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.
1. 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.
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.

![Membership Level Form]

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

![Visibility Settings]

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.

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.

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.
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**.
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.


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.

Congratulations! You have finished the WSPTA checklist!
To learn more about sending member cards to your members, click here.