported officer for each PTA in your council. You can sort and search based on PTA name, PTA number, position, first & last name, and email address. You can also export this report as a spreadsheet by clicking **Download Excel**.

Contacting Local Officers

In the future, we're going to see a lot more integration between the **Committees** tab and the Distribution Lists generated within memberplanet. For now, the system offers a simple email service for contacting your area's reported officers.

Let's return to the page shown below and click **Contact Committees**



The following menu will give you a choice between contacting **All Committee Members** or **Specific Committee Members**. In PTA language, this means **Send to All Positions** or **Send to Specific Positions**. That means that if you select All Committee Members, every single officer in your area will receive the email you're about to draft. If you select **Choose Specific Positions**, you'll be given the choice of selecting recipients by position.

Contact Committee Members

Choose recipients

☒ All committee members

☐ Choose specific positions

Check the box next to the position(s) you want to target with your message. For example, if you want to reach all **Presidents** and **Treasurers**, check those two boxes and no other. Then click **Continue**.

The next screen will be the email editor. Click **Edit** to customize the sender name, sender email, subject header, and body of the email. The editor is rich text, so you can utilize basic formatting, but unfortunately there is not currently a way to embed images or customize columns or formatting.

Contact Committee Members

☒ Choose specific positions

	Position
<input type="checkbox"/>	Advocacy
<input type="checkbox"/>	Communications
<input type="checkbox"/>	F.A.C.E.
<input type="checkbox"/>	Membership

Once your e-mail looks ready to go, press **Continue**. The final page in the process is a Review/Confirm page, where you will be able to see the number of email addresses that will receive your email. Press **Send** to send the email on its way.

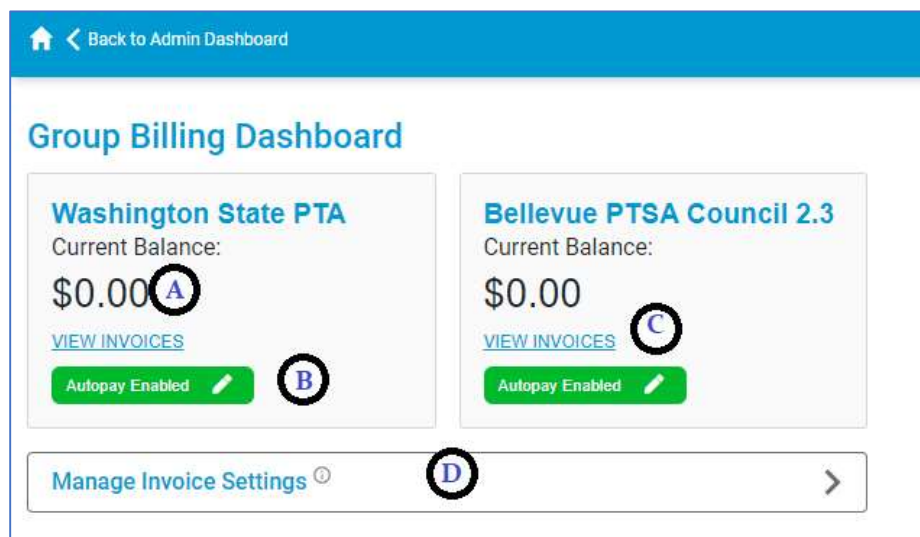
Group Billing

The **Group Billing** module is the main hub through which billing and payments occurs.

There are some key differences between what a local PTA sees when they open the module versus what a council sees.

On the Local PTA Side

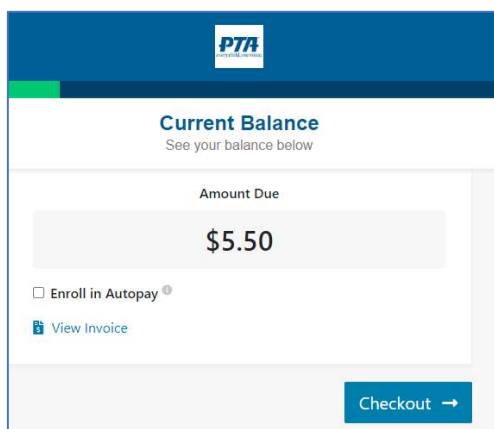
When a PTA selects **Group Billing** from the navigational dashboard, a screen like below will load:



This PTA is a member of Bellevue PTSA Council 2.3. When they are billed, they receive two separate invoices: One from Washington State PTA and one from Bellevue PTSA Council 2.3. Washington State PTA invoices assess an \$8 charge per member, which accounts for the \$2.25 National PTA dues fee and the \$5.75 WSPTA dues fee. Council invoice rates are determined by the individual councils.

When a PTA opens the Group Billing module, they are able to see their current balance due (A), check their autopay status (B), access a full billing/payment history (C), and designate to whom invoice emails should be sent (D).

If there is a balance due, a large green **Pay Now** button appears. Clicking it will open the secure online payment portal, pictured below.



Except for enabling autopay, there is no option to pay both sets of invoices simultaneously. PTAs signed up for autopay will see their balance due automatically debited from their account on the 20th of each month.

Invoices are generated between the 5th and the 10th of each month, with a notification email sent to the PTA's designated invoice recipients on the 10th. Invoices are based on a snapshot of the PTA's membership compared to the previous month's invoice, so if the system reads that there are two new members that weren't present last month – assuming no members have been removed – the system will bill for two members.

On the Council Side

When a council enters the **Group Billing** menu, a different interface is generated.

Council leaders can utilize this menu to track anything and everything connected to the billing of council fees. The most important pages with which to familiarize yourself are the **Groups** and **Reports** pages.

The **Billing Schedules** page allows you see on what days billing has occurred.

Important: Please do not edit any of the dates on this menu.

The **Charges** page contains a list of all charges incurred by the PTAs in your council. **Important:** Please do not edit anything in the Charges menu without first checking in with WSPTA Support. Improper modifications can have major consequences.

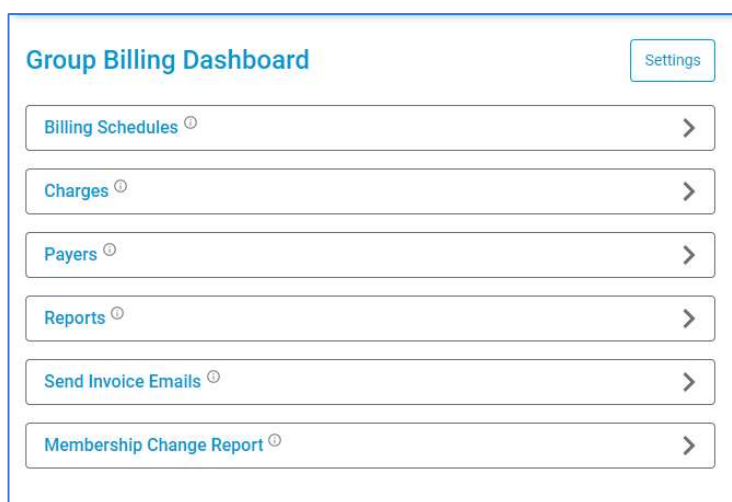
The **Payers** page is probably the most useful. Within it, you can generate a list of every PTA in your council along with their current balance due. Clicking the name of any of these PTAs will load a full payment/billing history, including copies of invoices. Its within this menu that you can also record check payments, the guide for which can be found below.

The **Reports** menu allows you to generate reports for dues payments, dues and invoices, and a full **Accounts Receivable Ageing** report. This will help your treasurer to understand how much is owed to your council.

You will not need to take any action on the **Send Invoice Emails** page. Invoice emails are on an automatic schedule.

The **Membership Change Report** allows you to track changes to membership numbers in the period since the previous invoice. **Important:** Please do not edit or take any actions on the reports within this page.

Finally, the **Settings** button at the top allows for some minor customization of invoices, invoice emails, and other information. You should not need to make any adjustments. We recommend reaching out to WSPTA Support before modifying anything.



How to Record a Check Payment in memberplanet

Although we try to encourage all PTAs to move to 100% electronic payments for membership invoices, there are, for myriad reasons, still some PTAs that will pay by check. If the council treasurer receives a check payment for dues, they no longer must coordinate with WSPTA to ensure the payment is recorded.

You will always want to ensure the check is made out to your council and not to WSPTA. Deposit the check first before taking steps to record the payment.

Here are the steps to record a deposited check payment:

1. From the **Group Billing** menu, click **Groups**.
2. Find the PTA in the list. Click its row to load its **Billing History**.
3. Click **Record Payment** in the top right.
4. Fill in each of the required fields (shown at right). If you do not know the payer's email address, you can just put in your own.
5. Under **Notes**, you can put the most recent invoice number, though that's not a requirement.
6. Double-check that everything is accurate, then click **Save** at the bottom.

Once you click **Save**, the payment will be automatically recorded and reflected in the PTA's billing history. Their balance due will instantly be reduced by the amount paid.

If a mistake is made in the recording process, you will need to reach out to memberplanet Support at support@memberplanet.com so that they can expunge the record of the payment. Please copy WSPTA Support on the email to memberplanet.

Reports

The greatest benefit of the Memberplanet database is the sheer breadth of data and reporting we can generate and use. We can compare and follow membership trends, maintain historical data, track financial transactions, and much more. Here's a quick guide to some of the most vital reports on the council side.

Group Profiles Report

This report contains all the information located within each PTA's **Group Info** page within their own database. It can also be used to track membership trends. The **Group Profiles Report** previously contained contact information for each PTA's reported officers, but this information has been moved to the **Board & Committee Manager**.

To access the **Group Profiles Report**, hover over **Reports** on the navigational menu, then select **Group Profiles Report** from the dropdown.



<div> <input type="text" value="Search group name"/> <input type="button" value="Q"/> </div> <div> Region: <input type="text" value="All Regions"/> Council: <input type="text" value="All Councils"/> <input type="button" value="RUN REPORT"/> </div> <div> <input type="button" value="Choose columns"/> <input type="button" value="Download"/> </div>						
	Group Name	Group...	Primary Contact Name	Primary Contact Email	City	President
	WSPTA Sample Basic		Eric Whittington	ewhittington@memberplanet.com		
	WSPTA Sample Premium		Eric Whittington	ewhittington@memberplanet.com		
	Region 1	100000	Region 1 Director	ptareg1@wastatepta.org	Tacoma	
	Region 2	200000	Region 2 Director	ptareg2@wastatepta.org	Tacoma	
	Region 3	300000	Region 3 Director	ptareg3@wastatepta.org	Tacoma	

Here are some tips for navigating the report:

1. Click the name of any PTA (displayed in blue) to access all the data housed under its **Group Info** page.
2. You can search any individual group by inputting its name in the "search group name" field.
3. You can control the number of PTAs that appear on a page via a box at the bottom of the screen.
4. The **Choose Columns** button is nifty if you're only looking for specific information or want to access additional information not displayed in the default view. For example, you can generate a report where the only columns are "Group Name" and "# of memberships."
5. Click the **Download** button to create a spreadsheet of the information currently on your screen. A screen will pop up alerting you that the download will take some time to generate. To access the download, click **View Downloads** in top right corner of the **Group Profiles Report**. Refresh the page if your download does not appear on the list. A record of each download will be stored in this location so you can come back later to re-download any previously generated report.

All Payments

The **All Payments** report is very useful for councils, as it tracks every transfer of funds received by the council. This mostly includes invoiced council fee payments by local PTAs to councils. Councils are also able to generate refunds via this report.

← Payments		Payments	Choose Columns		Any time	Quick Filters	Search
Activity in my group							
Date	First Name	Last Name	Source	Method	Ref #	Paid (\$)	Fees (\$)
07/16/2020			Invoice	eCheck	821136689637...	\$32.00	\$0.00
07/16/2020			Invoice	eCheck	821136689069...	\$184.00	\$0.00
07/15/2020			Invoice	eCheck	821048724365...	\$8.00	\$0.00
07/15/2020			Invoice	eCheck	820257075400...	\$24.00	\$0.00

To access the **All Payments** report, hover over **Reports** in the left dashboard, then select **All Payments** to launch a separate reporting menu. Each transaction is represented by a row of information within the report. Click any row to generate additional information about each transaction.

To generate a report detailing all deposits that have been made into the council's bank account, find the dropdown menu near the top of the page that reads "**Payments**." Click it and select "**Transfers**." Each separate money transfer is represented by a row of information. Click on any row to see an itemized description of each funds transfer, including the individual transactions which make up the transfer.

These transfers occur every Wednesday (assuming the council has elected to receive transfers on a weekly basis – see the **Banks** section for more information) if there is a balance to be deposited. That means the transfer made on Wed, 12/11 consists of all dues collected from the previous week, Mon (12/2) to Sunday (12/8). This is a useful report for local PTAs and councils to compare with their bank statements.

← Payments		Transfers	Choose Columns		Any time	Quick Filters	Search
Activity in my group							
Transfer Date	Type	Period	Account	Credit (\$)	Debit (\$)		
07/01/2020	Direct Deposit	07/01/2020		\$0.00	\$2.00		
06/17/2020	Direct Deposit	06/17/2020		\$0.00	\$0.50		
06/03/2020	Direct Deposit	06/03/2020		\$0.00	\$76.50		
05/28/2020	Direct Deposit	05/27/2020		\$0.00	\$0.50		

Additional Resources

There are additional features within memberplanet that we have not covered in this guide. These include the newsletter designer, website builder, upgraded account features, and various other communication tools. If you would like to learn more about these tools, we recommend visiting the WSPTA memberplanet Success Site, located [here](#).

And, as always, if you have any questions or concerns, please do not hesitate to contact support@wastatepta.org.