FREQUENTLY ASKED QUESTIONS (FAQ)

PLEASE USE THE GOOGLE CHROME BROWSER WITH MEMBERHUB

LOGIN INFORMATION

Q. Where do I go to login to MemberHub?

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 every unit where you were listed as a member or officer in the past. Just click on your name in the upper right 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 default to OFF. If a unit wishes to use the directory, it's important to understand what information is visible to all PEOPLE on the site (not just PTA members.) **Please note:** site admins will still see the directory but all others will not as long as the Directory remains off in SETTINGS. Also, if people hide their own profile information, they will personally still be able to see it but others will not.

Q. How do we turn the Directory ON 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. MH has a paid Upgrade available now to list only PTA members in the directory!

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 – This must be done every year!

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 incoming or continuing officers or if a paper form is filled out, the RD can assist. Paper 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 and they are sent an email.

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 use the X to delete access for outgoing officers. To delete access to the Store Admin, click into the Store Admin Button (top right) and 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 their name and 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 then PAUSE to see the search results from MemberHub. Select the person from the list and continue to fill in the information needed. If you type all the information yourself or your browser auto-fill adds the information, you will get an error message saying Email address is already claimed.

Q. How do I turn off the auto-fill so I can see the search results from MemberHub?

A. Please try pressing the ESC key and the browser auto-fill should disappear

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 we enter a member who pays the unit with cash/check and 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 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 family member eCard 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 eCard link 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 available 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 member information on the template provided by the state office and they will process these imports for you as time permits. To save this extra step, units should consider using their ONLINE STORE in MemberHub for all of their online collection needs.

Q. Can PTAs add additional information fields to membership items in the online store?

A. Yes, however this feature is only available in the Online Store for now. PLEASE NOTE - the additional information collected does NOT print on the 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 NOT 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, click on the Store Admin tab, click Membership (on left), click on 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 look at the details of your items (click on Edit) and see if the HIDE in STORE? Box is filled in Gray – this means the item will be hidden from the store. Also check the "Available on" and "Expire on" date.

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 processor charges a fee for their service and MemberHub includes a platform fee. The combined fee is 3.5% +$0.50 per transaction. (For example a $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 Dashboard.) The option to purchase membership with an e-check is not available 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 LIST

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

A. The 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. As a reminder, the Additional Fields added in the online store are only available in the Orders Export report.

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 E-check before the end of each month, regardless if the member joined online or in person with a cash or check. PLEASE NOTE: DUES ARE NOT AUTOMATICALLY SENT TO THE STATE FOR ONLINE MEMBERS!

Q. What Officers are allowed to initiate the E-check for state dues?

*A. The system allows only the President or Treasurer access to initiate the payment of state dues. To process go to the State Payments link on the right side on the PTA tab in MemberHub. This page will keep track of how many members the unit owes the state dues 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 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.   No, however, we encourage all units to complete the Merchant Processing Agreement to be able to offer Online Membership to your members.

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 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 (once a month if members were entered). This nominal fee will replace the cost of postage, envelopes and checks.

Q.   How do I transfer the owner on our WePay account when the person who set it up is no longer with the PTA?

A.   Please follow the new process explained in the help article here: https://support.memberhub.com/hc/en-us/articles/360007678394-How-to-transfer-WePay-accounts