

TRAINING MANUAL



CALIFORNIA STATE ASSOCIATION OF

PA | PG | PC

Member365 Chapter Management Training Manual

As Of: September 27, 2021

TABLE OF CONTENTS

PURPOSE.....	3
Overview.....	3
Roles	3
THE OWNER/SECONDARY CONTACT ROLE.....	4
Assigning Roles	4
Editing Existing Roles	5
MEMBERSHIP MANAGER ROLE	7
Yearly Membership Renewals	7
Submission Accepted.....	10
Submission Declined.....	10
User Renewal Submission Error	10
Wrong Membership Type.....	10
Member Not Added.....	10
Forgot to Delete a Member.....	10
Group Class Verification	11
User Group Class Submission Error	13
Forgot a Member on Class Roster	13
Credits Were Wrong for Class Activity	13
County Sent Payment Without Submitting Group Class Information Through Member365	13
Viewing Member Certification Records	13
BILLING MANAGER ROLE	15
Chapter Management Invoices	15

PURPOSE

Overview

Thanks to the California Department of Social Services training grant, the Association worked with our membership management platform, Member365, to streamline several membership and training processes to allow counties more access/control to member information.

The rebuild converted management of memberships from the individual employee to the county program management team giving more power to each county program to manage and view their members. This includes:

- **Chapter Management:** Creates chapters (County Programs: PA, PG and/or PC) that will improve membership management and allow roles within each county to manage their own members in real time
- **Membership Renewal/Billing:** Streamlines the membership renewal and billing process through improved membership verification and group billing – No more individual membership payments. All membership renewals will be done by an assigned County Program Membership Manager (can be any employee) and noted on one master invoice generated by Member365
- **Member Certification:** Allows designated contacts within each county program to view/download their members certification records
- **Training Course/Class Management:** Streamlines the verification and payment of group classes by Member365 creating an invoice for classes taken by County Program members once a class roster has been uploaded into Member365

Roles

Roles were created in the system to allow for the proper management of each county program (i.e. PA|PG|PC program). Roles include:

- **Owner:** The person identified within the organization membership that can assign the subsequent roles (this is the Principal member or designated contact for the county program). If no other roles have been assigned to other program team members, the system will automatically assign all roles to the Owner
- **Secondary Contact** (Back-up to Owner): Has the same permissions as the owner
- **Membership Manager** (MM): Manages the member/renewal list and other permissions such as editing member information or request member deletion, retrieve member certification records, etc. (*Can have up to two staff members assigned to the role if needed*)
- **Billing Contact** (BC): Receives and pays the applicable invoices for the individual membership applications/renewals and training fees (*Can have up to two staff members assigned to the role if needed*)

THE OWNER/SECONDARY CONTACT ROLE

The Owner role in Member365 is responsible for assigning the various organizational management roles available in the system that include Secondary Contact, Membership Manager and Billing Contact. The system automatically assigns the Owner role to the Principal and/or Designated Contact for the County Program that holds the County Fee membership. The Owner has no other system access outside of assigning roles. **If the Owner wants to view membership or billing records, they must also be assigned as a Membership or Billing Manager within Member365.**

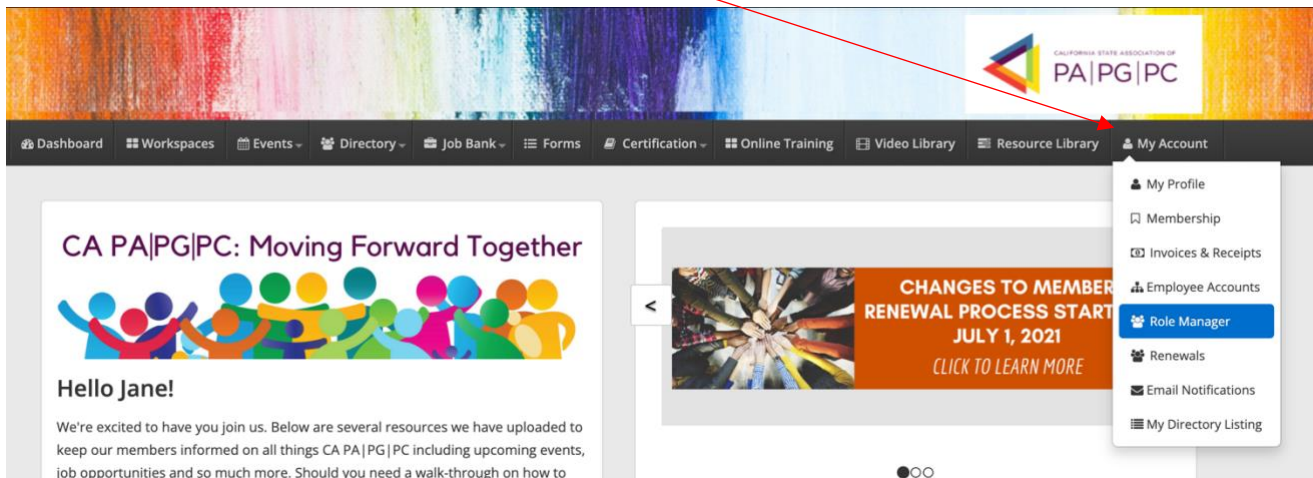


Please Note: The Secondary Contact has the same privileges as the Owner of the County Program.

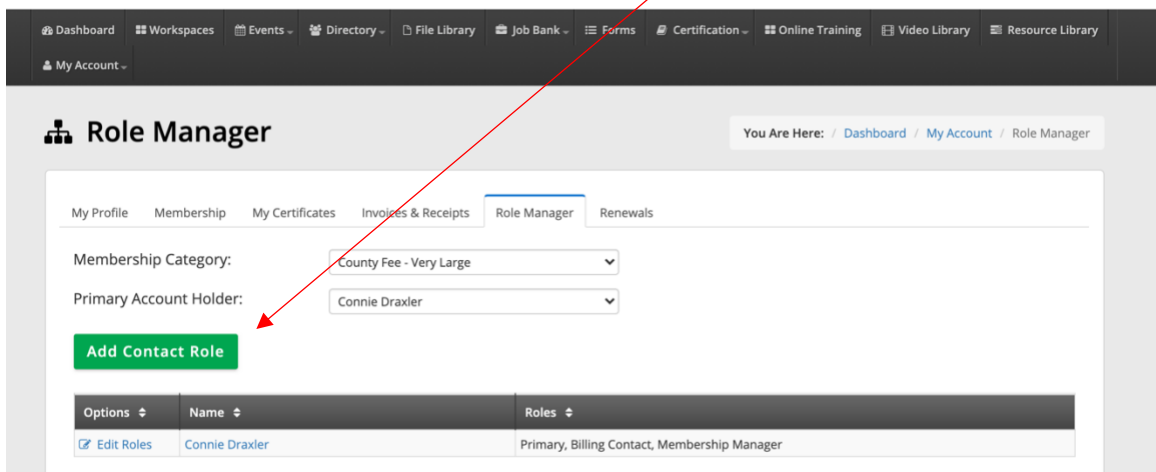
Assigning Roles

To assign roles in Member365:

1. From the Member dashboard go to My Account > Role Manager



2. The new window that appears shows a table listing the current County Program team members that have been assigned roles. Click on the green **Add Contact Role** button found above the table to assign a contact to a role

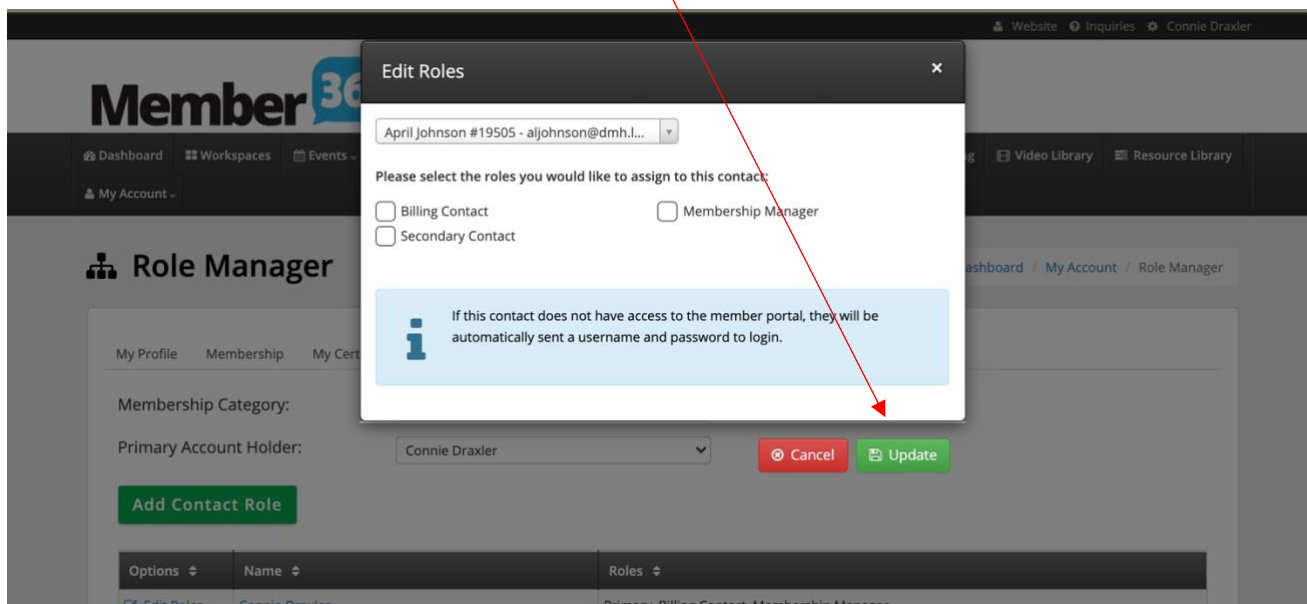


- A pop-up window will appear where you can search for the member you would like to assign a Chapter Management role to



Please Note: If you wish to assign a role to a staff member who does not currently have a membership you must contact the Executive Office at info@capagpgc.org

- Once you have selected the staff member you would like to assign a role to, a list of role options will appear. Simply check off the boxes next to each role you would like to assign the member to. Once done, hit the green **Update** button to save the record



- Repeat this process for each role you would like to assign to a staff member in your County Program

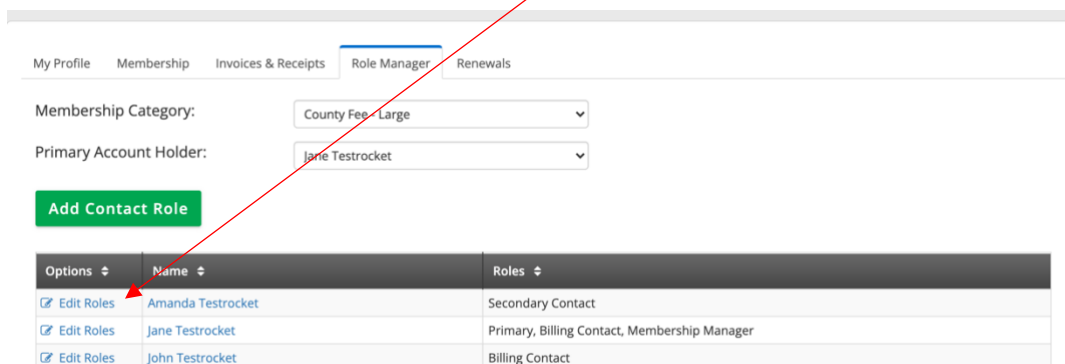


Please Note: You can only have one (1) Owner and one (1) Secondary Contact and two (2) Membership and two (2) Billing Managers per County Program on file.

Editing Existing Roles

To edit an existing role already assigned to a member simply:

- Log in to Member365 and from the Member dashboard go to My Account > Role Manager
- The new window that appears shows a table listing the current County Program team members that have been assigned roles. Click on the Edit Roles link next to the member you would like to change



3. Either select/unselect which roles you would like to assign/remove from the Member's profile and click the green **Update** button when done



Please Note: Any unassigned role will automatically be assigned to the Owner of the County Program if another member is not assigned.

MEMBERSHIP MANAGER ROLE

The Membership Manager role in Member365 is responsible for

- Overseeing the County Program member roster
- Posting training attendance information for review/approval by the Association and
- Can review the certification records of the members in the County Program

The Member Manager will be prompted to review their member roster and make any required changes such as changing individual member classifications, removing members, and adding new members each renewal season (Renewal season begins July 1).



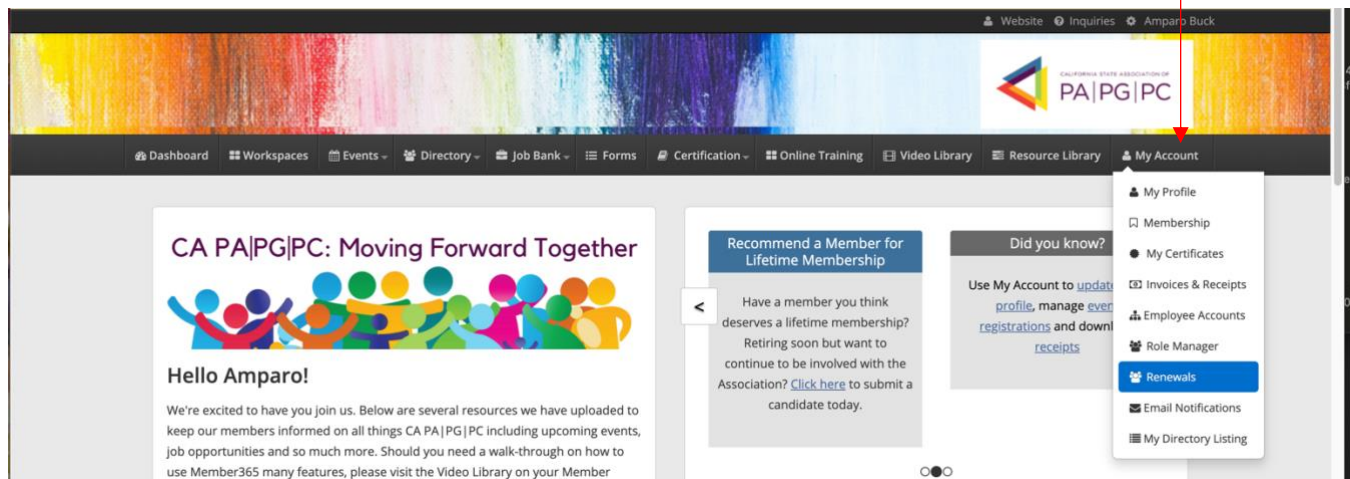
Please Note: All County Program memberships that have not been paid for more than 120 days after July 1 will be placed in inactive status and members will be unable to access the Association's membership portal, sign up for classes or receive credits until payment in full is made.

Yearly Membership Renewals

Membership renewals will happen in bulk instead of on an individual member basis as they have in the past. Starting July 1 of each year the assigned Membership Manager will get an email informing them that they need to log into Member365 to renew their staff's membership for the new fiscal year.

To begin the process of reviewing and submitting your County Program roster for membership renewals:

1. Log in to Member365 and from the Member Dashboard toolbar select My Account > Renewals



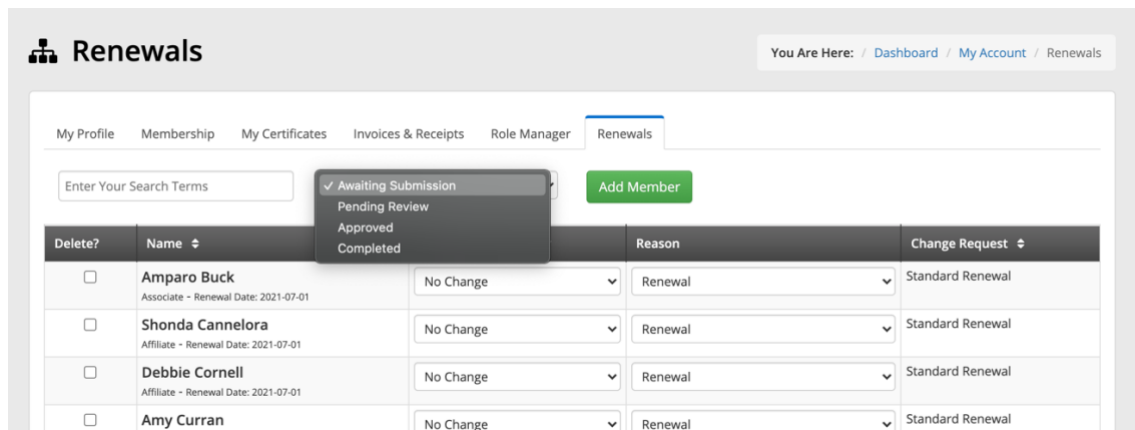
2. The Renewals window will open with a list of all current members associated with the County Program in question.



Please Note: If a member does not appear on your county roster it means that the Association did not receive payment for their membership from the previous year. For the member to be renewed, the Association must receive payment for the outstanding membership invoice. Once the outstanding invoice has been paid, the member will appear on the County program roster and the renewal process for your county program can proceed as normal.

The window offers the ability to search for a specific member by name as well as the status of your member roster submission broken down as follows:

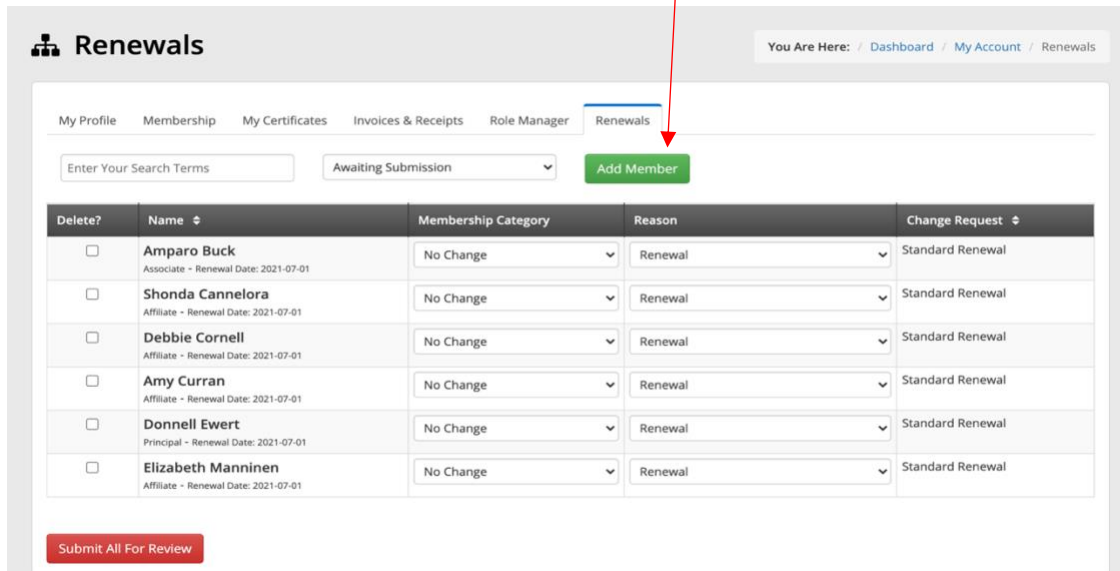
- a. **Awaiting Submission:** Member roster has not yet been submitted by the County Program for review by the Association
- b. **Pending Review:** Roster has been submitted and waiting for review by the Association
- c. **Approved:** Association has approved roster and an invoice has been generated by Member365 and sent to the Billing Manager
- d. **Completed:** All memberships have been paid for and members are in good standing with the Association



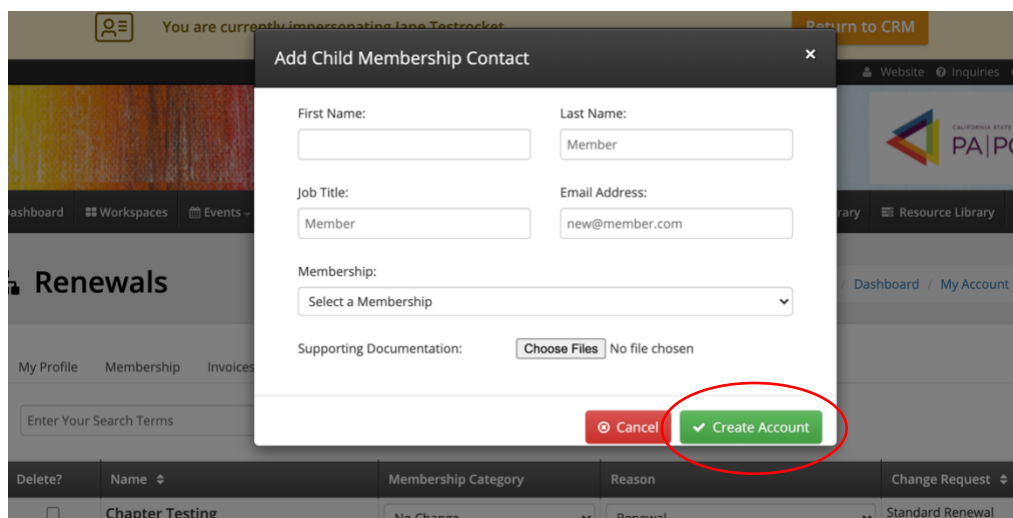
3. The renewal table is broken down into 5 columns that cover

- a. **Delete? Column:** An option to Delete a member from your county program roster. Only check this box if you need to remove a member from your roster
- b. **Name Column:** The name of each county program member (the member's membership type is listed under the member's name)
- c. **Membership Category Column:** The membership category the member should be in (system will default to the membership the member currently holds)
 - i. If you need to change a membership, simply select from the drop-down menu what the new membership type for the next fiscal year should be
- d. **Reason Column:** The reason for a change (System defaults to renewal but you can also select from the drop-down Membership Change or Membership Deactivation) and finally
- e. **Change Request Column:** A recap of the change request or action to be taken for verification i.e. Standard Renewal, Change in Membership Type or Delete

- You can also add a member by clicking the green **Add Member** button found above the roster table.



- Enter the below information (first & last name, title, etc.) and once done click on the green **Create Account** button.
 - First & Last Name
 - Title
 - Member Email Address
 - Type of Membership (Principle, Associate or Affiliate)
 - Upload required Verification documentation which can be [found here](#)



- Once you have completed all the changes to your County Program roster for the renewal season simply click on the red button at the bottom of the page labeled **Submit All for Review**. A pop-up window will appear asking that you confirm your roster. The Association will either accept or decline your submission.



Please Note: Once confirmed **no** further changes to the roster can be made.

Submission Accepted

If accepted, the Billing Manager on file will receive an email with a master invoice listing the County Membership fee and all the individual membership dues you selected for renewal. The Membership Manager will also receive an email confirming the roster has been approved and no further action is required.

Submission Declined

If the Association declines the submission, the Membership Manager will receive an email with the reason for declining the submission and the Membership Manager needs to make the necessary changes and resubmit for further review/approval within the renewal window (no later than October 1).

All memberships are considered renewed when payment has been received from the County Program.

User Renewal Submission Error

Should a Membership Manager submit wrong information on the membership renewal roster, and the Association has approved the roster, there are several corrective actions that can take place.

Wrong Membership Type

If the wrong membership type was selected for one or more of the members listed on the County program's yearly renewal roster either:

- A refund for the difference between what the membership type should have been vs what was selected will be processed after the County has paid their original invoice in full or
- A second invoice will be created for any additional fees owed to the Association based on the difference between what the membership type should have been vs what was selected

Member Not Added

Should a new staff member have not been added to the renewal roster at the time of roster submission, a new member application can be completed with a separate invoice generated for that individual membership by [clicking here](#).

Forgot to Delete a Member

If the Membership Manager forgot to delete from the roster a member that is no longer working for the County, then the Membership Manager needs to send an email to info@capapgpc.org with the name of the member to be deleted and their termination date. Termination date must be before the renewal season to receive a refund for that member's membership fee.

Once the Association has processed the original check payment, and confirmation of the member's termination has been received, a refund will be processed to the County program in question.

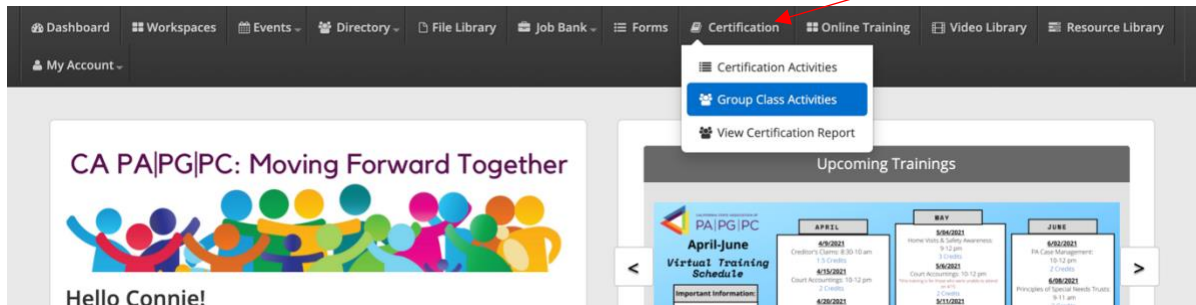
To learn more about corrective options for renewal errors please [click here](#).

Group Class Verification

County Programs must now upload course verification documents (class roster or attendance certification as well as a new [Group Activity Cover Sheet found here](#)) for all classes not given by the Association. Counties must still go through the training approval process for trainings by submitting a County Training Accreditation Application [found here](#).

To upload course verification documents the Membership Manager must:

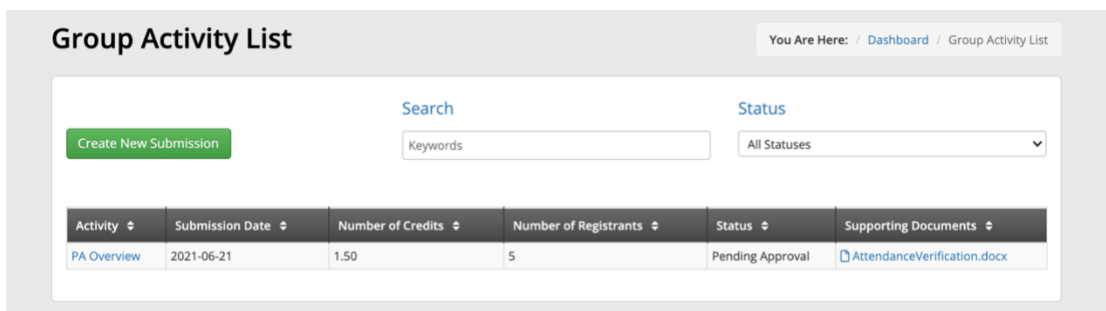
1. Log in to Member365 and from the Member Dashboard toolbar select Certification > Group Class Activities



2. Once you are in the Group Activity (Course) List you can view previous submissions and their status including:
 - a. **Drafted:** Group Activity that has not been submitted to the Association for review
 - b. **Pending Approval:** Group activity has been submitted to the Association and waiting to be reviewed
 - c. **Approved Pending Payment:** The Association has reviewed the Group Activity submission and approved. An email will be sent to the Billing Manager with an invoice listing all members that attended the training and had the necessary backup documentation to prove attendance (sign-in sheet, etc.)
 - d. **Rejected:** The Association denied the Group Activity submission. An email will be sent to the Member Manager outlining the reason the submission was denied and the Member Manager can resubmit once corrections have been made
 - e. **Paid:** The Association has processed the payment for the Group Activity and credits have been assigned to applicable members



Please Note: All trainings must be uploaded and paid in full within 90 days from the date of the course being given otherwise members will not receive credit for the training in question.



3. Click on the green **Create New Submission** button to submit a new Group Activity
4. The new window has several items that need to be completed to create a new Group Activity submission including:
 - a. **Activity Selection:** This is a dropdown menu with approved Activities you can select from (i.e. PA Basics, Ethics, etc.). Please be aware that there may be multiple activities that are labeled the same but have different credits associated to them. Be sure to select the correct course or your submission will be rejected. We have made this easier by putting the number of credits for each class in the class title
 - b. **Activity Date:** Here you can enter the date the course was given
 - c. **Number of Credits:** The number of credits is automatically filled out based on the Activity you selected earlier from the dropdown menu. **Please double check to make sure you have selected the correct course with the correct amount of credits**
 - d. **Cost per Credit:** This lists the Association's standard per unit cost
5. A list of all your County program members will appear at the bottom. Simply check off the box next to the name of the member(s) that attended the course
6. Once all members have been selected, upload the supporting verification documents (sign-in sheets/attendance certification as well as Group Activity cover page) by clicking the green **Upload Supporting Document** button
7. Once done you can either save your progress by hitting the blue **Save Progress** button to edit or review at a later date or select the green **Submit Activity** for Association review

Select the activity that was taken:

Select Activity Activity Date: 2021-09-27 Number of Credits: 0.00

Credit Cost: \$

Select the County Members that completed this course:
(You have selected 0 members)

Keywords

Completed? ▾	Name ▾	Collection Period ▾	Membership Category ▾
<input type="checkbox"/>	Amanda Testrocket	2014-07-01 - 2018-06-30	Affiliate
<input type="checkbox"/>	Chapter Testing	2020-07-01 - 2024-06-30	Associate
<input type="checkbox"/>	John Testrocket	2020-07-01 - 2024-06-30	Associate
<input type="checkbox"/>	Jane Testrocket	2020-07-01 - 2024-06-30	Principal



Please Note: when you submit the activity a pop-up window will appear asking you to confirm your submission. Once submitted **no** further changes can be made to the submission.

User Group Class Submission Error

Should a Membership Manager submit wrong information on the Group Activity roster, there are several corrective actions that can take place.

Forgot a Member on Class Roster

If the Membership Manager forgot to add a member when submitting the class roster, simply submit a new Group Class Activity submission for the member missed. No changes to the original invoice are needed.

Credits Were Wrong for Class Activity

If the Membership Manager submitted a class without verifying the credits were correct, and an invoice has already been generated by the system, the original invoice and activity will be voided in the system and the Membership Manager will need to resubmit a new Group Class Activity with the correct class/credits selected.

County Sent Payment Without Submitting Group Class Information Through Member365

The Association will no longer accept mail in confirmation of class attendance. All County hosted trainings must be uploaded into Member365 for members to receive credit after payment has been made. Should the Association receive a class payment in the mail, it will not be processed until such time as the class/activity has been uploaded into Member365 with all the correct verification documents attached.

To learn more about corrective options for group class submission errors please [click here](#).

Viewing Member Certification Records

The Membership Manager has access to their County Program members certification records. To access these records:

1. Log in to Member365 and from the Member Dashboard toolbar select Certification > View Certification Report
2. The certification report is broken down into the following components:
 - a. **Credit Collection Status:** The various status include:
 - i. In Progress: Active 4-year certification window
 - ii. Completed: Past certification windows
 - iii. Grace Period: This category is not applicable for Association certification
 - iv. Did not Complete: Those members that did not complete the necessary credits to be certified
 - b. **Collection Period:** A listing of all past and current 4-year certification windows
 - c. **Membership Status:** Listing those members that are either active (membership has been paid) or inactive (membership has not been paid)

- d. **Membership Category:** The various membership types
- e. **Search by Name:** A search box where you can search for specific County Program members

3. Once you have the collection period or member you wish to review, the table shows you
 - a. **Member:** Member’s name
 - b. **Lifetime Credits:** What a member’s lifetime credits are
 - c. **Collection Period:** This is the collection Period based on your search parameters
 - d. **Credits Required:** These are the credits required to be considered certified within that 4-year period
 - e. **Credits Earned:** Credits Earned are the credits the member has earned in the certification window and
 - f. **Credits Still Needed:** Credits Still Needed are the credits the member still needs to earn to be considered certified

Member	Lifetime Credits	Collection Period	Credits Required	Credits Earned	Credits Still Needed	Unofficial Transcript
Testing, Chapter	5.0000	2020-07-01 to 2024-06-30	40.00	5.0000	35.0000	Download
Testrocket, Amanda	31.5000	2021-07-01 to 2025-06-30	65.00	5.0000	60.0000	Download
Testrocket, John	5.0000	2020-07-01 to 2024-06-30	40.00	5.0000	35.0000	Download

4. To view a member’s unofficial transcript simply click on the blue **Download** button next to the member’s name and a new window will open for you to review/download. You must contact the Association’s Executive Office to obtain a member’s official transcript records



Please Note: A member can have more than 40 credits required to be considered certified if they did not complete all 40 credits in their last 4-year cycle. To learn more about certification requirements and penalties please [click here](#).

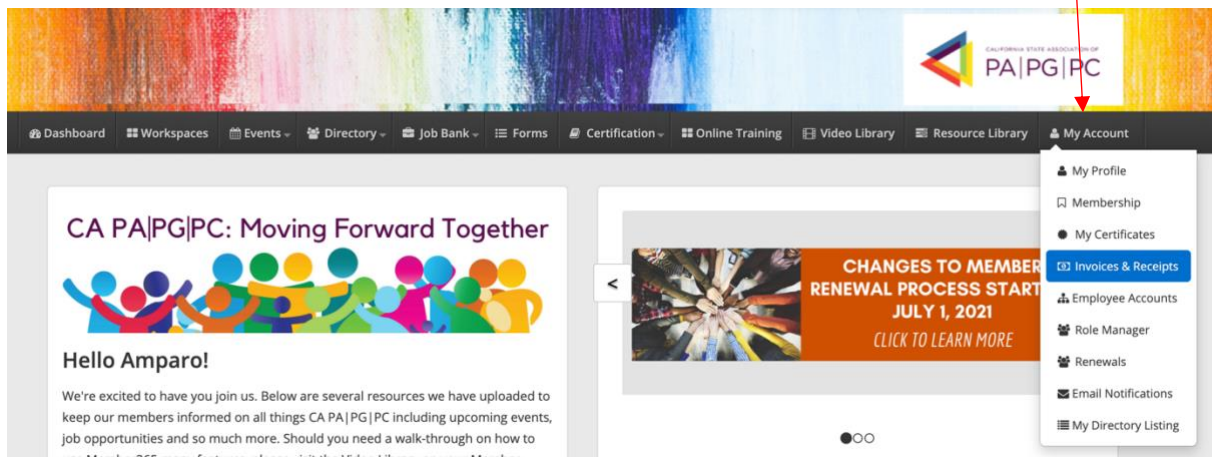
BILLING MANAGER ROLE

The Billing Manager role oversees the billing process for all invoices related to membership (new member and renewal fees) as well as group class submissions. Invoices for events will still be processed individually such as courses hosted by the Association (virtually or in-person) or online via the Association's Learning Management system.

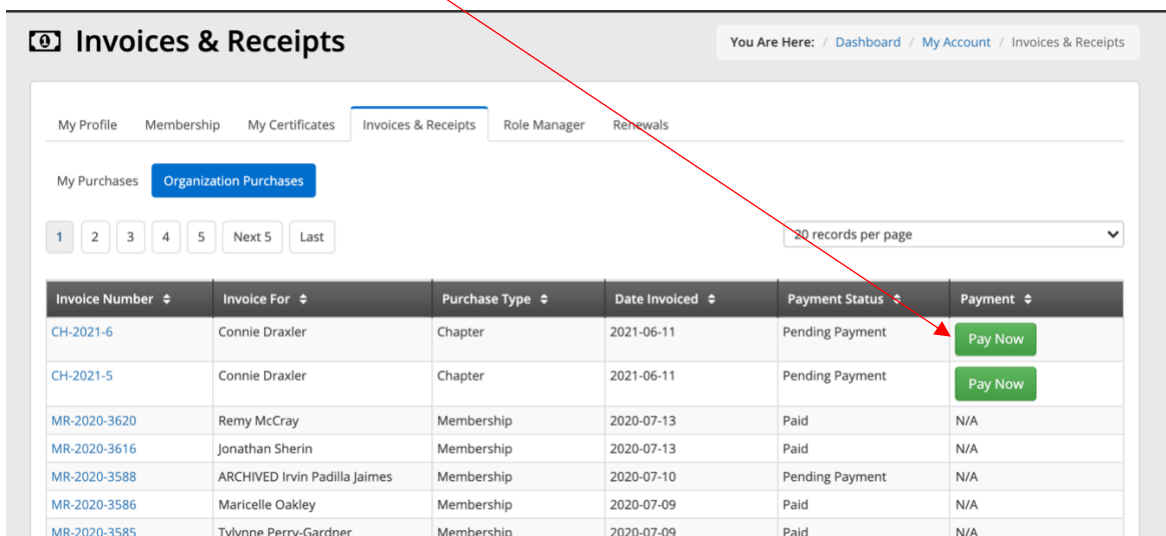
Chapter Management Invoices

To view County Program invoices related to memberships or group classes:

1. Log in to Member365 and from the Member Dashboard toolbar select My Account > Invoices & Receipts



2. Purchases are broken down into two tabs: My Purchases and Organizational Purchases. Click on the Organizational Purchases tab
3. On the Organizational Purchase tab you will find a listing of all paid and unpaid membership and group activity invoices for your County Program. To pay an invoice simply
 - a. Click on the green **Pay Now** button next to the invoice you would like to pay



- b. The new window will show the invoice with the amount owed broken down by item(s) being billed and amount for each with a total owed at the bottom
- c. After reviewing the invoice choose the method of payment and click the green **Pay Now** button at the bottom of the screen



Please Note: Depending on type of transaction you will be able to select from either check or credit card. Some transactions only allow for check payment based on total owed.

- d. You can also view/save the invoice as a PDF by hitting the blue **View PDF** button

Mr. Michael Atwell
Alpine PA
PO Box 248
Markleeville, California
96120
United States
matwell@alpinecountyca.gov

Invoice Number: CH-GCP-2021-33
Date of Issue: 2021-06-29

Item/Description	Fee
Michele Del Vecchio - Alpine PA - Group Class Payment for 'Motivational Interviewing Part 1 (5.0)' (5.00 credits)	\$1.25
Michael Atwell - Alpine PA - Group Class Payment for 'Motivational Interviewing Part 1 (5.0)' (5.00 credits)	\$1.25
Subtotal	\$2.50
Total	\$2.50
Amount Paid	\$ 0.00
Amount Due	\$ 2.50

Select your payment method:

[Invoice Terms & Conditions](#)

- 4. An email will be sent to the Billing Manager confirming payment is being processed and the Invoice & Receipts Organizational tab will show the invoice as Pending Payment
- 5. Once payment has been received/processed by the Association the invoice will be marked as Paid in the system



Please Note: An invoice # must be on all checks (or a copy of the invoice included with check) to expedite processing. The Association will not be held responsible if this information is not included and processing time falls outside the 90-day window for members to receive credits for trainings or 120 days from July 1 for membership renewals.