



*For people with intellectual
and developmental disabilities*

Membership Processing

General information and examples

Presentation by: Peggy Cooper

Yes, It Can Be Complicated

- Membership Processing can be complicated, particularly for new processors but if you follow the instructions like a recipe, it becomes easier with time.
- I enter memberships for the entire state into a database and transmit to The Arc US monthly, so I respectfully ask everyone to follow the directions and deadlines carefully and to provide the information in the format requested.
- If unsure, ask, ask, ask. Print *How to Process Memberships* off and use it as a guide each month!
- In a perfect world, there would be one database hosted on the Internet that we all use and we wouldn't have to process memberships three times (local, state, national levels) – but the world isn't perfect and that database does not yet exist.

Monthly Deadline for Membership File Transmittal

- The 20th of every month, regardless of the day of the week it falls on. In other words, if the 20th falls on Saturday or Sunday, then I expect your files to be in my inbox Monday morning.
- Please, only submit new and renewing members once per month! Multiple files with just one line entry each is not necessary! Hold them and send them in all together.
- The deadline is necessary to allow enough time to get the entire state's memberships processed and sent to The Arc United States in their required format.
- Files received after the deadline will be processed the following month.

What Not To Do to the Excel Templates

- Do not change the order of the columns
- Do not change the names of the columns
- Do not put additional information in the columns or on the spreadsheet other than what is required*
- Don't leave key information blank but if there are fields you do not track, please leave those fields blank.
- On NEW members files do not put information in the shaded columns named Date Entered and Member ID. I will fill in that information.

Why? Because information in Members files is imported into The Arc TN database and must be consistent and in the same order.

*See examples on following slides.

What Not To Do

Incorrect

	A	B	C	D	E
1	The Arc of [redacted] County				
2	[redacted]				
3	Membership Renewals				
4	15-Aug-11				
5					
6	Last name	First name	Member ID Number	New Expiration Date	
7	Coulter	Ashley	190809-02	8/31/2012	
8	Hill	Mark	190810-06	8/31/2012	
9					
10					

Why? Because the information above the column headers is not necessary and takes time to remove. The name of the file identifies the chapter.

Correct

	A	B	C	D	E
1	Last name	First name	Member ID Number	New Expiration Date	
2	Coulter	Ashley	190809-02	8/31/2012	
3	Hill	Mark	190810-06	8/31/2012	
4					
5					

Why? Because the column headers begin on line 1.

What Not To Do

Incorrect

Anderson New August 2011.xls [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L
1	The Arc [redacted] County				August 2011 Membership information			New Members				
2												
3	Last Name	First Name	Address 1	Address 2	City	State	Zip	Date Entered	Expiration Date	Member ID	Chapter #	Chapter
4	Miceli	Vera	PO Box 150		Norris	TN	37828		8/31/12		618	Arc [redacted] Co.
5	Cremese	Constance B.	113 Brentwood Dr		Oak Ridge	TN	37830-7666		8/31/12		618	Arc [redacted] Co.
6												
7												
8												
9												
10												

Why? The information above the headers is not necessary and has to be removed before importing. The headers (column titles) should appear on line 1. I can identify which chapter's file it is by the Chapter # field.

“The Arc or “Arc of” is not needed? Only put the county or chapter name. The same is true for the Resides In column. No need to put the word County after the name.

Correct Entries for NEW Members File

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Last Name	First Name	Address 1	Address 2	City	State	Zip	State Entered	Expiration Date	Member ID	Chapter #	Chapter	Resides In
2	Chisholm	Joel	1806 Broadmoor Dr		Johnson City	TN	37604		8/31/12		1167	Washington	Washington
3	Chisholm	Carrie	1806 Broadmoor Dr		Johnson City	TN	37604		8/31/12		1167	Washington	Washington
4	Laviano	Michael	174 Autumn Ridge Rd		Erwin	TN	37650		8/31/12		1167	Washington	Unicoi
5	Laviano	Ricki	174 Autumn Ridge Rd		Erwin	TN	37650		8/31/12		1167	Washington	Unicoi
6	Fuqua	Ashley	1008 Quality Cir		Johnson City	TN	37615		8/31/12		1167	Washington	Washington
7													
8													

Row 1 contains the header (column names)

Shaded columns are left blank.

Chapter and *Resides In* fields just contain the county and no other words. If a person lives in another state (not TN) then put OOS for "out of state"

What To Do

- Proofread what you enter for typos and mistakes!
- Double check your spellings, addresses and zip-codes for accuracy! Just calling a Street a Road can make a difference! If a street spelling or zip-code is wrong, forget it, mail will never reach the individual. Addresses and zip-codes can be verified at:
<https://tools.usps.com/go/ZipLookupAction!input.action>
- Enter information in proper English – this is not texting! Names entered in lower case letters means that newsletters and other correspondence will be addressed that way!
- If you learn a member has a new address, please include them on a Changes file submittal as soon as possible!

What To Do

- Name your files using the following formula:
- 522NEW08.20.11.xls
- 522RENEW08.20.11.xls

522 identifies chapter number

NEW means new members

RENEW means renewing members

08.20.11 is the month, day and year the file is sent

NEW and RENEW

- NEW members must be submitted on the NEW members Excel template that includes all contact information, etc.
- RENEW members should be submitted on the RENEW members Excel template that only contains limited information.
- Duplicates!!!! There were many members sent in twice last year as NEW members. Since those are imported into the database many were not caught until late in the year. Please double check your list of current members to make sure the person you think is NEW is not already a member. If so, send in as a RENEWAL.
- The Excel files should be attached, not pasted into the body of the email.

Membership ID Numbers

- Members never share ID numbers. Each line entry must contain its own unique number. I assign NEW members their numbers using the following formula:

190811-01

19 is Tennessee's state chapter number.

08 is the month the new member is entered in the state database.

11 is the year the new members is entered in the state database

01 represents the order new members are entered for that month, 01, 02, 03, etc.

Some members also contain an E between the 19 and month that represents "electronically" submitted.

Some members will have a mixture of alpha and numeric IDs because The Arc US used to randomly assign numbers.

Future Membership Processing Plans

The Arc US is finally looking at hosting a membership database online. Nothing has been finalized yet but I have asked to be involved with their plans to ensure we get a product that works for everyone. The hope is that locals could get to all their member information, enter members, change addresses, run reports and print mailing labels. I could access the entire state of TN and The Arc US could access it all.

Stay tuned for more information. I volunteered Tennessee to participate in a pilot database.

If you have ideas on this, please share them with me.

? Questions?

- Not sure you understand everything?
- Need a file of your members from my database?
- Need the instructions and templates again?

Contact:

Peggy Cooper

Membership, Chapter and Communications Manager

The Arc TN

pcooper@thearctn.org

1-800-835-7077 or 615-248-5878 ext. 15