



RESOURCES

[NYS PTA MemberHub webpage](#)

[NYS PTA FAQ document](#)

[State Office Help](#)

[MemberHub Support Desk](#)

[MemberHub one-on-one training call](#)

OFFICERS & SITE ADMINS	
<input type="checkbox"/>	<p>Add Officers for the current school year - Good Standing requirement <i>Compliance > Officers > Add Officers button</i></p>
<input type="checkbox"/>	<p>Check your site admins - remove prior year officers <i>Contacts > Filter > Role > Organization Admin > Apply > To Remove, Click on <u>ADMIN</u> and REMOVE, but keep as Contact</i></p>
STORE	
<input type="checkbox"/>	<p>Make sure your Stripe Account is set up for online transactions <i>Dashboard after logging in> Checklist on the right side or Online Store > Store Settings > See if any messages say Information is needed</i></p>
<input type="checkbox"/>	<p>Online Store link will be yoursdomain.memberhub.com/store – be sure to make sure the link is correct before you publish to Facebook, your website or in a flyer <i>Online Store > View Store > see url in the address bar top left</i></p>
<input type="checkbox"/>	<p>Create a QR scan code using your Online store link to make it easier for people to join with their mobile devices. Right-click while on the store page using Google to see the option to create a QR code or use a free QR code website like https://www.qrcode-monkey.com/ Download the code you create and print it out on a flyer or place on your website or in an email.</p>
<input type="checkbox"/>	<p>Check Dues rate for all Membership Items to make sure they match current bylaws <i>Online Store > Products > Memberships (top menu) > three little dots to edit – then SAVE</i></p>
<input type="checkbox"/>	<p>Check Memberships or other item visibility in your Store <i>Online Store > Products > Memberships (top menu) > Checkmark = Visible, X = Hidden</i></p>
<input type="checkbox"/>	<p>ADD text to Open Donation (if using) “does not include membership” to avoid confusion <i>Online Store > Products > edit item using little dots to alter the description and SAVE</i></p>

<input type="checkbox"/>	<p>Sort the order of how items appear in the Store <i>Online Store > Products > Memberships (top menu) > SORT > drag and drop items to change order > click DONE</i></p>
<p>MESSAGES TO ALL CONTACTS ON YOUR SITE</p>	
<input type="checkbox"/>	<p>Send a message to all asking to rejoin if they haven't already – consider this once a month throughout the year <i>Communications > Messages > New Message > Send to Everyone or use Filters</i></p>
<p>UNIT INFORMATION</p>	
<input type="checkbox"/>	<p>Enter Number of School Employees - Required to qualify for Super Teacher /Staff Award Compliance <i>Compliance > Unit Data > Scroll down to field and enter Number > SAVE</i></p>
<input type="checkbox"/>	<p>Find Membership Goal set by NYS PTA - used in Early Bird, Savvy Membership & Trailblazer Awards <i>Compliance > Unit Data > Scroll down to see Membership Goal</i></p>
<input type="checkbox"/>	<p>Check Bylaws Expiration Date and Last Year Insurance Paid - Good Standing Requirements <i>Compliance > Unit Data > Scroll down to see status of these fields</i></p>
<input type="checkbox"/>	<p>Confirm IRS Exemption status is not Revoked and your 990 has been filed for 2020 - Good Standing Requirement <i>Compliance > Unit Data > Scroll down to see IRS Status field Check with your President or Treasurer to make sure 990 has been filed</i></p>
<p>HUBS</p>	
<input type="checkbox"/>	<p>Check your Hub settings for accuracy <i>Communication > Hubs > three little dots > Hub Settings</i></p>