



memberplanet

NCGA Checklist for Basic Membership

The following is a simplified checklist to easily fulfill the NCGA requirement that all local clubs enter paid members into the membership database used by NCGA. This checklist should be used if your club 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

1. Add Members

2. Remove Members (optional)

Before we begin:

First things first - you'll need to claim your admin account. You should receive the Claim Admin Account email from memberplanet. **Click the claim account link** within the email to activate your account.

After clicking the claim account link, you will be prompted to **enter your email address** to activate your account.

An onscreen notification will appear and a verification email will be sent to the email address you entered. In the verification email you receive, **click the verify account link**.

You will then be prompted to **create a password** and complete the activation process.

When finished, you will receive a confirmation page with a link that will direct you to your admin portal on memberplanet.

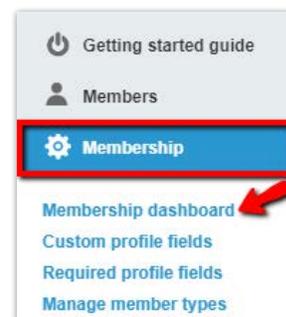
If you have not received a Claim Admin Account email, please contact member@ncga.org

When you first log in to memberplanet and view your member database, you will see your existing members. These records are automatically populated because of our sync with GHIN. Continue to Step 1 to add members who have paid by check or cash.

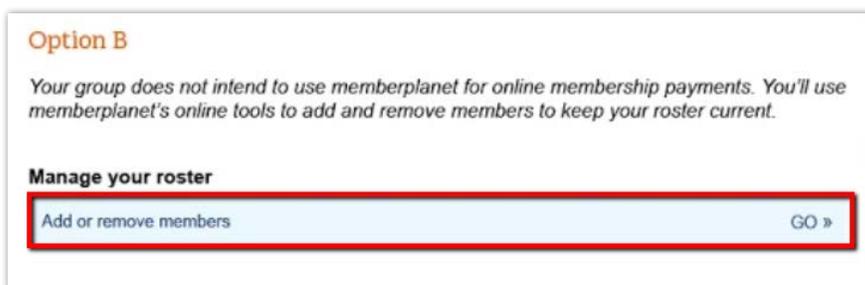
□ I. Add Members

When you add a member record to memberplanet, the sync allows the record to be populated in GHIN within an hour and will generate a GHIN number for new members. Currently, you can add members through this process one at a time.

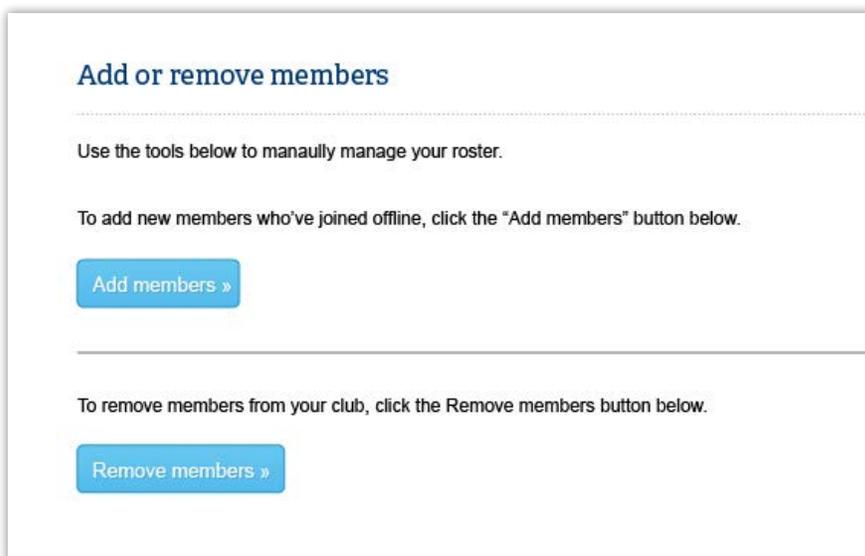
First, go to your memberplanet admin portal. On the left navigation sidebar, click **Membership**. Then, in the submenu, select **Membership Dashboard**.



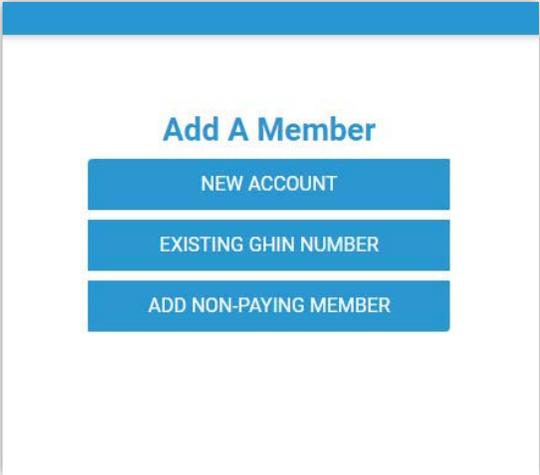
On your membership dashboard, you'll see two options. You'll skip Option A, which is irrelevant for you because of our sync with GHIN. Under Option B, select **Add or Remove Members**.



In the popup window, click **Add Members**.



If the member is new to NCGA, select the New Account option to create a new profile and generate a new GHIN number. If the member already has a GHIN number, select the Existing GHIN number option. Note: the Add Non-Paying Member, is used to add non-NCGA members to your group and is useful for creating non-dues-paying admin accounts. This option will not generate a GHIN number for the user.



Enter in the member information

The screenshot shows a web form titled "Create New Account" with the subtitle "Create a new user account". The form is contained within a blue header bar. Below the header, there are several input fields: "First Name" (text input), "Last Name" (text input), "Email" (text input), "Date of Birth" (calendar icon and "03/day/year" text), "Gender" (dropdown menu), "Street Address" (text input), "City" (text input), "State" (dropdown menu), and "Zip code" (text input). At the bottom left, there is a blue button labeled "BACK" with a left arrow, and at the bottom right, there is a blue button labeled "CONTINUE" with a right arrow.

Or enter the member's GHIN number and select **Continue**.

The screenshot shows a white rectangular area with a blue header bar at the top. Below the header, the text "Enter GHIN Number" is centered in a bold blue font, with the subtitle "Locate an existing account" below it. At the bottom, there is a text input field containing "Enter GHIN Number" and a blue button labeled "Search" to its right.

Confirm the member details and click **Add Member** on the bottom right.

[← Back](#)

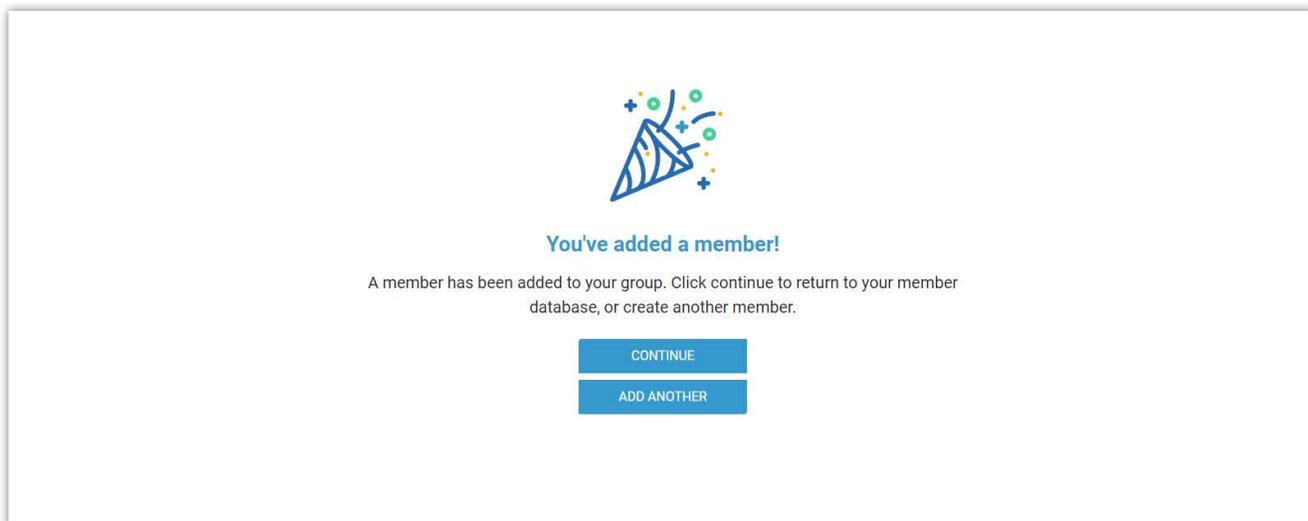
Review

Confirm your member details

Member Info	Arnold Palmer apalmer@mp.com Date of birth: 10/09/1960 123 St Torrance, California 12345
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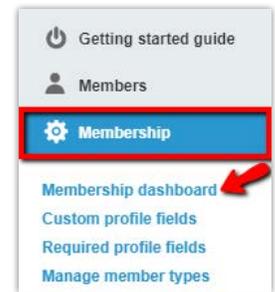
[← BACK](#) [ADD MEMBER](#)

A confirmation will appear. To add more members, select **Add Another** and go through the same process.



□ 2. Remove Members

To remove members from your memberplanet database, navigate back to the membership dashboard by clicking **Membership** on the left navigation sidebar. Then, in the submenu, select **Membership Dashboard**.



Under Option B, select **Add or Remove Members**.

Option B

Your group does not intend to use memberplanet for online membership payments. You'll use memberplanet's online tools to add and remove members to keep your roster current.

Manage your roster

Add or remove members
GO »

In the popup window, click **Remove Members**.

Add or remove members

Use the tools below to manually manage your roster.

To add new members who've joined offline, click the "Add members" button below.

Add members »

To remove members from your club, click the Remove members button below.

Remove members »

Delete members - permanently remove them from the member database and cancel any future payments.

Note: Once you remove members from your group, this cannot be undone.

From the dropdown menu, select an action, then click the checkboxes next to the member names you wish to remove. Select the **Remove Members** button at the bottom right of the screen.

Remove members

Cancel

This page allows you to remove members from your group in one of 2 ways: deleting members, or setting their membership to Lapsed.

Deleting a member will permanently remove them from Member Database and cancel any future membership payments. Lapsing a member will remove their access to the group and cancel future membership payments, but they will remain listed in your Member Database.

Please note: these actions cannot be undone.

<input type="checkbox"/>	First name	Last name	Email	Org ID
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com
<input type="checkbox"/>	Firstname	Lastname	flastname@example.com	flastname@example.com

500 records
Prev | Next

per page
page 1 of 5 | jump to page [Go](#)

Remove members

On the next screen, confirm that you wish to delete the members you have selected by typing in **DELETE** in the text box and clicking **Remove Members**.

Remove members from your group

Cancel

You have selected 32 members to remove from your group.

To confirm that you want to permanently remove these members, please type the word **DELETE** in the box below and click the button.

Remove members