

THE MEMBERPLANET GUIDE FOR REGION DIRECTORS

Contents

Introduction	1
Adding Additional Admins	2
Group Info.....	3
Banks and Group Billing.....	3
Group Profiles Report	4
Board & Committee Manager.....	6
Officer Reports.....	7
The Terms Report	7
The Position Holders Report.....	7
Communication Tools.....	8
Emails.....	8
Broadcast	8
Surveys.....	8
Other Features Worth Knowing.....	9
All Payments Report	9
Additional Resources	9

Introduction

Hello Region Directors and RSC members!

Welcome to the memberplanet database guide. The goal of this document is to teach you the basics of running reports, accessing PTA/council data, and supporting local leaders with database questions. We hope this resource helps you get the most out of the system and makes your job a whole lot easier.

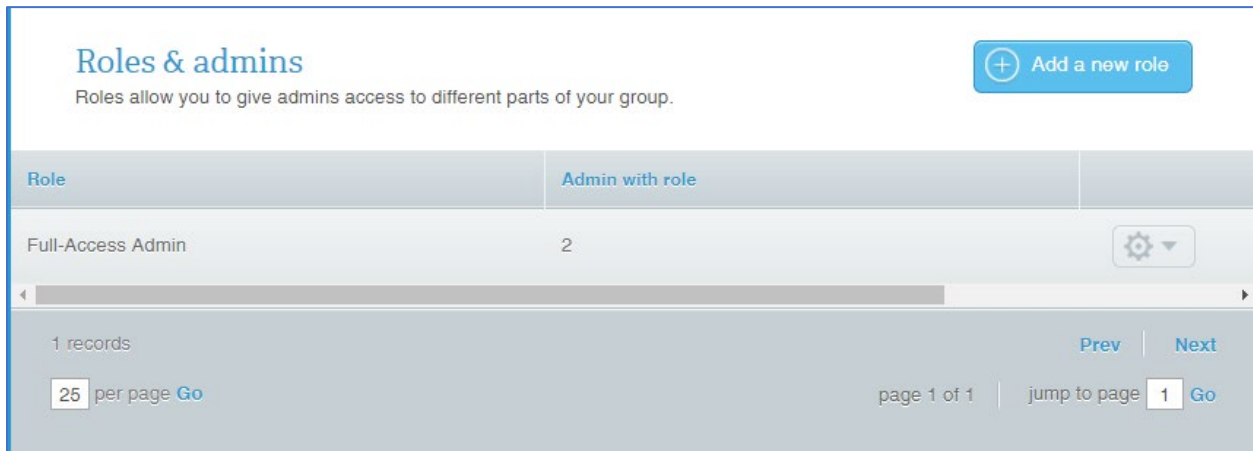
We'll also cover elements of memberplanet relevant to local councils. There are quite a few differences in how councils use memberplanet, so it makes sense for region teams to understand their experience as well.

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

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

Adding Additional Admins

You may invite other team members to become Region admins and gain login access. From your group's memberplanet homepage, click **Admins** on the left dashboard. You'll see the screen below, which shows how many accounts currently have login access. **Note:** Although you have the option (via the blue button) to add additional admin roles, we recommend keeping things as they are.



The screenshot shows the 'Roles & admins' management page. At the top right, there is a blue button labeled '+ Add a new role'. Below the title, a subtitle reads 'Roles allow you to give admins access to different parts of your group.' The main content is a table with two columns: 'Role' and 'Admin with role'. The table contains one row: 'Full-Access Admin' with '2' admins. To the right of the table is a gear icon with a dropdown arrow. Below the table, there are pagination controls: '1 records', '25 per page Go', 'Prev', 'Next', 'page 1 of 1', and 'jump to page 1 Go'.

To add a new admin, you can follow these steps:

1. Click the gear icon to the right of the page
2. Select "add this role to members."
3. Select "add a new member."
4. Input name/email of the person to whom you want to make an admin, then click "add member."
5. Check the box next to their name (now on the list) and select "Assign role to selected members."
6. Finally, you'll click "Send activation email" next to their name on the list of current admins. If you miss this step, your new admin will not receive their invitation to activate their account.

That's all you need to know to get your region team set up with memberplanet access!

Note: It's also a good idea to scan the list of current admins and remove anyone who should no longer

Group Info

This feature is less important for the regions than for the local PTAs and councils, but it's essential to understand how it affects reporting. As a member of the region team, you can generate reports that compile data about all the PTAs under your watch. Each PTA has its own **Group Info** page which houses this data.

From the homepage, click the **Group Info** tab on the left dashboard. The **Group Info** landing page features key group details, such as contact information and the PTA's mailing address. Each PTA and council must ensure this information is up to date to ensure accurate reporting.

At the top of the page is a separate tab labeled **Additional Info**. This page's primary purpose is to store critical historical data, such as the PTA's past membership numbers, legal name, EIN, charter date, national unit number, etc. This information feeds into your **Group Profiles Report**, which we'll cover below. Any PTA that does not know its National PTA unit number or any other bit of information like that should check the Additional Info tab to see if its stored there.

Banks and Group Billing

Memberplanet's money-related features are not relevant to you as an RD, but we think it's wise to go over a few things for clarity's sake.

The **Banks & Accounting** page, located in the left dashboard on the group homepage, is where local PTAs and councils designate a bank account to receive funds collected through memberplanet. Designating a bank account is essential for local PTAs that collect membership payments through memberplanet's **Online Join** feature. If a PTA skips this step, any money collected through memberplanet will remain in limbo until an admin designates and verifies an account.

One common point of confusion for local PTAs is that authorizing an account to **receive** dues is separate from authorizing an account to **pay** dues and invoices. The process for authorizing an account for paying dues occurs in the **Group Billing** menu (not included on the region version of Memberplanet).

Group Billing is the invoice/payment hub for local PTAs to pay their membership dues. You can find guides and videos for things like invoicing and autopay on the WSPTA Membership Database page on our website, [located here](#).

The table below details the difference between setting up a bank account for autopay in Group Billing versus setting up a bank account in the Banks & Accounting menu. The PTA should set up the same account for each, but they should know the difference between the two menus.

Setting up a "Group Billing" Bank Account	Setting up a "Banks & Accounting" Bank Account
Required for payment of WSPTA dues	Optional - Only required for PTAs collecting funds through memberplanet (e.g., Online Join)
Does not require verification by memberplanet	Does require verification by memberplanet
Only used to pay WSPTA/council invoices	Only concerns funds deposited into PTA account
Can opt-in to invoice autopay (20 th of each month)	Can set up weekly or monthly transfers

Group Profiles Report

This is one of the two most important reports available to you and your region team.

From the homepage, hover over the **REPORTS** tab on the left and select **Group Profiles Report**. This report contains nearly everything you would want to know about the local PTAs and councils under your purview, including PTA name, ID numbers, historical dates, current membership figures, and membership numbers from past years. The councils have a version of this report that allows them access to the same data for their subsidiary PTAs.

Here is what you can use this report to do:

- Check membership figures in your region
- Search for individual PTAs in your region
- Identify struggling PTAs or ones that have not yet reached necessary benchmarks
- Compare region membership numbers to years past
- Find a PTA's charter date, tax-exempt status, etc.

	Group Name	Group ID	Status	Region	Council	2019-2020 Memberships	2020-2021 Memberships
	Cascade View PTA 2.18.7	2.18.7	Active	2	Snoqualmie Valley PTSA Council 2....	292	168
	Cascade Ridge PTSA 2.6.2	2.6.2	Active	2	Issaquah PTSA Council 2.6	385	201
	Pacific Cascade Middle PTSA 2.6.41	2.6.41	Active	2	Issaquah PTSA Council 2.6	580	418
	DISAFFILIATED-Cascade Middle PTSA 3.5....	3.5.27	Inactive	3			0
	Cascade K-8 PTSA 6.12.53	6.12.53	Active	6	Shoreline Council PTSA 6.12	37	48

10 records
5 per page Go
page 1 of 2 | jump to page 1 Go

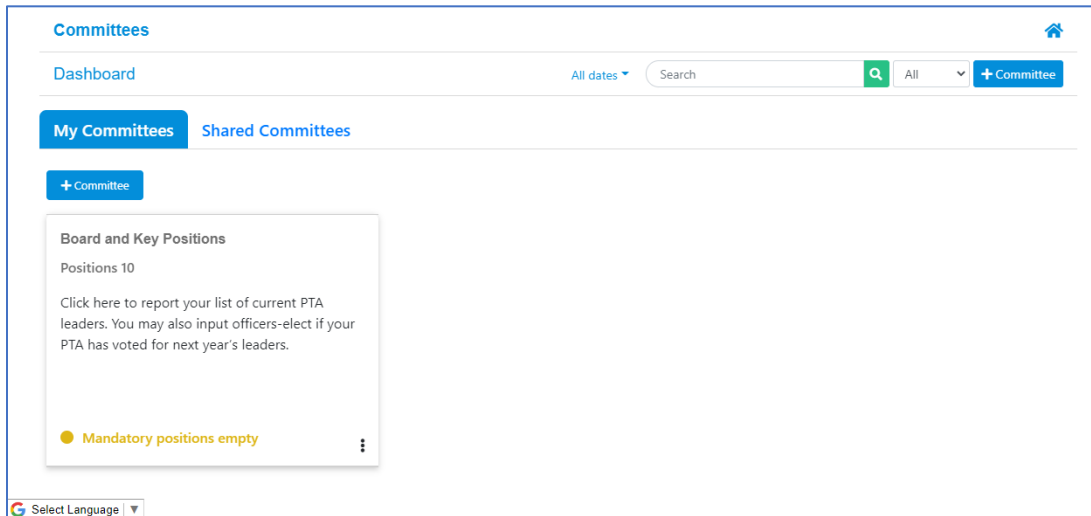
Here are some tips for navigating the report:

1. Click the name of any PTA or Council to access all the data housed under its **Group Info** page: contact info, names of officers, etc.
2. You can search any individual group by inputting its name in the search field, as shown above.
3. You may limit your search to a specific region/council via the dropdown bars, then click **RUN REPORT**
4. You may also control the number of PTAs displayed per page via a field at the bottom left of the page. In the example above, it is set to show five results per page.

5. The **Choose Columns** button is nifty if you are looking for additional information not displayed in the default view, or if you want to export a pared-down version of the default report. For example, you can generate a report where the only columns are “Group Name” and “# of memberships.”
 - a. Available columns include Group Name, Group ID, Status (Active vs. Inactive), Region, Council, Current Membership, Past Years’ Membership, Primary Contact info, Address, City, National Unit Number, Charter Date, Foundation Status, Tax-Exempt Status, UBI number, PTA legal name, and Unit type (primary, secondary, etc.).
6. Click the **Download** button to create a spreadsheet of the information currently on your screen. The download process can go in one of two ways depending on the size of the file requested.
 - a. Sometimes the download will occur automatically, placing an exported excel file in your downloads folder
 - b. Other times, a pop-up window alerts you that the system requires time to compile the report. To access your download, click **View Downloads** in the top corner of the Group Profiles Report screen. The system stores a record of each download in this location, so you can return later to download any previously generated report.
7. The default columns in this report include one called “Percentage,” which compares current membership figures to the previous year’s number.

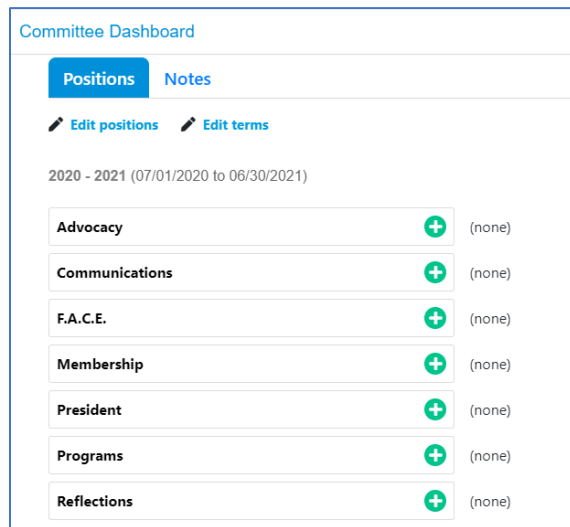
Board & Committee Manager

Each PTA must report its executive board and elected officers in the Committees menu, accessed by clicking **Committees** on the homepage. Here is what it looks like:



There are two tabs near the top of this module: **My Committees** and **Shared Committees**. The Shared Committees tab is only visible to councils, regions, and WSPTA.

Let's go through the process of how a local PTA would report its officers. Click the box titled "Board and Key Positions."



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 the user can select the appropriate person for the position. A Region Director could choose to input RSC members here, but that is by no means a requirement.

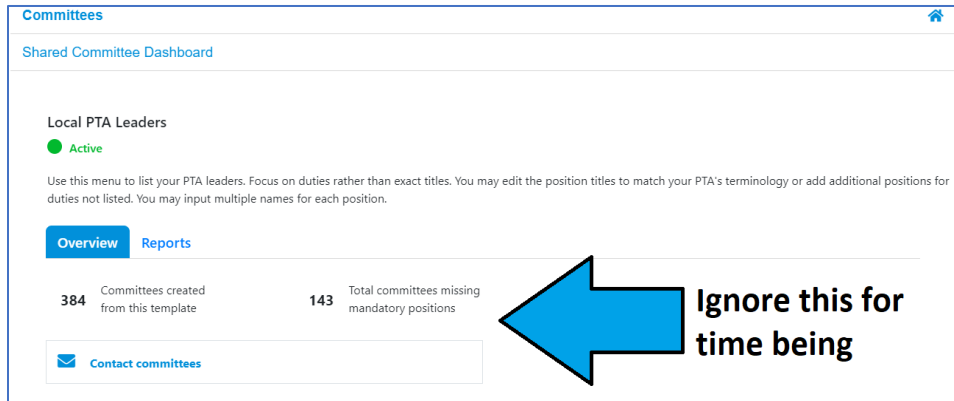
A PTA or council may select multiple people for a position, assign one person to multiple positions, add additional positions, and/or change the name of a position.

We require each PTA and council to report a **President, Treasurer, and Secretary**.

Some PTAs get confused and report their officers in the **Admins** menu instead of here. If you have a PTA that claims to have completed this step, but you show nothing in your reports, this is likely the reason.

Officer Reports

Here’s how you can export a list of local leaders in your region. Back on the main page of the Committees module, click the **Shared Committees** tab, then click **Board and Key Positions**. Here’s the screen you’ll see:



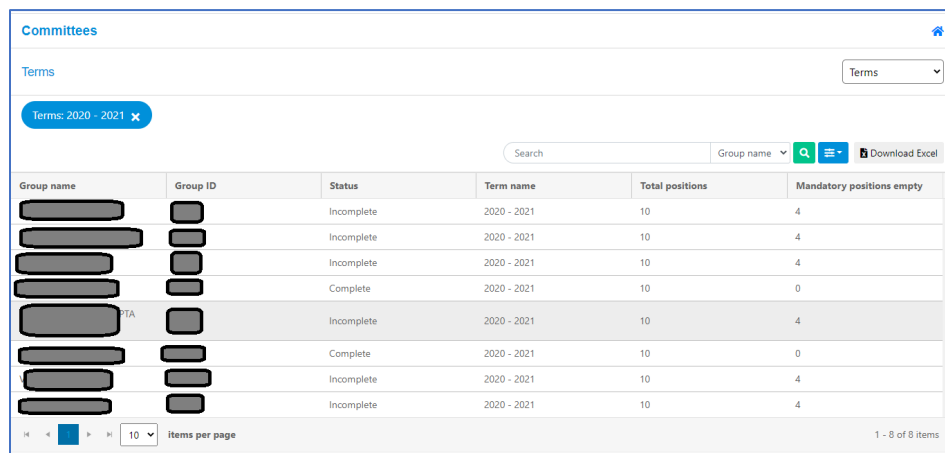
Click the **Reports** tab. Then, click **Terms**.

The Terms Report

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

PTAs that have reported all their mandatory officers will display a ‘0’ in the “Mandatory positions empty” column. PTAs who have not reported any mandatory officers will display a ‘3’ in that column.

You can toggle between the current term and future (if applicable) or previous terms by clicking the blue icon near the search bar and selecting “Terms.”



The Position Holders Report

From the Terms report, you can access a full officer contact list. Just click the dropdown menu in the top right that reads “Terms” and select “Position Holders.” The **Position Holders** report lists every reported officer in your region. The list is sortable and allows for searches by PTA name, PTA number, position, first & last name, and email address. You can also export this report as a spreadsheet by clicking **Download Excel**.

As with the Terms report, you may toggle between the current term and the previous term by clicking the blue icon near the search bar and selecting “terms.” If applicable, you can also search future terms (i.e., next year’s officers).

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

Neither the Position Holders Report nor any other report with officer information currently interfaces with the **Broadcasts** and **Emails** function within Memberplanet, but that’s something we’re working toward so that your distribution lists update automatically whenever a PTA updates their officers.

Communication Tools

There are several Communication tools built into memberplanet that you may use for outreach with your PTA leaders. You’ll find a more thorough guide on how these tools work by clicking [here](#).

Emails

This is a lite version of a newsletter editor not unlike Constant Contact or MailChimp. You can create a newsletter from scratch or modify one of the many available templates. Utilize the distribution lists function to target specific audiences with your e-blasts. You’ll then be able to access tracking data and run engagement reports. The easiest way to reach local PTA leaders is to export a contact list from the **Committees** tab and upload it when selecting recipients.

Broadcast

Broadcasts are like a pared-down version of **Emails**. You can send text-based (no HTML) emails and/or text messages to designated recipients. This feature is handy if you want to send short notices or reminders to your intended audience. Broadcasts come with the same tracking/engagement tools as **Emails**.

Surveys

This is a simple form-builder function that allows you to collect and access information from your targeted audience. For example, you can use a template to create a quick survey form asking local PTA leaders to list their main concerns or areas of interest for the upcoming year. You can then send a notification message to your recipients asking them to take the survey, or you can generate a URL to include in a separate email or post to social media. **Surveys** are a terrific tool for soliciting feedback and getting to know your local leaders. You can access and export results from the **Surveys** menu, as well as enable email notifications anytime someone completes a survey.

Other Features Worth Knowing

All Payments Report

This report is not used by regions but is very important for councils and local PTAs. Hover over **Reports** in the left dashboard, then select **All Payments**. This report features a summary of payment activity related to monies received. For councils, this includes payments of council fees by subsidiary PTAs.

There's a field in the top left that reads "**All.**" Click on it and select "**Transfers.**" This report details all the deposits into the group's designated bank account. Transfers occur every Wednesday (unless the group has opted for monthly payments). 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 report is helpful for local PTAs and councils to reconcile with their bank statement.

Additional Resources

There are additional features we chose not to cover here because they're not relevant to regions. If you would like to learn more about these tools, we recommend visiting the WSPTA Membership Database Resources page, located [here](#).

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