## PA FBLA Membership Processing Instructions 2014-2015 Membership Year

In order to process your membership, you will need PA FBLA web site username and password. Follow these steps to process your membership:

1. Go to www.pafbla.org

2. At the left, look for "adviser area" and click the arrow to the right of those words. The menu will expand.

3. Click on "student registration and dues."

4. If your log-in was successful, the first screen that you will see in the following. You must read the statement and check the box indicating that you understand that all names you submit will be invoiced and any changes must be made by the state office. Therefore, it is essential that you make sure you have names correctly spelled before clicking the "submit" button.

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5. Once you click "continue," the following screen will appear:



6. To add a student to the membership database, click on the "insert record" button. The following screen will appear:

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- 7. You will see the following appear:
  - a. Your school name preceded by your chapter number.
  - b. A series of 8 data boxes.
- 8. The fields are:

First Name (required) Middle Initial (not required, but helpful since we do have students with identical names) Last Name (required) Grade Level (required) Gender (required) Ethnicity (not required, but helpful in determining who our customers are) -----ethnicity: don't ask the student/informal observation by adviser is acceptable -----the choices are: CAUC (Caucasian) AFAM (African-American) ASIA (Asian) HISP (Hispanic) AMIN (American Indian) OTHR (Other) FBLA Office Held (not required; only choose from the following) President Vice President Secretary Treasurer Historian Reporter Parliamentarian Other E-mail address (not required, but helpful in communicating with members about FBLA events; advisers will be able to add this information later)

9. Once you enter the data fields, you form will look like the following:

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## 10. Click "insert."

11. Once you click "insert," the following screen will appear (and the list will continue to build as you add members):

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12. To add additional members, click on the "insert record" button again and repeat the steps listed above.

13. To the left of each name you will notice two buttons, "edit" and "display to print." Edit is the first button at the left and looks like a sheet of paper with a pencil over it. When you click on that, the only item you can edit is the student e-mail address. It will look like the following:

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14. Nothing happens when you click the "reset" button; clicking "cancel" will take you out of the individual membership form.

15. If you wish to generate a dues invoice, click the "dues invoice button. It will look like the following:

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Mr. Bruce E. Boncal PA FBLA Executive Director P O. Box 6065 Jersey Shore, PA 17740	
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16. Click "ok" on the message box.

17. If you wish to print the invoice, you can click the "print" button.

18. At the bottom of the invoice, you will see a button titled "membership processing area" to return to enter more students.

19. If you remember, we generated an invoice for 1 person--Bruce Boncal. We now have added 2 more members. If you want an invoice for these 2 members only, click on "dues invoice" again, and it will generate a new invoice for all those who had not been previously invoiced. It will look like the following:

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20. Now let's say you want to generate a new invoice for all 3 members--not just the last 2 members. If that is the case, you can click on "re-generate an invoice" and put in a date range." The screen will look like the following:

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21. Simply enter a date as you see in the screen shown below and click "generate an invoice." Your new invoice will look like the following:



22. If you want to see the status of your dues and the dates they were entered into the system, click the "show all dues" button and the following will be displayed. You can print this if you choose to do so.

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23. If you see incorrect school address information at any time on one of your invoices, please send the state office an e-mail.

## **Membership Processing Policies**

1. Once the adviser clicks the "submit" button, the chapter will be invoiced for that member.

2. Once the adviser clicks the "submit" button, the chapter adviser will not be able to edit any student information. Edit can only be done through the state office. If there is a spelling correction to be made, you must notify the state office of the change to be made.

3. Once the adviser clicks the "submit" button, the chapter adviser will be able to add the student email address after the "submit" button is clicked. That is the only editable portion of the student record that the adviser may change.

4. <u>Membership is not transferrable</u>. Advisers may not substitute one student's name for another name once invoiced. If a student leaves a school system where he/she was an FBLA member and enrolls in another school system where an FBLA chapter exists, the national office will transfer the student from one chapter to another.

5. <u>A copy of the invoice must accompany the dues check</u>. Submit one copy to your school as documentation to generate the check; keep another copy to submit with the check.

6. <u>Dues may be paid with credit cards</u>. Click on the "credit cards payments" menu at the left side of the page at www.pafbla.org. Make sure you complete the credit card documentation form for membership processing and e-mail it to Bruce Boncal, PA FBLA Executive Director. Remember, there is a 3% convenience fee for using credit cards. Otherwise, chapters should submit a check made payable to "Pennsylvania FBLA" for membership dues for \$12 per person.

7. Remember to allocate enough time for membership to be processed to meet state and national deadlines.

8. Membership can be submitted as many times as an adviser wishes during the school year. However, all membership must be entered and paid by the regional deadlines posted on the PA FBLA web site in order to participate in the 2014-2015 RLC competitive events. In addition, all names of members submitting entries for the state-only competitive events must be on the web site and paid no later than the December 5, 2014, RECEIVED BY deadline.

9. Once the state office receives your check, we will export your membership from the state site to the national site. Advisers <u>are not</u> to enter membership on the national site.

10. <u>Membership is unified</u>. A member must be a member of both the state and national chapters--not one or the other.

11. Questions? E-mail Bruce Boncal at bboncal@pafbla.us.