Memberplanet Relaunch Checklist

Your PTA's database requires annual housekeeping to maintain up-to-date information. Please complete the tasks below to prepare for the new year. For additional WSPTA database resources, including how-to videos, click here.

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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

6. Update Online Join Packet (if applicable) ☐
   a. Adjust dates, notifications, and confirmation email

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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.

Please note: Each admin should use a unique login rather than sharing a login across multiple officers. It is best to use a personal email address as a login username rather than a "legacy" email address that is passed down (such as president@johnsonpta.org).

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

- o **Customize Roles (Optional):** 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 may follow this guide to adjust. (Note: We recommend most PTAs avoid multiple customized roles. It's better to keep things simple and stick with the single "Full Access Admin" role.)
- o **Add/Remove Admins**: 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 You can remove admins who are no longer active.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 these steps:
  - o Click on **Add this role to someone** in the page's top right.
  - o Select which member or members to assign the role to.
    - ▪ If a member's name does not appear in the list, click **add a new member** and follow the steps to create a new record.
  - o Click on **Assign role to selected members** in the bottom right to complete the process.

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 to obtain access.

- o **Access Group Billing**: Visit the GROUP BILLING page via the left navigation menu. You will see your PTA's current balance due to WSPTA (and your local council, if applicable). You may click the blue VIEW INVOICES link to access billing/payment history dating back to 2019. Familiarize yourself with this menu.
- o **Enable Autopay**: 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.
- o **Update Invoice Recipients:** Each PTA must annually update their invoice recipients. On the main GROUP BILLING page, click 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. **Please remove any outdated contact information from this menu.**

3. Confirm Membership Levels

Each PTA may 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.

- o **Access Membership Levels**: From the MEMBERSHIP page, click MANAGE MEMBERSHIP LEVELS & AUTOMATED ACTIONS. You will find a list of your currently active membership levels. You may edit them using the gear icon to the right.
  - o **An important note:** Multiple membership levels and pricing tiers are necessary only if you use memberplanet to sell your memberships via the online join packet. If your PTA uses memberplanet solely to report member names (i.e., manual membership reporting), you only need one membership level, and the price does not matter.
- o **Ensure Bundled/Family Memberships are Correctly Configured**: If your PTA offers a family or bundled membership for online join, you must 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 to configure a family membership level with a built-in discount for multiple members of the same household. Please refer to the price scaling guide here. You may end up with inaccurate member counts if family/bundled memberships are incorrectly configured.
- o **What About Free Memberships?** The system will not allow you to create a "free" membership level. If you subsidize certain members' membership dues, you should manually report these folks onto your roster. Here's a video that covers how you can set this up.

4. Confirm Executive Board/Officers

We use memberplanet's COMMITTEES menu to handle board/officer reporting, a WSPTA Standards of Affiliation requirement. If you haven't already, please input your new officers ASAP. We use this information for essential communications, so PTAs without updated info could miss out on vital information. You may access a complete guide to reporting your officers here. There's also a how-to video which can be found here.

- o **Report Your Officers**: 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. *Note: If a name is not on this list, the person has no current record in your database. You must exit to the main menu and visit the MEMBERSHIP page to create a record for them.*

  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, but one of them is the Vice President of Membership, you will want to categorize that person under MEMBERSHIP.
  - o 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.

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- While it is not required to report an officer for each listed position, each PTA must report a 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.

5. Confirm Group Info

Each PTA's database contains contact information that must be confirmed, including primary email and mailing address.

- **Confirm Updated Contact Info**: 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 legacy PTA email address passed down from officer to officer, e.g., president@lincolnpta.com or mickeymousepta@gmail.com. If your PTA does not have this, the primary contact email should be the president's. This email address will sometimes serve as the default for several database functions, including sending online join email invites.

6. Update Online Join Packet (If Applicable)

You may skip this step if you do not use memberplanet's online join forms to register members.

Memberplanet only allows one active membership registration packet at any given time, so it's best to recycle last year's packet instead of using a new one. Please follow the steps below to ensure your packet is ready for use in the new year.

- **Re-open your packet:** Your packet may have closed at the end of the previous fiscal year. To re-open it, click PACKETS in the left navigation menu, then click the title of your packet in the menu. Near the top of the page, you will see if your packet has closed. If it is still open, you will see its scheduled close date. Make any necessary adjustments here.
- **Edit your packet**: From the PACKETS menu, click your packet's name, then click the blue EDIT button in the top right. You may update the packet's name on the first page you see and configure any additional pages you'd like to add/remove. Click the blue NEXT button to adjust the text on your online join landing page. Make sure there are no vestigial references to the previous school year.
- **Update the Thank-You Message:** This is an important one. Whenever someone completes your online join packet, they receive a confirmation email with a thank you message. This message needs to be updated every year. Click your packet's name from the PACKETS menu, then click ADD A THANK-YOU MESSAGE. Update the text with any personalized greeting you want to add. Then, input the current member discounts login, which, for 2023-24, is:

Username: ptamember
Password: Potential

- o **Manage Payment Alerts**: Do you want to receive an email whenever someone joins via this online join link? If so, go to the PACKETS menu, click your packet's name, then click MANAGE PAYMENT ALERTS. Be sure to input whichever email address should receive notifications <u>and remove any outdated email addresses</u>.
- o **Access Your Online Join URL**: Go to the PACKETS menu, click your packet's name, then click CUSTOMIZE THE URL. You will see two separate URLs – one long, one short. The long one is customizable, but **BE AWARE** that if you edit that link, it will deactivate the previous URL and create dead links anywhere it's been shared online. For this reason, <u>we strongly recommend you do not update this URL.</u> The shorter URL is perpetual; it will never change and will always reach your packet if the packet is not closed.

Any further questions? Don't hesitate to reach out to support@wastatepta.org

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