Electronc Membership Information Packet 2018

For more information or questions, please contact:

Emembership@capta.org
Electronic Membership FAQ's

1. What is the electronic membership system?
   - The electronic membership system is an electronic platform that allows people to join PTA at their local unit online.
   - The system (Totem) was developed specifically for California State PTA and it collects the dues payment, provides a receipt and an electronic membership card, and simultaneously distributes the per-capita dues payments among the various levels of PTA.
   - The electronic membership card can be stored on a smartphone and has the potential to link to member perks.
   - The system allows for automatic membership renewals on July 1 and many other features.

2. What are some of the benefits to a local PTA?
   - Local PTAs will be able to let members join online with a credit or debit card.
   - Local PTA leaders and members will be able to invite friends and family to join with a just a click.
   - The system will reduce the need to print out forms, collect checks and make trips to the bank.
   - Membership campaigns will be able to utilize social media to increase awareness and membership.
   - Anyone, anywhere will be able to join any PTA that participates in the program.

3. How can I join the pilot program?
   - District leaders should contact emembership@capta.org if they are interested in participating in the pilot program.
   - Council and unit leaders should talk to their districts about upcoming details on the pilot program.
   - We will add as many PTAs as we can to the pilot program based on its success. If things are going well, we will keep adding on. If there is a challenge or a something to work out, we will stop until it is resolved.
   - We will keep you updated on important work as we move into state-wide launch.

4. How do members know their credit card information is secure?
   - The electronic membership system (Totem) uses Stripe, a well-known and well-regarded payment processing system. The storage of card data will comply with the Payment Card Industry Data Security Standards (PCI DSS). Stripe has been audited by an independent PCI Qualified Security Assessor (QSA) and is certified as a PCI Level 1 Service Provider. This is the most stringent level of certification available in the payment industry.
   - We will not store any credit card information on our California State PTA servers.
5. How much will this cost?
   - There is no cost for a local unit to use the system.
   - Each member that joins using the electronic membership system will pay a $1 convenience fee per membership. This will cover all the Stripe fees, and other costs of the system. This dollar will be paid by the member and it is added on to the membership dues so it will not reduce the portion of dues deposited in the local PTA unit bank account.
   - This may save local PTA units money if they are currently mailing membership cards or paying bank fees on cash and check deposits.
   - Members still have the option to join with cash, check or any other payment system used by a local PTA.

6. How will local PTA unit leaders know who the members are?
   - The electronic membership system will generate a list of members and local leaders will be able to access the list and keep track of members in the system.
   - The leaders will be able to manually enter other members (those who paid with cash or check) into the system.
   - Leaders will also be able to download the list to an Excel spreadsheet to be used with any membership tracking system they like.

7. Can members still join at a Back-to-School table?
   - Of course! Leaders will be able to use computers, tablets and smartphones to access the electronic system and you can collect cash and checks from members who prefer to join that way.

8. Can I enter and manage members who join with check or cash? Will the members receive an electronic membership card?
   - Yes. As long as the local PTA is participating in the electronic system, and the member is willing to give an email address, the PTA leaders will be able to manually upload members names and emails into the system, and they will be able to receive the PTA electronic membership card.

9. Can I use the system if my unit has different dues and membership levels?
   - Yes, units who have different dues structures will be able to enter that information into the system.

10. How will a member search for the PTA they would like to join?
    - The system will use geo-location and addresses to help people find the right PTA so they do not have to scroll through a long list of PTAs. Can easily access on capta.org/join

11. Can a member sign up for multiple memberships with a single checkout?
    - Yes, the member will have the ability to sign up more than one member during a session such as two parents, or parents and grandparents.
12. What are the steps PTA leaders will complete to connect and verify a bank account?

- The electronic membership system will use a two-factor authentication to connect a bank account.
- There is a visible record for the user who create or modify any account information.
- The electronic membership system requires a second authorized leader to confirm new account information.
- Detailed bank account verification flow attached.

The system will be available to all PTAs in California as long as they are in good standing, able to provide basic banking information and agree to participate in the program.
Electronic Membership Flow of Money
Bank Account Verification Flow

This document outlines the steps leaders will complete to connect and verify a bank account in order to begin accepting online payments.

REQUIREMENTS

- PCI-Compliant, secure entry of bank account information
- Two-factor authentication to connect a bank account
- Visible record of the users who create or modify any account information
- Require a 2nd authorized leader to confirm new account information

AUDIENCES

- **Authorized Leader** - President, Treasurer, or other roles that have authorized access to bank accounts for an association. These users must also have completed registration and email confirmation with the platform.

- **Other Leader** - Staff, volunteer or other leadership position within the association that does NOT have authorized access to bank accounts.

USER STORY

NOTE: Other Leaders will not have access to the banking information view from the platform. The menu item will not appear for these users.

Jane, the President of RUHS PTA has just been invited by a CAPTA staff member to accept her leadership role with the association on the platform. Jane receives an email inviting her to the platform which she clicks to complete her registration. As a new leader, she is first taken to view the RUHS PTA dashboard which shows a list of tasks to be completed next.

**Next Steps**

- ✔ Register 3 Leaders
- Connect a Bank Account for Deposits

Jane then clicks on 'Connect a Bank Account' and is taken to the Banking Accounts view:
Bank Accounts

You must connect a bank account to receive payouts.

Since she is excited to begin accepting online memberships, she clicks 'Add an Account' and is taken through three screens to verify her identity and enter the PTA bank account information for the association. This process uses a text message sent to her phone as a two-factor authentication method.

After clicking the 'Create Account' button she returns to the banking information page:
Bank Accounts

PENDING ACCOUNTS
A second leader is required to login and verify
the last 4 digits of the account number in order
to activate this account.

Status: Pending
Bank: Wells Fargo
Routing: 1220484
Account: xxxxxxxxx

Connected by Jane Doe on 5/20/2018

Jane reads the instructions and phones her treasurer Don Smith to tell him the next steps. Don chuckles, since he had just received an email letting him know that Jane had added the account and he needed to confirm it.

He clicks the link in the email and is taken to the same page Jane is viewing, although it looks slightly different for him:

Bank Accounts

PENDING ACCOUNTS

Status: Pending
Bank: Wells Fargo
Routing: 1220484
Account: xxxxx [Confirm]

Please enter the last 4 digits of the bank deposit account for confirmation.

Connected by Jane Doe on 5/20/2018

As the treasurer, Don knows the account number by heart, so he enters the last for digits into the box and clicks 'Confirm'. Since his last 4 are the same as the account Jane connected, his view is updated:
He tells Jane to reload the page. When she does she sees the same view as Don, and they move on to the next step of accepting online memberships.

As an additional security step, Stripe has sent Jane an email to confirm her email address. She later clicks the link in that email.