



Online Membership System Resource Guide for Units

INTRODUCTION

Online and mobile technology is infused into everything we do, whether it is getting the daily news, ordering a double cheese and pepperoni pizza, or paying for your morning coffee using your cell phone. There is not a facet of our daily lives that is not touched by this virtual and online world. It is becoming more and more apparent that to survive in this fast paced and increasingly mobile environment, there is a need to adapt and make ourselves as tech and mobile friendly as possible.

Over the past year, New York State PTA has been listening to members and units across the state tell us what we are doing right and, more importantly, where we need to improve. Overwhelmingly our members have told us that we need to increase our online presence, and make becoming a PTA member easier for the on-the-go mobile families of today. They have told us that online tools for both becoming a member and communicating the message from our units to their members top the list of ways to accomplish this.

This feedback from you, our members has guided the development of our new Online Membership System. This online system will help us to become more economical, ecological, technological, and timely. The traditional paper card has been replaced by a virtual eCard that will be emailed to members upon purchase of a membership in one of our units. Members will have the ability to print their eCard if desired, or they may simply have it present on their mobile device. Units will still have the ability to accept payments in person and will have the capability to register members online immediately at meetings and events. This gives our members the ability to choose how they wish to become members of their local PTA while streamlining enrollment for our units.

BECOMING A MEMBER

We understand that there is no “one size fits all” method that will work for all of our units. To help better integrate our new Online Membership System, we have built in three different ways for an individual to become a member.

Register in Person, Pay in Person

This is the method closest to the way Membership has been handled in NYS PTA for the last 100 years. An individual comes to a meeting or event, or is sent out a registration form and their information is captured on paper and payment is received directly from the member by the unit. The unit will then enter the member's information into the Unit Portal on the Online Membership System, where an eCard is generated and emailed to (or printed for) the member.

Register Online, Pay Online

This is the method our members have been asking for. An individual will go online to the link that the unit will provide and can enter their information directly into the Online Membership System. Once they select their membership type and enter their information they will be able to make a credit card payment for the amount of their membership, plus a small convenience fee. Once the payment has been processed, their information goes directly into the Unit Portal and their eCard will be generated and sent automatically to the member. This method requires no interaction from the unit.

Register Online, Pay in Person

This is a hybrid method offering the member the opportunity to enter their own information online, but still pay the unit directly with a check or cash. Individuals will be given the same link to sign up as above, but would select “Pay In Person” after entering all their information. This will send their information to the Unit Portal, but will not generate an eCard until the individual makes a payment in person and the unit marks them as Paid.

THE UNIT PORTAL

The screenshot shows the NYS PTA Portal interface. At the top is a navigation bar with links for "NYS PTA Portal", "Home", "About", and "Contact". Below this are three main sections: "Unit Goals" with a progress indicator, "Add Member" button, and "Online Register Link" button. A "Your Members" section shows a "Download to Excel" button and a message "No Members Found". Below that is a "Text to Blast" section with a text input field and a "Blast It" button. At the bottom is an "Email to Blast" section with an "Enter email subject" input field.

The Unit Portal is the gateway to the Online Membership System for our units. This is where units will enter new members and maintain their Unit Roster. This is also where units will be able to send out email and/or text blasts to their members, and check on their unit's goal and how close they are to meeting it.

Accessing the Unit Portal

Access to the Unit Portal is done through a unique link that will be provided to certain board members (President, Co-President, Treasurer, Secretary, and Membership Chair) at the email address provided to the NYS PTA via the Annual President/Officer Contact Information (or the Form A) Wizard, or in the case of the membership chair, the Membership Chair Update Wizard. This link to the Unit Portal will provide access to add and modify member information, and therefore will not be available to units who do not have an updated Form A on file with the NYS PTA.

Updating the Membership Chair

Since most units don't appoint their unit chair until August, the unit chair information needs to be updated outside of the Form A. This can be done at any time by selecting the "Update Membership Chair" button on the right side of the front page of the NYS PTA website.

Getting the Unit Portal Link

The screenshot shows a form titled "Getting the Unit Portal Link". It starts with a navigation bar and the text "Please enter your unit code:". Below this are two input fields for "99" and "999", followed by a "FindUnit" button. The text "Your Unit: MISC Unit" is displayed. Below that is the section "Select A Contact:" with a dropdown menu showing "President" selected, and a "SendLink" button. The dropdown menu is open, showing options: "President", "CoPresident", "Treasurer", and "Secretary".

You can have the link emailed to you at any time by going to the NYS PTA website and clicking on the "Online Membership System" button on the right side of the front page. This will take you to the link request page. You will need to enter your NYS PTA Unit Code then select your position and click on the "Send Link" button. The link will then be emailed to the address provided to the NYS PTA by the unit president when they filled out the Form A or the Membership Chair Update.

Once the link has been emailed to you, you can bookmark it, or save it in an email folder to use whenever you need to access the Unit Portal. If you ever forget or somehow lose this link, you can follow the steps above to have it re-sent. If the email that is on file with the NYS PTA is incorrect, you will need to have it corrected by your unit president.

The Unit Goals Box

The Unit Goals box contains a message letting you know how many members you currently have, what your goal for this year is, and how many members you need to meet this goal. Your goal for this year was determined by the NYS PTA Membership Team and is based on your membership numbers over the last five years.

The Add Member Box

The Add Member box, when clicked, will expand to allow you to enter a new member. This is only for members who have chosen to register using the *Register in Person, Pay in Person method*. Members who have registered using one of the other two methods will automatically be added to your unit roster and do not need to be entered this way. When entering members into the Add Member box, only the First Name, Last Name, Gender, and Membership Type are required. Email and Mobile are not, but if an email is not captured, the eCard will not be sent to the member, and any email blasts your unit sends will not be received. Similarly, if a mobile number is not captured, text blasts will not be received. As soon as you click on the “Add Member” button, it will generate the eCard, email it out (if an email was provided) and add the member to your roster.

The Online Register Link Box

The Online Register Link box, when clicked and expanded, provides the unit with the link for the unit’s Online Registration Portal to provide to individuals wishing to register online. This URL can be emailed to your mailing list, tweeted out to your unit’s Twitter feed, or put on your unit’s website or Facebook page. In addition it also provides a mobile, scannable QR code that can be copied onto any printed materials so individuals can use their mobile devices to get to the Online Registration Portal with a quick scan of the barcode.



The Your Members Area

Your Members 35											
Download to Excel											
	First Name	Last Name	Mobile Phone	Paid	Email	Date Entered	Link to	PaymentType	Gender	MemberType	MemberNumber
Edit	Judy	Van Haaren	5163436151	<input type="checkbox"/>	jvhpta@gmail.com	5/17/2015	eCard				
Edit	UnitTestFname	UnitTestLName	555-555-1212	<input type="checkbox"/>	test@hotmail.com	7/8/2015	eCard	Unit	M	Standard	2015999991
Edit	UnitTestFname	UnitTestLName	555-555-1212	<input type="checkbox"/>	test@hotmail.com	7/8/2015	eCard	Unit	M	Standard	2015999991
Edit		testuser	555-1212	<input checked="" type="checkbox"/>	testuseremail@hotmail.com	7/9/2015	eCard	Online-Pending	M	Standard	
Edit	Testnow	testnow	5185987804	<input type="checkbox"/>	bernie@manthaconsulting.com	5/25/2015	eCard				
Edit	Gene	Test	5859679866	<input type="checkbox"/>	test@hotmail.cmo	5/14/2015	eCard				
Edit	Dania	Test	5186697587	<input type="checkbox"/>	stampmom@stampupastorm.com	7/3/2015	eCard	Unit	F	Standard	

The center of the portal is where your unit’s member roster is contained. Each row of the grid contains the information for a single member. Members are shown on this grid regardless of how they were registered. Here you will have access to modify phone, email, gender, member type, and most importantly, paid status.

When a member self-registers online but chooses to pay in person, their information is added to the roster, but the “Paid” box will remain unchecked, no eCard is generated, and no Member Number is assigned. Once payment has been made in person, the unit can edit that member record and check the box marked paid at which point the Member Number is assigned and the eCard is generated and is ready to be sent.

If the member’s name needs to be modified, or if the member was added in error and needs to be deleted, please contact the Membership Manager at the NYS PTA office at dwelch@nyspta.org and she will make those adjustments for you.

There is also a “Download to Excel” button which will allow you to download the information contained in the table in an Excel spreadsheet, useful for printing or maintaining an off-line copy of your membership list.

The Text and Email to Blast Boxes

Text to Blast

Enter text blast

This message will be sent to all members with a mobile phone registered.

Blast It

Email to Blast

Enter email subject

Enter email body

This message will be sent to all members with an email address.

Blast It

At the very bottom of the screen are the Text to Blast and Email to Blast boxes. Using these two tools, you can either send out a text message or email to every member in your roster who has a mobile phone or email address registered.

Unit Info

Unit Number 99 - 999

Unit Name MISC Unit

My Info

First Name

Enter first name

Last Name

Enter last name

Email address

Enter email

Mobile

Enter mobile

Gender

M

Membership Type

Standard

Pay Online Pay In Person

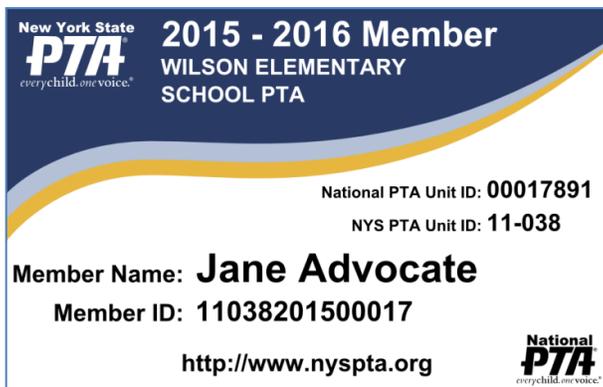
THE ONLINE REGISTRATION PORTAL

Perhaps the largest change to the membership process this year is the ability for an individual to self-register themselves as a member of a unit and, if they wish, to pay their membership dues online. This is done through the Online Registration Portal. There are two ways to get to the portal. The first way is to go directly to the Online Registration Portal and enter the NYS PTA Unit Code of the unit you want to become a member of. The other, and best way, is to get the direct link from the unit you want to join which will pre-fill the NYS PTA Unit Code for that unit so there will be no mistaking that you are becoming a member of the correct unit.

Once the correct unit has been selected, you can enter your information into the portal. All information is required except for Mobile number. After the information has been entered, you can select "Pay Online" which will take you to the credit card processing page, or "Pay in Person" which will take you to the confirmation page. Either way, once the transaction is completed, your information is automatically added to the unit's roster.

THE ELECTRONIC CARD (eCard)

The Electronic Card (eCard) will be sent electronically to anyone who provides their email upon registration. This card contains



the membership year at the top along with the unit it provides membership in. Both the National and State PTA Unit IDs as well as the unique Member ID is provided, as is the name of the member to which it belongs. The eCard can be displayed as identification on a member's mobile device, or it can be printed by the member. Both individual units and NYS PTA will accept either electronic or paper versions as proof of membership in a unit. This will provide our members instant access to proof of membership without having to keep track of a paper card. It also provides easier access to a replacement if the card is lost, as it can be re-sent to a member's email and then reprinted directly from the Unit Portal without having to request a paper copy from the NYS PTA office.

REIMBURSEMENTS FOR ONLINE MEMBERSHIPS

NYS PTA will be collecting membership dues for all memberships paid for online. We will be sending reimbursement checks to units with a balance greater than \$50 on the following schedule:

- First week of October
- First week of November
- First week of March
- First week of June (all remaining balances)

We will send out checks in between these scheduled dates if a unit has an exceptionally large amount owed.