



Manage Memberships

Created: 08/2017

Table of Contents

KNOW WHAT DATA IS REQUIRED	1	Download the National Template & Import All Members	3
View Chapter Requirements:.....	1	Manually Add All Members One At A Time	3
OPTIONS FOR ADDING MEMBERSHIPS	3	OVERVIEW OF MANAGE MEMBERSHIPS	4
Self-Registration	3	EXPORT PREVIOUS ROSTER(S) TO NATIONAL TEMPLATE	5
Export Previous Roster to National Template, Edit & Import	3	RENEW MEMBERSHIPS	6
Renew Returning Members On-Screen & Import New Members	3	DIFFERENCE BETWEEN DISAPPROVE AND CANCEL	7
Renew Returning Members On-Screen & Manually Add New Members	3	TRANSFER MEMBERSHIPS	7

KNOW WHAT DATA IS REQUIRED

Before starting your roster, it is important to know what data national and state require for your **Chapter Profile**, **Student/Member Roster** and **Teacher/Advisor Profile**. State required data is defined by each state and may vary.

Required Chapter Profile data must be provided the first time it is presented. You will be prohibited from moving forward until the required data is completed. Once the data has been updated, you will only have to revisit/modify the required data when new data points have been added or existing data needs to be reviewed.

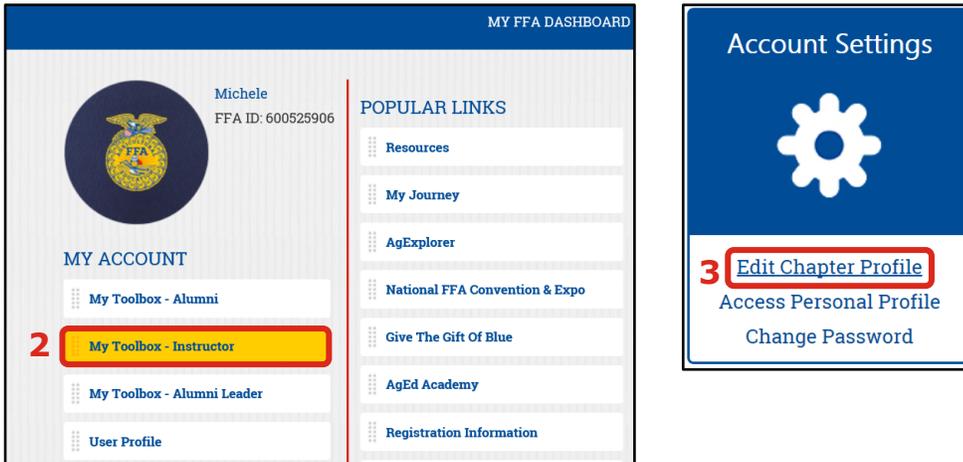
View Chapter Requirements:

To view your chapter requirements, [1] **Open Your FFA Dashboard** (top right of page).

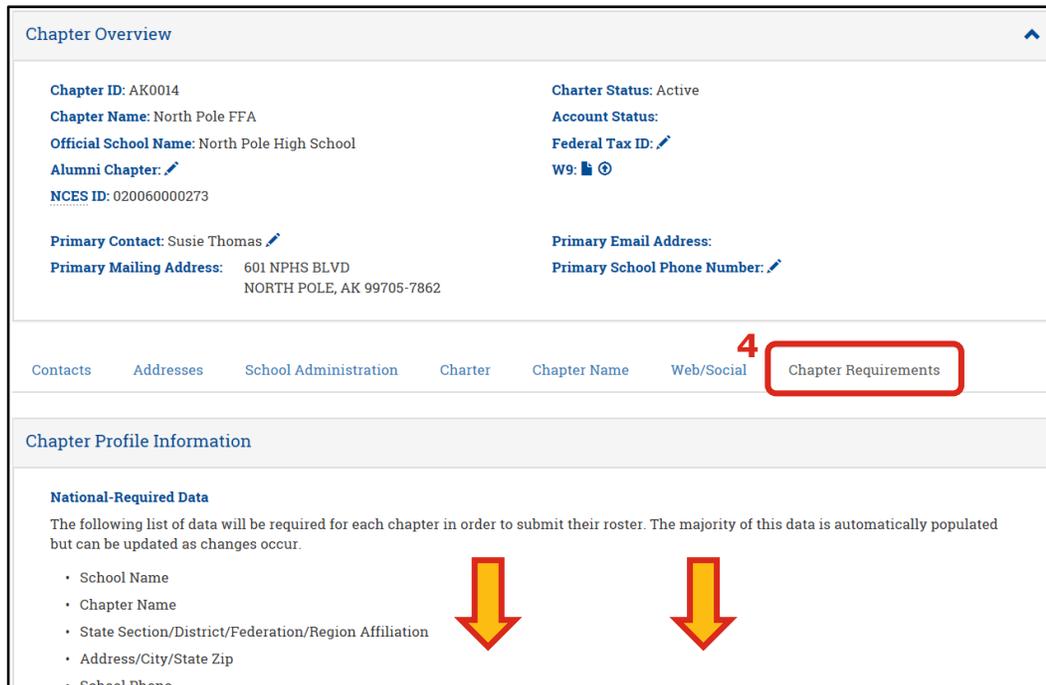


Next, [2] select **My Toolbox – Instructor**. Then, under *Account Settings*, [3] click **Edit Chapter Profile**. If your chapter profile is not missing required data, you will be directed to your chapter profile.

IMPORTANT: If your chapter profile is missing required data, the requested data must be provided to move forward. Add the required data and then select **Update & Continue**.



[4] Click the **Chapter Requirements** tab and scroll down to review each section.



OPTIONS FOR ADDING MEMBERSHIPS

There are six ways to add memberships to your roster.

Self-Registration



1. Returning members with an FFA.org account just need to login and register
2. Returning members without an FFA.org account will need to use one of the following means to create an FFA.org login and then register:
 - a. Chapter Invite Code and first and last name exactly as shown in the system
 - b. Chapter ID and personal Invite Code, found on Manage Memberships
 - c. FFA ID and last name exactly as shown in the system, found on Manage Memberships
3. New members simply need to create an FFA.org account and register
4. Under *Approve Pending Memberships*, carefully review and then submit all memberships for state approval

Export Previous Roster to National Template, Edit & Import



1. Under *Manage Memberships*, export roster(s) from previous year(s) to the national template
2. Make necessary changes
 - a. Update returning members
 - b. Remove members not returning
 - c. Add new members
3. Under *Add Memberships*, import your revised Excel roster
4. Under *Register Added Memberships*, carefully review and then register all the memberships you added
5. Under *Approve Pending Memberships*, carefully review and then submit all memberships for state approval

Renew Returning Members On-Screen & Import New Members



1. Under *Manage Memberships*, renew returning members from previous years
2. Under *Add Memberships*, download the blank, national template
3. Add new members only to the Excel template
4. Under *Add Memberships*, import your Excel roster of new members
5. Under *Register Added Memberships*, carefully review and then register all the memberships you added
6. Under *Approve Pending Memberships*, carefully review and then submit all memberships for state approval

Renew Returning Members On-Screen & Manually Add New Members



1. Under *Manage Memberships*, renew returning members from previous years
2. Under *Add Memberships*, add new members one at a time using the on-screen form
3. Under *Register Added Memberships*, carefully review and then register all the memberships you added
4. Under *Approve Pending Memberships*, carefully review and then submit all memberships for state approval

Download the National Template & Import All Members



1. Under *Add Memberships*, download the blank, national template
2. Add all members to the Excel template
3. Under *Register Added Memberships*, carefully review and then register all the memberships you added
4. Under *Approve Pending Memberships*, carefully review and then submit all memberships for state approval

Manually Add All Members One at A Time



1. Under *Add Memberships*, manually add new members one at a time using the on-screen form
2. Under *Register Added Memberships*, carefully review and then register all the memberships you added
3. Under *Approve Pending Memberships*, carefully review and then submit all memberships for state approval

OVERVIEW OF MANAGE MEMBERSHIPS

The various features within the **Manage Memberships** section are highlighted below.

Manage Memberships

Toggle between Student and Alumni Rosters
Must have permissions for both roster to access both

View members from current and previous membership years

Search

Member Type: Student Alumni

Membership Year: 2017-2018

State: AK - Alaska FFA Sta

Chapter: All

Advanced Search

Membership Type: All

State Association Division: All

Grade: All

Gender: All

First Name: Last Name

Batch ID: FFA ID

Search Reset

Switch views to see details about your members on-screen

Memberships Profiles Location

Select all 24 memberships

<input type="checkbox"/>	FFA ID	First Name	Last Name	Membership Type	State	Chapter	Membership Year(s)	Status-Batch ID	
<input type="checkbox"/>	602679972	Noble	A'field	One Year	AK	AK0014	2017 - 2018	Local	
<input type="checkbox"/>	601143333	Tommy	Frank	One Year	AK	AK0014	2017 - 2018	Local	
<input type="checkbox"/>	600365687	Josie	Gibbs	One Year	AK	AK0014	2017 - 2018	Local	
<input type="checkbox"/>	600717039	Rena	Swanson	One Year	AK	AK0014	2017 - 2018	Local	
<input type="checkbox"/>	553127645	Erik	Tyler	One Year	AK	AK0014	2017 - 2018	Local	

1 of 2 24 Membership(s)

Review your memberships by exporting them to Excel

Perform multiple actions for one, a few or all members

Actions

- Submit Membership(s) to State
- Change Membership Type
- Transfer Membership(s): State: AK Chapter: All
- Renew Membership(s): Membership Year: 2016-2017
- Print Invitation(s)
- Disapprove Membership(s)
- Cancel Membership(s)
- Export Memberships to National Template

EXPORT PREVIOUS ROSTER(S) TO NATIONAL TEMPLATE

Memberships from previous years (e.g. 2016-17, 2015-16, etc.) can be exported the national template. The export can then be edited and imported into the system for the new membership year. [1] Under Search, select a **Membership Year** from the dropdown or choose **ALL**. [Optional] Narrow your search results further by using the **Advanced Search** (e.g. select all memberships in grade 12 or below). Next, [2] click **Search**. Then, [3] select **Export Memberships to National Template**. Make necessary changes to the document (e.g. update returning members, remove members not returning and add new members.) Afterwards, go to Add Memberships and import your entire roster of new and returning members.

Search

1

Membership Year
2016-2017 ✕

State
AK - Alaska FFA Sta ✕

Chapter
All

Member Type
 Student Alumni

Advanced Search ^

Optional

Membership Type
All - Include

Submission Level
All - Equals

Batch ID
[]

State Association Division
All

Grade
12 ✕ - Or Below (<=) ✕

FFA ID
[]

Gender
All - Include

First Name
[]

Last Name
[]

2

Search Reset

Memberships Profiles Location Select all 24 memberships

<input type="checkbox"/>	FFA ID	First Name	Last Name	Membership Type	State	Chapter	Membership Year(s)	Status-Batch ID	
<input type="checkbox"/>	602679972	Noble	A'field	One Year	AK	AK0014	2016 - 2017	Local	🗑️
<input type="checkbox"/>	601143333	Tommy	Frank	One Year	AK	AK0014	2016 - 2017	Local	🗑️
<input type="checkbox"/>	600365687	Josie	Gibbs	One Year	AK	AK0014	2016 - 2017	Local	🗑️
<input type="checkbox"/>	600717039	Rena	Swanson	One Year	AK	AK0014	2016 - 2017	Local	🗑️
<input type="checkbox"/>	553127645	Erik	Tyler	One Year	AK	AK0014	2016 - 2017	Local	🗑️

« < 1 of 2 > » 🗑️ 24 Membership(s)

Actions

[Submit Membership\(s\) to State](#)

[Change Membership Type](#) Select

[Transfer Membership\(s\)](#) State: AK ✕ Chapter: All

[Renew Membership\(s\)](#) Membership Year: 2016-2017 ✕ Membership Type: Select

[Print Invitation\(s\)](#)

[Disapprove Membership\(s\)](#)

[Cancel Membership\(s\)](#)

3

[Export Memberships to National Template](#)

RENEW MEMBERSHIPS

To renew memberships, [1] select a **Membership Year** from the dropdown or choose **ALL**. [Optional] Narrow your search results further by using the **Advanced Search** (e.g. *select all memberships in grade 12 or below*). Afterwards, [2] click **Search**. Then, [3] select one, a few **or** [4] all memberships. Next, [5] select a **Membership Year** and **Membership Type** and then [6] click **Renew Membership(s)**.

Search

Member Type Student Alumni

1 Membership Year 2016-2017 ✕

State AK - Alaska FFA Sta ✕

Chapter All

Advanced Search ^

Membership Type All - Include

Submission Level All - Equals

Batch ID

State Association Division All

Optional Grade 12 ✕ - Or Below (<=) ✕

FFA ID

Gender All - Include

First Name

Last Name

2 Search Reset

Memberships Profiles Location

3 **OR** Select all 24 memberships **4**

FFA ID	First Name	Last Name	Membership Type	State	Chapter	Membership Year(s)	Status-Batch ID	
<input type="checkbox"/> 602679972	Noble	A'field	One Year	AK	AK0014	2016 - 2017	Local	🗑
<input type="checkbox"/> 601143333	Tommy	Frank	One Year	AK	AK0014	2016 - 2017	Local	🗑
<input type="checkbox"/> 600365687	Josie	Gibbs	One Year	AK	AK0014	2016 - 2017	Local	🗑
<input type="checkbox"/> 600717039	Rena	Swanson	One Year	AK	AK0014	2016 - 2017	Local	🗑
<input type="checkbox"/> 553127645	Erik	Tyler	One Year	AK	AK0014	2016 - 2017	Local	🗑

« < 1 of 2 > » 24 Membership(s)

Actions

Submit Membership(s) to State

Change Membership Type Select

Transfer Membership(s) State AK ✕ Chapter All

6 Renew Membership(s) Membership Year 2017-2018 ✕ Membership Type One Year ✕

5

Print Invitation(s)

Disapprove Membership(s)

Cancel Membership(s)

Export Memberships to National Template

DIFFERENCE BETWEEN DISAPPROVE AND CANCEL

On *Manage Memberships*, under *Actions*, there are options to **Disapprove Memberships** and **Cancel Memberships**. At times, **Disapprove** will be indicated by the "undo" icon (↶) and **Cancel** will be identified by the trashcan icon (🗑).

Teachers/Advisors and/or Alumni Leaders can **disapprove** memberships if the batch has not been approved by the state or national. State staff can **disapprove** memberships if the batch has not been approved by national. Upon disapproval, the memberships will revert to a Local submission level. **IMPORTANT**: Disapproved memberships can still be found on *Manage Memberships* and will reappear on *Approve Pending Memberships*.

Teachers/Advisors and/or Alumni Leaders are able to **cancel** memberships if the batch has not been approved by the state or national. State staff are able to **cancel** memberships if the batch has not been approved by national. **Upon cancellation, the memberships will be deleted**. **IMPORTANT**: The cancellation only deletes the unapproved membership for the selected year. All past years of approved membership will remain intact.

TRANSFER MEMBERSHIPS

Teachers/Advisors and/or Alumni Leaders now have the ability to transfer memberships both in-state and out-of-state. If the chapter leader has access to both the inbound and outbound rosters (e.g. *middle school and high school*), the transfer will be immediate. If the chapter leader does not have access to both inbound and outbound rosters (e.g. *state-to-state transfer*), a transfer request will be created and have to be approved by the inbound chapter leader.

State staff still have the ability to transfer memberships within their state, which will be immediate. However, they can now initiate a state-to-state transfer, in which a transfer request will be created and have to be approved by the inbound chapter or state leader.

Memberships are not officially transferred until the inbound chapter leadership approves the request.

To transfer a memberships, [1] select one or more memberships. Next, [2] select a **State** and **Chapter** and then [3] click **Transfer Membership(s)**. Inbound and outbound transfers can be found on *Approve Pending Memberships*.

The screenshot shows the 'Memberships' tab in a web application. At the top, there are radio buttons for 'Memberships', 'Profiles', and 'Location'. Below this is a table with columns: FFA ID, First Name, Last Name, Membership Type, State, Chapter, Membership Year(s), and Status-Batch ID. Three rows of membership data are visible, each with a checkbox in the first column. A red box labeled '1' highlights these checkboxes. Below the table is a button that says '3 Membership(s)'. Below the table is an 'Actions' panel. The first action is 'Submit Membership(s) to State'. The second action is 'Change Membership Type' with a 'Select' dropdown. The third action is 'Transfer Membership(s)', which is highlighted with a red box labeled '3'. To the right of 'Transfer Membership(s)' are two dropdown menus: 'State' (set to 'AK') and 'Chapter' (set to 'AK0055 - R'), both highlighted with red boxes. Below these are 'Membership Year' (set to '2016-2017') and 'Membership Type' (set to 'Select'). A red box labeled '2' highlights the 'State' and 'Chapter' dropdowns. Below these are 'Renew Membership(s)', 'Print Invitation(s)', 'Disapprove Membership(s)', 'Cancel Membership(s)', and 'Export Memberships to National Template'.

FFA ID	First Name	Last Name	Membership Type	State	Chapter	Membership Year(s)	Status-Batch ID
601804737	Randy	Holloway	One Year	AK	AK0014	2017 - 2018	Local
602679311	Sol	Went	One Year	AK	AK0014	2017 - 2018	Local
602679312	Nathaniel	Whitford	One Year	AK	AK0014	2017 - 2018	Local

Questions/Concerns

If you have any questions or concerns, please contact the Membership Team at National FFA at membership@ffa.org or 888-332-2668.