

A MEMBERPLANET GUIDE FOR COUNCIL LEADERS

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Introduction

Hello Council Leaders!

Welcome to the memberplanet database guide. This document aims to teach you the basics of running reports, accessing PTA 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 much 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.

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...

The Council Portal

Once you have council admin status, you should have immediate access to your council's group portal. You may need to toggle back and forth between group portals if you are part of multiple groups (e.g., your council and a local PTA). To toggle, click the group name at the top of the page to 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 cannot 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 and Membership, are irrelevant to the council MP experience. These are essential features for local PTAs, who use them to manage member records. Councils do not report members like PTAs, so you can mostly ignore them.

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

Adding Additional Admins

You may invite other team members to become council 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.

| Role | Admin with role |
|-------------------|-----------------|
| Full-Access Admin | 2 |

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." If the person's name is on the list on this page, skip ahead to step 5.
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 set up your council team with memberplanet access!

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

Note: A local PTA's Admins feature is the same as the Admins feature within the council version of memberplanet.

Note: We generally recommend that PTAs avoid customized roles for admins, as there is a risk of things becoming needlessly complicated.

Group Info

This page houses contact info and 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 helpful page for information such as the council's incorporation date, tax-exempt status, EIN, and other similar data.

The information stored in the **Group Info** menu populates the **Group Profiles Report**, which allows councils, regions, and WSPTA to aggregate data from multiple PTAs.

Banks & Accounting

The **Banks & Accounting** page, identical in the local PTA and council versions, contains the group's banking information to receive funds collected through Memberplanet. These funds include 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 may receive these funds via weekly or monthly deposits. For security reasons, each local PTA and council must be verified by memberplanet when adding or editing this banking information. Information about this verification process is on the **Banks & Accounting** page.

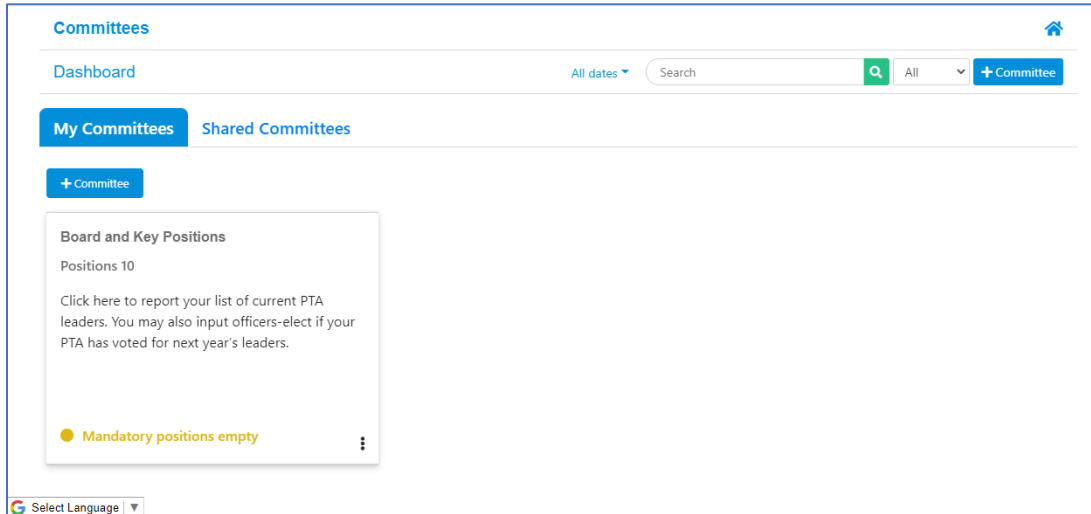
It's a good idea for council leaders to verify at the beginning of the year that the information on this page is up-to-date and accurate.

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. For local PTAs, the process for authorizing an account for paying dues occurs in the **Group Billing** menu.

*Note: For local PTAs, the **Banks & Accounting** page is only relevant to those groups that have elected to collect money through memberplanet (e.g., use of the online join packet). Local PTAs that **do not** intend to use Memberplanet to collect money may ignore this page.*

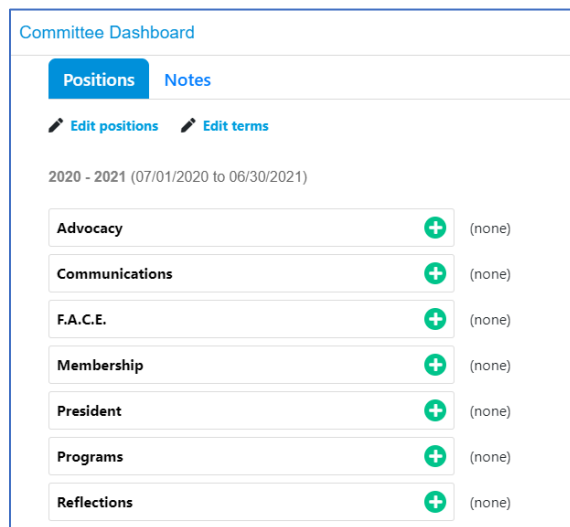
Board & Committee Manager

Each PTA and council 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 review how a local PTA or council reports its officers. Click the box titled "Board and Key Positions."



By default, ten positions/duties are 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. If the new officer does not appear in the list, use the "add a new member" feature detailed in the **Admins** section earlier in this guide to create a new record for them, then return here.

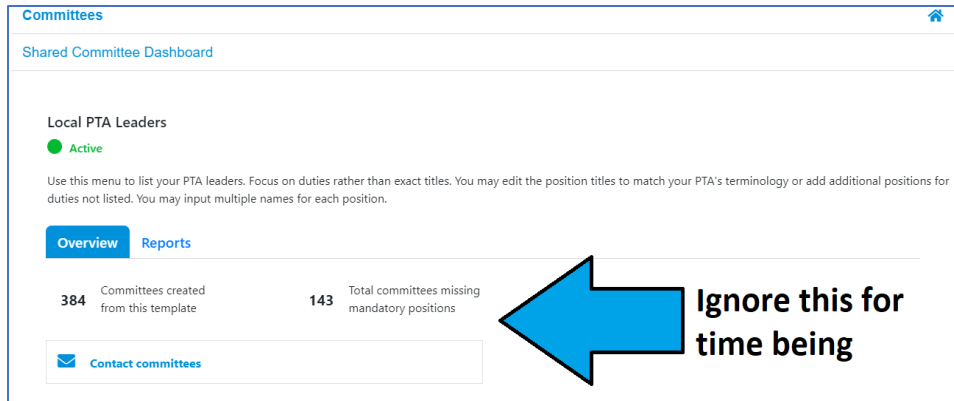
A PTA or council may select multiple people for a position, assign one person to multiple positions, add additional positions, and/or change the name of a position.

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 to 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 all PTAs within your council 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 reporting 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.”

| 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

From the Terms report, you can access a complete officer contact list. 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 council. 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 and previous terms by clicking the blue icon near the search bar and selecting “terms.” You can also search future terms (i.e., next year’s officers) if applicable.

| 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. However, that’s something we’re working toward so that your distribution lists update automatically whenever a PTA updates their officers.

Group Billing

The **Group Billing** module is the central hub for billing and payments.

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

On the Local PTA Side

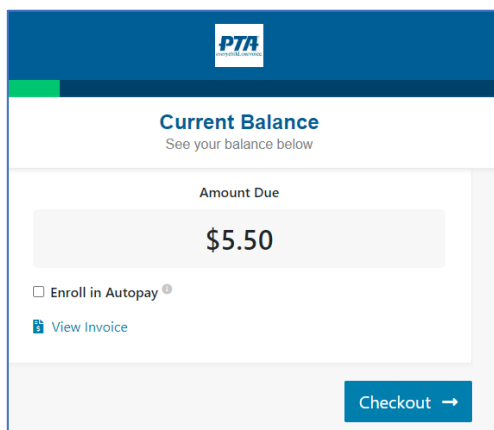
When a PTA selects **Group Billing** from the navigational dashboard, a screen like the one below will load:

This PTA is a member of Bellevue PTSA Council 2.3. When 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 includes a \$2.25 National PTA dues fee and a \$5.75 WSPTA dues fee. The individual councils determine their invoice rates.

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

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



There is no option to pay both sets of invoices simultaneously manually. PTAs that enable autopay will see their balance(s) 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. Charges 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

A different interface appears when a council enters the Group Billing menu.

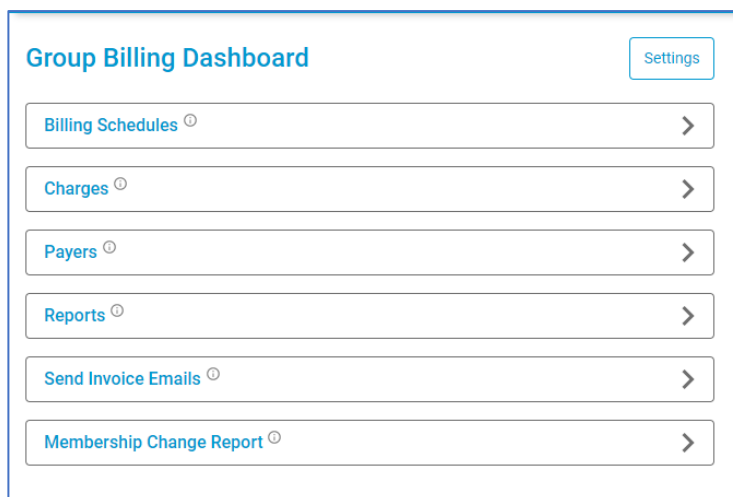
Council leaders can utilize this menu to track anything and everything connected to the billing of council fees. The **Payers** and **Reports** pages are the most important pages.

The **Billing Schedules** page contains settings related to the billing calendar.

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

The **Charges** page lists all charges incurred by the PTAs in your council.

Important: Please do not edit anything in the Charges menu without first checking with WSPTA Support. Improper modifications can have significant consequences.



The **Payers** page is probably the most useful. Within it, you can generate a list of every PTA in your council and their current balance due. Clicking the name of any of these PTAs will load an entire payment/billing history, including copies of invoices. Within this menu, 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, plus a complete **Accounts Receivable Ageing** report. These reports will help your treasurer with reconciliation.

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 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 should ensure the payment is recorded.

You will always want to ensure the check is made out to your council, not WSPTA.

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). You can just put in your own if you do not know the payer's email address.
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 payment record. Please copy WSPTA Support on the email to memberplanet.

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 templates available. 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 simple form-builder function 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 and enable email notifications anytime someone completes a survey.

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, etc. Here's a quick guide to some of the most vital reports on the council side.

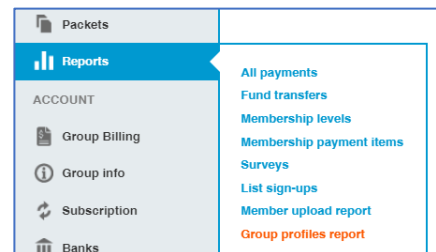
Group Profiles Report

This report contains all the information located within each PTA's **Group Info**. It can also track membership trends and determine if a PTA is in good standing.

From the homepage, hover over the **REPORTS** tab on the left and select **Group Profiles Report**.

Here is what you can use this report to do:

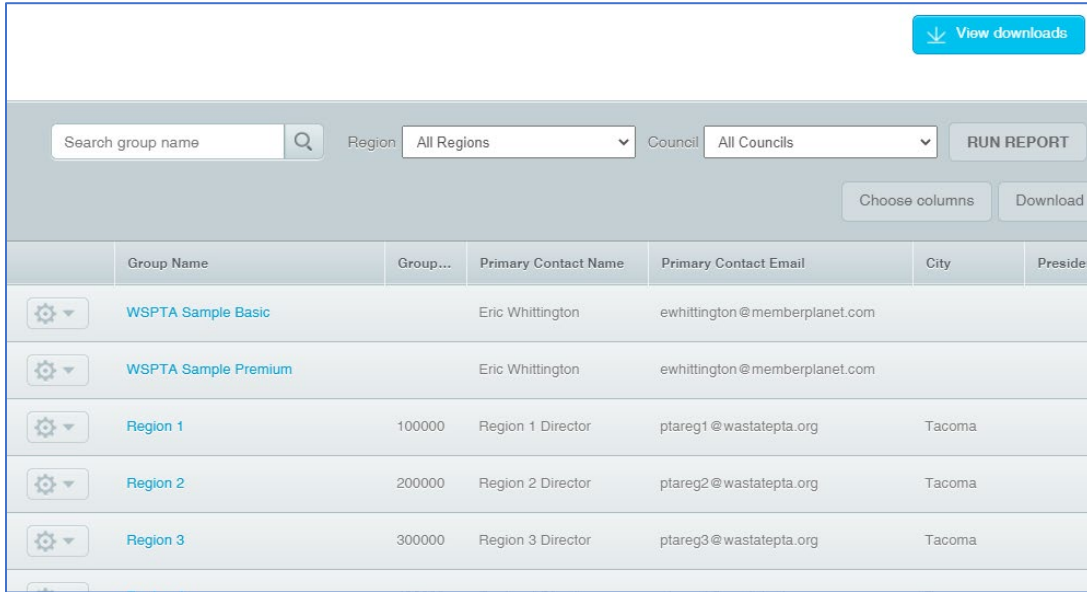
- Check membership figures in your region
- Search for individual PTAs in your region
- Identify struggling PTAs or ones that have not yet reached necessary benchmarks
- Compare council membership numbers to years past
- Find a PTA's charter date, tax-exempt status, etc.
- Quickly check if a PTA has reported contact info for its president, secretary, and treasurer.



| | 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 3.5.27 | 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 |

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. As shown above, you can search for any individual group by inputting its name in the search field.
3. You may also control the number of PTAs displayed per page via a field at the bottom left. In the example above, it is set to show five results per page.
4. The **Choose Columns** button is nifty if you want additional information not displayed in the default view or 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.).
5. Click the **Download** button to create a spreadsheet of the information 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.
6. The default columns in this report include one called “Percentage,” which compares current membership figures to the previous year’s number.



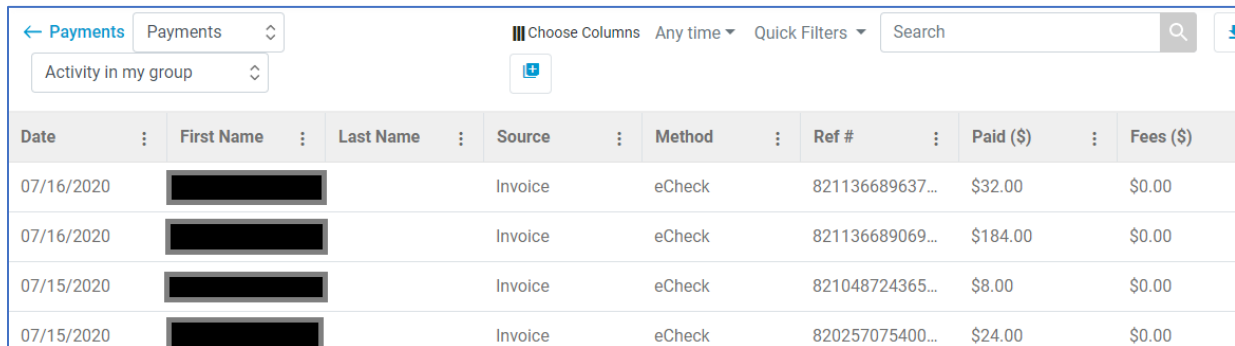
| Group Name | Group... | Primary Contact Name | Primary Contact Email | City | President |
|----------------------|----------|----------------------|-------------------------------|--------|-----------|
| WSPTA Sample Basic | | Eric Whittington | ewhittington@memberplanet.com | | |
| WSPTA Sample Premium | | 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:

7. Click the name of any PTA (displayed in blue) to access all the data housed under its **Group Info** page.
8. You can search any individual group by inputting its name in the “search group name” field.
9. You can control the number of PTAs on a page via a box at the bottom of the screen.
10. 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.”
11. Click the **Download** button to create a spreadsheet of the information 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 the 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 return later to re-download any previously generated report.

All Payments

The **All Payments** report is helpful for councils, as it tracks all transactions received and deposits into the council bank account. Councils may also generate refunds via this report.



| Date | First Name | Last Name | Source | Method | Ref # | Paid (\$) | Fees (\$) |
|------------|------------|------------|---------|--------|-----------------|-----------|-----------|
| 07/16/2020 | [REDACTED] | [REDACTED] | Invoice | eCheck | 821136689637... | \$32.00 | \$0.00 |
| 07/16/2020 | [REDACTED] | [REDACTED] | Invoice | eCheck | 821136689069... | \$184.00 | \$0.00 |
| 07/15/2020 | [REDACTED] | [REDACTED] | Invoice | eCheck | 821048724365... | \$8.00 | \$0.00 |
| 07/15/2020 | [REDACTED] | [REDACTED] | 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. A row of information represents each transaction within the report. Click any row to generate additional information about each transaction.

Note: The report will default to a date range of only the current calendar day. Click “Today” at the top of the page to change the date range.

To generate a report detailing all deposits 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 row represents a separate money transfer. 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 weekly – see the **Banks & Accounting** section for more information) whenever there’s a balance. 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). Local PTAs and councils should reconcile the transfers report against their bank statement.

| ← 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 | [REDACTED] | \$0.00 | \$2.00 | |
| 06/17/2020 | Direct Deposit | 06/17/2020 | [REDACTED] | \$0.00 | \$0.50 | |
| 06/03/2020 | Direct Deposit | 06/03/2020 | [REDACTED] | \$0.00 | \$76.50 | |
| 05/28/2020 | Direct Deposit | 05/27/2020 | [REDACTED] | \$0.00 | \$0.50 | |

Additional Resources

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

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