



memberplanet

# Washington State PTA Checklist for Basic Membership Manual Entry

The following is a bare-bones, simplified checklist to easily fulfill the WSPTA requirement that all local PTAs enter paid members into the membership database used by WSPTA. This checklist should be used if your PTA meets the following conditions:

- You intend to use **memberplanet** simply for reporting purposes, as you use an external tool (such as a spreadsheet or alternate database) to manage member information
- You will not be collecting online payments for membership through **memberplanet**
- You would prefer to avoid using an Excel spreadsheet

- 1. Membership level setup (optional)
- 2. Add more membership levels (optional)
- 3. Assign membership
- 4. Add new members

### **Before we begin:**

It's important to understand that WSPTA records paid members and processes invoices based on **the number of memberships assigned**. This is a key distinction that will make more sense as you progress through this checklist.

To accurately record your members, we'll need to focus on assigning memberships to two separate groups: your **returning members** and your **new members**.

Any paid 2018-2019 members who were present in PT Avenue have automatically been rolled over into your **memberplanet** database. By default, these individuals are listed as "inactive." The first step to accurately recording your members is to "activate" your returning members from this pool of rolled-over individuals by assigning them a membership. That will be **our first goal**.

Once the returning members have been "activated," we'll move on to **our second goal**, which is to add new members to the database who were not rolled over from PT Avenue. We'll also ensure they are assigned to memberships, just like the returning members. Once these two goals are fulfilled, your membership numbers will align with paid members and you'll be all set!

**(Estimated time to complete: 30-60 minutes)**

## One last thing before we begin...

Your PTA might be best served by skipping Steps 1 & 2 below. Let's determine if that's the case.

**memberplanet** allows local PTAs to organize members using multiple tiers of memberships (e.g. Parent, Teacher, etc.). Some PTAs utilize this feature when reporting their members because they want to ensure the membership tiers in **memberplanet** reflect how they organize memberships outside of **memberplanet**. This is by no means a requirement - especially if you are just using **memberplanet** to report paid members. WSPTA and your local council (if applicable) will invoice all memberships the same, no matter what your levels are (i.e. parent memberships are invoiced the same as teacher memberships).

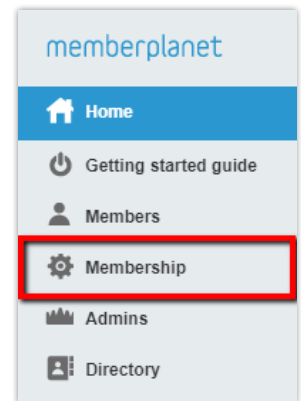
Is it important to you that what you enter into **memberplanet** reflects your PTA's multiple membership levels? Again, this is not a requirement, but some PTAs find it useful to organize information this way. If yes, **begin at Step 1.**

Are you just using **memberplanet** to report your paid members and you want the most seamless process to accomplish that goal? If yes, **skip Steps 1 & 2 and proceed directly to Step 3.**

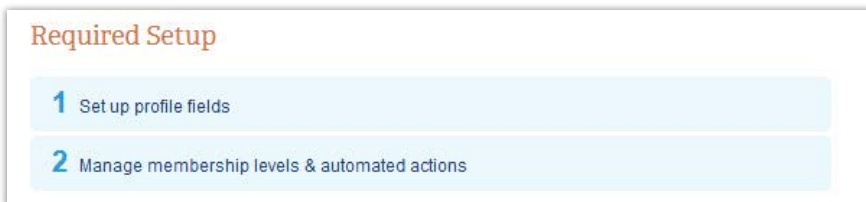
## □ I. Membership Level Setup

You've chosen to utilize **memberplanet's** ability to create multiple membership levels. Good on you! For every local PTA, a single placeholder membership level has been set up by default. Let's update that one first and then add additional ones as needed.

First, go to your **memberplanet** admin portal. On the left navigation sidebar, click **Membership**.



In the Required Setup section, select **2. Manage Membership Levels & Automated Actions**. The reason we are skipping the first option is because it relates only to PTAs that handle their member registration online. Even if this is an option you'd like to explore in the future, for the time being it's not applicable to our current goal of getting your memberships recorded. That's why we're skipping to option 2.



You will find yourself on the **Membership Levels** page. As mentioned, a default placeholder membership level has been set up and labeled "PTA Membership." Let's make this align with your local PTA's membership levels. Click the gear icon in the same row and select **Edit** from the dropdown menu.

### Membership Levels Organize your members & track membership renewal

**What is a membership level?**  
Membership levels allow you to organize your members into different categories. For example, your group might offer a free membership or different tiers of paid membership levels. Use this page to set up your membership levels along with automated reminders and notifications.

My group has membership levels [Learn more about membership levels »](#)

Label	Price \$ (?)	Period (?)	Renewal (?)	
PTA Membership	25.00	Annually	Manual	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">⚙️</div>

[+ Add a membership level](#)

→

Edit  
 Delete  
 Move up  
 Move down

**Update the label and the price of the membership level** to reflect what your local PTA uses. Please do not change the rest of the default settings, as doing so could cause major issues down the road.

Label	Price \$ (?)	Period (?)	Renewal (?)
<input type="text" value="PTA Membership"/>	<input type="text" value="Paid"/> <input type="text" value="\$ 18.00"/>	<input type="text" value="Annually"/> <input type="text" value="Specific date"/> <input type="text" value="1st of Jul"/>	<input type="text" value="Manual only"/> <input checked="" type="checkbox"/> Members cover fees (?) <input type="checkbox"/> Pro-rate payments (?)

Scroll down to the bottom of the page and click the **Save and Close** button.

**Visibility (?)**

Public - All members may choose this level

Private - Only specific members with an access code may choose this level

Congratulations! You have successfully created your first Membership Level. Let's add some more, shall we?

## □ 2. Add More Membership Levels

Underneath the membership level you edited, click the **Add a Membership Level** button.

**What is a membership level?**  
Membership levels allow you to organize your members into different categories. For tiers of paid membership levels. Use this page to set up your membership levels also.

My group has membership levels ▼ [Learn more](#)

Label	Price \$ (?)
Membership	16.00

+ Add a membership level

Fill in the **Level Title** or label, **Price**, and select **Annually** in the Period dropdown menu, then change **Based on join date** to **Specific date** and select **1st of Jul** from the addition field that appear. Again, these default settings are very important for the proper reporting of membership numbers, so please do not deviate from them.

The remainder of the fields can be ignored, as you are not using **memberplanet** to collect membership payments.

Label	Price \$ (?)	Period (?)	Renewal (?)
PTA Membership	16	Annually	Manual
Level title	Paid <span>▼</span> \$ 0	Annually <span>▼</span> Specific date <span>▼</span> 1st of Jul <span>▼</span> <input type="checkbox"/> Pro-rate payments (?)	Auto-pay or manual <span>▼</span>

Click the **Continue** button.

**Repeat these steps to add more membership levels.**

**One important note:** Please do not create a free membership level, even if your local PTA offers subsidized memberships. The database will miscount anyone assigned to a free membership.

When finished, click **Save and Close** at the bottom of the page.

### □ 3. Assign Membership

Your PTA's paid members from the 2018-2019 school year were automatically rolled over to **memberplanet** when we transitioned from PT Avenue. These individuals, by default, will be listed in your database as "inactive." Before you add new members to the database, you will want to "activate" the rolled-over members that have re-upped for the 2019-2020 school year. This is accomplished by assigning them to a membership level.

From the **memberplanet** admin portal, access the **Membership** page via the left navigation sidebar. Then click **Add Members and Assign Membership** from the **Member Database Tool**.

#### Member Database Tools

Add members and assign membership


On the following page, under the subheader "Option 1: Manual setup," click **1. Assign Membership**.

#### Option 1: Manual setup

**1** Assign membership (manual)


**2** Add new members (manual)

On this page, you will see a list of individuals who were rolled over from the previous database. You will want to compare this list to your current member roster in order to see which of the individuals listed have paid for a 2019-2020 membership, that way, you won't miss anyone, or inadvertently double up a member later in the process. To "activate" these members, you will want to assign them to a membership level. **Please note:** You should not "activate" any members from the 2018-2019 school year who have not paid for a 2019-2020 membership.



### RECORD A PAYMENT

Use this option when you want to show the offline transaction in your payment reports



### ASSIGN WITHOUT PAYMENT

Best for when you just want to place a member on a level without showing a payment in your reports

(a)

**Level \*** (b)

\$18.00-PTA Membership

**Quantity \*** (c)

**Paid through date \*** (d)

MM/DD/YYYY


Date on which the next payment is due  
If the renewal is on a cycle of fixed dates, this date must fall onto a valid renewal date in the cycle


Ensure that the **Assign Without Payment** (a) option is selected. (The “Record a Payment” option is not relevant to your PTA and should be ignored). Select the **Membership Level** (b) from the dropdown menu. If you skipped steps 1 & 2, a generic placeholder PTA membership will be your only choice. Don’t worry about the price - it’s not relevant to what we’re accomplishing here. If you did not skip steps 1 & 2, you’ll see the membership levels we just created in this dropdown.

Next, enter **‘1’** in the **Quantity** (c). This refers to the number of memberships assigned to each member. Assigning more than one will likely result in overbilling. We don’t want that!

Next, enter **07/01/2020** for the **Paid-Through Date** (d). Additionally, by checking off the **Member Card Email** (e) box, you can automatically send a member card to your members. You will also be able to customize the email message they will receive with the member card.

Ensure that the **Choose Members** tab is selected and the Filter is set to **All**.

 **Choose members**

 **All members**

Filter by All and Active & Inactive members

Rows selected : 1

	First Name ▲	Last Name	Email	Level	Paidthru date
<input checked="" type="checkbox"/>	Billy	Barker		General Membership (Member Covers Fees)	



Click the blue First Name or Last Name headers at the top of the table to sort alphanumerically and compare the list of names to your current 2019-2020 paid member roster. **Click the checkboxes** next to the names you wish to “activate” with 2019-2020 memberships.

It’s a good idea to mark your current roster to keep track of whom you’ve assigned to a membership level.

Click **Assign Level** at the bottom of the page to assign the selected members to the specified level. If you have multiple membership levels, just repeat this process to assign your members to their respective membership levels. Useful tip: On your subsequent go-arounds, you can use the filter to exclude members from your list that have already been assigned to memberships by selecting **None** from the “Filter by” dropdown menu.

Congratulations! You have successfully activated your returning members. That accomplishes our first goal. Now it’s time to add and activate new members who were not rolled over from the previous system. Once we do that, we should be all set.

## □ 4. Add New Members

Let's navigate back to the membership page by clicking **Membership** in the left navigation bar. Click **Add Members and Assign Membership** from the **Member Database Tools**.

### Member Database Tools

Add members and assign membership

Underneath Option 1: Manual Setup, select step **2.Add New Members**.

On the following page, select the applicable **Member Level** (a) from the dropdown menu. **Enter 07/01/2020** for the **Next Due Date** (b).

Leave **Account Type** (c) set to the default **Adult** value and enter information for each paid 2019-2020 member: **member names** (d), **email address** (e) and **enter '1' for the quantity of memberships purchased** (f). Note: By checking off the **Member card email** (h) box, you will automatically send a member card to your members. When finished, click the **Save & Continue** (g) button.

Account type (a)	First Name (d)	Last Name (d)	Email Address (e)	Quantity (f)
Adult				#
Adult				#
Adult				#
Adult				#
Adult				#

(i)

**Member card email**  Send members an email with a link to the member card (h)

(g)

**Congratulations! You have finished the WSPTA checklist!**

To learn more about sending member cards to your members, [click here](#).