FREQUENTLY ASKED QUESTIONS (FAQ)

YOU MUST USE THE GOOGLE CHROME BROWSER WITH MEMBERHUB

LOGIN INFORMATION

Q. Where do I go to login?

 A. Visit: https://app.memberhub.com/login Enter your email address and choose the 2nd option, "I need to create a password" then click "Next" and follow the instructions (if you haven't already logged in with a password).

Q. What if it logs me into wrong unit?

 A. The system will find your email address in a unit where you were listed as a member or officer in the past. Just click on your name in the upper right hand corner and scroll down to switch to the correct unit.

DIRECTORY LISTING

To alleviate privacy concerns, we have chosen to have the online directory for all MemberHub sites switched to OFF. If a unit wishes to use the directory, it's important they understand what information is visible to all PEOPLE on the site (not just PTA members). Every person who has access to the site, should be aware that they have the option to manage their own profile visibility. This link can be located by clicking on their name in the upper right corner, then select "Your Profile," then "Adjust Profile Visibility." **Please note:** site admins will still see the directory but all others will not. Also, if people hide their own profile information, they will still be able to see it but others will not.

Q. How do we turn on the directory after making sure everyone on our site is aware of what will be shared?

 A. Go to Admin Console> Settings> Features> and check the Directory box. This will turn on the Directory for all people listed on your People Tab.

Q. How do I restrict other people on the site from seeing my email address if the Directory is ON?

 A. Login to MemberHub and click on your name in the upper right, click "Your Profile," then click on the "Adjust Profile Visibility" link.

ADD OFFICERS/FORM A

Q. Do I have to enter the officers if they are continuing in their position for the next year?

 A. Yes, all officers must be entered each year as they are stored with the YEAR as part of the record.

Q. Who needs to enter new Officers information into MemberHub?

 A. Any outgoing officer in the unit or council can enter them online or if a paper form is filled out, the RD can assist. Form A available here

Q. How do new officers get admin access to the site?

 A. As long as the check box that says "Give access to Admin Console and Store Admin" remains checked during the ADD OFFICER process all new officers and the Membership Chair will be granted access.

Q. How do we remove access for outgoing officers?

 A. Go to the SETTINGS tab and click on "Administrators" in the right hand navigation and then use the X to delete access for outgoing officers. To delete access to the Store Admin, click into the Store Admin Tab, then Access Store Admin and then choose "User Permissions" to delete or add store admins..

Q. Will membership chairs be added in MemberHub with admin access so they can add members?

 A. Yes, they are added with the ADD OFFICER button on the Officers/Committee Chair page. If you have more than one Membership chair, you will need to give them access by finding them in the People tab, click on their name and then use the People actions drop down to select "Make Site Admin" so they too can enter members.

Q. Why do I get an error when trying to add officers stating the email address is already claimed?

A. Please make sure you are not using Internet Explorer browser. When adding officers, start typing the first 3 or 4 characters of the person's name and PAUSE to allow MemberHub to find them if the name exists. If found, select from the list and continue adding the rest of the information. If you type it all in yourself or your browser autofill adds the information, you will get an error message saying Email address is already claimed.

Q. How do I turn off the autofill in Google Chrome so it doesn't interfere when trying to add officers?

A. Please reference this help article in Chrome - <https://support.google.com/chrome/answer/2392709>

Q. In trying to Add Officers, I cannot click on the person's name once the system finds them?

A. Are you using the (IE) Internet Explorer browser? MemberHub does not work properly with the IE browser. Please use Google Chrome which works best with MemberHub.

ENTERING MEMBERS

Q. How will I enter a member who pays the unit with cash/check who uses the same email address as another family member?

A. The MemberHub system only allows one person per email. However, you can enter additional members leaving the email address blank and adding a valid mobile phone number or any 10 digits (ex. 111-111-1111) into the mobile field to bypass this requirement. The unit officer/membership chair can send the eCard links to the family email address provided or they can print and mail the membership cards if no email was provided.

Will I still receive a link to my eCard via email?

Yes, your receipt email will include a link to download your Membership eCard. If purchased with a credit card online, all of the family member links will be available in this one receipt if purchased together in one transaction. Please be aware that the person receiving the receipt email will need to forward the email or the link to the eCard to those other family members or you can print out the card for them.

Q. What if a member loses the link to their card, how can they get it again?

A. The unit officer can send the link to their card (the cards are linked on the MEMBERS page). The member can also login to MemberHub with their email address at <https://app.memberhub.com/login> and click to create a password. Once logged in, they will see a link to the card on their dashboard right hand side. This assumes the unit allows people to login to their site.

Q. If we use another Online Membership System already with an outside company, how will we get our member information into MemberHub?

A. The unit will need to supply a list of members to the [state office](#) (if more than 25 – less than 25 can be entered manually by the unit) using the template provided (new for 2018) and office staff will import them into MemberHub. To save this extra step, units should consider changing to using their ONLINE STORE in MemberHub for all of their online collection needs.

Q. Can the units add custom fields to the online store for membership items?

A. Yes, however this feature is only available in the Online Store. PLEASE NOTE - the additional information collected does NOT print on members export reports. The information is only available in the Store Orders Export Report.

ONLINE STORE

Q. Where do I find the online membership link to promote for my unit?

A. If your unit has processed the Merchant Processing Agreement (under the Store Admin tab) your store will be live for membership. Admins can find the link to their store by clicking on SHOP (at the top of any page). Copy and paste that custom URL to promote online membership. Be sure to test it first before promoting to others!

PLEASE NOTE: If you enable and use the Site Joins link, this is <u>NOT</u> the link to join your PTA. This only allows the person to join your site as a person.

Q. Can I change the logo that defaults for the Membership items in the store?

A. Yes, go to Store Admin tab, click Access Store Admin, click Membership (on left), click EDIT on the item you want to add an image, scroll down to ADD MORE IMAGES. Upload your image and scroll down to UPDATE MEMBERSHIP.

Q. Why is my store not showing any items?

A. Please check the HIDDEN column in the Membership section. This should be OFF for every item you want to show up in your store. Sometimes, this is confusing and the items are set to ON in error.

Q. Will we be able to bundle our membership types to create a membership bundle?

A. Yes, you have the option in your online store only to create a custom bundle. Please note that all membership fees must reflect what is in your current approved bylaws.

Q. Can a membership bundle include a donation as well?

A. Yes, you can create different levels of Membership (ex. Diamond, Gold) that include a donation. Again, please price these options to include the membership dues set for the membership types in your bylaws and then add the donation amount.

Q. Are there processing fees for purchasing online with a credit card?

A. Yes, the credit card processors charge a fee for their services. The fees are 3.5% +$0.50 per transaction for using credit cards. (For example $10 membership would be $10.85 total cost). The unit has the option to pass the fee to the member (default) or to budget for the expense and absorb the fee at the unit level (requires a change in the Settings menu on the Store Admin Tab.) An option to purchase membership with an e-check is not available at this time, only credits cards at this time.

Q. If the unit changes their bylaws and update their Membership Fees, how do they change them in MemberHub?

A. They will edit those amounts in the Membership section of the Store Admin once Bylaws are approved by the State. These new amounts will also be reflected in the member entry and export report for new members entered manually as well.

MEMBERSHIP ROSTERS

Q. Membership lists – will we be able to export our membership roster to excel?

A. The new Members Export report reflects all fields entered for Members. You can also search for a member name using the search box or sort on any column by clicking the column heading. Custom fields added for online members will only be available in the Orders Export report.

Q. In the old membership portal, some members used the same email or no email, how were they imported last year?

A. Only one person per unique email could be migrated to MemberHub with the import process. However, a complete roster for last year's 2017 members is available from the [state office](#).

STATE DUES PAYMENTS ($4 per member)

Q. How do we pay state dues this year and when are they due?

A. Units are responsible for paying the state/national portion of the membership dues to the state via ACH transfer/e-check before the end of each month, regardless if the member joined online or in person with a cash or check. **PLEASE NOTE: Change from last year – DUES ARE <u>NOT</u> AUTOMATICALLY SENT TO THE STATE FOR ONLINE MEMBERS!**

Q. Who at the unit is allowed to initiate the ACH/e-check for state dues?

A. The system allows only the President or Treasurer access to initiate the ACH Transfer/e-check for dues. To process payments, go to the State Payments link on the right hand side in the PTA tab in MemberHub. This page will tell them how many members the unit owes the state due for at any point in time. **BEFORE YOUR FIRST PAYMENT, PLEASE READ THIS HELP ARTICLE** *which is also linked on our MemberHub page on our NYSPTA.org site.*
https://support.memberhub.com/hc/en-us/articles/360011869713-Comprehensive-State-Payments-Guide

MERCHANT PROCESSING AGREEMENT and ACH/E-CHECK PAYMENTS

Q. Do units need to complete the Merchant Processing agreement to pay NYS PTA state/national dues and to be able to collect payments online for membership and fundraising?

A. Yes, the Merchant Processing agreement will be required going forward to make the ACH/e-check payments and to use their Online Store.

Q. What information is required of the person filling out the Merchant Processing Agreement?

A. New Federal requirements (KYC laws)requires Name, Address, Phone, Email, Birthdate and last 4 of SSN to be able to verify the individual setting up the account is an authorized user on the PTA bank account. You will set up an account with WePay through Chase Bank with your own password (separate from MemberHub login). All information is stored and used by WePay only (not MemberHub or NYS PTA) with the highest bank level security. [Please read more information from WePay.](#)

Q. Can we still pay NYS PTA state/national dues with a check?

A. The ACH/e-check state dues payment feature is an integral part of our new membership system, simplifying what the unit needs to do to process dues payment. The online transactions are encrypted and secure. If your unit has questions regarding setting up this account, please contact your [Region Director](#). If needed, the state VP of Membership is available to answer any additional questions.

Q. Is there a fee for units to process the ACH transfer to the state on a monthly basis?

A. Yes, the fee is $1 per transaction (usually monthly during heavy membership months). This nominal fee will replace the cost of postage, envelopes and checks.