

# Chapter Advisor Membership Registration System Manual

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[www.bpa.org](http://www.bpa.org)

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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:

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

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[New Chapter Request](#)

**Chapter ID / Membership ID / Email / Username:**

**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:**

**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)

The screenshot shows the 'User Information' section of a login form. It includes fields for Prefix (Mr.), First Name (Tony), Middle Name, Last Name (Drywall), and Suffix (Select...). Below these are fields for Office Phone, Extension, Fax Number, Email (drywall@gmail.com), Alternate Email, Cell Phone, and a New Password field. There are also fields for LinkedIn Link and Principal's Information (Principal's First Name, Last Name, Email). At the bottom, there are 'Save And Logout' and 'Confirm Information' buttons.

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

The screenshot shows the 'Principal's Information' section of the login form. It includes fields for Principal's First Name (Janet), Principal's Last Name (Dover), and Principal's Email (janet@gmail.com). There are also fields for Address. At the bottom, there are 'Save And Logout' and 'Confirm Information' buttons.

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

The screenshot shows the 'Addresses' section of the login form. It is titled 'Copy Chapter Addresses' and contains four address sections: Work Address, Billing Address, Home Address, and Alternate Address. Each section has fields for Address 1, Address 2, Address 3, City, State, Zip/Postal Code, and Country. At the bottom, there are 'Save And Logout' and 'Confirm Information' buttons.

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

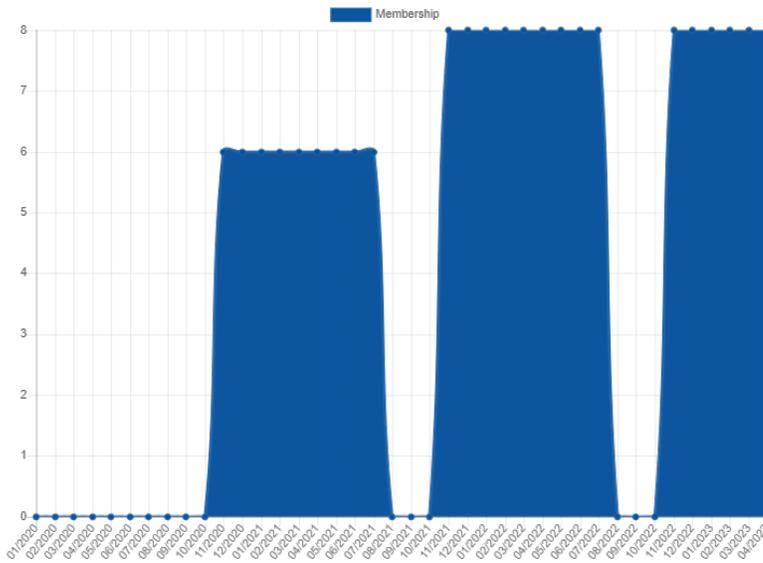
**Total Unsubmitted** is the Total Number ALL Unsubmitted Members

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

# Membership System Navigation Continued

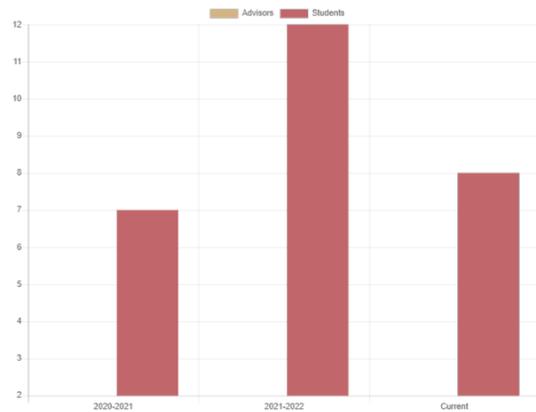
## How to View the Membership Graph:

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

Students | Chapter Information | Chapter Advisor(s) | Conferences | Invoice History | Quick Links | Notifications | State Information | Resources | BPA Practice Test Engine | Email

Graduate | 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

Submit Membership

Show: All entries

Status	Select	Membership ID	Last Name	First Name	Gender	Grade	Submitted Date	Invoice Number	Edit	More Options	Delete
	<input type="checkbox"/>	00112341	Jones	Tony	Male	10					
PENDING		00112340	Weber	Allison	Female	9	04/28/2023	16783			
MEMBER		00000000			Male	11	10/27/2022				
MEMBER					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:

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



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.

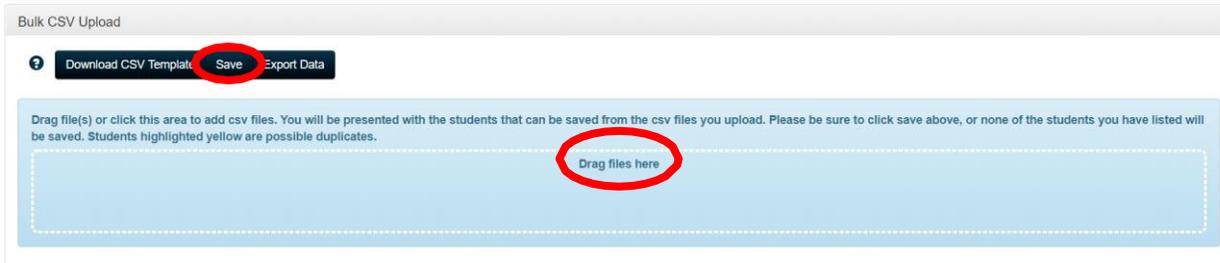
A screenshot of the 'Individual Member Entry' form. The form is divided into several sections: Name (Prefix, First Name, Middle Name, Last Name, Suffix), Grade, Gender, Demographic, Member Title, Email, Cell Phone, Home Phone, Field of Employment, T-Shirt Size, Years As A Member, and a section for special accommodations (checkboxes for Audio, Visual, Mobility, Dietary, Other) and a text field for special accommodations requested. At the bottom right, there are two buttons: '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
	<input checked="" type="checkbox"/>	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?

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
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">00112341</a>	Jones	Tony	Male	10					
PENDING		<a href="#">00112340</a>	Weber	Allison	Female	9	04/28/2023	16783			
<b>Member Title</b> Chapter Member Membership Date Not yet affiliated											
MEMBER		<a href="#">00000000</a>	<a href="#">[redacted]</a>	<a href="#">[redacted]</a>	Male	11	10/27/2022	<a href="#">[redacted]</a>			

Reset Password

**Transfer History**

Name Change Request

Conference Results

## Student Tab and Screens Continued

### How to Download a Membership Report:

1. Click on the “**Students**” tab



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



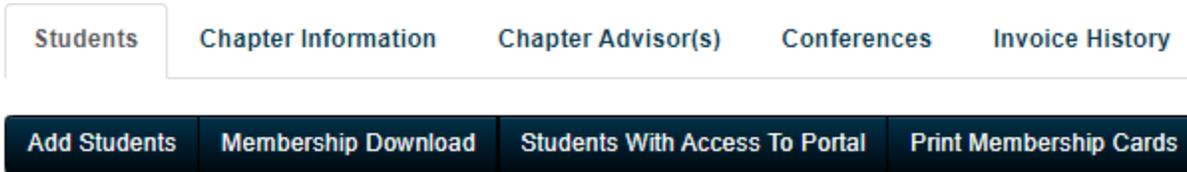
3. Select “**PDF**” if you want the Student Membership Information displayed in a “**PDF**” file format  
**OR** Select “**.CSV**” if you want the Student Membership Information displayed in a “**.CSV (Excel)**” format

*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



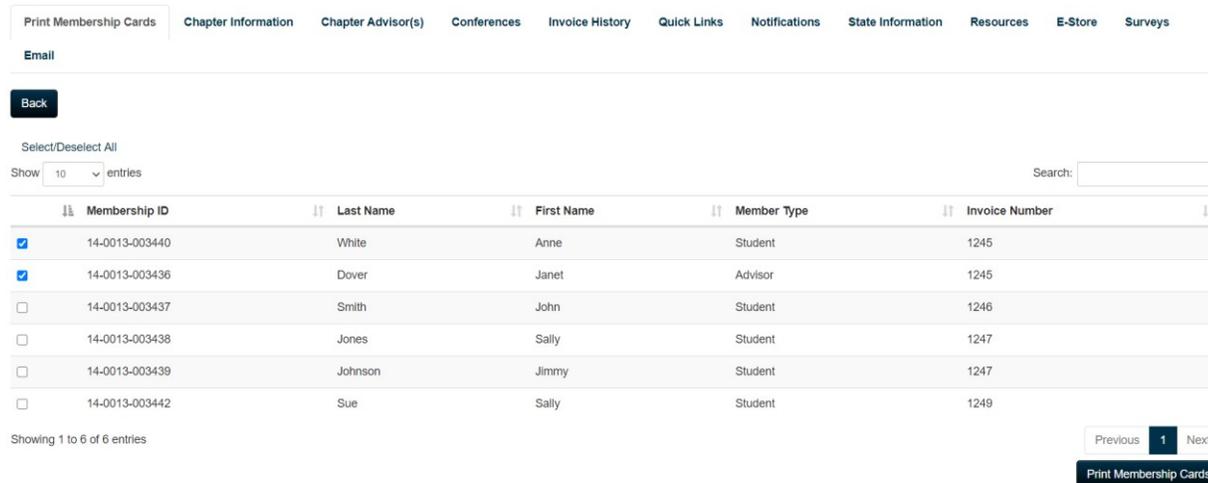
2. Click on the “**Students with Access to Portal**” button
3. Select “**PDF**” if you want the Student Portal Access Information displayed in a “**PDF**” file format **OR** Select “**.CSV**” if you want the Student Portal Access Information displayed in a “**.CSV (Excel)**” format

### How to Print Membership Cards:

1. Click on the “**Students**” tab



2. Click on the “**Print Membership Cards**” button  
*(Only paid Student Members will be displayed on the Student 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
<input checked="" type="checkbox"/>	14-0013-003440	White	Anne	Student	1245
<input checked="" type="checkbox"/>	14-0013-003436	Dover	Janet	Chapter Advisor	1245
<input checked="" type="checkbox"/>	14-0013-003437	Smith	John	Student	1246
<input type="checkbox"/>	14-0013-003438	Jones	Sally	Student	1247
<input type="checkbox"/>	14-0013-003439	Johnson	Jimmy	Student	1247
<input checked="" type="checkbox"/>	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



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



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 "New Email" form. The form has a title bar "New Email" with a close button. Below the title bar are four input fields: "Test Email:" (with a small icon), "From:" (containing "Janet@gmail.com"), "Subject:" (containing "Subject"), and "Attachments:" (with a "Choose File" button and "No file chosen" text). Below these fields is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and source. The text editor shows "B I S" and "Normal" style options.

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

The screenshot shows a web form titled "Chapter Information". It contains several sections of input fields:

- School Name:** A text input field.
- Chapter Name:** A text input field with a dropdown arrow.
- Original Chapter ID:** A text input field.
- Phone Number:** A text input field with a "Phone Number" label below it.
- Extension:** A text input field with an "Extension" label below it.
- Fax Number:** A text input field with a "Fax Number" label below it.
- Student Password:** A text input field with "bpa" entered.
- Update all student passwords:** A checkbox.
- Principal/Dean's First Name:** A text input field.
- Principal/Dean's Last Name:** A text input field.
- Principal/Dean's Email:** A text input field.
- Chapter Website:** A text input field with a "Chapter Website" label below it.
- School Website:** A text input field with a "School Website" label below it.
- Twitter:** A text input field with a "Twitter" label below it.
- Facebook:** A text input field with a "Facebook" label below it.
- Division:** A dropdown menu with "Secondary" selected.
- State District:** A dropdown menu with "Region 5" selected.
- Uses Group Membership Model:** A radio button.
- Is your district and/or school a Title I district?:** A checkbox.
- Use Associate Rates?:** A checkbox.
- Require Paper Invoices?:** A checkbox.
- Demographic numbers:** A section with multiple text input fields for various categories like "Economically disadvantaged", "Free/Reduced Lunch", "Single parents, including single pregnant women", "Homeless/displaced", etc.
- Multilingual:** A section with a "Language" dropdown and a "Number" input field.
- Upload W-9:** A "Choose File" button and a "No file chosen" message.

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 a navigation menu with the following items: Students, Chapter Information (selected), Chapter Advisor(s), Conferences, Invoice History, Quick Links, Notifications, State Information, Resources, E-Store, Surveys, and Email. Below the menu, an accordion is expanded to show 'Addresses', with 'Chapter Information' and 'Graduating' also visible.

Save

BPA Inc. Membership System

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

The screenshot shows the 'Addresses' section of the form. It is divided into two columns: 'Primary Address' and 'Billing Address'. Each column has three address lines (Address 1, Address 2, Address 3) and a row for City, State, and Zip/Postal Code. The 'Billing Address' section also includes fields for Contact name and Contact email. The form is pre-filled with 'Rainbow Lane', 'Rainbow', 'AK', and '55512'.

Save

BPA Inc. Membership System

4. Click on the “Save” button.

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

The screenshot shows the 'Graduating' section of the form. It includes a dropdown menu for 'Select The Highest Grade Level For This Chapter' with '12' selected. To the right is another dropdown menu for 'Please Select One Of The Following Options On How To Treat Your Graduating Members' with 'Eligible for Alumni' selected. Below these is a 'Graduation Completed' checkbox 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



**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		

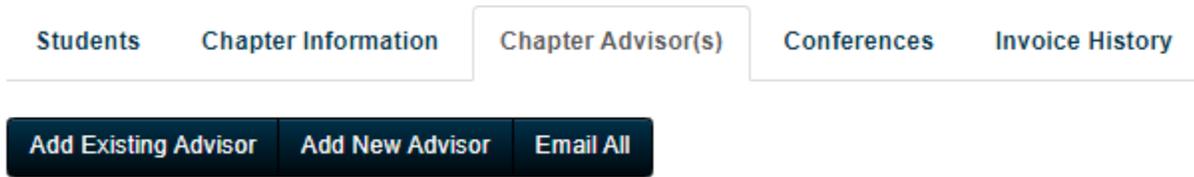
Showing 1 to 1 of 1 entries

Previous 1 Next

BPA Inc. Membership System

## Chapter Advisor(s) Tab and Screens Continued

### How to Add an Existing Advisor:

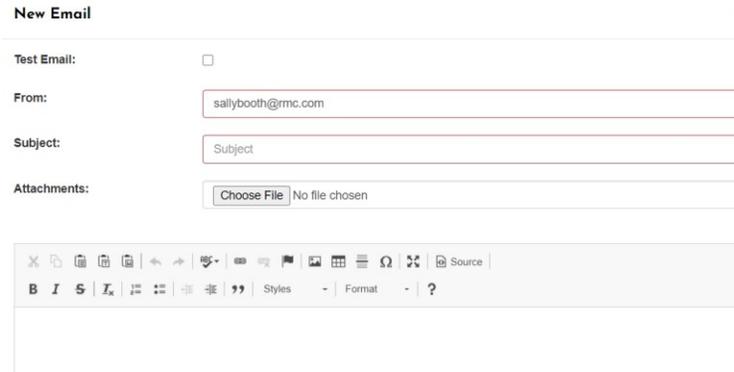


The screenshot shows a navigation menu with five tabs: "Students", "Chapter Information", "Chapter Advisor(s)", "Conferences", and "Invoice History". The "Chapter Advisor(s)" tab is highlighted with a white border. Below the menu is a dark blue bar containing three buttons: "Add Existing Advisor", "Add 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 with the following fields and options:

- Test Email:**
- From:**
- Subject:**
- Attachments:**  No file chosen

Below the form is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, source code, and help. The text area below the toolbar is 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:

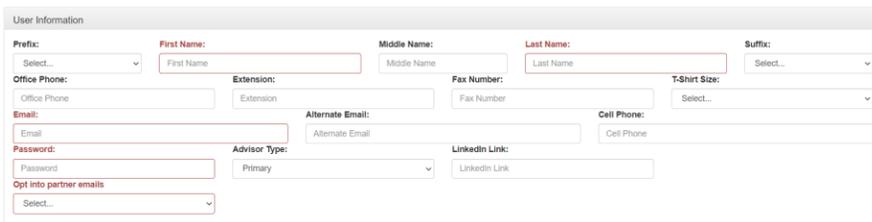
1. Click on the “Chapter Advisor(s)” Tab



2. Click on the “Add New Advisor” button



3. Click on the “User Information” accordion

A screenshot of the "User Information" form. It contains various input fields: 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 3<sup>rd</sup> Party vendors. If you select “No”, you are Opting out of receiving emails from BPA National 3<sup>rd</sup> 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

The screenshot shows a table with the following columns: "Pay All", "Invoice #", "Date", "Invoice Type", "Paid Status", "Terms", "Amount Due", and "Items". There are three rows of invoices. The first row is selected with a blue checkbox. The "Items" column contains a list of dues with sub-totals and balances.

Pay All	Invoice #	Date	Invoice Type	Paid Status	Terms	Amount Due	Items
<input checked="" type="checkbox"/>	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
<input type="checkbox"/>	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
<input checked="" type="checkbox"/>	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	06/02/2023	06/02/2023	National	Payments	PO's	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



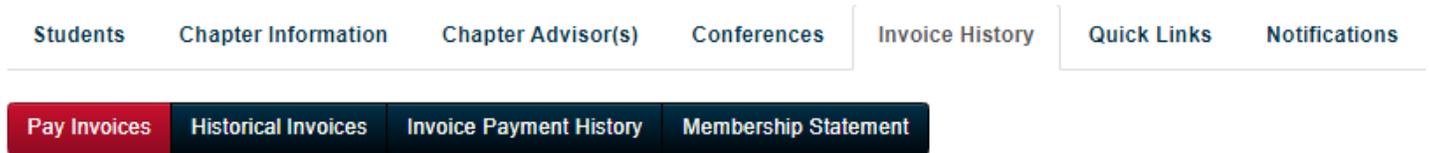
2. Click on the “Historical Invoices” button
3. Click on the “Payments” button to view “Payments” that have been made
4. Click on the “PO’s” button to view “P.O” information
5. Click on the “View” icon to view the Invoice

**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

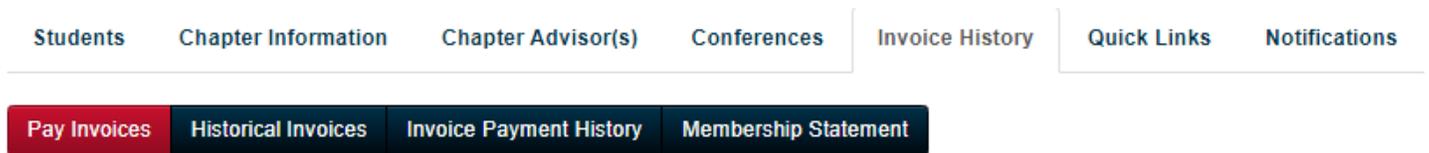


2. Click on the “**Invoice Payment History**” button

*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>

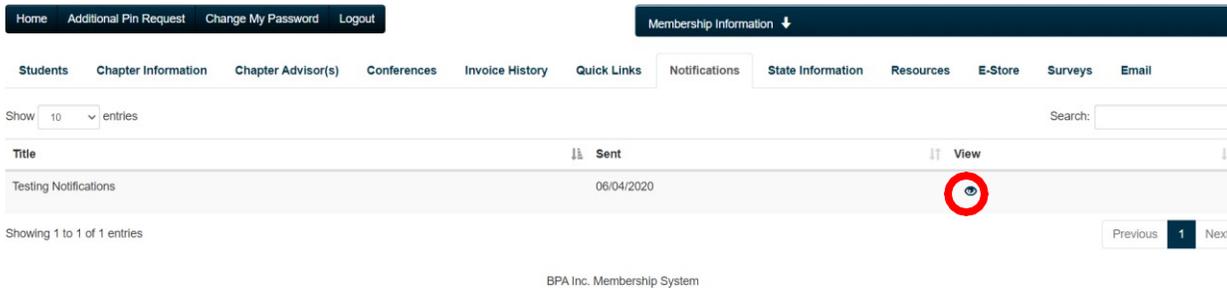
Professional Division Login & Sign-Up: <https://register.bpa.org/professionals>

1. Click on the “**Quick Links**” Tab

*NOTE: Quick Links are setup by National BPA. These links will take you to 3<sup>rd</sup> 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**

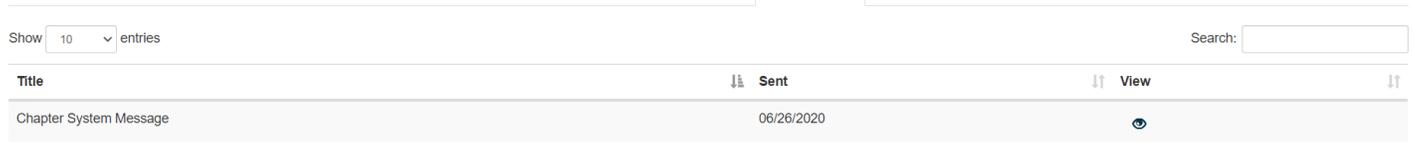
## Confirm Notification

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@lest.com](mailto:ben.brown@lest.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.registtermychapter.com>

State Conference Date:

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

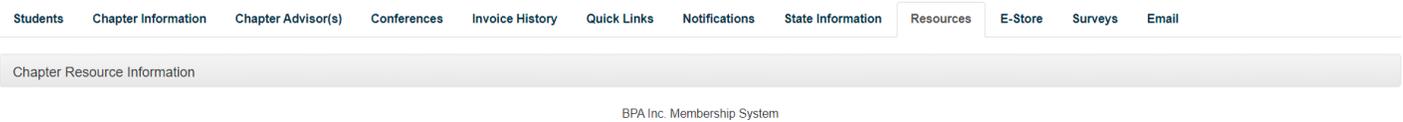
## The State information Tab will Display the following information:

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

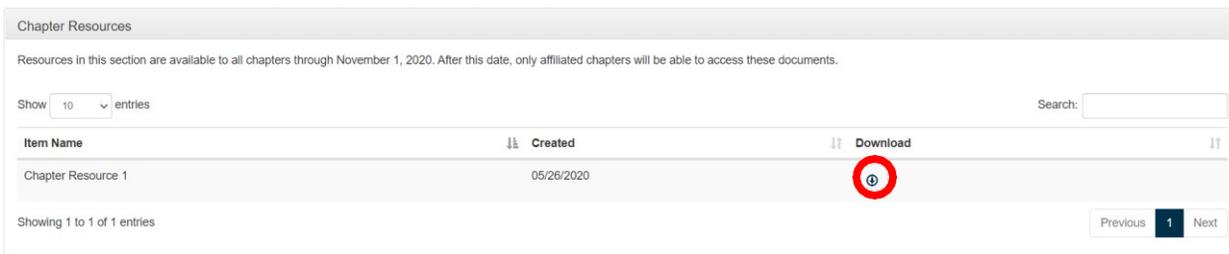
## How to Download Chapter Resources:

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
[REDACTED]	[REDACTED]	Not Invoiced	<input type="checkbox"/>
[REDACTED]	[REDACTED]	Invoiced & Paid	
[REDACTED]	[REDACTED]	Invoiced & Paid	
[REDACTED]	[REDACTED]	Invoiced & Paid	

### Reports

Report Name	Report Format
Test Attempts	<a href="#">Select Report Format</a>
Utilization	<a href="#">Select Report Format</a>

# 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 Transfers

**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:

Rich text editor toolbar with icons for Undo, Redo, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Source, and Help. Below the toolbar is a large text area for composing the email message.

Send

# Torch Awards Tab and Screens

## Student Resumes

**Resumes**

All
  Submitted Executive
  Submitted Diplomat
  Submitted Statesman
  Submitted Ambassador

Totals		
Diplomat Submitted: 0	Statesman Submitted: 0	Ambassador Submitted: 0
Diplomat Rejected: 0	Statesman Rejected: 0	Ambassador Rejected: 0
Total Resumes: 1		

Show  entries

Search:

First Name	Last Name	Member #	Executive Status	Diplomat Status	Statesman Status	Ambassador Status	View	Delete
[Redacted]	[Redacted]	00000000	Unsubmitted	Unsubmitted	Unsubmitted	Unsubmitted		

Showing 1 to 1 of 1 entries

**Reports**

Report Name	Report Format
All Resumes	<a href="#">Select Report Format</a>
All Active Resumes	<a href="#">Select Report Format</a>
Resumes Submitted to Executive	<a href="#">Select Report Format</a>
Resumes Submitted to Diplomat	<a href="#">Select Report Format</a>
Resumes Submitted to Statesman	<a href="#">Select Report Format</a>
Resumes Submitted to Ambassador	<a href="#">Select Report Format</a>
Resumes Approved for Diplomat	<a href="#">Select Report Format</a>
Resumes Approved for Statesman	<a href="#">Select Report Format</a>
Resumes Approved for Ambassador	<a href="#">Select Report Format</a>
Top 3 Resumes in each district	<a href="#">Select Report Format</a>

# 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**

**Recommendation**

**Rationale**

**Does this replace a current policy or procedure?**

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

**State**

**Email**

**Representing**

**Attachment**  
 No file chosen  
Max file size 50MB.

## 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.**