

**UPHA Membership System
Processes and Responsibilities**

Updated 1/2016

Member System Updates	<p>https://board.upha.org/members/</p> <p>Membership system updated with new year data fields</p> <p>Renewal Email Message created Renewal frequency decided</p> <p>Renewal Message installed into System Renewal Emails sent by System from membership@upha.org</p>	<p>Staff</p> <p>Member Services</p> <p>Staff</p> <p>Staff</p>
Membership Renewal by Current UPHA Members	<p>https://www.upha.org/membership.html</p> <p>Member accesses MEMBERSHIP area of association public Web Site</p> <ul style="list-style-type: none"> - clicks on <u>Apply / Renew / Refresh online</u> link - logs into system using first and last name and password - updates information - designates Member type - prints invoice - pays dues <ul style="list-style-type: none"> -- by check sent to UPHA -- by credit card through secure payment system 	<p>Current Member</p>
New Member Joins UPHA	<p>https://www.upha.org/membership.html</p> <p>New Member accesses MEMBERSHIP area of association public Web Site</p> <ul style="list-style-type: none"> - clicks on <u>Apply / Renew / Refresh online</u> link - clicks on button ENTER NEW MEMBER APPLICATION - enters member data - designates Member type - prints invoice - pays dues <ul style="list-style-type: none"> -- by check sent to UPHA -- by credit card through secure payment system 	<p>New Member</p>
Payment Processed	<p>See Financial Policies: https://board.upha.org/members/secure/policies/</p> <p>Dues payment received:</p> <p>- By Check or Cash</p> <ul style="list-style-type: none"> -- follow Financial Procedures for mail, cash and checks -- prepare Cash /Check Receipts Log -- payment detail data entered on QuickBooks Account 50 -- deposit report prepared -- deposit made or checks and deposit report sent or delivered to Staff or Treasurer and deposit submitted -- deposit receipt attached to Log 	<p>Staff</p> <p>Bookkeeper</p> <p>Bookkeeper</p> <p>Staff or Bookkeeper</p>

	<p>- By Credit Card – into Merchant Account</p> <ul style="list-style-type: none"> -- find each payment on Treasurer's email account -- enter the payee, amount, date and other information onto Membership system and QuickBooks Account 52 -- monthly report from First Data on payments processed, generated and payee and cost center confirmed -- payee data and revenue account entered on Transfer Document -- prepare and process transfer of funds from Merchant Account to General / Operating Account and Staff Account at MACU and enter on QuickBooks 	<p>Bookkeeper</p> <p>Bookkeeper Staff and Bookkeeper</p>
Membership Payment Recorded	<p>Member payment entered on to Member System Financial area, including:</p> <ul style="list-style-type: none"> - member type - receipt number - receipt date 	<p>Staff or Member Services</p>
Membership Confirmation Notice Created	<p>Membership confirmation notice designed – text and content of letter and membership card</p>	<p>Member Services</p>
Confirmation Sent to Member	<p>Prepare and send Membership Confirmation letter with embedded Membership Card</p>	<p>Staff or Bookkeeper</p>
Membership Reporting	<p>https://board.upha.org/members/secure/policies/</p> <p>Request for report received</p> <p>- Simple report</p> <ul style="list-style-type: none"> -- Lookup on system performed -- report created and formatted -- report sent to requestor <p>- Complicated report</p> <ul style="list-style-type: none"> -- data query performed -- report created and formatted -- report sent to Member Services or Board 	<p>Anyone</p> <p>Member Services</p> <p>Staff or Bookkeeper</p>