

MemberHub Guide for PTAs...Learn the Basics

FOR BEST RESULTS USE CHROME AS YOUR BROWSER

To have access to the PTA's MemberHub account, an officer or administrator will need to add you as either an officer or administrator. You may also contact office@ncpta.org to request access.

Logging in to MemberHub (Create log in/profile)

- Visit memberhub.com/login
- Enter your email address.
- Choose the 2nd option, "I need to create a password" and enter your first and last name.
- Check your inbox and click the link in the confirmation email. Choose a password.
- NOTE: After logging in you should see an orange Admin Console button in the upper right-hand corner, this is your site admin access.
- If this is the first time your PTA's MemberHub site has been accessed, you will be prompted to update your school's MemberHub site address, for example: ABCElementary.MemberHub.com

NOTE: After logging in, if you do not see the Admin Console button at the top right of your screen, please contact your PTA President or the NCPTA office to request site admin access.



Forgot Your Password

- On the login page click the "I forgot my password" link
- Enter in your primary email for MemberHub (which is also your username to login)
- click the blue "send confirmation" button. This is to verify that you own this address
- You will be sent an email with a link prompting you to change your password
- Click the link and follow the steps
- Once that is done, you can log in as normal under your new password

Admin console:

If you are a Site Administrator for your PTA MemberHub site you will see an orange "Admin Console" button to the left of your name in the top right-hand corner of the screen. Click the tab in the Admin Console labeled PTA. Clicking on that tab gives you access to various pages to perform PTA-specific duties which keep your unit in good standing.

How to grant admin rights:

There are 2 ways for someone to receive “admin” rights:

1. Enter person as an officer. All officers automatically receive admin rights. See instructions on entering officers.
2. You may grant “admin” rights to someone who is not an officer by adding them as an “admin”:
 - Click the Admin Console
 - Click Settings
 - Click Administrators
 - There you will see a list of all existing Organization Administrators.
 - To remove an administrator, simply click on the x beside that person's name
 - To add a new Organization Administrator, click on the Add Administrator button at the bottom of the list. Enter the person's email address
 - Click Send Invitation

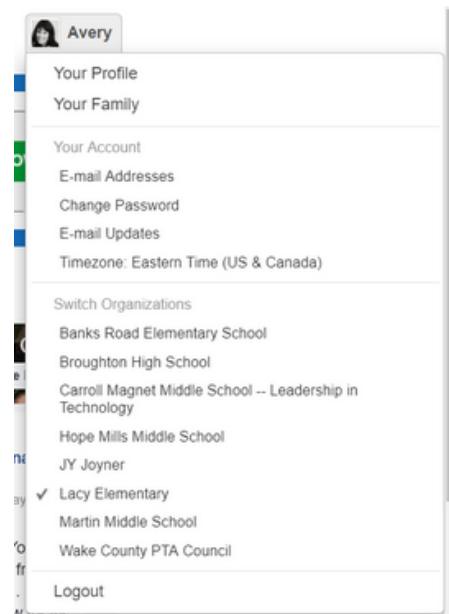
How to switch between organizations/

What to do if you are on the wrong MemberHub site

If you have logged into MemberHub and you are logged in to the wrong PTA MemberHub site,

Ex: logged in under the ABC Elementary PTA but need to access the DEF Elementary PTA site, follow these steps:

- Click on your name in the upper right-hand corner
- You will see *Your Profile, Your Family, Your Account, Switch Organization and Logout.*
- Under Switch Organizations, you should see a list of PTAs in which you have a profile.
- You can easily switch back and forth between organizations by clicking on the PTA name.



Updating Officers and Entering Members:

After you've clicked the PTA tab, you will land on the Officers page. If any were previously entered, you will see the current year's officers as well as officers from previous years.

Note: After June 30, past year officer information cannot be updated or removed. Prior year officer information should remain in MemberHub for the North Carolina PTA data record; therefore, you are not able to delete past officer information.

Update officers

- Log in to MemberHub
- Click orange Admin Console button
- Click PTA
- Click Add Officer

- Enter Officers name, email and office hit enter
- *If an officer is returning for their second term, they will need to be reentered as an officer for the new membership year.

Entering Members

Note: If your PTA completes the MPA and accepts online membership payments/allow members to join online through your MemberHub store, the members contact information is automatically entered and there is no action required of the PTA. (See info on MPA and School Store)

Enter Members Manually

- Log in to MemberHub
- Click orange Admin Console button
- Click PTA
- Click Members
- Click the blue box “Enter Member”
- Fill in the info (first and last name, email and/or phone, and address required)
- Click add member

Uploading Members from a Spreadsheet

This feature is “under development” by MemberHub...please contact the State PTA Office at office@ncpta.org to request that the State PTA Office assist in uploading members if your PTA has 150 members or more. Please note membership dues must be submitted and received by the State Office prior to upload assistance.

How to Edit/Void a Member

Administrators can void members that get created when manually entering members. This allows you to edit PTA membership by first voiding a transaction and then re-entering it. This is the process administrators can use to edit someone's membership that was entered in incorrectly.

- Log into MemberHub
- Click orange Admin Console button
- Click PTA
- Click Members
- In search box, search and find member that you need to edit
- Once found, click the “X” icon to the right of the person’s name
- You will see a popup message verifying that you want to void the person’s membership
- Click the **Yes** button
 - The PTA membership will be marked voided. Voided memberships can be seen by clicking on “Status” dropdown box and selecting “Voided”. All voided memberships will be listed here.

Also, the yellow star and the membership card will be removed from that person's profile.

Re-enter that person with the correct information

- Click PTA
- Click Members
- Fill in the info (first and last name, email and/or phone, and address required)
- Click add member

How to Print A Membership Roster

Once your PTA has manually entered members and/or has PTA members join online through your MemberHub PTA Store, then all active members can be found under the “Members” tab within the PTA Admin Console. To access an excel file of your PTA Members, please follow these steps:

- Click PTA
- Click Members
- Click “Export”-found on the right-hand side next to the “Search” box
- This will create an excel file of your PTA members

Financial Confirmations:

Financial Review Confirmation:

This Confirmation is not the actual financial review/audit. After the financial review has been completed by the PTA Audit Committee and the results have been presented to your PTA’s Board of Directors, here are the steps to submit the confirmation:

- Log in to MemberHub
- Click orange Admin Console button
- Click PTA
- Click Financial Review Confirmations
- Click Add Financial Review Confirmation
- Complete all the requested information in the popup box
- Click the box to confirm that the “annual financial review has been completed on the date provided and results reported to my PTA's Board of Directors. A copy of this review is being kept with our PTA’s permanent records.”
- Click Submit

Form 990 Confirmation

FIRST-FILE WITH THE IRS. This confirmation IS NOT the actual FORM 990 filing. Once your PTA has filed the form 990 with the IRS, here are the steps to submit the confirmation:

- Log in to MemberHub
- Click orange Admin Console button
- Click PTA or Click PTSA

- Click Form 990 Confirmations (on right hand side)
- Click Add Form 990 Confirmation
- Complete all the requested information in the pop-up box; have the following info on hand
 - date filed
 - form filed (epostcard/EZ/long form/IRS extension)
 - Gross Receipts (includes all monies deposited into your PTA bank account during the fiscal year with the exception of the State and National portion of dues).
- Click the box to confirm that the PTA “filed a 990 tax return with the IRS on the date provided.”
- Click Submit

***If your PTA filed an extension, you must still submit a confirmation that an extension was filed. Once the actual filing is submitted, then you will go back and resubmit the confirmation.**

Online Payments:

Merchants Processing Agreement (MPA)

Please ensure your President or Treasurer has submitted your Merchant Processing Agreement to enable online payments of dues and other items in your MemberHub site. You will need your PTA banking information for this step. This will also enable your PTA to accept payments for other items such as tickets, spirit wear, field trips, etc.

Please note: A MPA IS NOT REQUIRED to pay State and National dues electronically with an eCheck through MemberHub. You only need your PTA banking information.

How to complete your merchant processing agreement to take payments online

- From the Admin Console click on the Money Tab.
- Then click on Merchant Processing Agreement.
- Click on Register for WePay Account.
- Complete the sign up form in the pop up window.
- Confirm your email - it's sent to the email address provided.
- After you confirm your email, click Next.
- Enter the Details of your nonprofit.
- Enter your information as authorized agent. You don't have to be the "Controller."
- Enter your banking information and disbursement frequencies.
- Click Submit

For a step by step guide, please visit <https://support.memberhub.com/hc/en-us/articles/360005261593-How-to-complete-your-application-to-take-payments-online>.

MemberHub Fees:

3.5% plus \$.50 per electronic payment

Who pays the credit card/convenience fees?

This is up to your PTA Board of Directors to decide, either the charges are paid by the payer and not out of the proceeds of the PTA, or the PTA incurs the cost of the convenience fees for its members. The new enhancement will be if units decide to absorb or pass on the fees. It is up to your PTA.

How to set/change processing fees:

- Log in to MemberHub
- Click the Orange Admin Console
- Click Store
- Click Settings
- Select either "Pass on processing fees to your payers" or "Cover processing fees for your payers"
- Click Save Settings

eCheck (Paying Dues Electronically to State Office)

\$1.00 per eCheck no matter the amount.

How to transfer your WePay account when you get a new treasurer/fiscal officer

1. **First, change the email address:**

- Log in at <https://www.wepay.com/login>
- Select the Security tab on the left.
- Select the Edit tab next to the email address.
- Enter the new email address and click Update.
- The person taking over the account will not see the previous person's personal information.

2. **Next, get the account transferred.**

- The new email account owner will verify his or her email address.
- Then, fill out a request at <https://support.wepay.com/hc/en-us/requests/new> to get the account transferred.

Here's what to include:

Subject	Merchant Account Issue Review
Info to include	<ul style="list-style-type: none">• WePay account_id• plus details below
Account Transfer Request	<ul style="list-style-type: none">• Topic: Account Transfer Request• Current merchant full name• Current merchant email• New merchant full name• New merchant email• Reason for account transfer: <i>"Off-boarding previous treasurer and onboarding new treasurer."</i>

How to Pay State and National Dues:

Please note: If your PTA is accepting online membership payments THROUGH your PTA Store IN MemberHub, please be aware that the State and National portion of dues are **not automatically forwarded to the State PTA**. Your PTA will need to pay dues to the State Office for all members that have joined the PTA regardless of “how” the member joined.

How to Pay Dues Electronically:

State and National membership dues can be paid to the State PTA Office electronically through MemberHub.

Points to remember:

*To send an electronic payment:

- Your PTA must then enter members. (See instructions on entering members for help.)
- **Only the following officers can be eCheck signers in MemberHub: President, Treasurer, Secretary, Vice President 1.**
- **Anyone who authorizes an e-Check MUST be an authorized signer on the PTA bank account.** In accordance with the *Uniform PTA Bylaws, Section 11.5 – Checks*. *All bills of this local PTA shall be paid by check. Checks must be signed by two of no more than four officers authorized by the board of directors to sign checks, except that none of these officers so authorized shall be related, and at least one of these authorized officers shall be the Treasurer. The signing of blank checks is prohibited.*
- The same officer cannot be the 1st and 2nd signer-requires 2 different officers
- Sending an eCheck is a 2-part process

Follow these steps to electronically pay your State Dues:

Part 1 aka Signer 1 (the initiator):

After members are entered in MemberHub

(members can be entered manually, uploaded from a spreadsheet or added electronically when a member pays and joins with a credit card through the MemberHub School Store via WePay)

- **Click the Admin Console**
- **Click on the PTA Tab**
- **Click State Payments from the menu on the left**

This will take you to a screen that will show how much your PTA owes the State PTA Office for State and National Dues.

Please note, this number is based on members entered in MemberHub. If you would like to know

The screenshot shows the 'NCPTA Member-At-Large Unit Admin Console' interface. At the top, there is a navigation bar with 'PTA' selected. Below it, the 'State Payments' section is active, displaying a message: 'You owe the NCPTA \$20.00 for 5 members for school year 2018-2019.' A red circle highlights the 'Show/Hide Members' link. Below this, a note states: 'Note: Your state/unit has second signer requirement so your eCheck payment will be processed using second signer.' There are two buttons: 'Send Payment via eCheck' and 'Send a check'. A table below lists 5 members to be flagged as 'Sent to State':

Name	Member Type	Joined
Russell Wilson	Faculty	07/17/18
Matt Ryan	Parent/Guardian	07/17/18
Cam Newton	Student	07/17/18
Ben Roethlisberger	Parent/Guardian	07/17/18
Aaron Rodgers	Student	07/17/18

At the bottom of the table, it says 'Showing 1 to 5 of 5 entries' with 'Previous' and 'Next' buttons.

which members you are paying for, click “Show/Hide Members” in the yellow box.
PRINT THIS LIST FOR YOUR RECORDS.

- **Click on Send payments via ECheck**

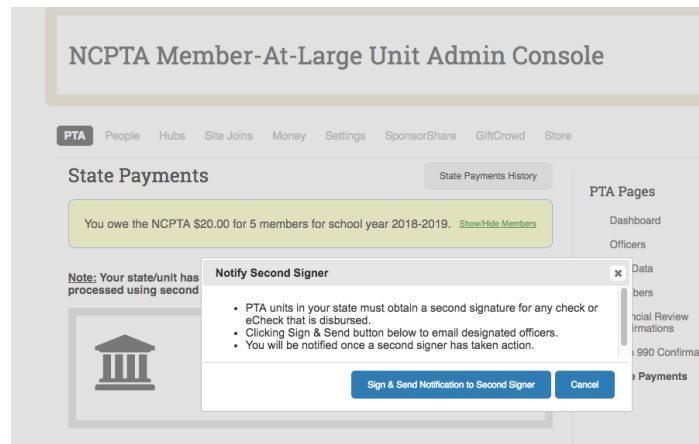
(Just as with all checks the Uniform Bylaws requires two authorized signatures to process checks, 2 signers are **REQUIRED** to send an eCheck through MemberHub for payment to the State PTA Office.

This option costs 1.00 and sends an ECheck directly to the state for your PTA.)

- **Click “Sign & Send Notification to Second Signer”- (this is considered the First Signer).**

An email is sent to the other 3 eCheck signers letting them know they need to login and approve the eCheck.

Once sent, you will then see the message that your eCheck payment is submitted for approval by a Second Signer.



Part 2 aka Signer 2 (the approver)

The other 3 eCheck signers will get an email notification that an eCheck payment has been initiated. The email contains the following info:

- Who is the First Signer
- A Second Signer is needed
- Number members being paid to the State PTA
- Amount being paid
- Date and time first signer sent the check

Once you have reviewed and verified the information is correct, **click add your signature.** This will take you to your PTA’s MemberHub site and prompt you to log in.

Once logged into MemberHub, the screen will again confirm the following

- A Second Signer is Needed
- The amount and number of members in which the payment is for
- Who is the first signer
- the time and date the eCheck was initiated

On this screen there is the option to show members that are being paid for; NCPTA recommends you print this screen for your records.

Please note, for the first eCheck the second signer will have to verify the banking information. For a step by step guide on verifying the account in second signer, please visit <https://support.memberhub.com/hc/en-us/articles/360006895253-How-to-pay-your-state-dues-in-MemberHub>.

- Click “Add Your Signature & Complete Payment”
- A popup box will appear verifying the \$1 transfer fee. There is a \$1 transfer fee PER eCheck.
- Check the box to approve the charge
- Click “Send Payments to NCPTA”. Once the eCheck is signed by each signer, you will see a confirmation along with a confirmation number. NCPTA recommends you print this screen for your records.

The confirmation will contain the following:

- Confirmation number
- The amount and number of members for which the payment includes
- Who is the first signer
- The time and date the eCheck was initiated
- Who is the Second signer
- The time and date the eCheck was initiated

Procedures for logging a Paper Check

If your PTA opts to send a paper check to the State PTA Office for membership dues; follow the steps below to log the check in MemberHub:

- Click on **State Payments** from the menu on the left

This will take you to a screen that will show you how much your PTA owes the State PTA Office for State and National Dues. **Please note, this number is based on members entered in MemberHub.** NCPTA recommends you **PRINT THIS LIST FOR YOUR RECORDS.**

- Click on “Send a Check”: A box will pop up explaining the number of members and amount your PTA owes to the State PTA Office.
- Enter the PTA Check number in the box.

***Do not send a personal check**

- Check the box “Are you sure you want to send”
- Click “Record State Payment”

Send Payment to NCPTA via Check

The portion owed to NCPTA for 6 members is \$24.00. Enter in your check number below to record a state payment. When the NCPTA processes the check they will mark this payment as "Received".

Check Number:

10000

Are you sure you want to send ?

Record State Payment Cancel

The next screen will confirm notification has been sent to the State PTA Office that a paper check is on the way. **Be sure to then mail the check! “Logging” a check does not mean that the check will be sent by MemberHub. It means your PTA plans to mail a paper check.**

Make check payable to NCPTA and mail to NCPTA, 3501 Glenwood Avenue, Raleigh 27612.

State Payments History:

This button will take you to your payments history. Here you will see both eCheck and paper checks that are submitted and received by the State PTA Office. Please note, a payment will only show as received once it has been received and recorded by the State PTA Office.

PTA People Hubs Site Joins Money Settings SponsorShare GiftCrowd Store

State Payments

State Payments History

You owe the NCPTA \$24.00 for 6 members for school year 2018-2019. [Show/Hide Members](#)

Note: Your state/unit has second signer requirement so your eCheck payment will be processed using second signer

Send Payment via eCheck

or

Send a check

PTA Pages

- Dashboard
- Officers
- Unit Data
- Members
- Financial Review Confirmations
- Form 990 Confirmations
- ➔ **State Payments**

Payments will have the following 3 “status” messages:

1. Second Signer-waiting on the second signer to approve the eCheck
2. Sent-eCheck has both signatures and has been electronically sent to the State or a paper check has been logged
3. Received-payment for the eCheck or paper check has been received at the State Office and State PTA staff has confirmed in MemberHub.

PTA People Hubs Site Joins Money Settings SponsorShare GiftCrowd Store

State Payments History

Date ▲	Members ▾	Amount ▾	Fees ▾	Check No. ▾	Status ▾
2018-07-16	1	\$4.00		eCheck	<u>Second Signer</u>
2018-07-16	7	\$28.00	\$1.00	eCheck	<u>Received</u>
2018-07-17	5	\$20.00	\$1.00	eCheck	<u>Sent</u>
2018-07-25	6	\$24.00		0000	<u>Received</u>
2018-07-25	4	\$16.00	\$1.00	eCheck	<u>Sent</u>
2018-07-25	3	\$12.00		eCheck	<u>Second Signer</u>
2018-07-26	2	\$8.00		1111	<u>Sent</u>

Showing 1 to 7 of 7 entries

Previous 1 Next

PTA Pages

- Dashboard
- Officers
- Unit Data
- Members
- Financial Review Confirmations
- Form 990 Confirmations
- ➔ **State Payments**

School Store:

In the MemberHub Store you can sell individual memberships, customized membership bundles, spirit wear, and much more. You can find the store by going to the Admin Console and clicking on the Store Tab.

Once you click on the Store Tab the Store Admin Site will open in a new tab. Once in the school store you can add your categories, then add your memberships and items to your store. Follow the steps below to set-up your Bundled/Family Memberships in MemberHub:

1. Click on the Admin Console then click on the Store Tab to access the MemberHub Store Admin Site.
2. Click on Memberships on the left hand side. Then click on New Custom/ Bundled Memberships in the top right.
Note: Your Standard State Membership Types will already be listed in the store. You can create New Custom/ Bundled Memberships from this page.
3. Fill out the Membership Name, Short Description, Long Description, Number of Members, and the price. Note: Your membership level price must be greater than the number of potential members that are joined multiplied by the amount due to the state for each member (\$4.00).
4. Enter an Available At and an Expires At date.
5. Add an Image.
Note: The following fields are automatically included any time someone is purchasing a membership online through your site or an administrator is entering a membership manually: First Name, Last Name, either an email address or a mobile phone number must be provided when entering a member and Member Type.
6. Add Additional Fields. Choose the Field name, Field type, and option values.
7. Click Add Membership.
8. Now you can see the Memberships listed in your live store.