Manage Membership Renewals

The following topics are covered in this section. Click on the title to access each section.

Membership Renewal Overview Membership Renewals with Dues Payments Email Reminder to Members Who Haven't Paid Dues Membership Renewals with No Dues Payments – Chapter Board, National Board, and Honorary Add Board Position Relationships Deceased Members Resignations How to Renew Expired Memberships Status Override Function

Membership Renewal Overview

CiviMember works best for online renewals with a credit card. However, even though a Chapter's site is set up for online membership renewals, not all members take advantage of this functionality. As a result, back end work is required to record offline membership renewals for those members that are not comfortable going online or who register online but opt to send in a check.

For membership data entry, the following roles are suggested, but not required. The Treasurer or Assistant Treasurer receives the dues. It streamlines operations, if one of them enter membership renewals rather than creating a spreadsheet and passing it along to the VP Membership to enter. The VP Membership or Website Administrator can easily follow the data entry via **the Memberships Dashboard** and/or **Membership Reports**. The VP Membership or Website administrator should be responsible for data entry of Chapter Board Memberships; Chapter members who have National Board Memberships or who serve on National Board Committees; and Honorary Memberships as well as managing membership searches, contact records, groups, reports and mailings.

Virtually all memberships (with the exception of lifetime memberships) must be renewed on a yearly basis. To make this job easier, the profile **Custom Membership Details - Bulk Entry** allows updating multiple memberships at one time. On July 1 each year, memberships that have not been renewed for the new fiscal year are automatically assigned a membership status of **Grace**. This is in effect for three months. If the membership is not renewed within the three-month grace period, it will automatically change to **Expired** on September 30.

If Chapter memberships expire, then after September 30 any member with Expired Status will not be listed in the Chapter and National Membership Reports as well as the Memberships Dashboard. It is very important to keep memberships current for organizational reports, mailings and statistics.

If your Chapter does not have online membership renewal capability and would like it, please contact <u>is.help@arcsfoundation.org</u>

Membership Renewals with Dues Payments

At the appropriate time, the VP Membership sends out an email with information on how to renew memberships online for current and new members. Membership renewal timelines vary per Chapter. Typically, current member renewals begin sometime in January and new member renewals begin sometime between March and July. There are three possible scenarios for how a member can pay their dues.

SCENARIO 1 - ONLINE MEMBERSHP RENEWAL WITH PAYMENT BY CREDIT CARD

If a member does their membership online and pays by credit card, the **Contributions** tab and **Memberships** tab on their **Contact Record** update automatically. The member automatically receives an email confirmation receipt and anyone who was cc'd and/or bcc'd, when the **Manage Contribution Page** was set up also receive one as well. The confirmation receipt also lists the member's **Profile** information as well as **Volunteer Interests and Skills**. No further work is needed by the Treasurer/Assistant Treasurer.

NOTE: For maximum efficiency, it is clearly worth training members to login and renew online by credit card to avoid data entry!!

SCENARIO 2 - ONLINE MEMBERSHIP RENEWAL WITH PAYMENT BY CHECK

If a member renews online but opts to pay by check instead of credit card, the **Contributions** tab on their contact record needs to be updated once dues are received. Since the Treasurer/Assistant Treasurer receives the dues, it is most efficient for them to update the current member's **Contributions** tab rather then the VP Membership. The member automatically receives an email confirmation receipt and anyone who was cc'd and/or bcc'd, when the **Manage Contribution Page** was set up, also receive one as well. However, unlike a membership renewal online paid by credit card, the **Memberships** tab does <u>not</u> update, if they pay by check. The following steps must be taken:

Step 1: Upon receipt of a member's dues, the Treasurer/Assistant Treasurer searches for the member's **Contact Record**. An easy way to find a member is to **Login**, select **CiviCRM** and use the search function located in the upper left hand side of the screen.

Step 2: Select the member's **Contributions** tab on their **Contact Record**. If the member did their membership online but opted to pay by check, there will be a recent **Member Dues** entry with a **Contribution Status** as **Pending (Pay Later)**. See screenshot below. Scroll to this entry. If there is not a **Member Dues** entry, proceed to <u>Scenario 3</u> below.

Mrs. Dian	ne Might							
∃ Actions	* Edit	Delete Contact						
Summary Con	ntributions 56	Pledges 0 Memberships 2 Events 41 Activities 5907	Awards 0 Relation	nships 7 Groups	3 Notes 4	Tags 1 C	hange Log 913	
Click Record Co contributor usin	ontribution to g their credit	record a new contribution received from this contact. Clic card.	k Submit Credit Ca	rd Contribution to	process a r	new contribu	ution on behalf of the	е
Record Con	tribution (Che	eck, Cash, EFT)						
Current Year-t	to-Date – \$ 1 Total – \$ 5	3,680.00 # Completed Contributions – 9 Avg Amo 8,946.50 # Completed – 47	ount – \$ 1,520.00 Avg – \$ 1,254.18	Median \$ 500.	00 Mode	- \$ 500.00		
Next >	Last >> C	ontribution 1 - 50 of 56					Page 1 🗘 of	2
lick arrow to view	w payment de	tails.						
Amount	Туре		Received	Thank-you Sent	Status	Premie	um	
▶ \$150.00	Member Dues	Online Contribution: PHOENIX MEMBERSHIP PAYMENT AND RENEWAL	June 1st, 2018 9:37 AM		Pending (Pay Later)		View Edit m	nore
▶ \$100.00	Event Fee	2018 ARCS Foundation Phoenix Annual May Meeting and Luncheon : Offline registration (by Mrs. Diane Might	April 19th, 2018 1:20 PM		Completed		View Edit D	Delete

Step 3: Select **Edit**, change the the **Contribution Status** to **Completed**, and record the check number under **Payment Details**. Do <u>not</u> send a confirmation receipt as they already received one, when they did their online membership. **Be sure to SAVE!!!!**

Note: Once the **Contribution Status** changed from **Pending** to **Completed**, the **Memberships** tab on the contact record <u>automatically</u> updates the **End Date** by one membership period. No further work needs to be done by the Treasurer/Assistant Treasurer.

SCENARIO 3 – OFFLINE MEMBERSHIP RENEWAL WITH PAYMENT BY CHECK

If a member does <u>not</u> renew online and only sends in a check, the Treasurer/Assistant Treasurer renews the membership under the **Memberships** tab on the member's **Contact Record**. The following steps must be taken:

Step 1: Upon receipt of the member's dues, the Treasurer/Assistant Treasurer searches for the member. The easiest way to do this is to **Login** select **CiviCRM** and use the search function in the upper left hand side of the screen.

Step 2: Select the **Contributions** tab first to make sure the member did <u>not</u> do an online renewal. If there is <u>not</u> a current **Member Dues** online entry, proceed as follows:

Step 3: Select the **Memberships** tab. Scroll to the current membership and select **more**. See screenshot below. If they are a new member, who has not renewed online, their **Active** membership needs to be added. See <u>Add New Membership</u> below.

Mrs. Kathy k	Jecan		1							
Actions >	dit 🗰 🛙	elete Contact								< Previou
Summary Contribu	tions 5 Pledges	0 Memberships	Events 7 Ac	tivities 189 Aw	ards 0 Relationships 1	Groups 1	Notes 0 T	ags 0 Chang	e Log 33	
Click Add Members	hip to record a n	ew membership.	Click Submit Cre	dit Card Memb	ership to process a Me	mbership on	behalf of th	ie member usi	ng their c	redit card.
Add Membersh	p 🖸 Submit (Credit Card Memb	ership							
	hine									
Active Members	mps									
Active Members	Member Since	Start ⇒ Et Date Date	nd 🖕 Sta ate	tus _{\u00e9} Source	e	÷	Auto- renew	Related		

Step 4: Select Renew

& Mrs. Kathy Kl	ecan												
Actions 🗵 🖌 Edi	t 🗇 🖸	elete Contac	:t										
Summary Contribution	ons 5 Pledges	0 Members	hips 1 Events	7 Activities	192 Awards 0	Relationships 1	Groups 1	Notes 0	Tags 0	Change l	.og 33		
Click Add Membershi	Click Add Membership to record a new membership. Click Submit Credit Card Membership to process a Membership on behalf of the member using their credit card.												
Add Membership	Submit 0	Credit Card N	lembership										
Active Membersh	nips												
wennerenh 🖗	Since	Date \$	Date \$	Status &	300100		▼	renew	Tielau	tu ≜			
Active Member (Phoenix)	July 1st, 2016	July 1st, 2016	June 30th, 2017	Grace	Active Member signup (by Mrs	Membership: O . Pat Elder)	ffline		N/A	enew	View	Edit more •	
									_		_	Rene	w Mer

Step 5: A renewal page appears. See screenshot below. Check **Record Renewal Payment.** Scroll to the **Renewal Payment and Receipt** section and enter the check number.

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Step 6: Select **Send Confirmation and Receipt**, since a member renewing offline, has not yet received a confirmation receipt. If needed, you can include a personalized message but it is not required. **Be sure to select Renew**.

Send Confirmation and	
Receipt?	Automatically email a membership confirmation and receipt to kklecan@gmail.com?
Receipt From	ADDCC Foundation Departial rehearing according area
	ARCS Foundation, Phoenix @arcsioundation.org>
Renewal Message	Enter a message you want included at the beginning of the emailed receipt. EXAMPLE: Thanks for supporting our organization with your membership.'
✓ Renew × Cancel	

Below is a screenshot of what the the offline membership confirmation receipt looks like. If a personalized message is included, it would be located where the **TEST SPECIAL MESSAGE** appears. The offline receipt is a different receipt than the online renewal confirmation receipt, which was set up under the **Manage Contribution Page**.

ARCS F	oundation, Phoenix		Today at 3:33 P
To: Dia	ne Might		
Member	ship Confirmation and Receipt		
	TEST SPECIAL MESSAGE		
	Please print this receipt for your record	s.	
	Membership Information		
	Membership Type	Associate Member (Phoenix)	
	Membership Start Date	June 2nd, 2018	
	Membership End Date	July 1st, 2019	
	Membership Fee		
		Member Duce	
	Financial Type	Member Dues	
	Financial Type Amount	\$ 150.00	
	Financial Type Amount Received Date	\$ 150.00 June 2nd, 2018	

ADD NEW MEMBERSHIP WITH DUES PAYMENNT

If a new member does not renew online, they need to have their membership <u>added</u>, so they appear on the **Memberships Dashboard** and select **Reports**. When a membership type is added, it auto-populates as **New**. Obtain a list of the new Chapter members. There are two ways to add a new membership to a contact record: **CiviCRM > Memberships > New Membership** or through the member's **Contact Record**. The latter is shown below:

Step 1: Search and find the new member's Contact Record.

Step 2: Select Memberships tab > Add Membership or Submit Credit Card Membership.

Step 3: Select the **Membership Organization** as **ARCS Foundation – Phoenix Chapter**. And the **Membership Type** as **Active** or whatever the Chapter convention for new members is.

Step 4: The **Member Since** date populates the day the renewal is made. Enter the same date for the **Start Date.** Neither can be in the future and need to be changed after July 1 to the beginning of the fiscal year. Enter the **End Date** as the end of the upcoming fiscal year. If a new member

pays for more than one year, this can be designated under **Number of Terms**. The membership payment information populates automatically based on the **Membership Type** selected.

Step 5: Select **Send Confirmation and Receipt.** If needed, include a personalized message welcoming the new member, but it is not required. Be sure to select **Renew.**

EMAIL REMINDER TO MEMBERS WHO HAVEN'T PAID DUES

Here's a quick way to remind members who haven't paid dues both near the renewal date and/or after the renewal date. Have a reminder text prepared that you can copy and paste into the email body. A note of caution: Always confirm first with the Treasurer/Assistant Treasurer that these members' dues are <u>not</u> paid before sending a reminder.

Step 1: CiviCRM > Memberships >Dashboard and scroll to the membership type that you want to send an email reminder to i.e. Active.
Step 2: Select Blue Number in the end column
Step 3: Sort by End Date - The members who have not paid their dues will not have the upcoming fiscal year end dates. A note of caution: Always confirm first with the treasurer that these members' dues are not paid before sending a reminder.
Step 4: Check box in front of members who have not yet paid their dues
Step 5: Select Actions
Step 6: Select Email – send now (to 50 or less)
Step 7: Fill in the subject
Step 8: Create the email text or Click on the area you want to paste text. Click on the paste box, paste, and select OK. Edit as needed.
Step 9: It is best to double check the routing list and select Send Email

MEMBERSHIP RENEWALS WITH NO DUES PAYMENTS – CHAPTER BOARD, NATIONAL BOARD AND HONORARY MEMBERS

When no membership dues are involved, it is relatively easy to renew returning **Chapter Board**, **National Board** and **Honorary** members. These memberships are <u>in addition</u> to the Chapter memberships that require dues payments (i.e. **Active** and **Associate**) and default to a duration of one year. It is important to make sure all Chapter Board, National Board, and Honorary members have their memberships added to their **Contact Record** each year, so they are reflected in the Chapter **Memberships Dashboard** and select **Reports**. Generally, the new Chapter Board, National Board, and Honorary Member lists are available by early May for data entry by either the VP Membership or the Website Administrator.

METHOD #1 - BOARD/HONORARY MEMBERSHIP RENEWALS VIA BULK ENTRY

A quick way to update Chapter Board, National, and Honorary Membership end dates is via bulk entry where multiple participants can be renewed at one time. Below is an example for Chapter Board

members. The same steps can be used for the National Board and Honorary Memberships, although **Method # 2** below may be more convenient, since they have just a few members.

Step 1: Suppose you want to update the **End Date** of the Chapter Board Members who are returning to the Board but don't want to have to go into each **Contact Record**. Obtain a list of all members returning to the Chapter Board. Select **Memberships > Dashboard** and scroll to the **Chapter Board Member** row. Select the blue number at the end of the column. Alphabetize by clicking on the <u>arrows</u> in front of the column heading **Name**. Check the boxes of members returning to the Chapter Board. Another option, if only a few members are going of the Chapter Board, is to have a list of those going off the Board. Check the box to the far left in the column heading to select all. Uncheck the boxes of those going off the Chapter Board.

		Fin	d M	embership	S									Ð	
► Edit Search Criteria															
	35 Results Membership Status In New, Current, Grace AND Membership Type In Chapter Board Member (Phoenix)														
		Se	ect F	Records:	○ A	Il 35 records	 29 Sel 	ected reco	ords only						
	 ⊘ Actions 					v									
				♦ Name	Туре	 Member Since 	♦ Start Date	♦ End Date	≜ Source		Auto- renew?				
			a	Douglas, Irene	Chapter Board Member (Phoenix)	June 30th, 2017	July 1st, 2017	June 30th, 2018		Current		View	Edit	Renew >	

Step 2: Select the Actions dropdown menu > Update multiple memberships > Custom Membership Details – Bulk Entry. See blue arrow below.

Update multiple memberships	Ð
✓ Cancel Select Profile • Custom Membership Details - Bulk Entry	
✓ Continue	

Step 3: The members listed should be all the members returning to the Chapter Board. Go to the column heading **Membership Expiration Date** and on the first name only put in the new **End Date** for these returning members. Click on the icon at the top of the heading and all dates in that column will change to the new **End Date**. This just saved going into all those contact records to renew Chapter Board memberships.

	pdate mul Ipdate field value or the first mem	hat value											
N	✓ Update Men lame	nberships < Cancel	Phone	Street Address	City	State/Province	Country	Postal Code	C Member Since	Membership Start Date	C Membership Expiration Date	() Membership Status	🖺 Membership Typ
D	louglas, Irene	irenesdouglas@yahoo.com	480-991- 1135	4555 East Mayo	Phoenix	Arizona	United States	85050	06/30/2017	07/01/2017	06/30/2019	Current \$	ARCS Foundation - Pho

Step 4: NOTE: Extreme care must be used when clicking on the icon, as all data will be changed on each contact record in that column. Before selecting Update Memberships in the upper right or lower left corner, make sure the updates are correct. If not, either correct or Cancel.

Step 5: Select **Update Memberships** in the lower left or upper right corner. Select **Done** on the next page that appears. Check the **Memberships Dashboard** to make sure the updates are correct.

Woodrow, yoodr Susan	rowdds@qwestoffice.net	6341 East Alta Hacienda Drive	Scottsdale	Arizona	United States	85251	07/01/2016 ∰ ×	07/01/2016 ∰ ×	06/30/2019 ∰ ×	Curren
✓ Update Membershi	ips 🕻 Cancel									

METHOD #2 BOARD/HONORARY MEMBERSHIP RENEWALS VIA DASHBOARD

Instead of doing a bulk entry, the **Memberships Dashboard** is sometimes more convenient to renew National Board or Honorary members, since there are often only a few that need to be renewed. Obtain a list of any Board or Honorary members who are **not** returning.

Step 1: Go to the **Memberships Dashboard** and select **Renew** at the end of the row for each member that will be returning to the Board.

Step 2: Do <u>not</u> **Record Membership** or **Send Confirmation and Receipt,** as there are no dues involved and a receipt will just confuse the member.

Step 3: Select **Renew** at the bottom of the page and the **Membership Dashboard** re-appears so other returning members can be renewed.

Step 4: Repeat the process for other member renewals.

Renewing will add the norn	nal membership period to the End Date of the previous period for members whose status is Current or Grace. For Expired
memberships, renewing wil the day after the previous E	I create a membership period commencing from the 'Date Renewal Entered'. This date can be adjusted including being set to and Date - if continuous membership is required.
✓ Renew X Cancel	
Membership Organization and Type	ARCS Foundation - Phoenix Chapter - Chapter Board Member (Phoenix) change membership type
Membership Status	Current Status of this membership.
Membership End Date	June 30th, 2018
Date Renewal Entered	06/03/2018 📷 🗰 🗙
Renewal extends members	hip end date by one membership period change
Record Renewal Payment?	Check this box to enter payment information. You will also be able to generate a customized receipt.
Send Confirmation and	
Receipt?	Automatically email a membership confirmation and receipt to diane@might.net?
✓ Renew × Cancel	

ADD NEW BOARD AND/OR HONORARY MEMBERSHIPS

New Board and Honorary members need to have their Memberships <u>added</u> so they appear on the **Memberships Dashboard** and select **Reports**. When a Board or Honorary membership type is added, it auto-populates as **New**. Obtain a list of <u>new</u> Chapter and National Board members as well as any new Honorary Members.

There are two ways to add a membership either **Memberships > New Membership** or **Contact Record > Memberships tab**. For the sake of demonstration, the **Membership > New Membership** method will be used. All memberships except Lifetime have a default expiration date of 1 year.

Step 1: Go to the **Contact Record** of each new Board/Honorary member and select **Memberships tab > Add Membership.**

Step 2: For the **Membership Organization** designate **ARCS Foundation – Phoenix Chapter**. Select from the **Membership Type** as either **Chapter Board Member** or **Honorary Member**. For Chapter members who are National Board Members or National Board Committee Members, designate the organization as **ARCS National** and the **Membership Status** as **National Board Member**. Note that the **Member Since** and **Start Date** cannot be in the future, so will need to be changed after July 1. The **End Date** can be in the future and is designated as the end of the upcoming fiscal year.

Step 3: Do <u>not</u> **Record Membership** or **Send Receipt**, as there are no dues involved and a receipt will confuse the member. See screenshot below. Be sure to select **SAVE**.

New Membership For auto-renewing members Member	rships the emails are sent when each payment is received w submit credit of member of the comment of the comm	ontact ership
Membership Organization and Type	ARCS Foundation - Phoenix Chapter Chapter Board Member (Phoenix)	ew the all ex
Number of Terms	Solect membership organization and then membership rype.	act
Source	corresponding fee is entered below.	
Member Since	Source of this membership. This value is searchable. O5/26/2018 When did this contact first become a member?	
Start Date	5/26/2018 * First day of current continuous membership period. Start Date will be automatically set based on	
End Date	Membership Type if you don't select a date. 6/30/2019 ** Latest membership period expiration date. End Date will be automatically set based on Membership Type if you don't select a date.	
Status Override? 📀		
Record Membership Payment?	Check this box to enter or update payment information. You will also be able to generate a customized receipt.	
Send Confirmation and Receipt?	Automatically email a membership confirmation and receipt to marciajobe@yahoo.com? OR if the payment is from a different contact, this email will only go to them.	
	Save Save and New X	Can

MEMBERS GOING OFF BOARDS AND/OR NO LONGER HONORARY MEMBERS

Depending on the Chapter timeline, nothing may need to be done to members going off the Board or Honorary members who have resigned. They automatically go from Grace on July 1 to **Expired** on September 30. After September 30, these members no longer appear on the **Memberships Dashboard** and select **Reports.** However, if July 1 is the Chapter's official transition date, it may be best to use the <u>Status Override</u> function and change their **Memberships Status** to **Expired** on or shortly after July 1. Otherwise, they will continue to be on the the **Memberships Dashboard** and select **Reports** with **Grace** status until September 30.

ADD BOARD POSITION RELATIONSHIPS

After entering the Chapter and National Board members for the upcoming fiscal year and confirming they are correct, it is time to enter Board positions through the **Relationships** tab on the **Contact Record**. Currently, there is no quick way to enter Chapter and National Board relationships that are used for the ARCS Light selection and Chapter Board position reports. One method is to go to the **Memberships Dashboard**, alphabetize the list, select the member's name and the **Contact Record** will appear to update the **Relationships tab**. Another method is to pull up each Chapter Board Member's **Contact Record** and update the **Relationships** tab. The first method is documented below:

Step 1: Login > CiviCRM > Memberships > Dashboard

- Step 2: Scroll to the Chapter Board Memberships
- Step 3: > Blue Number in the Current# Column.

Step 4: Click on the arrow in front of the Name column heading and alphabetize.

Step 5: Select the member's name in blue

Find Memberships												
+	Edit	Search Crite	ria									
4	41 Results Membership Status Membership Type In				. In New, Current, Grace <i>AND</i> n Chapter Board Member (Phoenix)							
Se	elect	Records:	○ A	II 41 records	O Sele	cted recor	ds only					
¢	O Action	ons		*								
		Name	Туре	Member Since	♦ Start Date	♦ End Date	♣ Source	Status	Auto- renew?			
	\$	Austerman, Ceda	Chapter Board Member (Phoenix)	May 26th, 2018	May 26th, 2018	June 30th, 2019		New		View	Edit	Renew ►
	ê	Bray, Jill	Chapter Board Member (Phoenix)	July 1st, 2017	July 1st, 2017	June 30th, 2019		Current		View	Edit	Renew ►

Step 6: Select the Relationships tab

🖁 Ms. Ceda Austerman	
Summary Contributions 10 Pledges 0 Memberships 2 Events 6 Activities 151	Awards 0 Relationships 1 Groups 2 Notes 0 Tags 0 Change Log 17
Employer	Tags

Step 7: Select Add Relationship to add Chapter Board positions.

Step 8: The screenshot below shows how to enter the relationship data for a Chapter Board member position. There are dropdowns so you can select the **Relationship Type** and **Contact(s)**. Note that the Board Relationships are based on the fiscal Year. Note: If a member is serving multiple terms, all that needs to be done is update the **End Date** and in the description enter how many years they have served in that position. For example, suppose it is the second year that the member is serving in that position, put **2 Years** in the description. Be sure to select **Save Relationship**, when done.

Relationship Type *	Chair/VP/Director of Newsletter of	
Contact(s) *	ARCS Foundation - Phoenix Chapter	
Start Date	7/1/2018 End Date 6/30/2019	
Deseriation	If this relationship has start and/or end dates, specify them here.	
Description		
NOTE		
Permissions	Ms. Ceda Austerman can view and update information about selected contact(s).	
Permissions Enabled?	 Ms. Ceda Austerman can view and update information about selected contact(s). Selected contact(s) can view and update information about Ms. Ceda Austerman. 	
Permissions Enabled?	 Ms. Ceda Austerman can view and update information about selected contact(s). Selected contact(s) can view and update information about Ms. Ceda Austerman. 	
Permissions Enabled?	 Ms. Ceda Austerman can view and update information about selected contact(s). Selected contact(s) can view and update information about Ms. Ceda Austerman. 	
Permissions Enabled?	 Ms. Ceda Austerman can view and update information about selected contact(s). Selected contact(s) can view and update information about Ms. Ceda Austerman. 	

After saving the **Relationship**, here is what the **Relationships** tab will look like. To get back to the **Memberships Dashboard** select the back arrow. Repeat for the next Chapter Member.

Ms. Ceda Aust	erman											
E Actions												
Summary Contribution	s 10 Pledges 0	Memberships 2	Events 6	Activities 151	Awards 0 Relati	onships 1	Groups 2	Notes 0	Tags 0	Change Log	17	
O Add Relationship												
Current Relationsh	ips											
Show 25 🛊 entries								First	Previo	ous 1	Next	Last
Relationship 🖕	Å	Since 🗍	Position	City 👙	State/Prov	Email		4	Pho	one ≜		
Chair/VP/Director of Newsletter of	ARCS Foundation - Phoenix Chapter	July 1st, 2018		Phoenix	AZ	phoenix@	arcsfound	ation.org		View	Edit	more •

DECEASED MEMBERS

When an individual passes, it is important to go and update their **Contact Record**.

Step 1: Find their **Contact Record > Edit > Demographics** tab and check **Contact is Deceased** and enter their **Date Deceased**. Be sure to select **Save**.

Step 2: While on their Contact Record, go to their Memberships tab and select Edit for any current Membership Types that they had. Check the Status Override function and change to Expired. Be sure to select Save.

Step 3: While on their **Contact Record**, go to their **Groups tab**. Remove (don't delete) any groups they belong to. Note: Nothing needs to be done to the **Relationships** tab, since it automatically goes to **Inactive** at the end of the fiscal year.

Resignations

Depending on the Chapter timeline, nothing may need to be done to members who submitted their resignations. They automatically go from Grace on July 1 to **Expired** on September 30. After September 30, these members no longer appear on the **Memberships Dashboard** and select **Reports.** However, if July 1 is the Chapter's official transition date, it may be best to use the <u>Status Override</u> function and change their **Memberships Dashboard** on or shortly after July 1. Otherwise, they will continue to be on the the **Memberships Dashboard** and select **Reports** with **Grace** status until September 30.

HOW TO RENEW EXPIRED MEMBERSHIPS

If a member pays their dues after their membership has expired, the membership can be manually renewed by performing the following steps:

- **Step 1**: Search for and select the member whose membership has expired.
- Step 2: Select the Memberships tab on the contact record.
- Step 3: Click on Edit to the right of the expired membership.
- Step 4: In the Edit Membership screen, change the end date to the end of the new fiscal year.
- Step 5: Check Record Membership Payment and note check number.
- Step 6: Check Send Confirmation and Receipt. Be sure to select Save.

STATUS OVERRIDE FUNCTION

Membership status is normally assigned and updated automatically. When a membership type is added, it auto-populates as "New". If you want to assign a **Membership Status** manually and bypass automated status setting, check the **Status Override**? box and select from the available status options. The status assigned remains in force, unless it is again modified on this screen. Note: As long as the **Status Override** flag is checked, the automated membership status update script will not update this membership record. This is recommended except for members who are deceased,. If you want to change or add membership status rules, please contact the IS Committee.

To access the status override, go to a member's **Contact Record** and select the **Memberships** tab. Scroll to any of the current memberships listed and select **Edit.** The following screen will appear with the **Status Override** check box:

1	🏷 Edit Membership							e	~ 2				
	For auto repowing memberships the ampile are cent when each payment is received												
	Member Mrs. Andrea Moselev												
	Membership Organization												
	and Type	ARCS Foundation - Phoenix Chapter \$											
		Select Membership Organization and then Membership Type.											
	Source	Online Contribution: PHOENIX MEMBER	SHIP PAYMEN										
		Source of this membership. This value is searchable.											
	Member Since	05/30/2018 💼 🛍 🗙											
		When did this contact first become a member?											
	Start Date	07/01/2017 🖬 🗰 🗙											
		First day of current continuous membership pe	riod. Start Date will I	be automatically	set based on M	lembership Type	if you dor	n't select a					
		date.											
	End Date)6/30/2019 🛗 🗙											
		Latest membership period expiration date. End	Date will be automa	atically set based	on Membershi	p Type if you do	n't select a	a date.					
Status Override? 😗 🗌													
	Membership Status	New											
	Send Confirmation and												
	Receipt?	Automatically email a membership confirmation	and receipt to and	ea@awecorpora	teinteriors.com	? OR if the payn	nent is fror	n a differe	nt				
		contact, this email will only go to them.											
	 Related Contributions 												
	Click arrow to view payment d	etails.											
	Amount Type	♦ Source	Received	Thank-	Status	Premium							
				you Sent									
	• \$150.00 Member	Online Contribution: PHOENIX	May 30th, 2018		Completed		View E	dit Dele	te				
	Dues		1:17 PM										
		nenewal											