

An Introductory memberplanet Guide for Local PTA Treasurers

Washington State
PTA[®]
everychild.one voice.[®]

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Introduction

Hello Local PTA Treasurer!

Welcome to your specifically tailored database guide. The goal of this guide is to familiarize you with the basics of the memberplanet platform with an emphasis on features most relevant to your treasurer duties. We'll cover membership, invoicing, bank accounts, payments, and financial reports.

If anything in this document is unclear, or you have additional questions or suggestions, please do not hesitate to let us know! Email us at support@wastatepta.org. You can also visit the [Membership Database Help Page](https://www.wastatepta.org/pta-leaders/leader-resources/membership-database/) on the WSPTA website (<https://www.wastatepta.org/pta-leaders/leader-resources/membership-database/>), which sports video guides and an FAQ section, as well as memberplanet's [Success site](http://wastatepta.memberplanet.com/) (<http://wastatepta.memberplanet.com/>), which has thorough instructions for navigating the platform.

So, without further ado...

The Ultra Quick Summary of Memberplanet for Treasurers

Here's the basic summary of things you'll want to know about memberplanet:

1. **How Invoicing Works:** Each month, usually on the 5th, the system takes a snapshot of your PTA's membership data. It compares that snapshot to the previous month's data. Any difference gets reflected on that month's invoice. For example, if your PTA has added two memberships and removed one, your next invoice will show two charges and one balance credit.
2. **Which Invoices to Expect:** Invoices are generated when there's been a change in membership. If applicable, a separate invoice will be issued through memberplanet for local PTA council fees. PTAs may sign up for notification emails with the current balance due and a link to the payment portal.
3. **What Your PTA is Charged:** In 2020-2021, the dues fee assessed per member is \$8. This consists of \$2.25 in National PTA dues and \$5.75 in WSPTA dues. Council fees vary per council.
4. **How to Make Payments:** Within memberplanet's **Group Billing** menu, PTAs may access their current balance due, a full payment/invoice history, settings to control invoice notification emails (sent on the 10th each month), and a link to the payment portal. You may also enable autopay so that the PTA's balance is automatically debited on its due date.
5. **Receiving Funds Collected via Memberplanet:** While not a requirement, many PTAs avail themselves of various features in memberplanet which allow them to collect money from members, including membership fees. Each PTA will need to designate a bank account on the **Banks** page into which you want collected monies to be deposited.

6. **How to Access Reports:** For those PTAs that collect money in memberplanet, it is important to learn about the reports used to reconcile bank statements and access transaction data.

Your Admin Account

Each database admin has a unique login that allows them to access the PTA's database. Ideally, you already have a login that was created for you by another admin. If not, or if you ever run into a login issue, please don't hesitate to reach out to support@wastatepta.org.

We recommend you use your personal email address for your login. That's because the database uses email addresses as unique identifiers for profiles and it can be a pain to separate your name and transactions from a legacy email address (e.g. treasurer@abcpta.org) when it is time to pass it to your successor.

At login, you should see a screen like below, with your PTA name at the top and a dashboard on the left. If you are part of multiple PTAs, you can toggle between them by clicking the group name at the top.

If the screen looks different from this (and your group name is not up top), please send an email to support@wastatepta.org so that we can help rectify this. You should be able to access your PTA's group portal immediately upon login.



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 **Directory**, **Emails**, and **Surveys** - are not tremendously relevant to a PTA treasurer.

The most important features for treasurers are **Members**, **Membership**, **Committees**, **Group Billing**, **Reports**, **Group Info**, and **Banks**. If you don't see any of these options, it could be that your admin privileges (as set by your PTA's full access admin) are incomplete. Please reach out to your PTA's full-access admin or to WSPTA Support for help in fixing that.

Members (Member Database)

When you click **Members** on the Navigational Dashboard, you'll access the database view that includes a list of every name currently in your PTA's database. It's important to note that memberplanet employs the term "member" differently from how it's often used in PTA. Think of "member" in this context as synonymous with "record." The **Members** page is where you go to access member records and to explore all the individuals within the universe of your PTA. Just because someone shows on the **Members** page does not necessarily mean they are being counted toward your reported membership figures. We'll cover that more below in the **Membership** section.

The **Members** page is most useful for accessing and editing data about these individuals, as well as exporting member rosters. You can also view a membership and payment history for each record in the database.

We won't go into depth on this menu here, but you can access a full guide to its features on the memberplanet Success Site (<http://wastatepta.memberplanet.com/>), accessible [here](#).

Membership (Membership Summary)

If the **Members** page is where you sift through the pool of records in the database, the **Membership** page is where you define the parameters of that pool.

On the right of this page is a small module with the header "Membership Summary." This is an extremely valuable feature because it tells you almost everything you need to know about your PTA's membership reporting. In the example below, the PTA is currently reporting 36 memberships. That is the number of memberships for which the PTA will be billed for dues.

Membership summary
Total active member records : 38
Total inactive member records : 40
Quantity of memberships : 36

Here's something important to note: The terms "active" and "inactive" do not relate to membership. Instead, they refer to how records are stored in the database. Let's explore that...

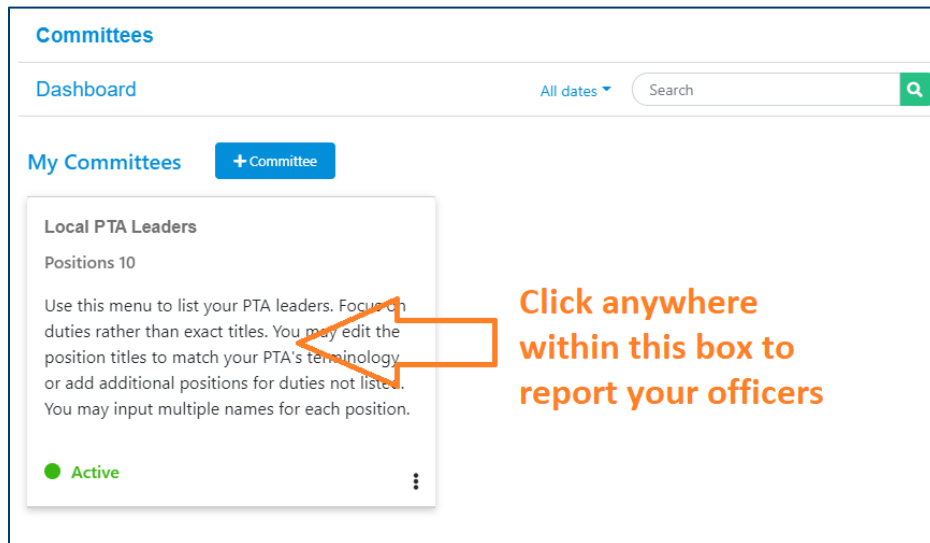
Total Active Member Records indicates the number of records that the system considers relevant to this current school year. This includes anyone who has been designated a paid member, anyone who has an active admin account, and any record that has been added to the system during this school year.

Total Inactive Member Records indicates the number of records in the system that were rolled over from last year but have not been acted upon in such a way that makes them "active." Records that remain "inactive" at the end of the school year will be automatically archived.

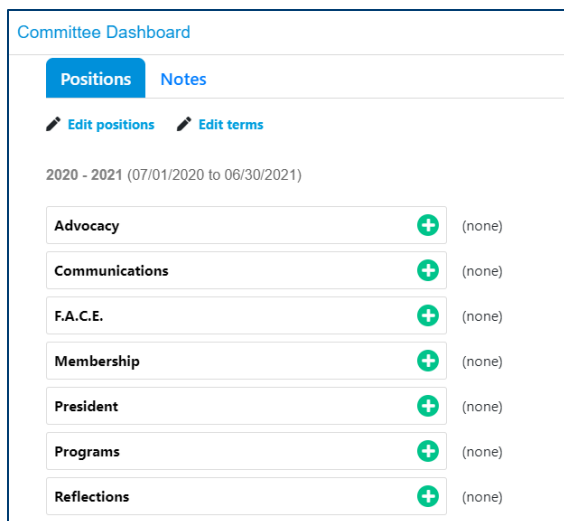
Quantity of Memberships is the magic number here. It refers to the total number of memberships being reported by your PTA. It is the number that will be reflected in your invoices and various reports.

Board & Committee Manager (Committees)

Each local PTA is required by the WSPTA Standards of Affiliation to report its current elected officers. This responsibility is most often delegated to the PTA secretary, but we'll cover it here too just in case you need to know how it works. To access the officer reporting form, click **Committees** in the left navigation menu, then click anywhere inside the box that reads "Local PTA Leaders."



The screenshot shows a web interface for managing committees. At the top, there's a 'Committees' header and a 'Dashboard' section with 'All dates' and a search bar. Below that, the 'My Committees' section features a '+ Committee' button. The main content area is titled 'Local PTA Leaders' and shows 'Positions 10'. A text box explains: 'Use this menu to list your PTA leaders. Focus on duties rather than exact titles. You may edit the position titles to match your PTA's terminology or add additional positions for duties not listed. You may input multiple names for each position.' Below this text is a green dot labeled 'Active' and a vertical ellipsis menu icon. An orange callout box with an arrow points to the text, containing the instruction: 'Click anywhere within this box to report your officers'.



By default, there are ten positions/duties listed: **Advocacy, Communications, F.A.C.E. (Family and Community Engagement), 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. You can then edit that person’s email address to match their preferred address for PTA emails.

Each PTA 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 is required to, 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.

You can return to the memberplanet home page at any time by clicking the blue “home” icon twice.

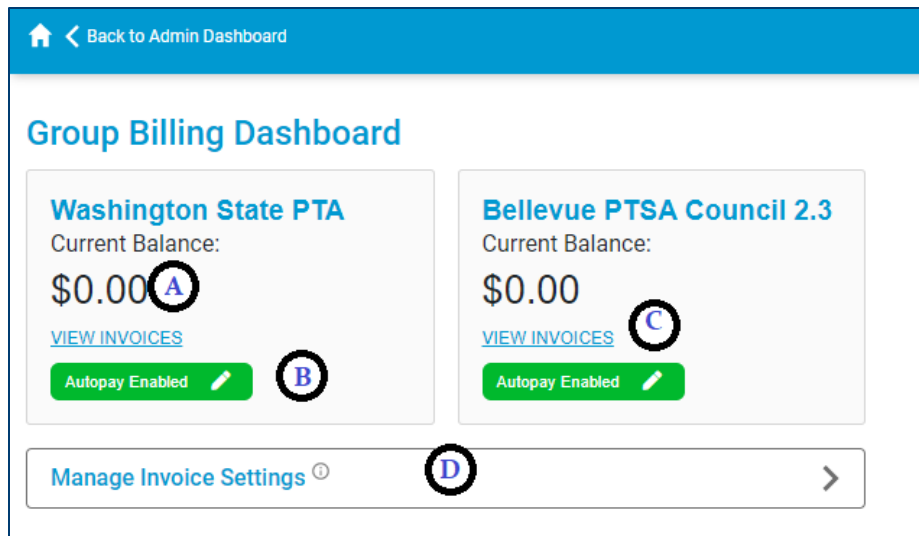
For more information on how to use the Board and Committee Manager, we recommend you read [the instructional guide on the Memberplanet Success Site.](http://wastatepta.memberplanet.com/)

(<http://wastatepta.memberplanet.com/>)

Group Billing

The **Group Billing** module is the main hub through which billing and payments occur. It will be among your most visited pages as PTA treasurer.

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



This PTA is a member of Bellevue PTSA Council 2.3, which is why you see two balances displayed. When the PTA is billed, it receives two separate invoices: One from Washington State PTA and one from Bellevue PTSA Council 2.3.

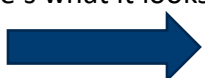
Washington State PTA invoices assess an \$8 charge per member, which accounts for the \$2.25 National PTA dues fee and the \$5.75 WSPTA dues fee. Council invoice rates are determined by the individual councils.

When you open the Group Billing module, you may view the PTA’s current balance due **(A)**, check its autopay status **(B)**, access a full billing/payment history **(C)**, and designate to whom invoice emails should be sent **(D)**.

Billing History

Each month, usually on the 5th, the system takes a snapshot of your PTA’s membership data. It compares that snapshot to the previous month’s data; any difference gets reflected on that month’s invoice. So, if your PTA adds two memberships and removes one, your next invoice will show two charges and one balance credit.

You can access a full billing/payment history (dating back to summer 2019) by clicking “View Invoices.” You can then click any invoice to access a PDF version. Here’s what it looks like:



Bill Date	Description	Invoiced Amount	Paid Amount	Balance
10/08/2019 12:00 AM	Invoice #WSPTA-1001 🔗	\$275.50		\$275.50
11/06/2019 12:00 AM	Invoice #WSPTA-2322 🔗	\$0.00		\$275.50
11/25/2019 12:00 AM	Paid by Check		\$275.50	\$0.00
12/05/2019 08:00 AM	Invoice #WSPTA-2571 🔗	\$216.00		\$216.00
01/06/2020 08:00 AM	Invoice #WSPTA-3433 🔗	\$0.00		\$216.00
02/07/2020 12:00 AM	Invoice #WSPTA-3595 🔗	\$32.00		\$248.00
03/09/2020 12:00 AM	Invoice #WSPTA-4373 🔗	\$0.00		\$248.00
04/09/2020 12:00 AM	Invoice #WSPTA-4714 🔗	\$0.00		\$248.00
05/08/2020 12:00 AM	Invoice #WSPTA-5037 🔗	\$0.00		\$248.00
06/05/2020 12:00 AM	Invoice #WSPTA-5848 🔗	\$0.00		\$248.00
06/25/2020 12:00 AM	Paid by Check		\$248.00	\$0.00

Invoices

Invoices are generated on or around the 5th of each month. Notification emails are sent to designated recipients on the 10th of each month. The due date for payment is the 20th of each month.

Here's an example of what your monthly invoice will look like:

Washington State PTA 15 Oregon Avenue, Suite 202 Tacoma, WA 98409-7463 (253) 214-7410		A <table border="1"> <thead> <tr> <th>Balance Due</th> <th>Bill Date</th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td>\$158.00</td> <td>04/09/2020</td> <td>04/20/2020</td> </tr> </tbody> </table>		Balance Due	Bill Date	Due Date	\$158.00	04/09/2020	04/20/2020
Balance Due	Bill Date	Due Date							
\$158.00	04/09/2020	04/20/2020							
Sample PTA 123 Sesame Street Olympia, WA 99999		Payer Info Account # 4.44.444 Payer Sample PTA							
		Send payments to: Only online payments accepted B							
Previous Activity									
03/09/2020	Previous Balance	C	\$150.00						
	Payment(s) since last invoice		\$0.00						
Current Charges									
Description	Qty	Unit Cost	Sub Total						
Membership D	1	\$8.00	\$8.00						
Details									
04/09/2020	Cat, Sophie	E	\$8.00						
			TOTAL DUE: \$158.00						

A: The invoice header always includes the current amount due at the time of the invoice's creation.

B: WSPTA encourages each PTA to make payments using the online payment portal, which we'll cover a little later in this section.

C: If your PTA has an unpaid balance from previous months, it will show up in this section. This amount gets included in your total balance due. **Of note:** Any balance credits assessed to your PTA will show up in this section as well, as will charges like returned payments.

D: This section details the total number of members for whom your PTA is being charged on this month's invoice. In this example, the PTA has reported one new member over the previous month.

E: Each new member will be listed by name to aid you in reconciling the current month's charges.

Paying a Balance

If there is a balance due, a large green **Pay Now** button will appear to the right of the balance amount on the **Group Billing** main screen. Clicking it will open the secure online payment portal (pictured right). On this menu, you can confirm the amount to be paid, review the latest invoice, and sign up for autopay (if you haven't already).

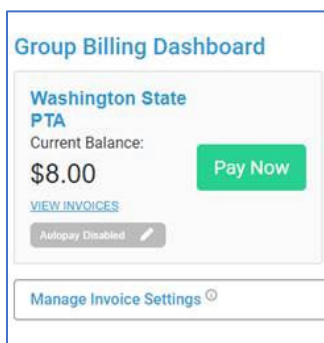
Click "Checkout" to proceed, and the subsequent menu will allow you to input an email address to which a payment receipt will be sent. Then you will be asked to either **Link Bank Account** or **Add Bank Account Manually**.

Link Bank Account: memberplanet uses a service called Plaid that creates a link between your memberplanet account and your bank account. This involves accessing your bank account's online banking login and granting permission for an ACH transfer. This method is more secure than manually inputting banking information and it ensures that an ACH payment will never bounce.

Add Bank Account Manually: This option will have you input your PTA's bank account number and routing number to execute an ACH payment. Be extra super careful when inputting this information – one transposed digit could cause a payment to be returned, resulting in a bounced payment fee assessed to your account.

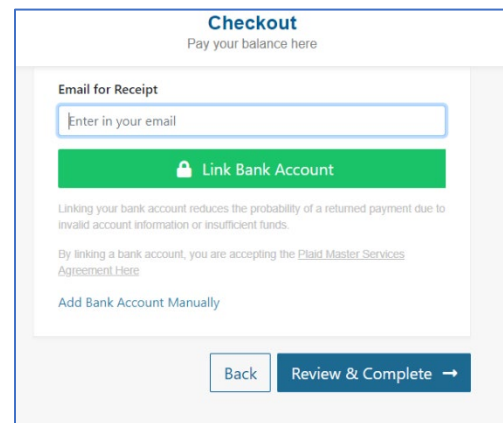
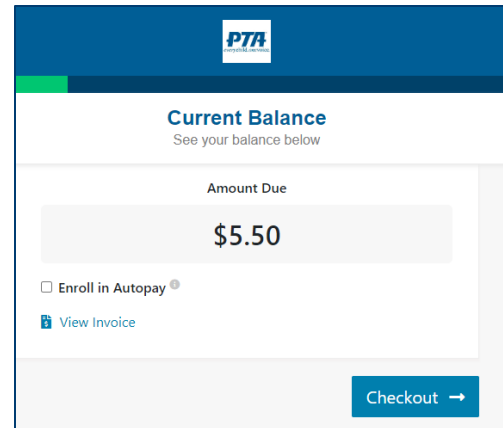
Autopay

Except when autopay is enabled, there is no option to pay both sets of invoices simultaneously. PTAs with autopay enabled will see their balances automatically debited from their account on the 20th of each month.



To enable autopay, simply visit the **Group Billing** dashboard and click the gray button that reads **Autopay Disabled**. Follow the instructions to designate an autopay bank account; you will either need to link your account through Plaid or input your banking details manually.

If your PTA is part of a council, you will need to repeat this process for the second set of invoices.



Invoice Reminder Emails

Each PTA needs to designate email addresses to which invoice reminder emails are sent. This is handled in the **Manage Invoice Settings** menu in **Group Billing**. We recommend that, at a minimum, you designate your treasurer and president to receive these emails. **Do not forget to update this information if/when you change president and treasurer!**

Online Membership Registration

Every PTA in Washington has the option of setting up **Online Join** in memberplanet, enabling members to purchase their yearly membership via an electronic form. Membership information will automatically be registered in your database and all the money collected will be deposited into the PTA bank account.

Getting **Online Join** up and running is a simple process, though several parameters need to be set before you can start accepting online members.

Here's a brief breakdown of the process:

1. **Designate your bank account** – This is a separate process from the bank settings in Group Billing. You will need to designate and verify your PTA bank account before you can receive funds collected through memberplanet.
2. **Determine data to collect** - By default, you will collect names and email addresses for each of your members. But you can also elect to require additional information for sign-up, including names/grades of students. This can be modified based on member type (e.g. you could require teachers to provide different data than parents).
3. **Set membership pricing** – Some PTAs keep things simple by having a single set price for membership. Others offer different tiers (e.g. \$10 for teachers and \$12 for parents). Others offer family memberships where a household gets a discount for bundling (e.g. \$10 for a single membership, \$18 for a family membership good for two people). Membership pricing is totally customizable in memberplanet so you can get it to fit your PTA's established price.
4. **Customize the Online Join packet** – Not only can you adorn your **Online Join** form with your PTA's logo and colors, but you can also attach additional forms (such as surveys or sign-up sheets) to create a more comprehensive membership packet. PTAs that upgrade to the paid version of memberplanet can add additional payment forms and donation fundraiser pages.
5. **Invite people to join** – Once your packet is published, you will have a URL that you can share with parents, teachers, school staff, and other members of your community. You can send specialized invites through memberplanet to anyone whose information is in your database. You can also set up automatic email notifications to your membership chair (and/or others) whenever someone joins.

In this guide, we won't go into depth on all these steps. If you want to learn more about Online Join, the following resources are available:

Video: [How to Set Up Online Membership Registration](#)

Checklist: [Online Membership Setup](#)

Transaction Fees

Any transaction that occurs over memberplanet will incur a fee of 3% plus \$0.30. This includes online memberships, collected donations, and any other sales. PTAs are given the choice to either pass the fee along to the purchaser (it gets added at checkout) or to absorb the fee by having it deducted from the amount deposited into its account. These are the only service fees or charges involved with memberplanet.

Online Join and Dues Billing

Please note that members who join online will still appear on a PTA's monthly dues invoice. WSPTA does not deduct from the funds collected via online join. WSPTA member dues are only billed via monthly invoices.

Banks

If you're planning to sell memberships online, you'll need to visit the **Banks** page to input your PTA's banking information to receive funds collected through memberplanet. If your PTA is not participating in **Online Join** and/or is not using upgraded features to collect funds through, then you do not need to designate an account.

Here are the things to know about the **Banks** page:

1. You will be asked to select how often you want your collected funds to be transferred (via ACH) into your account. We recommend you opt for weekly deposits.
2. For security reasons and to comply with financial regulations, memberplanet requires each PTA to complete a verification process when adding or editing a bank account on the **Banks** page. This involves one of your officers uploading a photo ID through memberplanet's secure verification system. You learn more about this process [here](#).
3. A common point of confusion 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 to pay invoices; that is instead handled in **Group Billing**.
4. If you do not designate and verify your bank account on the **Banks** page, any money collected in the meantime will be held by memberplanet until the verification process is complete.

How Deposits Work

It's important to understand the timeline of how money is collected and transferred to the PTA's bank account. Here's a breakdown of that process for a PTA that has chosen to go with weekly deposits:

1. The PTA earns money from selling memberships (or, if it has an upgraded account, by accepting donations or selling items via Payment Forms).
2. These funds are held in weekly batches by memberplanet. That means any funds collected Sunday through Saturday are grouped into one sum.
3. Batches are deposited into the PTA's designated bank account via ACH transfer, generally on the following Wednesday.
 - a. So, for example, if today is Wednesday the 11th, today's deposit would consist of all funds collected from Sunday the 1st to Saturday the 7th.
 - b. ACH payments are not instant, so expect it to take a few days before the funds appear in your bank account.

Additional things to note:

- PTAs that selected monthly deposits will receive funds on or after the first Wednesday of the month.
- The amount transferred from memberplanet to the PTA consists of all funds collected (unless the PTA has elected to absorb credit card [transaction fees](#), in which case that amount gets deducted).
- State, national, and council PTA dues are *not* deducted from the deposited amount and will instead be [billed monthly](#). That means members who join online will appear on invoices alongside any manually reported members.

Reports

Memberplanet comes equipped with a full complement of reports that will help you reconcile your PTA's finances. Here's a guide to some of the most vital reports for treasurers.

All Payments

The **All Payments** report can be accessed by hovering over **Reports** in the navigational dashboard and selecting "All Payments." This report is very useful for PTAs that collect money through memberplanet, especially **Online Join** memberships. Here's an example of what it looks like:

Date	First Name	Last Name	Source	Method	Paid (\$)	Fees (\$)	Transfer Amount	Returned Amount
12/01/2020			PTSA Membership	Credit Card	\$37.42	\$1.42	\$36.00	
11/10/2020			PTSA Membership	Credit Card	\$25.05	\$1.05	\$24.00	
11/02/2020			PTSA Membership	Credit Card	\$12.68	\$0.68	\$12.00	
11/01/2020			PTSA Membership	Credit Card	\$12.68	\$0.68	\$12.00	
10/26/2020			PTSA Membership	Credit Card	\$12.68	\$0.68	\$12.00	
10/25/2020			PTSA Membership	Credit Card	\$25.05	\$1.05	\$24.00	
10/23/2020			PTSA Membership	Credit Card	\$12.68	\$0.68	\$12.00	
10/19/2020			PTSA Membership	Credit Card	\$12.68	\$0.68	\$12.00	
					\$1,694.01	\$74.01		\$1,596.00

Each transaction is represented by a row of information within the report. You can click any row to generate additional information about that transaction.

You can customize the columns that appear in this report, as well as the time frame covered, by accessing the features marked by the arrow labeled “A” above.

You can export this report to excel by clicking the icon labeled “B.”

This PTA has elected to pass on the credit card transaction fee to the member, as evidenced by information detailed in the columns marked “C.” As you can see, the PTA is collecting a total of \$12 per membership. Their total amount earned is marked by the arrow labeled “D.”

How to Issue a Refund in the All Payments Report

Sometimes a member overpays or purchases the wrong item and thus requires a refund.

You can accomplish this in the **All Payments** report by finding the transaction on the list and clicking its row. You will generate a menu just like the one below to the left. Click the blue button to launch another menu like the one below to the right. Input the amount to be refunded and put a memo in the “Note” field with the date of the refund plus some information about why you’re refunding the amount.

You’ll notice there are two options for fulfilling the refund: through memberplanet or directly via the group. You will want to use the memberplanet option 99 percent of the time. The “direct refund” option is for refunds that you fulfill offline. Choosing the “memberplanet” option will allow memberplanet to return the amount paid directly to the method of payment.

Refunded amounts will be reflected in the far-right column on the **All Payments** report, as well as in the **Transfers** report, which we’ll cover on the next page.

Payment Details

Paid	\$37.42
Total Refunds/Returns	\$0.00
Name on Payment	
Payment Date	12/01/2020
Reference	010516
Source	PTSA Membership
Service	Membership

ISSUE A REFUND

Payment Details

Paid	\$37.42
Total Refunds/Returns	\$0.00
Payment Date	12/01/2020

Refund Amount* \$ 37.42

The sum of all refunds for this payment cannot exceed the original payment amount. Refunds processed by memberplanet are always paid back into the source of the original payment.

Note: Leave a note

Refund Method*

- memberplanet will process the refund to the original payment source (recommended).
- Our group will issue the refund directly.

CANCEL **SUBMIT**

If you need any assistance fulfilling a refund, feel free to reach out to us at support@wastatepta.org and we'll be happy to guide you through the process.

The Transfers Report

While the **All Payments** report is handy for tracking individual transactions, you will want to utilize the **Transfers** report to reconcile the batched deposits made by memberplanet into your bank account.

Starting on the **All Payments** report, find the dropdown menu near the top of the page that reads "**Payments.**" Click it and select "**Transfers.**"

Payments Payments Activity in my group

- Payments
- Fees & Returns
- Recurring
- Installment
- Transfers**
- Failed

Date	Last Na...	Source
12/01/2020		PTSA Membership
11/10/2020		PTSA Membership

Each separate deposit made into your PTA’s bank account is represented by a row of information in the **Transfers** report. You can use this report to cross-reference your PTA bank statement to ensure that all amounts are as they should be.

Transfer Date	Type	Period	Account	Credit (\$)	Debit (\$)
12/09/2020	Direct Deposit	12/09/2020	Bank of America	\$0.00	\$36.00
11/18/2020	Direct Deposit	11/18/2020	Bank of America	\$0.00	\$24.00
11/12/2020	Direct Deposit	11/11/2020	Bank of America	\$0.00	\$12.00
11/04/2020	Direct Deposit	11/04/2020	Bank of America	\$0.00	\$24.00
10/28/2020	Direct Deposit	10/28/2020	Bank of America	\$0.00	\$60.00
10/15/2020	Direct Deposit	10/14/2020	Bank of America	\$0.00	\$24.00
10/07/2020	Direct Deposit	10/07/2020	Bank of America	\$0.00	\$24.00
09/30/2020	Direct Deposit	09/30/2020	Bank of America	\$0.00	\$96.00
09/23/2020	Direct Deposit	09/23/2020	Bank of America	\$0.00	\$24.00

You can click on any row to see an itemized description of each deposit, broken down by individual transaction. You can also view any refunds that were recorded during this time.

If your **Transfers** report is blank, it means either you have not collected any funds to be transferred, your transactions were collected too recently to be deposited in a weekly batch, or you have not yet completed the [bank account verification](#) process.

Payment Forms and Fundraising

Everything we have covered so far is available for free in the basic memberplanet platform. Some PTAs may elect to upgrade their memberplanet account to gain access to features such as **Payment Forms** and **Donation Sites**. Both these features allow PTAs to expand their fundraising operations and they have been generally well-received by those PTAs that utilize them. We won’t dwell too long on these features, as they aren’t standard with the basic memberplanet platform, but let’s run through them quickly just for knowledge’s sake.

Payment Forms

With the free version of memberplanet, you can sell memberships but nothing else. With the upgraded version, you may create special order forms for selling items such as spirit wear or yearbooks, or for collecting donations. You can find a full tutorial on how to create and manage **Payment Forms** [here](#).

Transactions made via **Payment Forms** will also show up on the **All Payments** report. They will also incur the standard 3%-plus \$0.30 transaction fee, which can be passed along to the

purchaser. **Please note:** You should not be selling memberships through Payment Forms. This feature is not integrated with the member database part of the platform and purchasers will not be automatically recorded as paid members.

Fundraising with Donation Sites

Another option in the upgraded version of memberplanet is the **Donation Site**, which functions like a GoFundMe or other similar crowdfunding campaign. You can find a full guide on how to fundraise through memberplanet [here](#).

Again, these transactions will also appear on your **All Payments** report and will incur the transaction fee.

Group Info

If you need to access information such as your PTA's EIN, charter date, and historical membership numbers, you can find these on the **Group Info** page.

From the homepage, click the **Group Info** tab on the left dashboard. You'll see two tabs: **Basic Info** and **Additional Info**.

Basic Info displays the PTA'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). If your PTA does not have a legacy email like that, then use the president's email address. **Be sure to keep this updated if/when your president changes!**

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.

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.

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. Most PTA treasurers won't need to worry about those features, but if you would like to learn more, we recommend a visit to the memberplanet Success Site, located at <http://wastatepta.memberplanet.com/>.

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