

Chapter Advisor Membership Registration System Manual

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BPA Membership System

Chapter Advisor Membership Instructions

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BPA Membership System

Chapter Advisor Membership Instructions

IMPORTANT: Within the Membership System, any fields that are in **RED** are Required Fields

Login Instructions

How to Login as a Primary Chapter Advisor:

Login

New Chapter Request

Chapter ID / Membership ID / Email / Username:

Membership ID

Password:

Password

Login

Forgot Password

Note: The Chapter ID is the Chapter Number that is auto generated by the membership system. If you are a Secondary Chapter Advisor, the Username will be your email address

Note: If this is the first time you are logging into the membership system, you will use the membership system auto generated password that was sent to you via email

1. Type the appropriate “**Membership URL**”, provided by BPA National, into your Web Browser (Chrome Recommended)
2. Type the appropriate “**Chapter ID**” in the “**Membership ID**” field
3. Type the appropriate “**Password**” in the “**Password**” field
4. Click on the “**Login**” button

Login Instructions Continued

How to Use the Forgot Password function:

Login

New Chapter Request

Chapter ID / Membership ID / Email / Username:

Membership ID

Password:

Password

Login

Forgot Password

Note: If an account was found that matches the Chapter ID and Email Address on file, you will receive an email with your new temporary password

1. Click on the **“Forgot Password”** button

Enter All The Information Below To Have Your Password Reset and Emailed To You

Back

Chapter ID / User Name:

User Name

Email:

Email

Reset My Password

1. Type the appropriate **“Username”** in the **“Chapter ID/Username”** field
2. Type the appropriate **“Email Address”** in the **“Email”** field
3. Click on the **“Reset My Password”** button

Login Instructions Continued

First Time Login Chapter Advisor Instructions:

When you login for the first time you will be asked to confirm Chapter information
(Each year thereafter, you will be asked to confirm all information again)

User Information

Prefix: Mr. First Name: Tony Middle Name: Drywall Last Name: Suffix: Select...

Office Phone: Extension: Fax Number:

Email: drywall@gmail.com Alternate Email: Cell Phone:

LinkedIn Link:

New Password:

Principal's Information

Addresses

Save And Logout Confirm Information

1. Click on the **“User Information”** accordion
2. Confirm or Change the **“User information”** fields
3. Type the appropriate **“New Password”** in the **“New Password”** field

Principal's Information

Principal's First Name: Janet Principal's Last Name: Dover Principal's Email: janet@gmail.com

Addresses

Save And Logout Confirm Information

4. Click on the **“Principal’s Information”** accordion
5. Confirm or Change the **“Principal Information”** fields

Copy Chapter Addresses

Work Address Copy Work Address

Billing Address Copy Billing Address

Home Address Copy Home Address

Alternate Address Copy Alternate Address

Save And Logout Confirm Information

1. Click on the **“Addresses”** accordion
2. Type the appropriate **“Address Information”** in the **“Work Address, Home Address, Billing Address and Alternate Address”** fields

Note: The **“Work Address”** and **“Billing Address”** are required. The **“Home Address”** and **“Alternate Address”** is optional. If the address is the same, you can use the **“Copy”** functions i.e. **Copy Chapter Address or Copy Work Address**

Membership System Navigation

Action Buttons are located throughout the Membership System and when clicked on, these buttons allow you to perform membership related actions

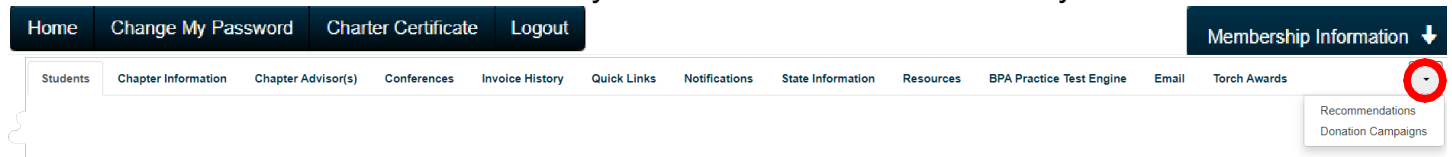
Tabs are located across the main page and groups like information and actions together

Accordions are located within a Tab and groups like information and actions together

Search When you see a “**Search**” field on a screen, this will allow you to search the information listed in the columns on that screen to filter your data on the screen

Show Entries When you see a “**Show Entries**” field on a screen, this will allow to set the number of entries on a screen

Sort Columns Click on the Column that you want to sort the information by on the screen



Action Buttons:

Home Action Button: When you click on the “**Home**” button, it will return you to the Main Page

Change My Password Action Button: When you click on the “**Change My Password**” button, it allows you to change your password.

Charter Certificate: When you click on the “**Charter Certificate**” button, a PDF suitable for printing will automatically download

Logout Action Button: When you click on the “**Logout**” button, it will log you out of the Membership system

Membership System Navigation Continued:

Membership Information Dashboard Toggle Button: When you click on the “**Membership Information**” button, it will open a Membership Information Dashboard with various membership information and graphs. When you click on the “**Current**” number or the “**Graph**” links, it will display detailed membership information. If you want to close the Membership Information Dashboard, Click on the “**Membership Information**” button

Membership Information 			
Membership Date: 11/07/2022	Expiration Date: 06/30/2023		Original Join Date: 09/14/2000
	2020-2021	2021-2022	Current
Paid Members	7	12	8
Unpaid/Pending Members	0	0	0
Paid Advisors	2	2	2
Unpaid/Pending Advisors	0	0	0
Total Paid	9	14	10
Total Unpaid	0	0	0
Total Unsubmitted	0	0	1
Total Membership	9	14	10
 Membership Graph			
 Overall Membership Chart			

Membership Chart Definitions:

Membership Date is the Date the Chapter was Created

Expiration Date is the Membership Expiration Date for the Current Year

Original Join Date is the Original Date the Chapter joined Membership

Paid Members is the Total Number of Paid Members

Unpaid/Pending Members is the Number of Unpaid/Pending Student Members

Paid Advisors is the Total Number of Paid Advisors

Unpaid/Pending Advisors is the Number of Unpaid/Pending Advisors

Total Paid is the Total Number of All Paid Members

Total Unpaid is the Total Number of All Unpaid Members

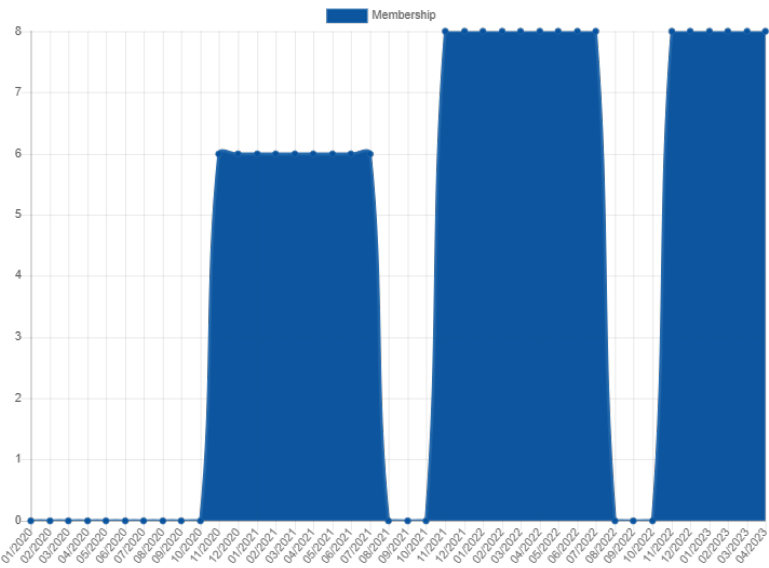
Total Unsubmitted is the Total Number ALL Unsubmitted Members

Total Membership is the Total Number of ALL Members Paid or Unpaid

Membership System Navigation Continued

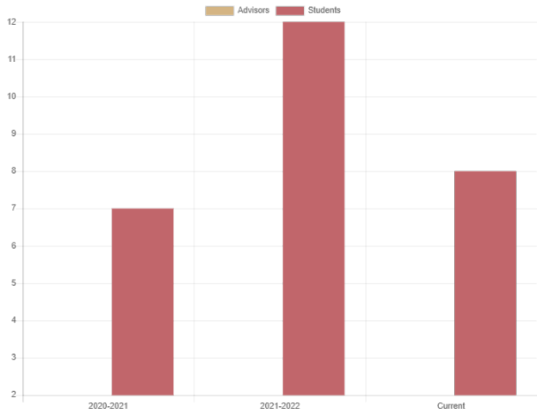
How to View the Membership Graph:

- 1. Click on the “Membership Graph” link



How to View the Overall Membership Chart:

- 1. Click on the “Overall Membership Chart” link



Student Tab and Screens

1. Click on the “Students” tab

Status	Select	Membership ID	Last Name	First Name	Gender	Grade	Submitted Date	Invoice Number	Edit	More Options	Delete
PENDING	☐	00112341	Jones	Tony	Male	10					
MEMBER		00112340	Weber	Allison	Female	9	04/28/2023	16783			
MEMBER		00000000	Smith	John	Male	11	10/27/2022	00000			
MEMBER			Smith	John	Male	12	10/27/2022				

Status

Pending: Member has been submitted; however, the membership invoice has not been Paid

Member: Member has been submitted and the membership invoice has been Paid

1. If the status field is blank, the members have not been submitted. Unsubmitted members can be edited and deleted.
2. Submitted members can be edited; however, they cannot be Deleted
3. Click on the “**Membership ID**” link to display detailed Student Member Information. This link also gives you the option to “**Print**” the “**Student Membership Card**” if the student is a member

Member Details

Membership ID:
14-0013-003437

First Name:
John

Gender:
Male

Email:

MN/MI:
7

Grade:
7

Cell Phone:

Last Name:
Smith

Demographic:
Caucasian

Home Phone:

Student Type:
Student Leader 1

Years As Member:
1

Close

Print Membership Card

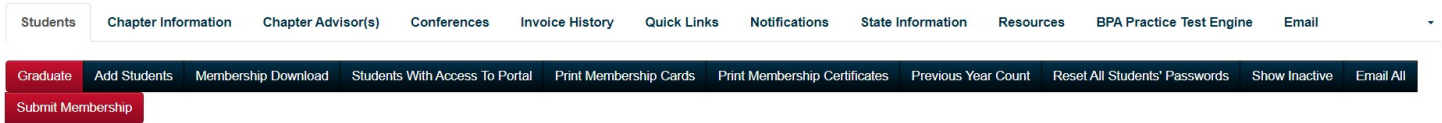
4. **Submitted Date** is the Date the Student was Submitted for Membership
5. Click on the “**Edit**” icon next the Student Member Name to “**Edit**” the Student Member information
6. Click on the “**Request Change**” icon to make a “**Name Change**” Request for a Submitted Student Member

Note: When you make a Name Change Request, the State Advisor will be notified via email. The State Advisor will have to approve the name change request before you will see the Name Change on your screen)

Student Tab and Screens Continued

How to Graduate Students:

1. Click on the “**Student**” tab



2. Click on the “**Graduate**” button
3. Review the students listed on the screen, if all are correct, click on the “**Select All**” button
4. If all are NOT correct, you may individually select certain checkboxes and click on the “**Drop Selected**” button at the bottom of the screen (Click Confirm)
5. Once you’ve verified that the remaining students are to Graduate, click on the “**Select All**” button
6. Click on the “**Graduation Completed**” button at the bottom of the screen
7. Read the “**Graduation Complete**” message and confirm “**Yes**” or “**No**”

Student Tab and Screens Continued

How to Add a Student:

1. Click on the **"Student"** tab

The screenshot shows a top navigation bar with the following tabs: Students, Chapter Information, Chapter Advisor(s), Conferences, Invoice History, Quick Links, State Information, Resources, BPA Practice Test Engine, Email, Torch Awards, Recommendations, Donation Campaigns, and Student Transfers. Below this is a secondary bar with buttons: Add Students, Membership Download, Students With Access To Portal, Print Membership Cards, Print Membership Certificates, Previous Year Count, Reset All Students' Passwords, Show Inactive, Email All, and Submit Membership.

2. Click on the **"Add Students"** button

Note: There are Two (2) ways to Add a Student Member

Individual Member Entry Accordion: Use this method to manually enter individual student members

For help please click on the ? icon.

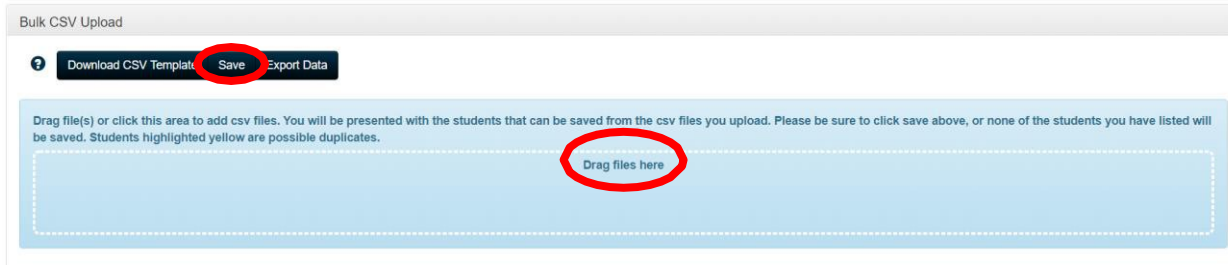
The screenshot shows the 'Individual Member Entry' form. It contains the following fields and sections: Prefix (dropdown), First Name, Middle Name, Last Name, Suffix (dropdown), Grade (dropdown), Gender (dropdown), Demographic (dropdown), Member Title (dropdown), Email, Cell Phone, Home Phone, Field Of Employment, T-Shirt Size, Years As A Member, and a section for disabilities with checkboxes for Audio, Visual, Mobility, Dietary, and Other. There is also a text area for 'Please specify special accommodations requested:' and two buttons at the bottom: 'Save And Finish' and 'Save And Add Next Member'.

1. Select the appropriate **"Prefix"** from the **"Prefix"** field Drop-Down list (optional)
2. Type the appropriate **"Student First Name"** in the **"First Name"** field
3. Type the appropriate **"Student Middle Name"** in the **"Middle Name"** field (optional)
4. Type the appropriate **"Student Last Name"** in the **"Last Name"** field
5. Select the appropriate **"Suffix"** from the **"Suffix"** field Drop-Down list (optional)
6. Select the appropriate **"Student Grade"** from the **"Grade"** field Drop-Down list
7. Select the appropriate **"Student Gender"** from the **"Gender"** field Drop-Down list
8. Select the appropriate **"Student Demographic"** from the **"Demographic"** field Drop-Down list
9. Select the appropriate **"Student Membership Title"** from the **"Member Title"** field Drop-Down list
10. Type the appropriate **"Student Email"** in the **"Email"** field
11. Type the appropriate **"Student Cell Phone Number"** in the **"Cell Phone"** field (optional)
12. Type the appropriate **"Student Home Phone Number"** in the **"Home Phone"** field (optional)
13. Type the appropriate **"Student Date of Birth"** in the **"DOB"** field (optional)
14. Type the appropriate **"Student Field of Employment"** in the **"Field of Employment"** field (optional)
15. Select the appropriate **"Student T-Shirt Size"** from the **"T-Shirt Size"** field Drop-Down list
16. Type the appropriate **"Student Number of Year as a Member"** in the **"Years as a Member"** field
17. Select the appropriate **"Student Disability"** checkboxes from the **"I have a disability field"** checkbox fields (optional)
18. Type the appropriate **"Student Member Special Needs Information"** in the **"Special Accommodations"** field
19. Click on the **"Save and Finish"** button OR Click on the **"Save And Add Next Member"** if you want to enter another Student Member

Student Tab and Screens Continued

Bulk CSV Upload Accordion: Use this drag and drop method to upload student members from a .CSV (Excel) file - Use this method for 250 or more students

1. Click on the “**Bulk CSV Upload**” accordion



Download CSV Template: Download the template to your local machine to add all of the student members that you want upload for membership. The template format **MUST** be used for the drag and drop method to work.

1. Click on the “**Download CSV Template**” button
2. Type the appropriate “**Student Member Information**” in the template spreadsheet

(Note: First Name, Last Name, Grade, Gender, Demographic, Member Type and Years as a Member are Required fields)

3. Once you have entered all of the Student Members that you want to upload, save the file to your local machine
4. Locate the Student Member file that you saved on your local machine
5. With your mouse, Left-Click and Hold the Left-Click on the Student Member file and Drag it to the “**Drag Files Here**” area of the screen and release the Left-Click on your mouse
6. Once you have Dragged the file to the screen and released the file, a screen will be displayed with all of the Student Members from the spreadsheet for your review
7. Click on the “**Save**” button

(IMPORTANT: If you do NOT click on the Save button, your data will NOT be Saved to the Membership system)

(Note: If you have any student member information incorrect, it will be highlighted in Red and will not be Saved. If you have Student Members highlighted in yellow, that is an indication that the student information is a duplicate)

Student Tab and Screens Continued

How To Delete an Un-Submitted Student Member:

1. Click on the “**Delete**” icon located on the right-hand side of the Student Member name

Note: If the student has not been submitted, you will have the option to delete the Student Member. If the Student Member has been submitted, the Delete Icon will no longer be displayed on the screen

How To Edit a Student Member:

1. Click on the “**Edit**” icon located on the right-hand side of the Student Member name

Note: If the student has not been submitted, you will have the option to Edit ALL Student Member Information . If the Student Member has been submitted, you will have the option to Edit some of the Student Member Information

Student Tab and Screens Continued

How to Submit Student Members:

1. Click on the “**Students**” tab

Students	Chapter Information	Chapter Advisor(s)	Conferences	Invoice History	Quick Links	State Information	Resources	BPA Practice Test Engine	Email	Torch Awards	Recommendations	Donation Campaigns	Student Transfers
----------	---------------------	--------------------	-------------	-----------------	-------------	-------------------	-----------	--------------------------	-------	--------------	-----------------	--------------------	-------------------

2. Select checkboxes located on the left-hand side of the Student Member(s) that you want to submit

Status	Select	Membership ID	Last Name	First Name	Gender	Grade	Submitted Date	Invoice Number	Edit	More Options	Delete
	☒	00112341	Jones	Tony	Male	10				:	
PENDING		00112340	Weber	Allison	Female	9	04/28/2023	16783		:	

Add Students Membership Download Students With Access To Portal Print Membership Cards Print Membership Certificates Previous Year Count Reset All Students' Passwords Email All

Submit Membership

1. Click on the “**Submit Membership**” button
2. Read the National Disclaimer
3. Click on the “**I have Read and Agree Disclaimer**” checkbox to continue
4. Click on the “**Confirm**” button
5. Once you click on the “**Confirm**” button, a Confirmation Membership Fee Summary will be displayed on the Screen for your review

NOTE: You will have an option to Export the Membership Fee details for the Membership that was Submitted

6. Once you have reviewed the Confirmation Membership Fee Summary, click on the “**Confirm**” button

Pay Or View Invoice(s) Now?

View Invoice(s)

Pay Invoice(s)

Pay Invoice(s) Later

Close

7. Click on “**View Invoices**” if you want to “**View**” the invoice that was created when you Submitted Membership **OR** Click on the “**Pay Invoice(s)**” button, to Pay the Invoice that was created when you Submitted Membership **OR** Click on the “**Pay Invoice(s) Later**” button, if you want to review the Invoice that was created when you Submitted Membership at a later time

NOTE: If you choose to Pay Invoice(s), please see the “*Invoice History*” section of this document for instructions on how to make a payment on an Invoice

Student Tab and Screens Continued

How To Change a Submitted Student Name:

- 1. Click on the “More Options” icon located next to the “Edit” icon
- 2. Click on “Name Change Request” from the drop down menu and follow the on screen instructions

Choose Change Type

Name Change Request

Close

Current Name

Prefix: First Name: Middle Name: Last Name: Suffix:

New Name

Prefix: First Name: Middle Name: Last Name: Suffix:

Reason For Change:

Save

- 3. Select the appropriate "Prefix" from the "Prefix" field Drop-Down list (optional)
- 4. Type the appropriate "Student First Name" in the "First Name" field
- 5. Type the appropriate "Student Middle Name" in the "Middle Name" field (optional)
- 6. Type the appropriate "Student Last Name" in the "Last Name" field
- 7. Select the appropriate "Suffix" from the "Suffix" field Drop-Down list (optional)
- 8. Type the appropriate "Reason for Name Change" in the "Reason For Change" field
- 9. Click on the “Save” button

How To View a Student’s Transfer History:

- 1. Click on the “More Options” icon located next to the “Edit” icon
- 2. Select “Transfer History” from the dropdown menu

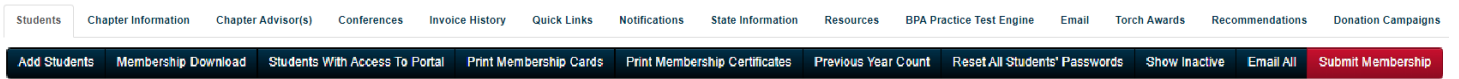
Note: If the student has never been transferred to another Chapter, there will be no transfer information displayed

Status	Select	Membership ID	Last Name	First Name	Gender	Grade	Submitted Date	Invoice Number	Edit	More Options	Delete
	☐	00112341	Jones	Tony	Male	10					
PENDING		00112340	Weber	Allison	Female	9	04/28/2023	16783			
Member Title Chapter Member Membership Date Not yet affiliated											Reset Password Transfer History Name Change Request Conference Results
MEMBER					Male	11	10/27/2022				

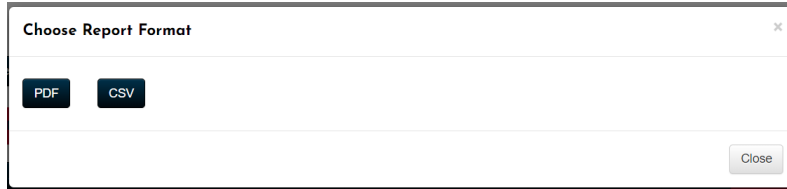
Student Tab and Screens Continued

How to Download a Membership Report:

1. Click on the “**Students**” tab



2. Click on the “**Membership Download**” button



3. Select “**PDF**” if you want the Student Membership Information displayed in a “**PDF**” file format
OR Select “**.CSV**” if you want the Student Membership Information displayed in a “**.CSV (Excel)**” format

Note: The Membership Download displays both affiliated AND Non-Affiliated Student Members

Student Tab and Screens Continued

How to View Students with Access to the Student Member Portal:

1. Click on the “**Students**” tab

Students Chapter Information Chapter Advisor(s) Conferences Invoice History

Add Students Membership Download **Students With Access To Portal** Print Membership Cards

2. Click on the “**Students with Access to Portal**” button
3. Select “**PDF**” if you want the Student Portal Access Information displayed in a “**PDF**” file format
OR Select “**.CSV**” if you want the Student Portal Access Information displayed in a “**.CSV (Excel)**” format

How to Print Membership Cards:

1. Click on the “**Students**” tab

Print Membership Cards Print Membership Certificates

2. Click on the “**Print Membership Cards**” button
(Only paid Student Members will be displayed on the Student Membership Cards)

Print Membership Cards Chapter Information Chapter Advisor(s) Conferences Invoice History Quick Links Notifications State Information Resources E-Store Surveys

Email

Back

Select/Deselect All

Show 10 entries Search:

	Membership ID	Last Name	First Name	Member Type	Invoice Number
☒	14-0013-003440	White	Anne	Student	1245
☒	14-0013-003436	Dover	Janet	Advisor	1245
☐	14-0013-003437	Smith	John	Student	1246
☐	14-0013-003438	Jones	Sally	Student	1247
☐	14-0013-003439	Johnson	Jimmy	Student	1247
☐	14-0013-003442	Sue	Sally	Student	1249

Showing 1 to 6 of 6 entries

Previous 1 Next

Print Membership Cards

1. Select the appropriate checkbox or checkboxes located on the left-hand side of the Student Membership-ID for the Student Members that you want to Print
2. Student Membership Cards for **OR** Click on the “**Select**” link at located under the “**Back**” button to Print ALL Student Membership Cards
3. Click on the “**Print Membership Cards**” button

Student Tab and Screens Continued

How to Print Membership Certificates:

1. Click on the “**Students**” tab

Print Membership Cards

Print Membership Certificates

2. Click on the “**Print Membership Certificates**” button
(Only paid Student Members will be displayed on Student Certificates)

Print Membership Certificates

Chapter Information

Chapter Advisor(s)

Conferences

Invoice History

Quick Links

Notifications

State Information

Resources

E-Store

Surveys

Email

Back

Select/Deselect All

Show 10 entries

Search:

	Membership ID	Last Name	First Name	Member Type	Invoice Number
☒	14-0013-003440	White	Anne	Student	1245
☒	14-0013-003436	Dover	Janet	Chapter Advisor	1245
☒	14-0013-003437	Smith	John	Student	1246
☐	14-0013-003438	Jones	Sally	Student	1247
☐	14-0013-003439	Johnson	Jimmy	Student	1247
☒	14-0013-003442	Sue	Sally	Student	1249

Showing 1 to 6 of 6 entries

Previous

1

Next

Print Membership Certificates

1. Select the appropriate checkbox or checkboxes located on the left-hand side of the Student Membership-ID for the Student Members that you want to Print Student Membership Certificates for **OR** Click on the “**Select**” link at located under the “**Back**” button to Print ALL Student Membership Certificates
2. Click on the “**Print Membership Certificates**” button

Student Tab and Screens Continued

How to a Download Previous Year Count Report (.CSV (Excel):

- 1. Click on the “**Students**” tab

Previous Year Count	Reset All Students' Passwords	Email All
---------------------	-------------------------------	-----------

- 1. Click on the “**Previous Year Count**” button
- 2. A .CSV (Excel) file will be auto generated. The file will display the Total Students and Advisors from previous year membership

How to Reset All Student Passwords:

- 1. Click on the “**Students**” tab

Previous Year Count	Reset All Students' Passwords	Email All
---------------------	-------------------------------	-----------

- 2. Click on the “**Reset All Students’ Passwords**” button

IMPORTANT: Once you click on the Reset All Student Passwords button, the student passwords will be reset to the default password for the chapter. This process cannot be reversed

Success

×

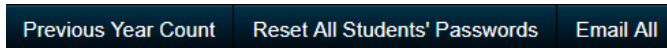
All the students' passwords have been reset to the default student password for this chapter.

Close

Student Tab and Screens Continued

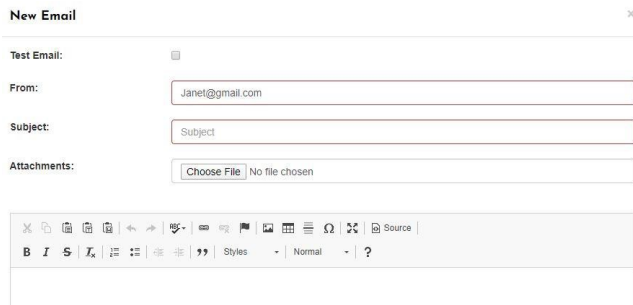
How to Email All Student Members:

1. Click on the “**Students**” tab



2. Click on the “**Email All**” button

NOTE: This will email to ALL Student Members that have an active email address in the Membership system

A screenshot of a web form titled "New Email". The form has a "Test Email:" checkbox. Below it are input fields for "From:" (pre-filled with "janet@gmail.com"), "Subject:" (pre-filled with "Subject"), and "Attachments:" (with a "Choose File" button and "No file chosen" text). At the bottom is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and other formatting options. The text area below the toolbar is empty.

3. The “**From**” field will be populated with the Primary Chapter Advisor’s email address
4. Type the appropriate “**Subject Text**” in the “**Subject**” field
5. Click on the “**Choose File**” button to attach a File (optional)
6. Type the appropriate “**Email Message**” in the “**Text Editor**” field
7. Click on the “**Send**” button

Chapter Information Tab and Screens

Students	Chapter Information	Chapter Advisor(s)	Conferences	Invoice History	Quick Links	Notifications	State Information
----------	---------------------	--------------------	-------------	-----------------	-------------	---------------	-------------------

Chapter Information

Addresses

Graduating

Save

How to Update Chapter Information:

1. Click on the “Chapter Information” tab
2. Click on the “Chapter Information” accordion

Chapter Information

School Name:

Chapter Name:

Original Chapter ID:

Phone Number:

Extension:

Fax Number:

Student Password:

Principal/Dean's First Name:

Principal/Dean's Last Name:

Principal/Dean's Email:

Chapter Website:

School Website:

Twitter:

Facebook:

Division:

State District:

Uses Group Membership Model:

Is your district and/or school a Title I district?:

Use Associate Rates?:

Require Paper Invoices?:

Update all student passwords:

Demographic numbers

Economically disadvantaged:

Free/Reduced Lunch:

Single parents, including single pregnant women:

Homeless/displaced:

Youth who are in, or have aged out of, the foster care system:

Guardian is member of Armed Forces:

Member plans to enroll (is enrolled) in Armed Forces:

Limited English Proficiency:

Multilingual: Add Row

Language

Number

Upload W-9

Choose File

No file chosen

Addresses

Graduating

Save

3. Type the appropriate "Chapter ID" in the "Original Chapter ID" field (optional)
4. Type the appropriate "Phone Number" in the "Phone Number" field (optional)
5. Type the appropriate "Fax Number" in the "Fax Number" field (optional)
6. Type the appropriate "Student Password" in the "Student Password" field (optional)

IMPORTANT: The student password is a generic password that you can give to the Student Member to logon for the first time in the Student Portal. A student will need their Membership ID and the generic password to logon to the Student Portal

7. Type the appropriate "Principal First Name" in the "Principal's First Name" field
8. Type the appropriate "Principal Last Name" in the "Principal's Last Name" field
9. Type the appropriate "Principal Email Address" in the "Principal's Email" field
10. Type the appropriate "Chapter Website URL" in the "Chapter Website" field (optional)
11. Type the appropriate "School Website URL" in the "School Website" field (optional)
12. Type the appropriate "Twitter URL" in the "Twitter" field (optional)
13. Type the appropriate "Facebook URL" in the "Facebook" field (optional)
14. Select the appropriate "District" from the "State District" field Drop-Down list
15. Uses State License Fees (This is not applicable for most states)
16. Click on the “Save” button

Chapter Information Tab and Screens Cont.

1. Click on the “**Chapter Information**” tab
2. Click on the “**Addresses**” accordion

The screenshot shows the BPA Inc. Membership System interface. At the top, there is a navigation bar with tabs: Students, Chapter Information, Chapter Advisor(s), Conferences, Invoice History, Quick Links, Notifications, State Information, Resources, E-Store, Surveys, and Email. Below this, there is a sidebar with an accordion menu. The 'Chapter Information' tab is selected, and the 'Addresses' accordion is expanded, showing a 'Save' button.

3. Complete the **Primary Address** fields and the **Billing Address** fields

The screenshot shows the BPA Inc. Membership System interface. At the top, there is a navigation bar with tabs: Students, Chapter Information, Chapter Advisor(s), Conferences, Invoice History, Quick Links, Notifications, State Information, Resources, E-Store, Surveys, and Email. Below this, there is a sidebar with an accordion menu. The 'Chapter Information' tab is selected, and the 'Addresses' accordion is expanded. The 'Primary Address' and 'Billing Address' sections are visible. Each section has fields for Address 1, Address 2, Address 3, City, State, and Zip/Postal Code. There are also fields for Contact name and Contact email. A 'Save' button is located at the bottom left.

4. Click on the “**Save**” button.

NOTE: If you have nothing in the “**Graduating**” accordion, it’s because graduating is not done the 1st year of Membership. This section will be added once you start your 2nd Year of Membership.

The screenshot shows the BPA Inc. Membership System interface. At the top, there is a navigation bar with tabs: Students, Chapter Information, Chapter Advisor(s), Conferences, Invoice History, Quick Links, Notifications, State Information, Resources, E-Store, Surveys, and Email. Below this, there is a sidebar with an accordion menu. The 'Graduating' accordion is expanded, showing a form with two main sections. The first section is 'Select The Highest Grade Level For This Chapter:' with a dropdown menu showing '12'. The second section is 'Please Select One Of The Following Options On How To Treat Your Graduating Members:' with a dropdown menu showing 'Eligible for Alumni'. There is also a checkbox for 'Graduation Completed:' which is checked.

Select The Highest Grade Level For This Chapter from the “Select The Highest Grade Level For This Chapter” dropdown menu

Select most appropriate option from the “**Please Select One Of The Following Options On How To Treat Your Graduating Members**” dropdown menu

Selections include: Eligible for Alumni, Move on to Various Chapters, Move onto one Chapter

Chapter Advisor(s) Tab and Screens

Students Chapter Information Chapter Advisor(s) Conferences Invoice History Quick Links Notifications State Information Resources BPA Practice Test Engine Email Torch Awards Recommendations Donation Campaigns

Add Existing Advisor Add New Advisor Email All

Show 10 entries

Search:

Advisor	Type	Office Phone	Membership ID	Email	Cell Phone	Status	First Year as a BPA Advisor	Number of Years as a BPA Advisor	Invoice Number	History	Edit
	Primary		00112339						16783	History	

Status Action Button: When you click on the **“Status”** button beside a Chapter Advisor Name, this will make it either active or inactive. The default status is active. If you click on the status button, it will make the Chapter Advisor inactive. A checkmark represents an active status. The no symbol represents an inactive status.

How to Add History Information:

1. Click on the **“History”** button
2. Click on the **“Create History”** button

History for Sally Booth

Date

Conference Attended / Community Service / Competitive Event Placement

Service Date

Subject

Details

Details

1. Type the appropriate **“Date”** in the **“Service Date”** field
2. Type the appropriate **“Subject Text”** in the **“Subject”** field
3. Type the appropriate **“History Details”** in the **“Details”** field
4. Click on the **“Save”** button
5. Repeat the above steps to add additional **“History”** entries
6. Click on the **“Back”** button to return to the **“Chapter Advisors”** screen

Chapter Advisor(s) Tab and Screens Continued

How to Edit History Information:

1. Click on the **“History”** button
2. Click on **“Edit”** icon located on the right-hand side of the **“History”** entry that you want to Edit

Service History for Sally Booth

Create History

Show 10 entries

Search:

Date	Conference Attended / Community Service / Competitive Event Placement	Delete	Edit
06/26/2020	2020 NLC		

Showing 1 to 1 of 1 entries

Previous 1 Next

3. Make the appropriate changes to the **“History”** entry
4. Click on the **“Save”** button
5. Click on the **“Back”** button to return to the **“Chapter Advisors”** screen

How to Delete History Information:

1. Click on the **“History”** button
2. Click on **“Delete”** icon located on the right-hand side of the **“History”** entry that you want to Delete
3. Click on the **“Confirm”** button to Delete OR Click on the **“Close”** button to cancel the Delete

Service History for Sally Booth

Create History

Show 10 entries

Search:

Date	Conference Attended / Community Service / Competitive Event Placement	Delete	Edit
06/26/2020	2020 NLC		

Showing 1 to 1 of 1 entries

Previous 1 Next

Home Additional Pin Request Change My Password Logout

Membership Information

Students Chapter Information Chapter Advisor(s) Conferences Invoice History Quick Links Notifications State Information Resources E-Store Surveys Email

Add Existing Advisor Email All Add Chapter Staff

Show 10 entries

Search:

Advisor	Type	Office Phone	Membership ID	Email	Cell Phone	Status	Years As A BPA Advisor	Invoice Number	History	Edit
Miss Janet Dover	Primary	(555) 666-1234	003436	Janet@gmail.com			3	1245		

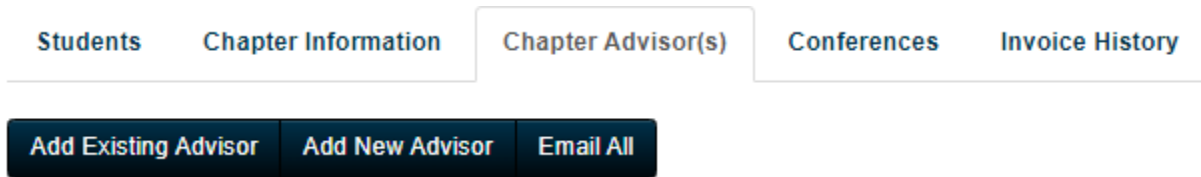
Showing 1 to 1 of 1 entries

Previous 1 Next

BPA Inc. Membership System

Chapter Advisor(s) Tab and Screens Continued

How to Add an Existing Advisor:

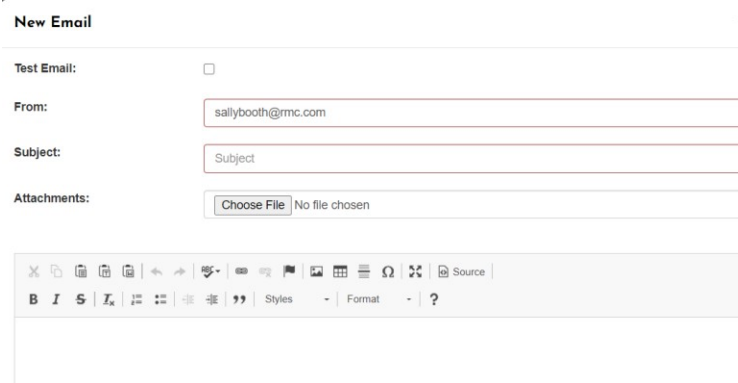


The screenshot shows a web interface with five tabs: "Students", "Chapter Information", "Chapter Advisor(s)", "Conferences", and "Invoice History". The "Chapter Advisor(s)" tab is selected and highlighted. Below the tabs is a row of three buttons: "Add Existing Advisor", "Add New Advisor", and "Email All".

1. Click on the **"Chapter Advisor(s)"** Tab
2. Click on the **"Add Existing Advisor"** button
3. Follow the On-Screen Instructions

How to Email All Chapter Staff:

1. Click on the **"Chapter Advisor(s)"** Tab
2. Click on the **"Email All"** button



The screenshot shows a "New Email" form. It includes a "Test Email:" checkbox, a "From:" field with the value "sallybooth@rmc.com", a "Subject:" field with the value "Subject", and an "Attachments:" field with a "Choose File" button and the text "No file chosen". Below the form is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and other formatting options. The text editor area is currently empty.

1. The **"From"** field will be populated with the Primary Chapter Advisor's email address
2. Type the appropriate **"Subject Text"** in the **"Subject"** field
3. Click on the **"Choose File"** button to attach a File (optional)
4. Type the appropriate **"Email Message"** in the **"Text Editor"** field
5. Click on the **"Send"** button

Chapter Advisor(s) Tab and Screens Continued

How to Add Chapter Staff:

1. Click on the “Chapter Advisor(s)” Tab



2. Click on the “Add New Advisor” button

Two horizontal accordions. The top one is labeled 'User Information' and the bottom one is labeled 'Addresses'. Both are currently collapsed.

3. Click on the “User Information” accordion

A screenshot of the 'User Information' form with all fields expanded. Fields include: Prefix (dropdown), First Name, Middle Name, Last Name, Suffix (dropdown), Office Phone, Extension, Fax Number, T-Shirt Size (dropdown), Email, Alternate Email, Cell Phone, Password, Advisor Type (dropdown), LinkedIn Link, and Opt into partner emails (dropdown).

7. Select the appropriate "Prefix" from the "Prefix" field Drop-Down list (optional)
8. Type the appropriate "First Name" in the "First Name" field
9. Type the appropriate "Middle Name" in the "Middle Name" field (optional)
10. Type the appropriate "Last Name" in the "Last Name" field
11. Select the appropriate "Suffix" from the "Suffix" field Drop-Down list (optional)
12. Type the appropriate "Office Phone Number" in the "Office Phone" field (optional)
13. Type the appropriate "Fax Number" in the "Fax Number" field (optional)
14. Select the appropriate "T-Shirt Size" from the "T-Shirt Size" field Drop-Down list
15. Type the appropriate "Email Address" in the "Email" field
16. Type the appropriate "Email Address" in the "Alternate Email" field
17. Type the appropriate "Cell Phone Number" in the "Cell Phone" field
18. Select the appropriate "Advisor Type" from the "Advisor Type" field Drop-Down list

IMPORTANT: There can ONLY be One (1) Primary Advisor. Any additional Chapter Staff Added MUST be Secondary Advisors. If you choose Primary, it will change the Primary Chapter Advisor to a Secondary Advisor

19. Type the appropriate "LinkedIn URL" in the "LinkedIn Link" field (optional)
20. Select the “Yes” OR “No” from the "Opt into partner emails" field Drop-Down list. If you select “Yes”, you are Opting into receiving emails from BPA National 3rd Party vendors. If you select “No”, you are Opting out of receiving emails from BPA National 3rd Party vendors.
21. Click on the “Save” button
22. Click on the “Addresses” accordion
23. Complete the **Work Address, Billing Address, Home Address and Alternate Address** fields
24. Click on the “Save” button

NOTE: Work Address and Billing Address are required fields. If you click on the “Copy” links at the top of each section, you can copy the address if it is the same address

Conferences Tab and Screens

Historical Results:

Click on the “Historical Results” button to see previous National Results for your students
Results can be downloaded by clicking on the CSV, PDF or Print buttons

CSV

PDF

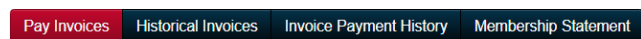
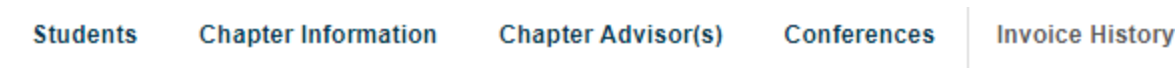
Print

Year	Conference	Contest/Event	Name	Prelim Place	Place
2023	State Leadership Conference	Presentation Team (560-S)	Team 1	N/A	5
2023	State Leadership Conference	SQL Database Fundamentals (345-S)		N/A	2
2023	State Leadership Conference	Video Production Team (430-S)	Team 1	N/A	8

Invoice History Tab and Screens

How to Pay Invoices:

1. Click on the “**Invoice History**” Tab



2. Click on the “**Pay Invoices**” button

Students	Chapter Information	Chapter Advisor(s)	Conferences	Make Payment	Quick Links	Notifications	State Information	Resources	E-Store	Surveys	Email
Back											
Pay All	Invoice #	Date	Invoice Type	Paid Status	Terms	Amount Due	Items				
☒	1245	06/02/2020	Middle Level Membership	Unpaid	Net 30	\$35.00	National Student Membership Dues Total: \$10.00 Balance: \$10.00 National Chapter Adviser Dues Total: \$10.00 Balance: \$10.00 Student State Dues Total: \$5.00 Balance: \$5.00 Chapter Adviser State Dues Total: \$10.00 Balance: \$10.00				
☐	1247	06/03/2020	Middle Level Membership	Unpaid	Net 30	\$30.00	National Student Membership Dues Total: \$20.00 Balance: \$20.00 Student State Dues Total: \$10.00 Balance: \$10.00				
☒	1248	06/03/2020	Middle Level Membership	Unpaid	Net 30	\$15.00	National Student Membership Dues Total: \$10.00 Balance: \$10.00 Student State Dues Total: \$5.00 Balance: \$5.00				

3. Select the appropriate checkbox(s) located in the **Pay All** column on the left-hand side of the invoice that you want to pay
4. Click on the “**Pay by Credit Card**” Accordion if you want to pay by Credit Card **OR** Click on the “**Enter PO Number**” Accordion to record your PO information.
5. Follow the On-Screen Instructions based on what Payment Method you have chosen
6. Click on the “**Pay**” button

Invoice History Tab and Screens Continued

How to View Invoices:

1. Click on the “**Invoice History**” Tab

Invoice Number	Invoice Type	Conference	Total	Balance Due	Paid On	Created	National/State	Payments	PO's	View
1245	Middle Level Membership		\$35.00	\$35.00	Unpaid	06/02/2023	National		PO's	View
1246	Middle Level Membership		\$15.00	\$0.00	06/02/2020	06/02/2023	National	Payments		View
1247	Middle Level Membership		\$30.00	\$30.00	Unpaid	06/03/2023	National		PO's	View
1248	Middle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2023	National		PO's	View
1249	Middle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2023	National		PO's	View
1250	Middle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2023	National		PO's	View
1251	Middle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2023	National		PO's	View
1252	Middle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2023	National		PO's	View
1253	Middle Level Membership		\$15.00	\$15.00	Unpaid	06/03/2023	National		PO's	View

2. Click on the “**Payments**” button to view “**Payments**” that have been made
3. Click on the “**PO's**” button to view “**P.O**” information
4. Click on the “**View**” icon to view the Invoice

How to View Historical Invoices:

1. Click on the “**Invoice History**” Tab

Pay Invoices	Historical Invoices	Invoice Payment History	Membership Statement
--------------	---------------------	-------------------------	----------------------

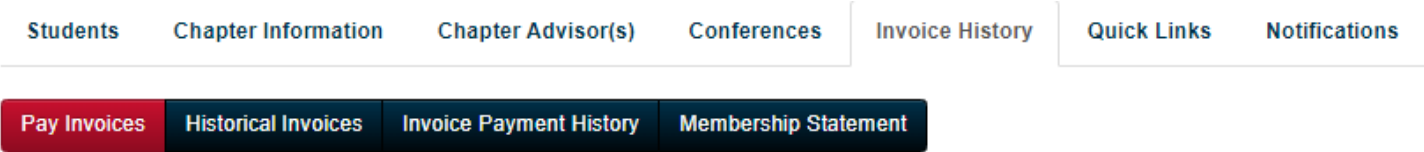
2. Click on the “**Historical Invoices**” button
3. Click on the “**Payments**” button to view “**Payments**” that have been made
4. Click on the “**PO's**” button to view “**P.O**” information
5. Click on the “**View**” icon to view the Invoice

NOTE: *Historical invoices are invoices that have been generated in previous years*

Invoice History Tab and Screens Continued

How to view Invoice Payment History:

- 1. Click on the “Invoice History” Tab

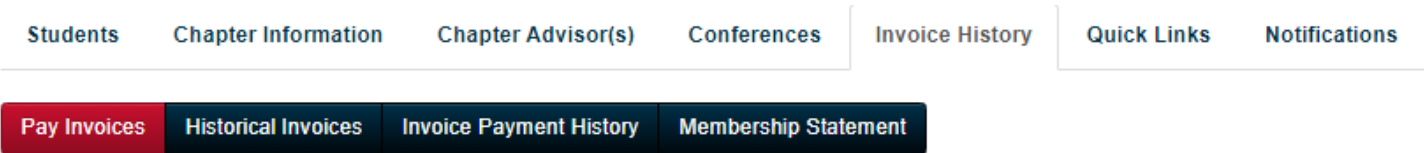


- 2. Click on the “Invoice Payment History” button

NOTE: The Invoice Payment History screen includes the following: payment information, date paid, pay type, check number, invoice number, payment total, overpayment amount, refund amount and refund date

How to View the Membership Statement:

- 1. Click on the “Invoice History” Tab



- 2. Click on the “Membership Statement” button

NOTE: The Membership Statement is generated as a PDF that can be viewed/saved/printed

Quick Links Tab and Screens

[Students](#)[Chapter Information](#)[Chapter Advisor\(s\)](#)[Conferences](#)[Invoice History](#)[Quick Links](#)[Notifications](#)

Quick Links

BPA Membership System Links

Helpful Tutorials: <https://members.bpa.org/tutorial-help-center/>

National | State | Local Login & Sign-Up: <https://register.bpa.org/>

Student Member Login: <https://register.bpa.org/members>

Alumni Division Login & Sign-Up: <https://register.bpa.org/alumni>

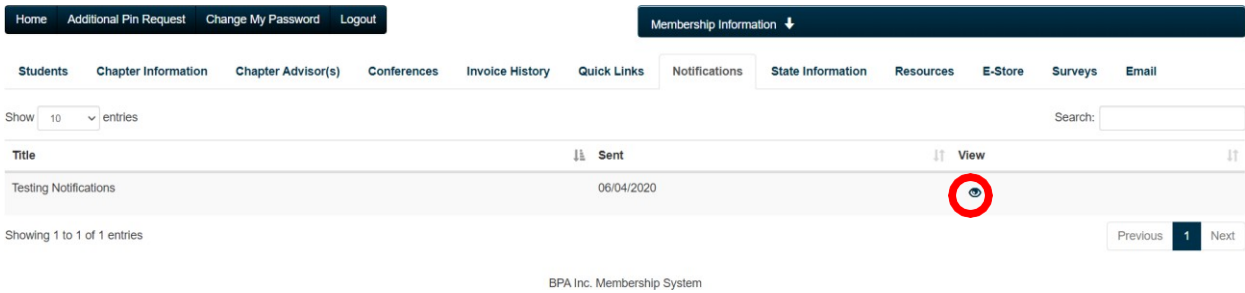
Professional Division Login & Sign-Up: <https://register.bpa.org/professionals>

1. Click on the “**Quick Links**” Tab

***NOTE:** Quick Links are setup by National BPA. These links will take you to 3rd Party Websites outside of the Membership System*

2. Click on the appropriate “**URL**” from the Quick Links list

Notifications Tab and Screens



NOTE: System Messages (Notifications) are sent through the Membership by National BPA. When you log into the Membership System, the System Message will appear on your screen. Once you click on the Confirm button, the System Message will no longer appear on your screen. If you want to go back and review the System Message, you would click on the Notification Tab – See Example Below. System Notifications can have expirations dates that are setup by National BPA. Once the notification has expired, you will no longer be able to see the System Message under the Notifications Tab

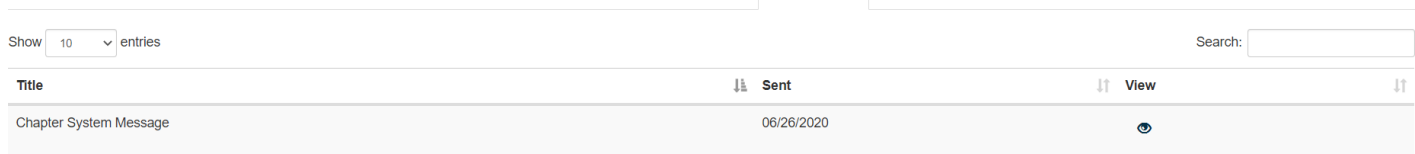
Confirm Notification

This is an example of a Chapter System Message sent from National BPA

Confirm

How to View Notifications:

1. Click on the “**Notifications**” tab



2. Click on the “**View**” icon located on the right-hand side of the System Message
3. Click on the “**Back**” button to return to the “**Notifications**” page

State Information Tab and Screens

How to View State Information:

1. Click on the “**State Information**” tab

Students	Chapter Information	Chapter Advisor(s)	Conferences	Invoice History	Quick Links	Notifications	State Information	Resources	E-Store	Surveys	Email
----------	---------------------	--------------------	-------------	-----------------	-------------	---------------	-------------------	-----------	---------	---------	-------

State Advisor Contact

Ben Brown
testing
555 Brown Street
Brown, AK 55555
ben.brown@test.com
(555) 555-5555 x.1234

State Dues

Fee Type	Membership Type	Expiration	Amount	Minimum Affiliants	Flat Rate	New Chapters
Student	09/30/2020	\$5.00	No Minimum	No	No	
Chapter Advisor	Never Expires	\$10.00	No Minimum	No	No	

Current State Membership Date(s)

August 1, 2020
April 15, 2021

State Meeting Date(s)

Fall Conference Dates:

Starts On September 1, 2020
Ends On September 1, 2020
<https://www.registermychapter.com>

State Conference Date:

Starts On April 16, 2021
Ends On April 18, 2021
<https://www.registermychapter.com>

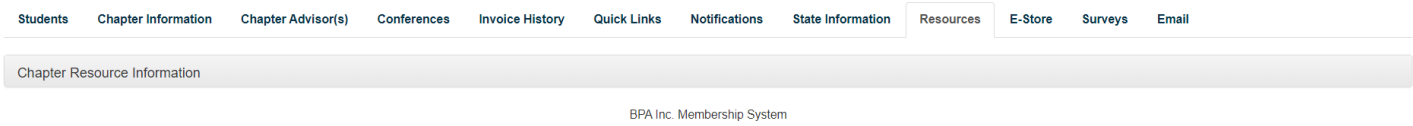
The State information Tab will Display the following information:

1. State Advisor Contact Information
2. State Dues
3. Current State Membership Dates
4. State Conference Dates and Conference Registration Link

Resources Tab and Screens

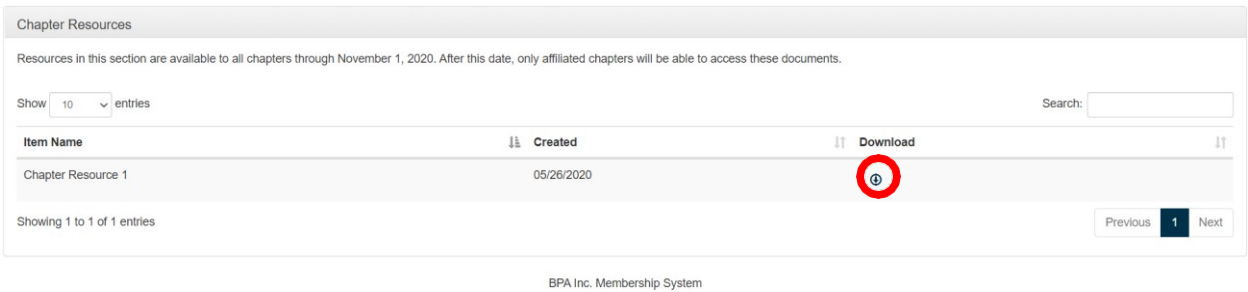
How to Download Chapter Resources:

- 1. Click on the “Resources” tab



- 2. Click on the “Resources” Accordion(s)

NOTE: Resources are developed by National BPA. You may see multiple Accordions under the Resources Tab



- 3. Locate the “Resource” that you want to Download from list
- 4. Click on the “Download” icon

BPA Practice Test Engine Tab and Screens

How to Gain AnswerWrite Practice System Access:

Students

Chapter Information

Chapter Advisor(s)

Conferences

Invoice History

Quick Links

State Information

Resources

BPA Practice Test Engine

Email

Torch Awards

Recommendations

Donation Campaigns

AnswerWrite Practice System Access

Select students below to generate your invoice for the AnswerWrite Practice system. Once students have been invoiced they will have access to the system.

Search:

Student	Membership ID	Status	Add To Invoice
		Not Invoiced	☐
		Invoiced & Paid	
		Invoiced & Paid	
		Invoiced & Paid	

Reports

Report Name	Report Format
Test Attempts	Select Report Format
Utilization	Select Report Format

Email Tab and Screens

How to Send an Email:

1. Click on the “**Email**” tab

[Students](#)
[Chapter Information](#)
[Chapter Advisor\(s\)](#)
[Conferences](#)
[Invoice History](#)
[Quick Links](#)
[State Information](#)
[Resources](#)
[BPA Practice Test Engine](#)
[Email](#)
[Torch Awards](#)
[Recommendations](#)
[Donation Campaigns](#)
[Student Transfer](#)

NOTE: : The Email options allows you to send ALL Student Members an email or you have the option to select specific Student Members to send an email to. ONLY students that have email address in their student member record will appear on this screen. Click on the Select/Deselect All option to select All Student Members or Deselect All Student Members

2. Click on the checkbox located on the left-hand side of the student(s) that you want to send an email to
3. Type the appropriate **“Subject Text”** in the **“Subject”** field
4. Type the appropriate **“Email Message”** in the **“Message”** field
5. Click on the **“Send”** button

Select Members to send Email to:

Select/Deselect All

☒ Sally Sue (Student)

☒ Anne White (Student)

Subject:

Subject

Message:

B *I* S I_x $\frac{1}{x}$ $\frac{\pi}{2}$ $\frac{1}{2}$ $\frac{1}{3}$ “ Styles Format ?

Send

Torch Awards Tab and Screens

Student Resumes

Resumes

All

Submitted Executive

Submitted Diplomat

Submitted Statesman

Submitted Ambassador

Totals

Diplomat Submitted: 0

Diplomat Rejected: 0

Total Resumes: 1

Statesman Submitted: 0

Statesman Rejected: 0

Ambassador Submitted: 0

Ambassador Rejected: 0

Show 10 entries

Search:

First Name	Last Name	Member #	Executive Status	Diplomat Status	Statesman Status	Ambassador Status	View	Delete
			Unsubmitted	Unsubmitted	Unsubmitted	Unsubmitted		

Showing 1 to 1 of 1 entries

Reports	
Report Name	Report Format
All Resumes	Select Report Format
All Active Resumes	Select Report Format
Resumes Submitted to Executive	Select Report Format
Resumes Submitted to Diplomat	Select Report Format
Resumes Submitted to Statesman	Select Report Format
Resumes Submitted to Ambassador	Select Report Format
Resumes Approved for Diplomat	Select Report Format
Resumes Approved for Statesman	Select Report Format
Resumes Approved for Ambassador	Select Report Format
Top 3 Resumes in each district	Select Report Format

Recommendations Tab and Screens

How to Add Recommendations:

[Students](#) [Chapter Information](#) [Chapter Advisor\(s\)](#) [Conferences](#) [Invoice History](#) [Quick Links](#) [Notifications](#) [State Information](#) [Resources](#) [BPA Practice Test Engine](#) [Email](#) [Torch Awards](#)

Recommendation History Add Recommendation

Show 10 entries

Search:

Subject	Recommendation	Final Decision	Edit	Delete
New Contest Proposal	Testing recommendations	Not Made		

1. Click on the “**Recommendations**” tab
2. Click on the “**Add Recommendation**” button
3. Select the appropriate subject from the “**Subject**” dropdown menu
4. Enter your Recommendation in the “**Recommendation**” text field
5. Enter your Rationale in the “**Rationale**” text field
6. Select the most appropriate item from the following dropdown menus:
 - a. **Does this replace a current policy or procedure?**
 - b. **If this recommendation is adopted, would it require a similar change to other events?**
 - c. **State**
 - d. **Representing**
7. If you have an attachment to add, click on the “**Choose Files**” button and add your attachment
8. Click on the “**Submit**” button when finished

Add recommendation

Subject

Select

Recommendation

Rationale

Does this replace a current policy or procedure?

Don't Know

If this recommendation is adopted, would it require a similar change to other events?

Select

State

Select

Email

wanda@registtermychapter.com

Representing

Select

Attachment

Choose Files No file chosen

Max file size 50MB.

Submit

Donation Campaigns Tab and Screens

This tab will show BPA donation campaigns that are available at the national level. Donations made by your chapter will be added to the BPA national general fund and will be used at the discretion of national BPA to enhance program offerings.