



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
- 5. Assign/update PTA leaders

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 members from the previous school year remain in your memberplanet database. These individuals have been listed as "inactive." The first step to accurately recording your members is to "activate" your returning members 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 last year. 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).

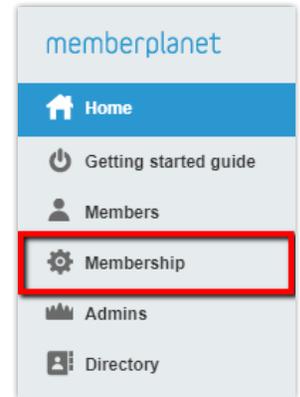
Is it important to you that what you enter into **memberplanet** reflects your PTA's multiple membership levels? Again, this is not a requirement, but some PTAs find it useful to organize information this way. If yes, **begin at Step 1.**

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.**

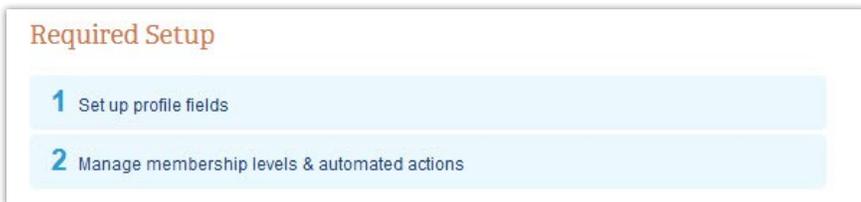
□ I. Membership Level Setup

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.

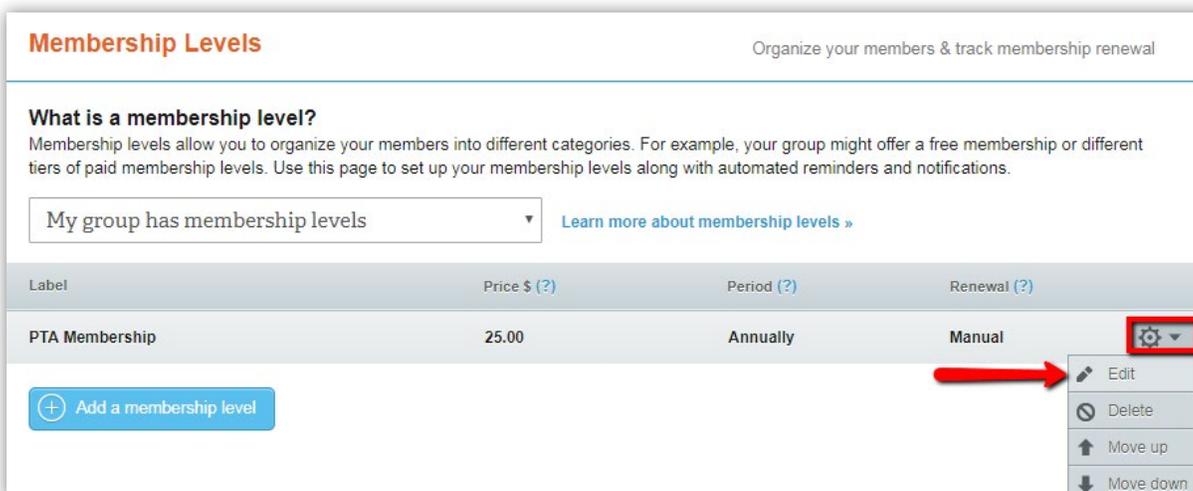
First, go to your **memberplanet** admin portal. On the left navigation sidebar, click **Membership**.



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.



Update the label and the price of the membership level to reflect what your local PTA uses.

Label	Price \$ (?)	Period (?)	Renewal (?)
<input type="text" value="PTA Membership"/>	<input type="text" value="Paid"/> \$ <input type="text" value="25"/>	<input type="text" value="One-time payment"/>	<input type="checkbox"/> Members cover fees (?)

You may also opt-in to utilizing **Price Scaling**, which allows you to establish varying prices based on the quantity of memberships an individual would like to purchase.

Label	Price \$ (?)	Period (?)	Renewal (?)								
<input type="text" value="PTA Membership"/>	<input type="text" value="Paid - Scaling"/> \$ <input type="text" value="25"/>	<input type="text" value="One-time payment"/>	<input type="checkbox"/> Members cover fees (?)								
<p>Instead of charging a flat amount multiplied by the number of memberships a user select, price scaling allows you to charge a different amount specifically based on how many memberships the user selects. For example, you might want to charge \$15.00 for the first membership, but only \$10.00 each for the second and third memberships. This means the user would pay \$25.00 in total for two memberships, or \$35.00 for three.</p> <p>Use these controls to indicate how much IN TOTAL a user should pay when paying for the corresponding number of memberships.</p> <table border="1"> <thead> <tr> <th>Quantity</th> <th>Total price</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>\$ <input type="text" value="15"/></td> </tr> <tr> <td>2</td> <td>\$ <input type="text" value="25"/></td> </tr> <tr> <td>3</td> <td>\$ <input type="text" value="35"/> ✘</td> </tr> </tbody> </table> <p>+ Add another row</p>				Quantity	Total price	1	\$ <input type="text" value="15"/>	2	\$ <input type="text" value="25"/>	3	\$ <input type="text" value="35"/> ✘
Quantity	Total price										
1	\$ <input type="text" value="15"/>										
2	\$ <input type="text" value="25"/>										
3	\$ <input type="text" value="35"/> ✘										

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 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	One-time payment	n/a	

 Add a membership level

Repeat these steps to add more membership levels.

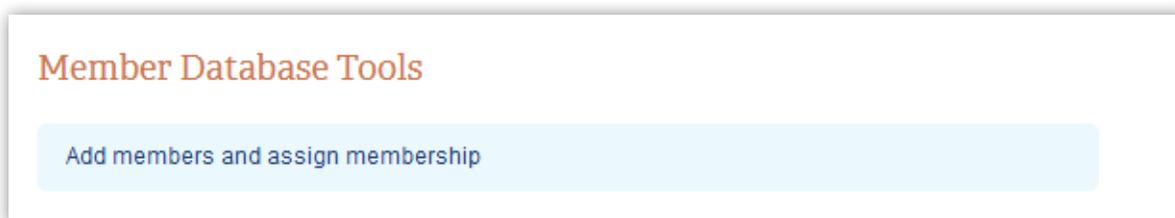
One important note: Please do not create a free membership level, even if your local PTA offers subsidized memberships. The database will miscount anyone assigned to a free membership

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

□ 3. Assign Membership

Your PTA's paid members from the previous school year remain in your database as "inactive." Before you add new members to the database, you will want to "activate" the members that have re-upped for the current 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**.



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



On this page, you will see a list of individuals who were members for the previous school year. You will want to compare this list to your current member roster in order to see which of the individuals listed have paid for last school year's 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 previous school year who have not paid for a current 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

Level * \$25.00-PTA Membership ▼

Quantity * 1

Member card email Send members an email with a link to the member card

Ensure that the **Assign Without Payment** 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** section. 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!

By checking off the **Member Card Email** 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

First Name ▼

Search

🔍

Filter by

All ▼

and

Active & Inactive members ▼

Rows selected : 3

	First Name ▲	Last Name	Email	Level	Paidthru date
<input checked="" type="checkbox"/>	Eric	Whittington	ewhittington@memberplan...		
<input checked="" type="checkbox"/>	George	Lucas			
<input checked="" type="checkbox"/>	Greg	Beilstein	gbeilstein@memberplanet...		
<input type="checkbox"/>	Mercie	Macatrao	mmacatrao@memberplan...		

12 records

Prev | Next

per page [Go](#)

page 1 of 1 | jump to page [Go](#)

Assign level ➔

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 paid member roster. **Click the checkboxes** next to the names you wish to “activate” with this school year’s 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 school year. 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** from the dropdown menu.

Leave Account **Type** set to the default **Adult** value and enter information for each paid member: **member names, email address, and enter '1' for the quantity of memberships purchased.**

Note: By checking off the **Member card email** box, you will automatically send a member card to your members. When finished, click the **Save & Continue** button.

Individuals or family members

Member level

Individuals ▼

PTA Membership ▼

Account type	First Name	Last Name	Email Address	Quantity
Adult ▼	<input type="text" value="Tony"/>	<input type="text" value="Stark"/>	<input type="text" value="ironman@email.com"/>	<input type="text" value="1"/>
Adult ▼	<input type="text" value="Natasha"/>	<input type="text" value="Romanoff"/>	<input type="text" value="blackwidow@email.com"/>	<input type="text" value="1"/>
Adult ▼	<input type="text" value="Steve"/>	<input type="text" value="Rogers"/>	<input type="text" value="cptamerica@email.com"/>	<input type="text" value="1"/>
Adult ▼	<input type="text" value="T'Challa"/>	<input type="text" value="Wakanda"/>	<input type="text" value="blackpanther@email.com"/>	<input type="text" value="1"/>
Adult ▼	<input type="text" value="Bruce"/>	<input type="text" value="Banner"/>	<input type="text" value="hulk@email.com"/>	<input type="text" value="1"/>

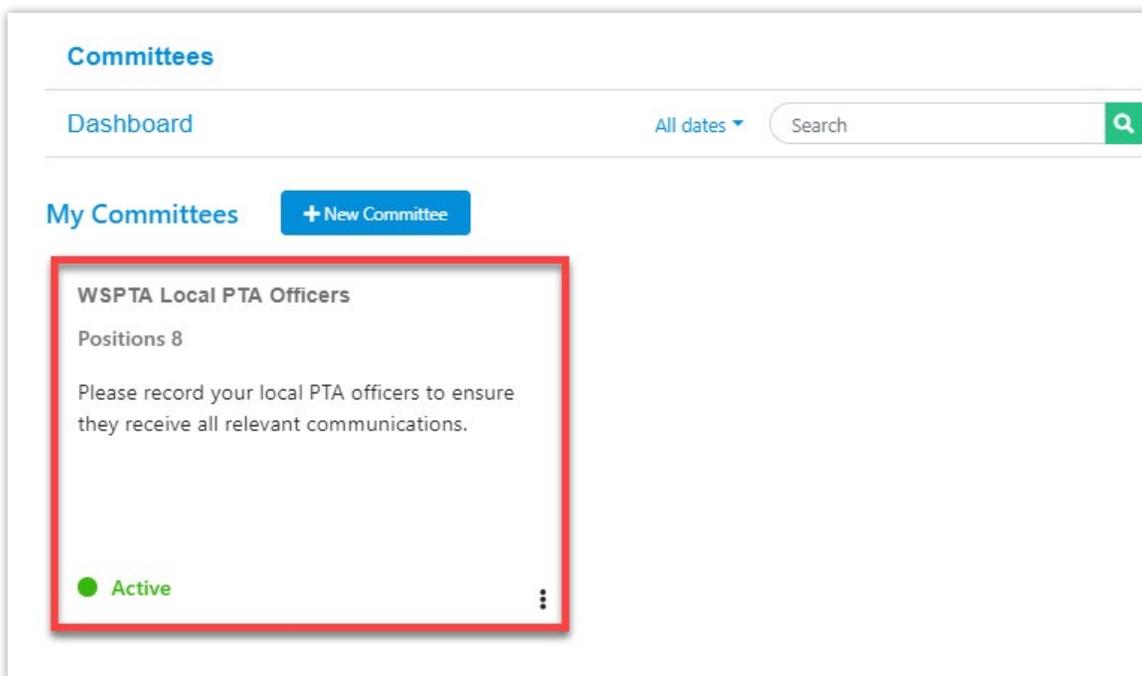
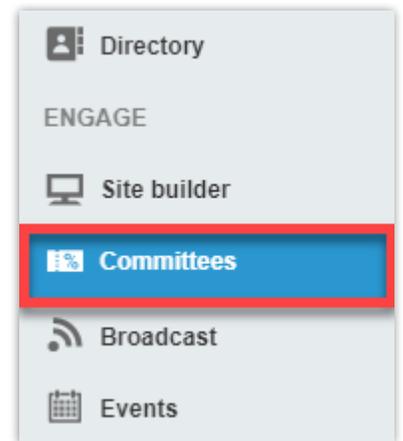
Member card email Send members an email with a link to the member card

□ 5. Assign/Update Officer Roles

The last step is to assign mandatory roles to members: president, vice president, treasurer, and secretary. These individuals **must already be in the database** for you to assign them their roles. If they are not in the database, go back to **Step 4** and add them before proceeding. As long as they are in the database, you can update their contact info within the Committees module.

In the left navigation sidebar, click **Committees**.

In your committee dashboard, click on the WSPTA card that is displayed.



Click to assign members to roles for **President, Vice President, Treasurer, and Secretary**.

Committees

Committee Dashboard

WSPTA Local PTA Officers [Edit committee](#)

● Active

Description here for local PTA Officers.

Positions [Notes](#)

[Edit positions](#) [Edit terms](#)

2020 - 2021 (07/01/2020 to 06/30/2021)

Advocacy		(none)
Communications		(none)
Membership		(none)
President		(none)
Reflections		(none)
Secretary		(none)
Treasurer		(none)
Vice President		(none)

Locate the person you wish to assign, then select the person's corresponding **Assign** button.

- You can use the search bar to search by name or email, then select a header to sort the column.

Committees

Assign a President [Cancel](#)

Search by name

Name ↑	Email	ID	
Abey Klain	aklain1b@mptest.com	713035	Assign
Abey Vitler	avitler44@mptest.com	713106	Assign
Addison Broscombe	abroscombe2r@mptest.com	713090	Assign

Click **Continue** at the bottom right.

You will be brought back to your committee dashboard. You can continue assigning committee roles until you are finished.

Optional: Once you have assigned a role, you can change a person's contact info by clicking the pencil icon. When finished editing the contact info, click Continue to save changes.

Committees

Committee Dashboard

Advocacy		(none)
Communications		(none)
Membership		(none)
President		Abey  
Reflections		aklain1b@mptest.com
Secretary		4021129320
Treasurer		(none)
Vice President		(none)

Congratulations! You have finished the WSPTA checklist!

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