MEMBERSHIP REPORTING SYSTEM

LOCAL LEADER MANUAL- Database Pilot

Revised October 26th, 2018

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Getting Started

The congresses participating in the online membership database pilot are **District of Columbia, Idaho, Kansas, Montana, New Mexico, Vermont, and Virginia.** To get your local PTA started, follow these steps:

Step One: **Complete and send ACH to National PTA.** *The ACH form is included at the end of this manual or can be found at www.pta.org/membershipdatabase under Reporting Resources.* ***Only new Pilot participants will need to submit an ACH form. If you have already submitted an ACH form you will not need to submit another one unless there is bank account change.***

**Please include the name of your local PTA and the PTA number on the form. Note it will take three business days to have your PTA's configuration completed at National PTA once the ACH form is received. Instructions for submitting your ACH form to National PTA can also be found at the bottom of the ACH form. To verify receipt of your ACH form at National PTA, please login and click the Details button to the right of your local PTA.*

Step Two: **Sign-In or Create an Account.**
Sign in to your individual PTA account at https://member.pta.org/Member-Login/Sign-In or create an account at https://member.pta.org.

Note: Your local PTA must be set up in the system as participating in the pilot in order for you to join online.* ***Once you have created your account, please contact the State PTA office to get set up as an officer.*

Step Three: **Log into your PTA's account** at https://member.pta.org/manage-dues to create your dues structure.

Step Four: **Ask your other officers to join at** member.pta.org/join.

**Note: If the officers do not have an account they will need to create one first. If your officers have already joined, promote them to officers. To promote your officers, please see Editing Your PTA Officers and Members instructions in this manual.*

When your unit is set up to accept dues, your members can go online to join. Once set up is complete, you will receive an email from National PTA as confirmation.

Once you are logged in, this manual will walk you through the basic functionality including adding members, running reconciliation reports, editing officer status and more.

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Please contact your state office with additional questions or if you find that edits to this manual are necessary. We hope the system provides you with the necessary tools to manage your local PTA membership in a seamless online system.

Thank you for all you do for our children

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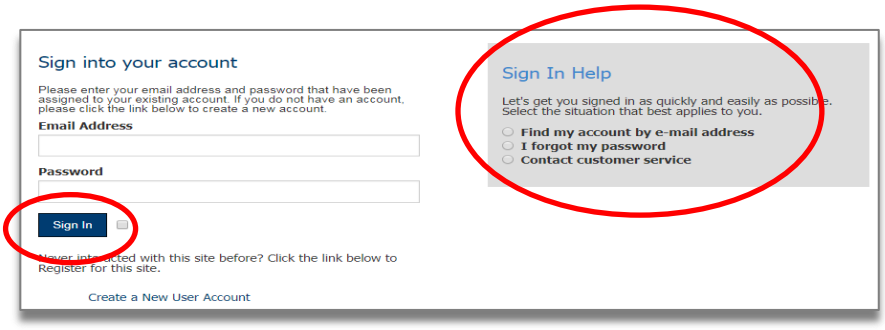
1. The Basics/Introduction

This manual is designed to help Local PTA leaders navigate the Membership Reporting System, gain access to member information for your Local PTA, upload members who join 'offline,' reconcile and receive dues from members who join online and more.

Once your state office staff or state leadership team assigns a leadership role to you as the PTA President, Treasurer or Membership Chair, you will have access to the system. If there are questions, please contact your state office staff or state leaders for assistance.

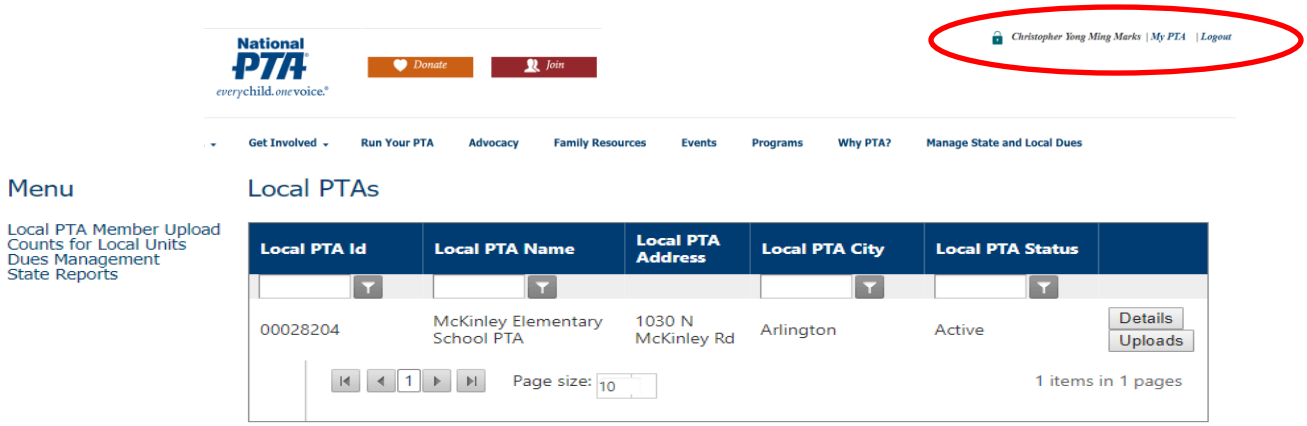
2. Logging In to Your Account:

To login to your PTA's profile and account information, go to https://member.pta.org/manage- dues. Once there, login with your email address and password and click the "Sign In" button. Follow the 'Sign In Help' instructions if you need assistance recovering your password.



2.a. Home Page:

Once logged in, you will reach the local leader homepage. Your first name appears in the upper right corner, a navigation menu on the left side, and your Local PTA information in the center.



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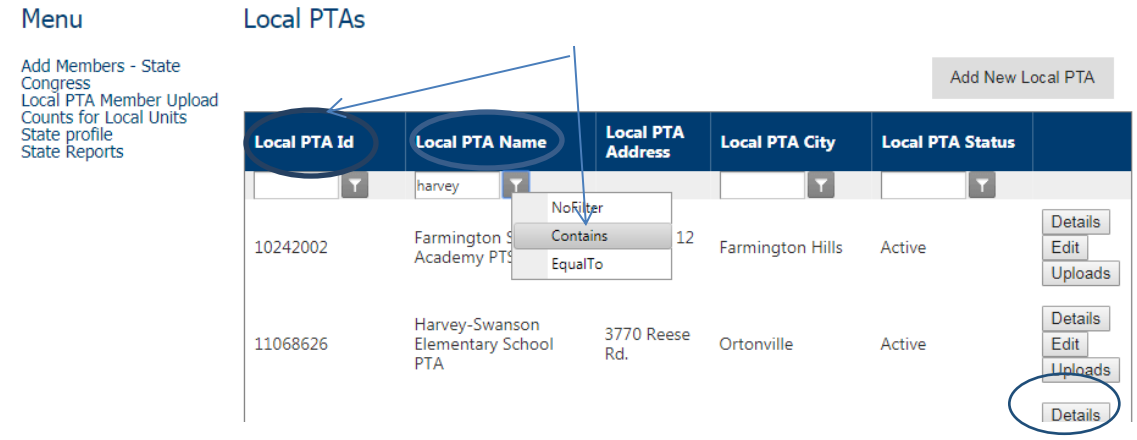
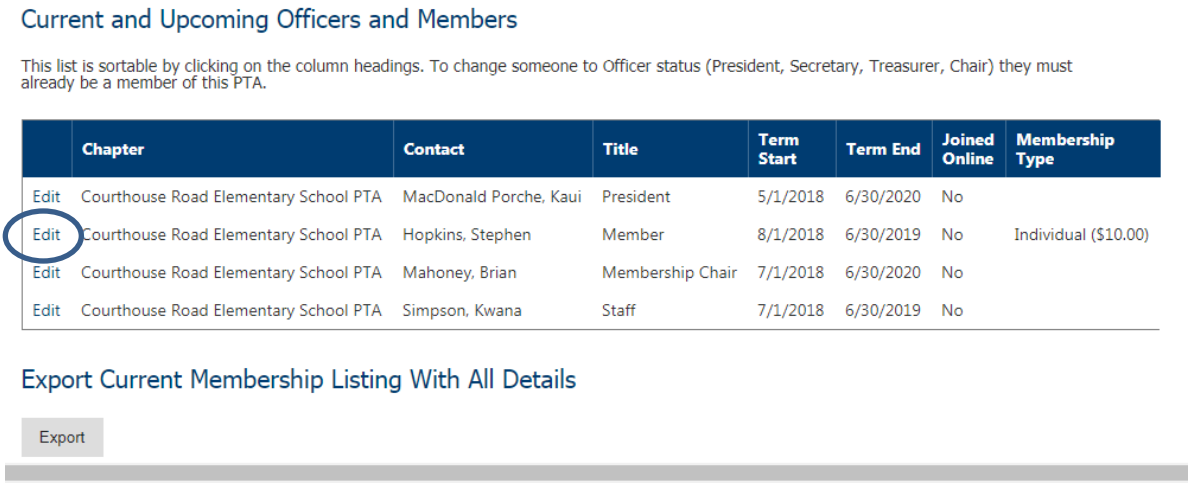
2.b. Promoting a member to an office position

Search for the local PTA that you would like to update, by entering the name of the PTA in the search box for local PTA name or entering the local PTA ID# for the PTA in the search box for the local PTA ID and clicking the filter icon to the right of the search box. This will filter the list of local PTAs and display the PTA that you would like to update.

Click the Details button to the right of the Local PTA of your choice.



Click the Edit button to next the member you would like to promote to leader.



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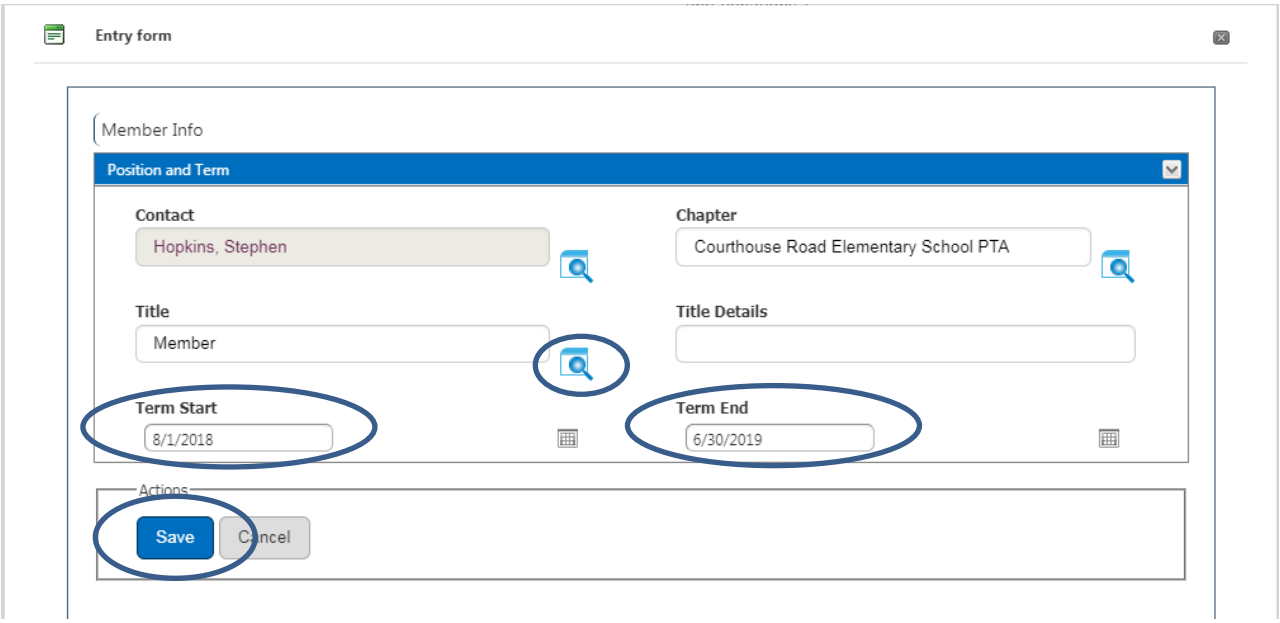
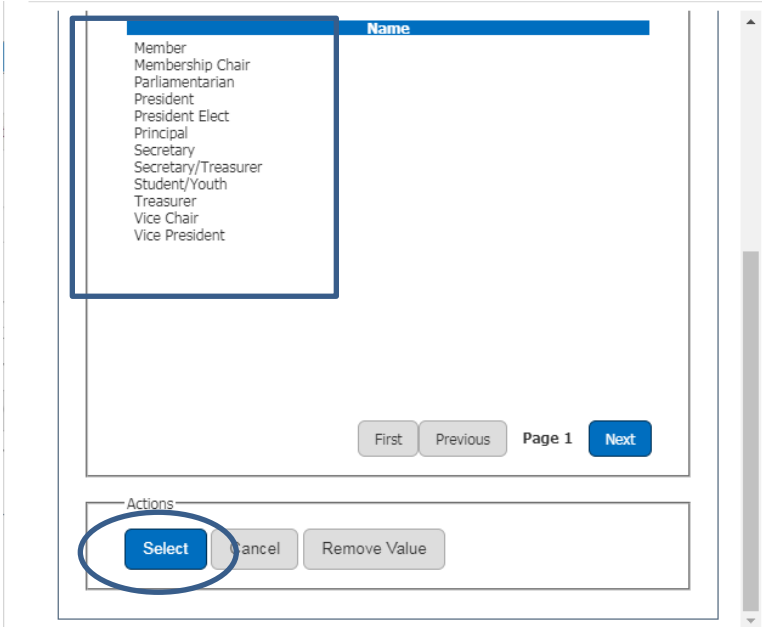
Click the search icon next to Title.



Choose the leader's position from the list and click Select.



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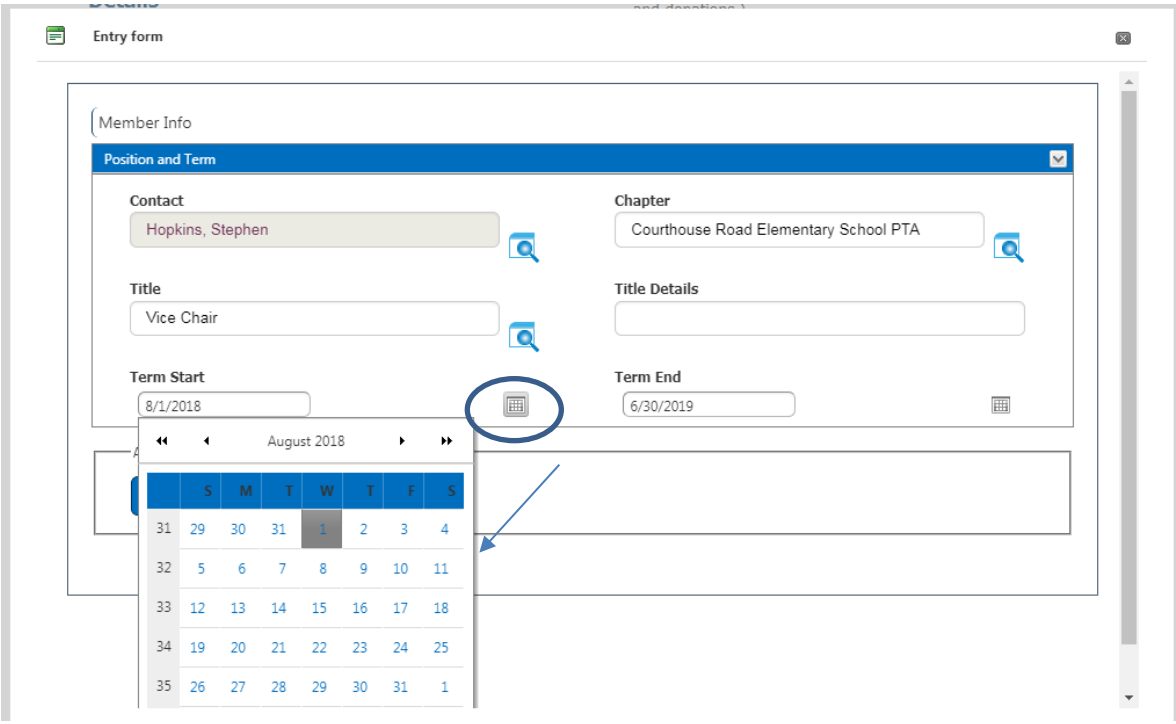
Update the leader's term dates (if needed) then click Save.



You can verify the changes once you return to the PTA Details page below.

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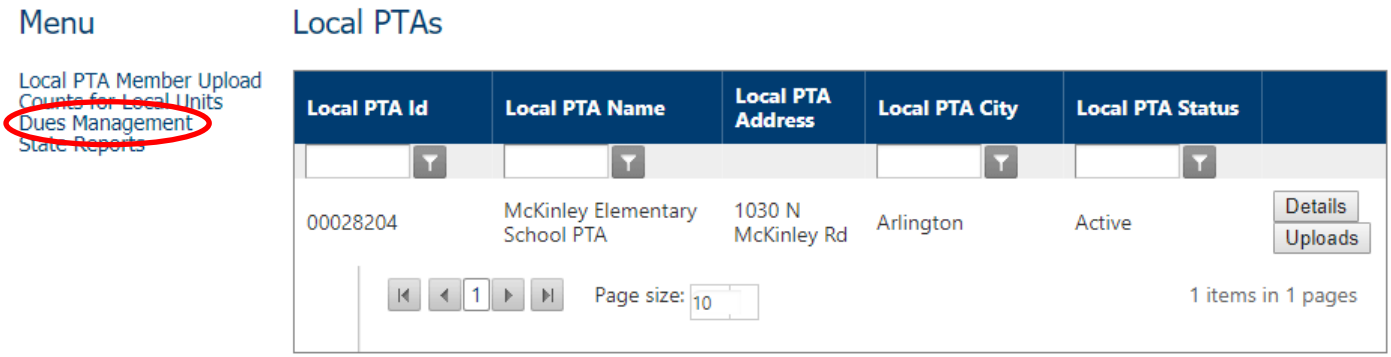
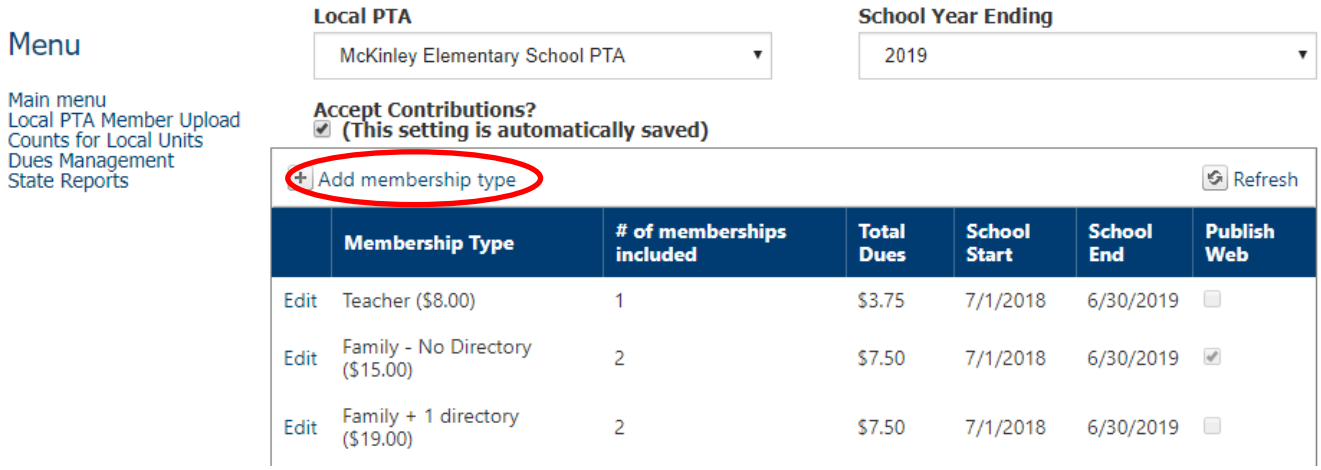
3. Dues Structure Management (Adding and Removing Membership Types)

Local PTAs may add membership types to their dues structure at any time. When logged in to member.pta.org/manage-dues as a President/Secretary/Treasurer or Membership Chair, select "Dues Management" from the main menu shown here:



The following screen will appear. This is where you can add or edit your membership types.



To add a membership type, click "Add membership type" shown above.

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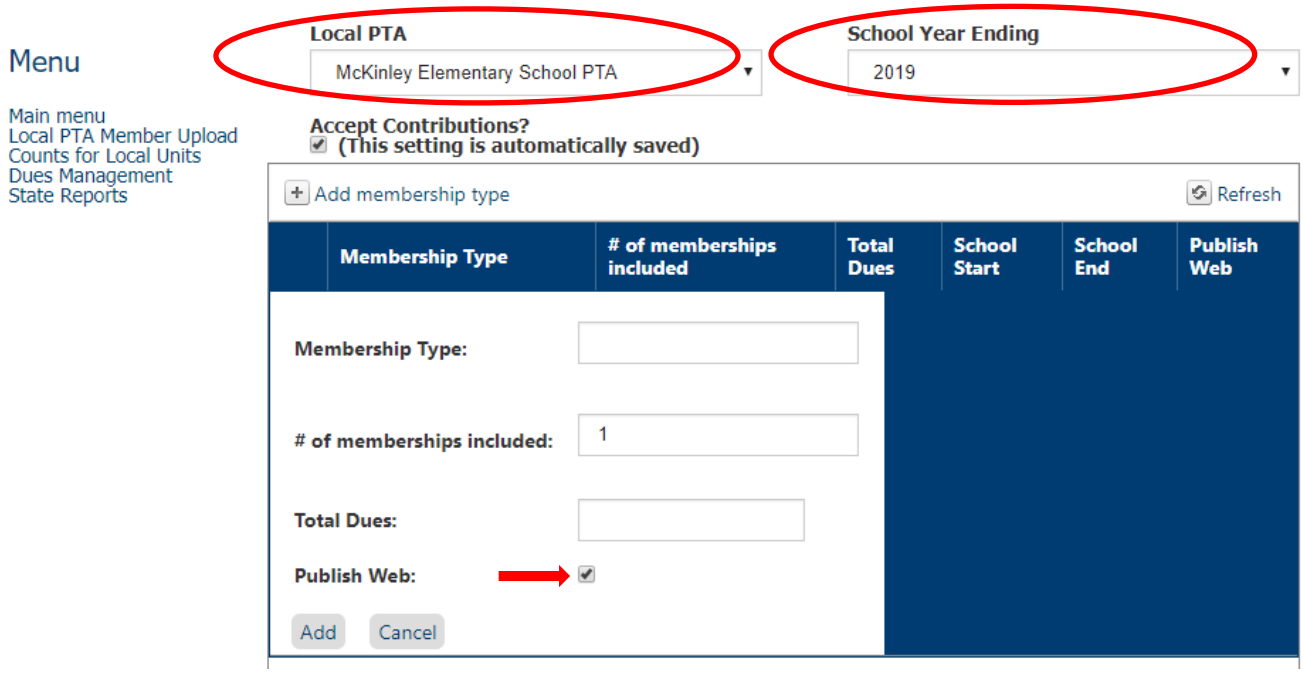
The screen below will appear. Before entering a new membership type, be sure that the name of your Local PTA is listed in the "Local PTA" box and the "School Year Ending" box shows the current school year.



In the box next to "Membership Type" enter the name of the membership (*e.g. Individual, Grandparent, or Parent/Guardian*). The information entered here is what will appear in the drop down when an individual is joining online. Please note that we encourage leaders to include the 'cost' of the membership along with the name of the membership – for example: Individual ($10.00) or Grandparent ($8.00).

In the box next to "# of memberships included," enter the number of memberships someone is purchasing when choosing that membership type (*e.g. individual = 1 or family = 2 or more*).
***Please do not list the number of people that currently belong to your PTA by type here.**

In the box next to 'Total Dues" enter the total cost of this membership type.

Make sure the "Publish Web" button is checked and review what you have entered.

Once reviewed, click "Add." The new membership type will now appear on the drop-down menu list as a join option when individuals go to member.pta.org/join to join.
***Note:** *Once you click "Add," you will not be able to change the name or # of memberships included. This is a security feature that ensures your PTA receives the correct portion of dues for any members who join online.*

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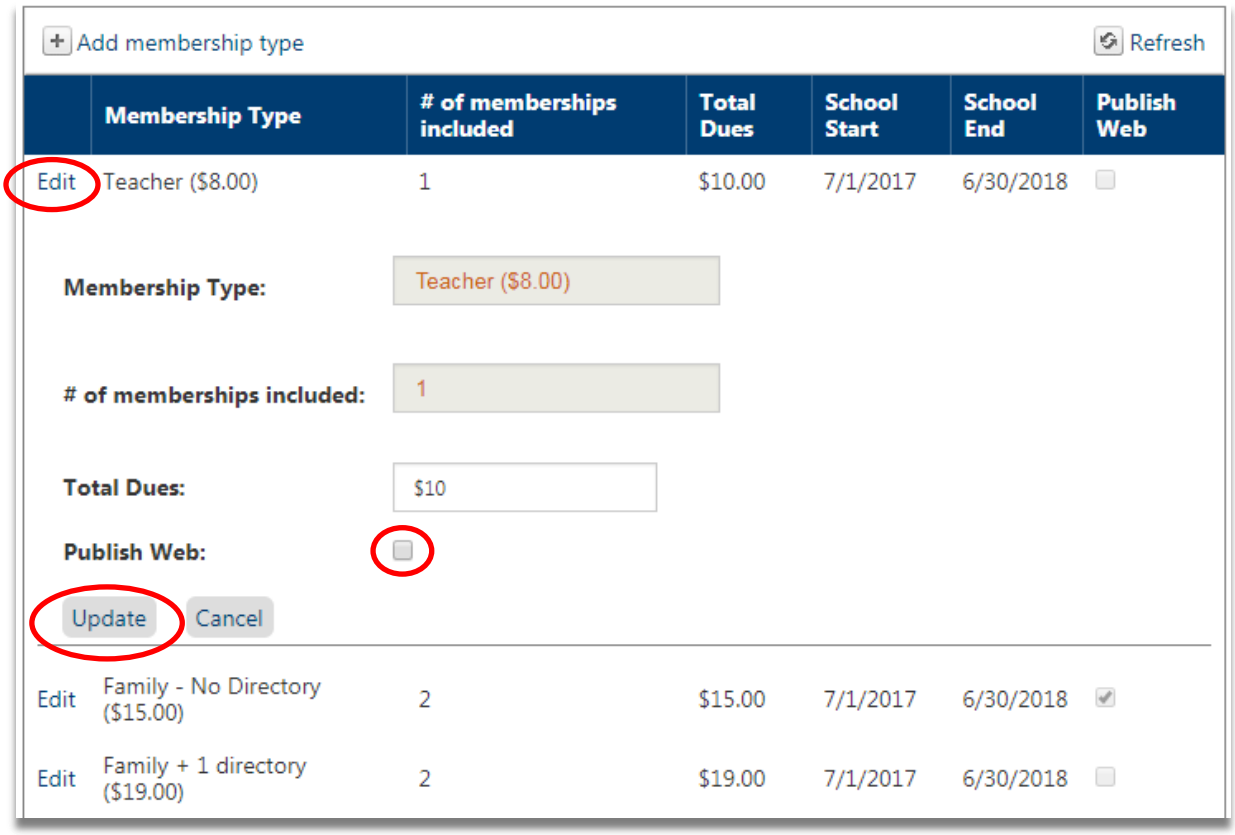
4. Unpublishing (or "Editing") Membership Types

Once a membership type is created, it cannot be deleted. However, if a membership type needs to be 'edited' it should be 'unpublished' and a new membership type created. To do this, click on "Edit" next to the membership type.



After clicking "Edit," the screen above will appear. To unpublish the membership type, uncheck the box next to "Publish Web" as shown above. This membership type will no longer appear on the drop-down list at member.pta.org/join, and you will no longer be able to upload members using this membership type. To change the membership type (call it a different name or add information), please create a new membership type with that information.

Once unchecked, click "Update" as shown above. It will save the changes and remove the membership type from the join options on the website.

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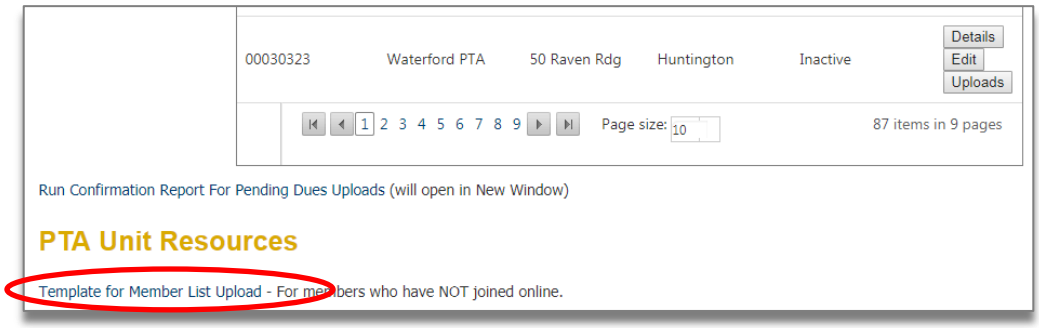
5. Uploading Member Spreadsheets:

Members who join "offline" with a paper form at events can easily be added to the system. There are two ways to upload members into the database. Members can be uploaded using an Excel spreadsheet, or members can be entered manually as they join one at a time.

To upload members to the database using an Excel spreadsheet, you'll need to download the excel spreadsheet used for upload. A link to the membership upload template spreadsheet can be found on the home page under "PTA Unit Resources" as shown below.

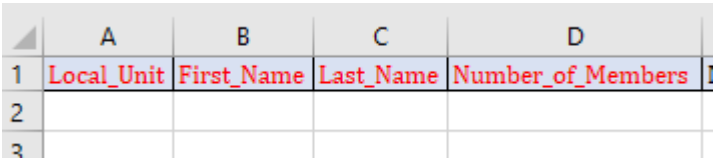


After clicking on this link, a spreadsheet will be downloaded to your computer. Please enter the member information onto the spreadsheet, and 'upload' the template to the database.

To ensure a smooth upload process, it is important that the following steps and guidelines be followed:

1. Enter all required fields. Noted in RED on the template, the following fields are required for each membership you plan to add to the Membership Reporting System. We encourage all PTAs to include complete member information in their upload spreadsheet. **Please note that email is required for profile login.**

    a. Local_Unit (the ID number of your local PTA), First_Name, Last_Name, and Number_of_Members for the membership type they a joining (Example: 1 for an individual and 2 for a mother and father). All entries MUST have these four fields filled out in order for them to be successfully uploaded.



	A	B	C	D
1	Local_Unit	First_Name	Last_Name	Number_of_Members
2				
3				

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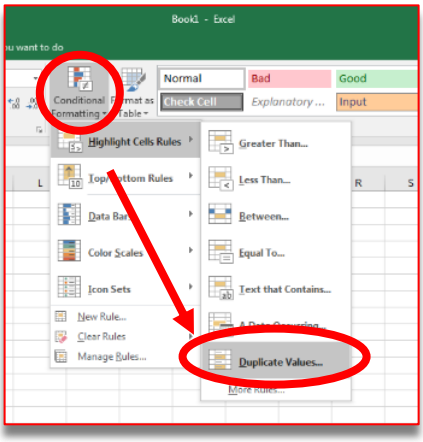
2. When filling out the 'Membership_Name' field on the spreadsheet (sometimes referred to as Membership_Type), the entered information must match up EXACTLY with the Membership Types created in the dues structure of your PTA. This means checking carefully for typos, extra spaces, missing decimal points, etc. For example, the membership type "Parent ($5.00)" is not the same as "Parent ($5.00)" because of the extra space before the $ sign. Please see instructions in the Dues Structure Management section of this manual.

3. Ensure there are no duplicate email addresses in the spreadsheet. A quick method of finding duplicate emails is to use conditional formatting on the email column in the spreadsheet – this will highlight anything that's a duplicate in red. See the image to the right.



4. Check to see if there are duplicate names. Duplicate names are defined as records having the same first and last name (i.e. two John Smith records.) If you have two members with the same name, they will need to be added to the system in two different uploads rather than in the same spreadsheet.

Additional recommendations for membership uploads:

- If the Membership includes more than one member/person (e.g. Family membership for two people), the second name/spouse name and email should be entered on the same row as the primary member name (columns V and W on the upload spreadsheet.)
- **Do not upload the same spreadsheet more than once. This could result in duplicated members.** If this happens you will need to contact your State PTA office with a list of the duplicate members.

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The full list of fields in the Member Upload Template spreadsheet are listed below. Required fields are in red text. Additional tips and hints for a smooth upload are in the boxes to the right:

- Local_Unit (PTA number –find this on the Details page for your PTA)
- First_Name
- Last_Name
- Number_of_Members
- Membership_Name (Parent, Teacher, Student, etc. See your Dues Structure)
- Name_Prefix (Mr. Mrs., Ms.)
- Middle_Name
- Name_suffix (Jr., Sr., III, etc.)
- Email
- Address_1
- Address_2
- Address_3
- City
- State
- Zip
- Home_Telephone (**accepted formats:** (202) 555-1212 or 202.555.1212)
- Work_Telephone
- Mobile_Number
- Position/Title: (e.g. Membership Chair, Parliamentarian, President, Secretary, Secretary/Treasurer, Treasurer, Vice Chair, Vice President, Member, Student/Youth)
- Begin_Date (First Day of PTA Membership Year (7/1/20XX)
- End_Date (Last Day of PTA Membership Year 6/30/20XX)
- Second_Name
- Second_Email
- Teacher1
- Teacher2
- Teacher3
- Children_Names

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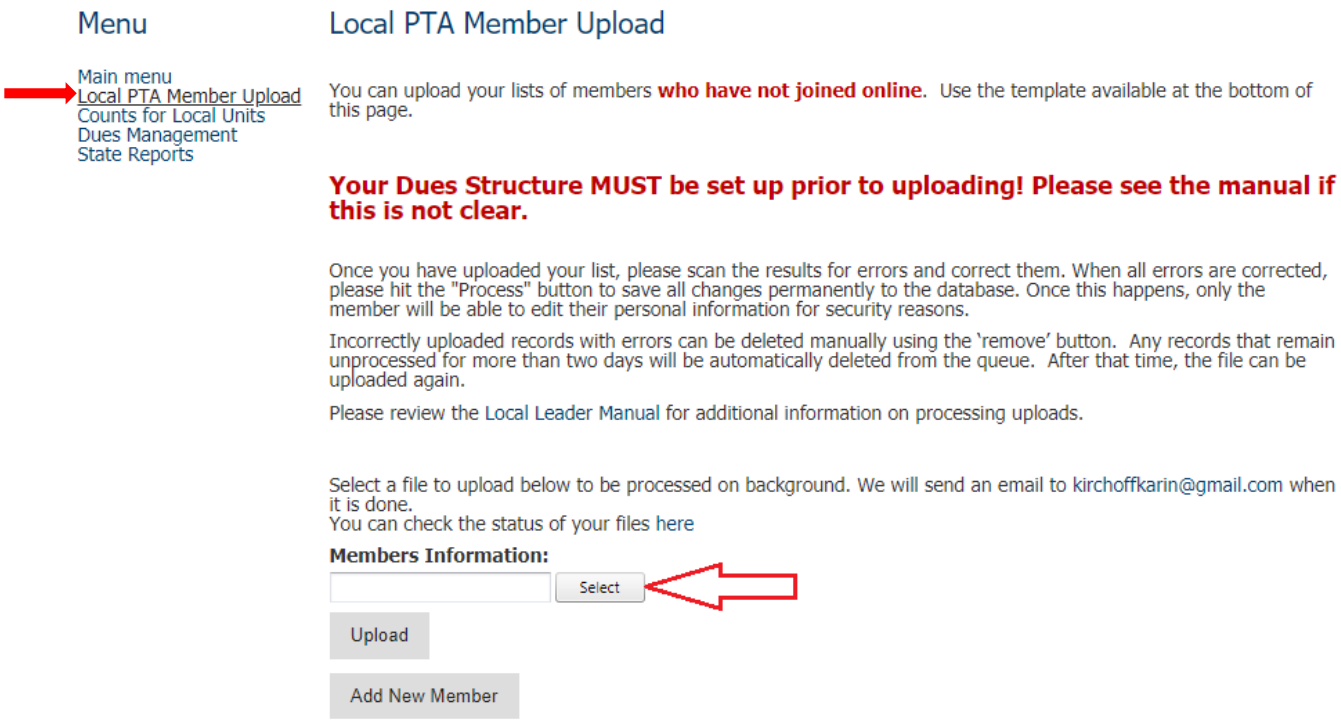
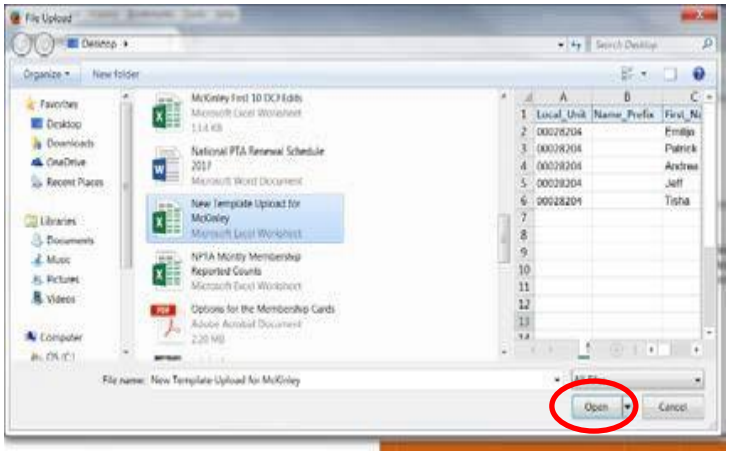
In the vertical left-hand navigation menu click on "Local PTA Member Upload." You will then be routed to the Local PTA Member Upload page, see image below. Then click "Select" to choose your file for upload.



A window will open allowing you to browse to and select your file for upload. Select the file and



click "Open" as shown.

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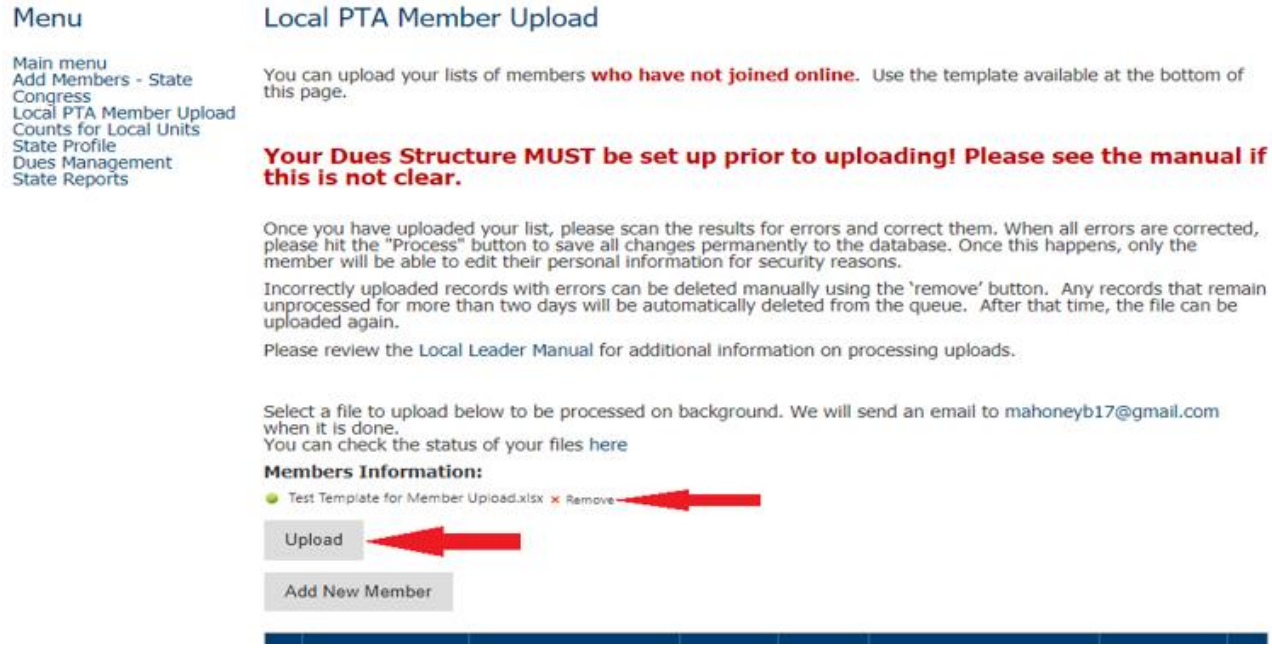
The file will be listed and available for upload. Click "Upload." If the incorrect file was selected, click "Remove" next to the file name and repeat the uploading steps again. Once you have successfully uploaded the member template, within 2 hours, you will be able to see the newly uploaded members on your Membership Roster and Unpaid PTA Members Invoice.



Should any member lines in the upload template contain an error, you will receive an email notifying you of the errors. You will then need to log back in, navigate to Local PTA Member Upload, and review the erred lines. Once you have corrected the errors, click the Process button at the bottom-left of the screen. Your members will now be uploaded.

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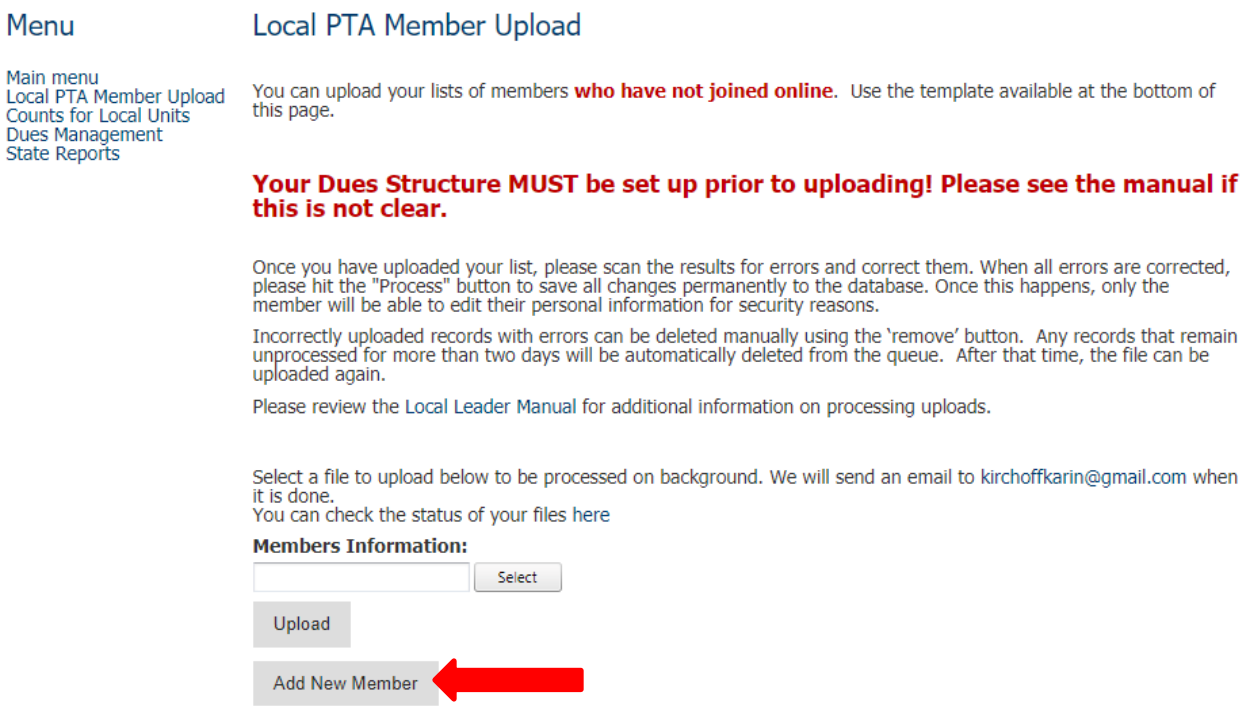
6. Adding Individual Members (Manual Input)

PTA leaders are encouraged to upload member information regularly to ensure your membership rosters and dues processing are up to date.

Click “Local PTA Member Upload” on the left-hand vertical navigation menu from the homepage.

Click “Add New Member”.



Enter all applicable and necessary information. Utilize the search icons to the right of ‘Title’ to choose the position they hold such as President or Member. Click the Save button at the bottom. See images below.

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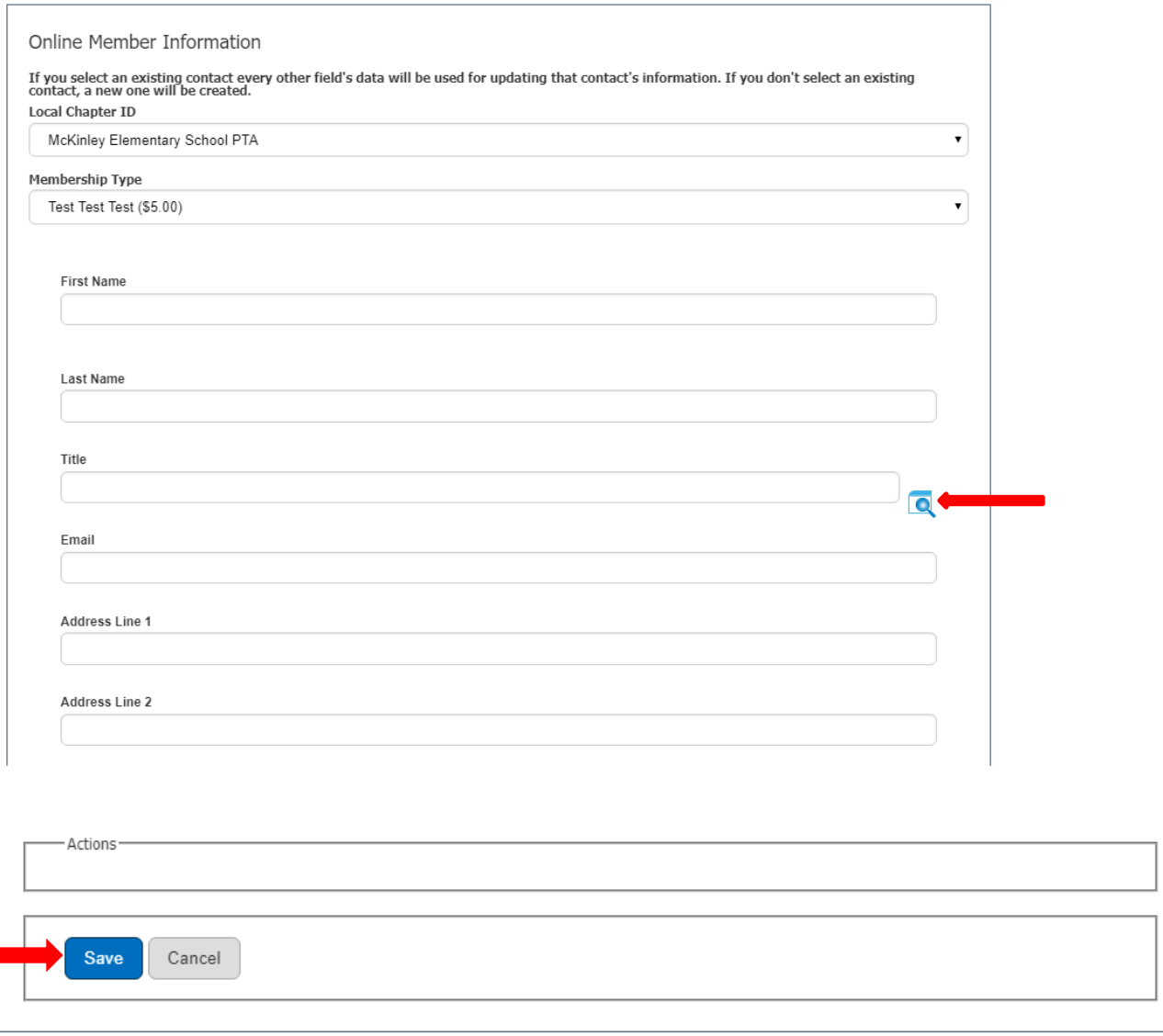

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7. Editing Your Local PTA Information Officer and Member Information:

As a local PTA President, Treasurer, Secretary/Treasurer or Membership Chair, you have access to edit your members' titles (positions) and the term (length/years) of that position. This includes editing officers. This is important when your Local PTA is first set up in the Membership Reporting System. As the 'first' officer associated with your PTA, you should set up your dues, encourage your other officers to join using the online join process, and change their 'title' from 'member' to the appropriate title after they have joined. If a member is becoming an officer in the PTA, the Membership Chair should edit their position from 'Member' to their new appropriate position.

Your Local PTA's information can be accessed by clicking the "Details" button on the home page. Once the new page loads, scroll down to view the list of members and officers.

Only officers with one of the four designated positions (President, Treasurer, Secretary/Treasurer or Membership Chair) can edit member 'Titles' or 'Positions'.

First, click 'Edit' next to the member's name.

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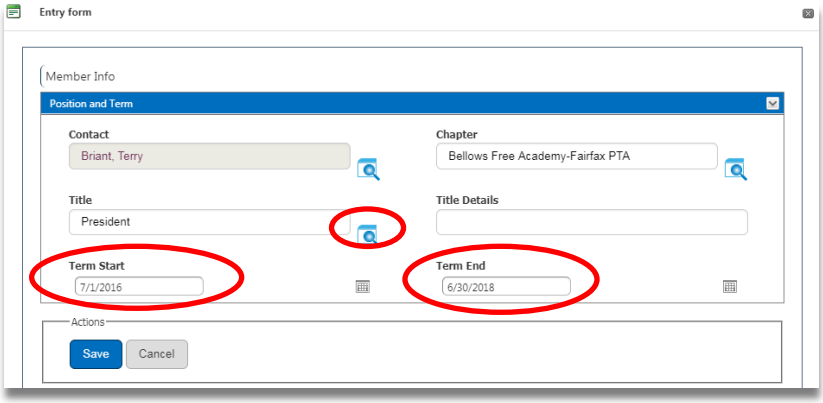
Next, click the blue search icon and select the member's appropriate title by highlighting the title. Then set the term start and end dates.



Note: *Officers with the title President, Treasurer, Secretary/Treasurer or Membership Chair will have the same level of access to your member's information that you have.* **Access begins on or after the Term Start and ends automatically on the Term End date. After an officer's term has ended s/he will no longer have access to the system.**

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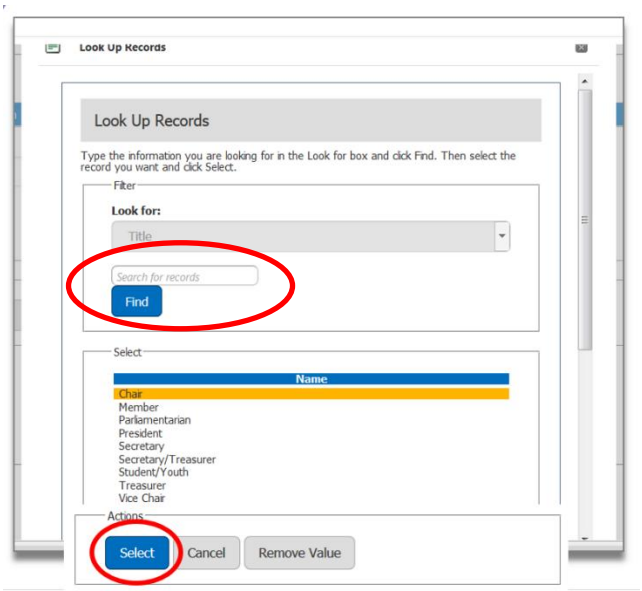
When you click on the search icon, a pop-up screen will appear allowing you to search titles available as shown below. You can choose a title listed and/or search for one. Highlight a title by clicking once and then scroll down to the bottom and click the "Select" tab to choose that title.



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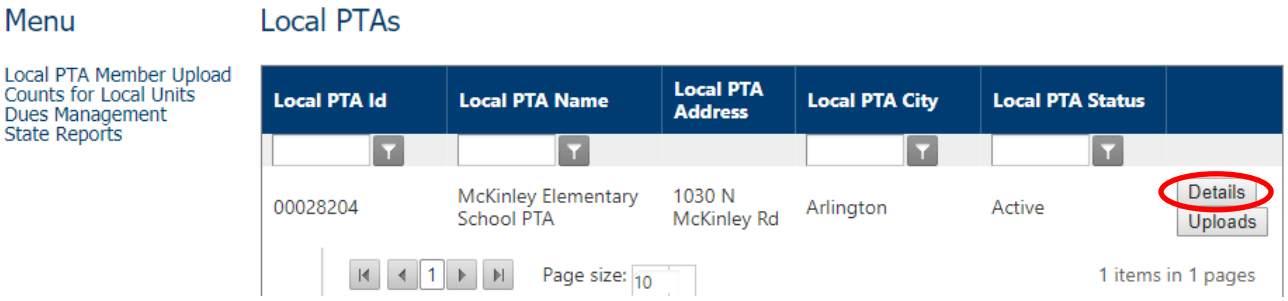
8. Running Reports and Managing Your Membership

Reports for your Local PTA including Online Join Reconciliation Reports, Simple Membership Roster, PTA Member Directory, Unpaid PTA Members Invoice, Donation Report, and Local Dues Structure Report. Access these reports by clicking on the "Details" button as shown below.



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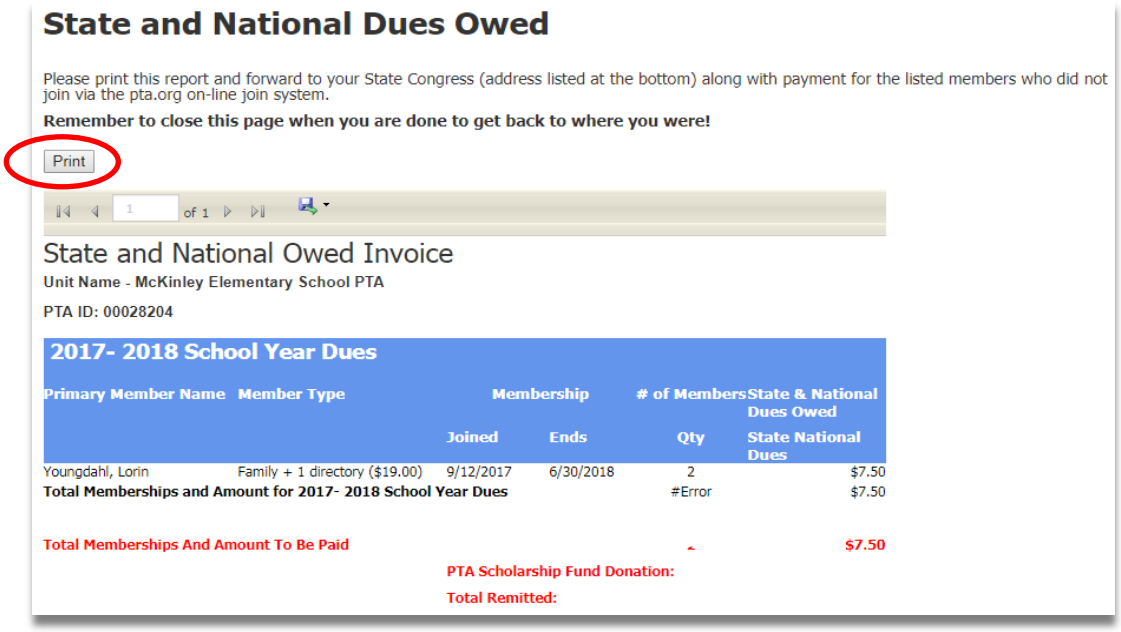
PTA Member Directory: The simple directory is straightforward. Click this link to create a pdf or download an excel spreadsheet with your membership information.

Reports for Treasurers: The Unpaid PTA Members Invoice, the Online Join Reconciliation Report and the Donation Report are common reports for Treasurer's to run and view. Click this link to create a pdf or download an Excel spreadsheet with your membership information.

9. Reports for Treasurers:

Unpaid PTA Members Invoice: For members who join offline and are uploaded into the system, your PTA will need to send state and National portion of their dues to your state office. This report lists all members who were uploaded, the number of members and the corresponding dues amount owed to the state and National PTA for those members. The system automatically calculates for you and totals the amount owed for all uploaded members.



State and National Dues Owed

Please print this report and forward to your State Congress (address listed at the bottom) along with payment for the listed members who did not join via the pta.org on-line join system.

Remember to close this page when you are done to get back to where you were!

Print

1 of 1

State and National Owed Invoice

Unit Name - McKinley Elementary School PTA

PTA ID: 00028204

2017- 2018 School Year Dues

Primary Member Name	Member Type	Membership		# of Members	State & National Dues Owed
		Joined	Ends	Qty	State National Dues
Youngdahl, Lorin	Family + 1 directory ($19.00)	9/12/2017	6/30/2018	2	$7.50
Total Memberships and Amount for 2017- 2018 School Year Dues				#Error	$7.50

Total Memberships And Amount To Be Paid $7.50

PTA Scholarship Fund Donation:

Total Remitted:

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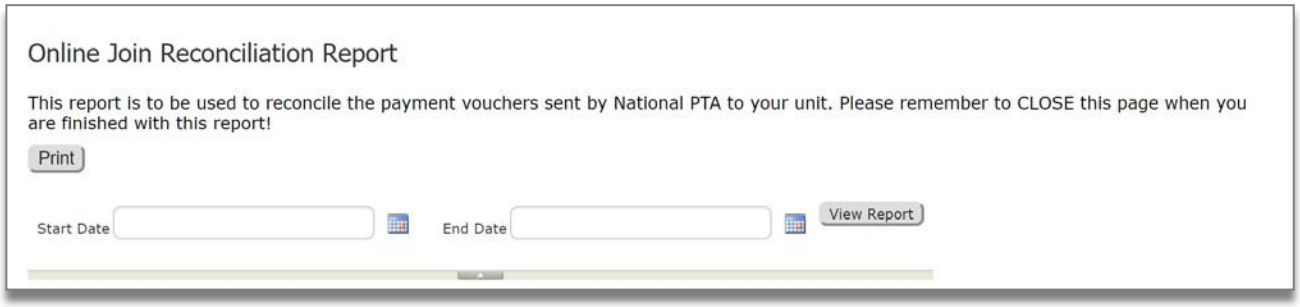
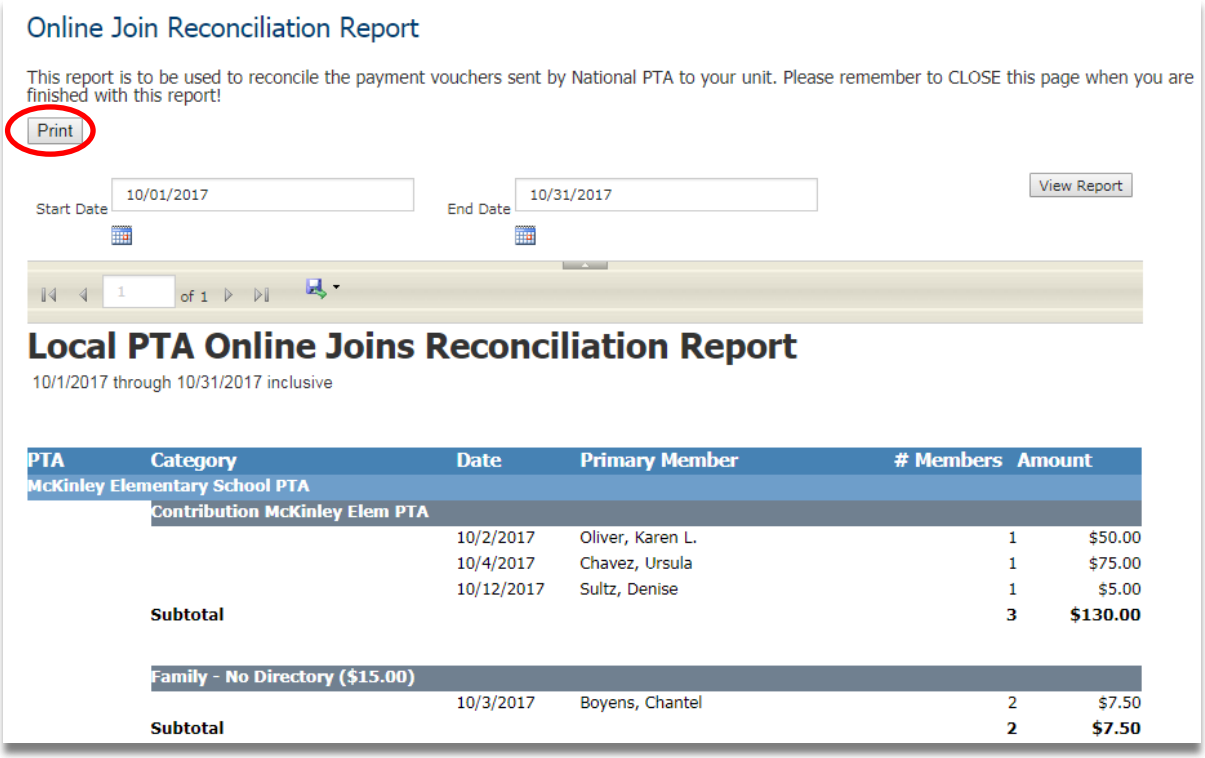
Online Join Reconciliation Report: Each Monday, National PTA will transfer any dues and contributions collected online for members in your PTA during the prior seven days. At the same time National PTA will send an email with notification of the transfer and the amount of the ACH transfer. This report – if run with the corresponding date ranges – will allow your Treasurer to reconcile any monies owed to your PTA.



Please select 'print' to see all pages of this report.



PTA	Category	Date	Primary Member	# Members	Amount
McKinley Elementary School PTA					
	Contribution McKinley Elem PTA				
		10/2/2017	Oliver, Karen L.	1	$50.00
		10/4/2017	Chavez, Ursula	1	$75.00
		10/12/2017	Sultz, Denise	1	$5.00
	Subtotal			**3**	**$130.00**
	Family - No Directory ($15.00)				
		10/3/2017	Boyens, Chantel	2	$7.50
	Subtotal			**2**	**$7.50**

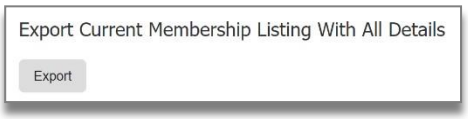
LOCAL LEADER MANUAL- Database Pilot

Revised October 26th, 2018

Note: ACH transfers will happen weekly on Mondays for the seven days ending midnight the Sunday before.

Donation Report: If your PTA has opted to accept online contributions/donations during your dues set up process (similar to a 'check writing campaign') a complete list of contributions can be run here.

To export a list of members, scroll to the bottom of the details page and select **Export**. The full membership list will download in an Excel spreadsheet that can be manipulated as necessary.



LOCAL LEADER MANUAL- Database Pilot

Revised October 26th, 2018

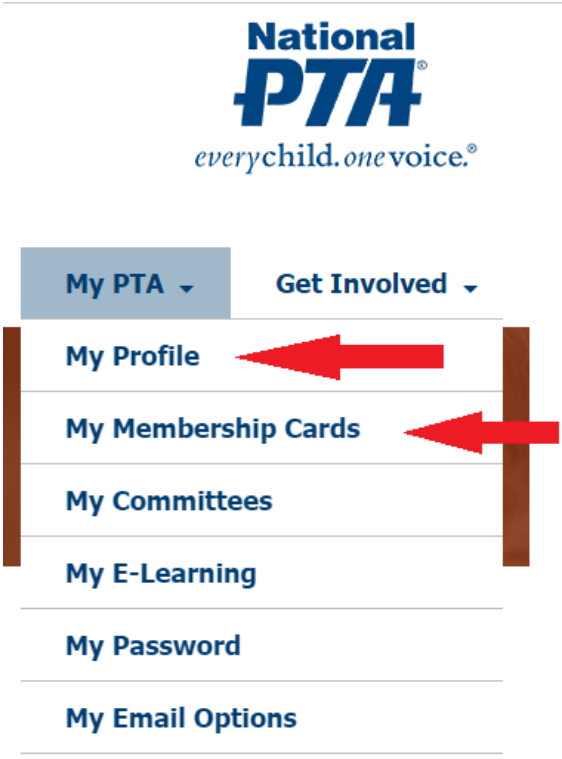
Helpful Guidelines for Your Members to Join Online

Join Page for PTA Members:

Encourage your members to join online by visiting https://member.pta.org/join. Members can use a major credit card, make a contribution that 100% goes to your PTA, and save family/teacher information if they choose. If the member doesn't have an account, they will need to create one at https://member.pta.org.

My Profile:

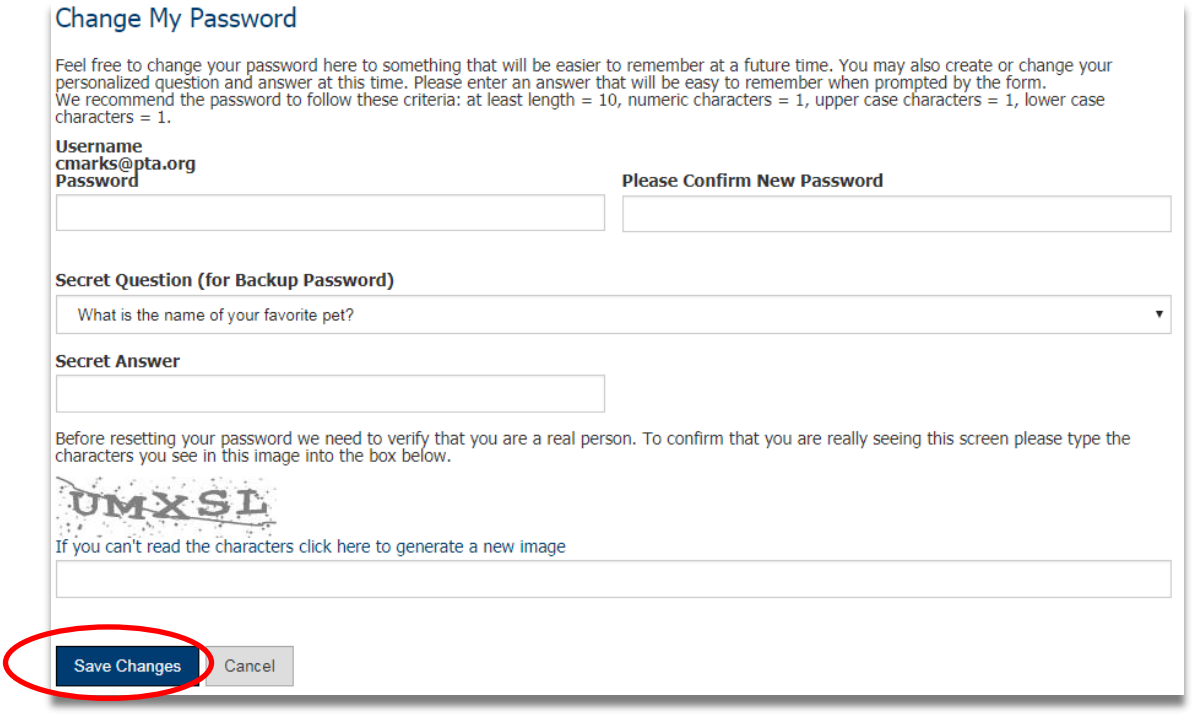
Once logged in, hover over the "My PTA" button. A drop-down menu will appear. Click on "My Profile" to edit your profile information and communication preferences. Also, members will be able to view, save, and print their membership cards. (To print your membership card, you must have "Print background images" turned on in your browser settings.



My Password

Under the same drop-down menu, “My PTA,” you can reset your password by clicking on the ‘My Password’ option. See image to the right.

A new page will appear, see image below. Enter the information in the fields listed and click “Save Changes” at the bottom to confirm your new password. Once you’ve logout, your new password can then be used.



PTA ACH Payment Authorization Form

This form is used for Automated Clearing House (ACH) payments. The information collected on this form will be secure and only used by National PTA to transmit payment data by electronic means to your financial institution. Failure to provide the correct information may delay or prevent the receipt of payment through the ACH Payment System. This form may also be used to update information to ensure your payments are accurately and timely processed.

Please complete the following information:

PTA Name	
PTA Chapter ID	
Street Address	
City, State Zip code	
Contact Name	
Contact Telephone No.	
Contact email address	
Federal ID No.	
Bank Name	
Bank ABA or Routing Number*	
Checking Account No.*	

_____ _____

Signature of Authorized Representative Date

_____ _____

Name and Title (please print) Telephone No.

Please include a voided check and mail, fax, or email to:

National PTA Attn: Chief Financial Officer 1250 N. Pitt St. Alexandria, VA 22314	Fax (703) 836-0942	Email jthomasell@pta.org

Questions?
Contact your State PTA staff