

## memberplanet Database Housekeeping Checklist

Here are the key database tasks you should complete each year. By finishing each step, you will ensure your PTA's contact information is 100% updated. Thorough explanations for each step are below. For additional WSPTA database resources, including how-to videos, click [here](#).

### 1. Confirm Admins

- a. Add new admins and remove old admins
- b. Ensure all admin permissions are correct

### 2. Confirm Group Billing Info

- a. Familiarize yourself with the Group Billing page
- b. Enable/Disable Autopay
- c. Designate the recipients of invoice emails

### 3. Confirm Membership Levels

- a. Ensure prices are accurate for online join
- b. Set family/bundled memberships (if applicable)

### 4. Confirm Executive Board/Officers

- a. Report officers using the Committees tab

### 5. Confirm Group Info

- 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 may customize admin privileges, though it's generally best to keep things simple. You can learn more with [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 to organize your admins? If not, you can follow [this guide](#) to tinker with them. (Note: We recommend smaller PTAs avoid multiple customized roles; it's better to keep things simple)

- To see admins currently assigned to a 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 You can remove admins who are no longer active.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 your hub for invoices and billing. It is also where PTAs manage their autopay settings and designate financial email recipients. 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 [support@wastatepta.org](mailto:support@wastatepta.org) to obtain access.

- 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 your local council, if applicable). You can click the blue "View Invoices" link to access an entire billing/payment history dating back to 2019. Familiarize yourself with this menu.
- On the main GROUP BILLING page, you will see text indicating whether autopay is enabled or disabled for your PTA. Click the adjacent button to manage your PTA's autopay settings. WSPTA highly 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 recipients for invoice reminder emails. We recommend that – at a 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 after the annual rollover, so it's important to confirm the correct settings 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:** Multiple membership levels and pricing tiers are necessary only if you use memberplanet to sell your memberships. If your PTA uses memberplanet solely to report member names, 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 "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. You can find a price scaling guide [here](#).

#### 4. Confirm Executive Board/Officers

memberplanet introduced the new COMMITTEES feature last year. It is through this menu that PTAs fulfill the SOA requirement of reporting elected officers. You can find a full guide to reporting your officers [here](#).

- Visit the COMMITTEES page via the navigation menu on the left of the screen. Click the card that reads BOARD AND KEY POSITIONS. You will see ten default positions listed. Click any position to generate a list of names. Select the appropriate position-holder from this list. Repeat for all board positions. Be sure to focus on the responsibilities of each role 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 is required to 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 [support@wastatepta.org](mailto:support@wastatepta.org).

#### 5. Confirm Group Info

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

- Click the GROUP INFO button on 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 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 sending online join email invites.