## A Guide to AHEPA Online Membership Presented by

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- Review of key membership portal functions
- You will learn how to:
  - ✓ Sign-on as first-time user
  - ✓ Manage personal account
  - Manage chapter/member account (for assigned chapter officers only)
  - ✓ Chapter dues payment (for assigned chapter officers only)
  - Download reports (for assigned chapter/district/national officers only)
  - ✓ Join New Member online

**IMPORTANT INFORMATION: ONLY assigned Chapter Officers can pay for their members' dues online at this time.** Individual members however can view/download their membership card and manage their account profile

### Q. HOW DO I ACTIVATE MY ACCOUNT

- Go to <u>https://members.ahepa.org</u>
- You will be routed to the Sign-in Membership Home Page see below screen shot
- Activate your account by clicking on "Forgot password" Link

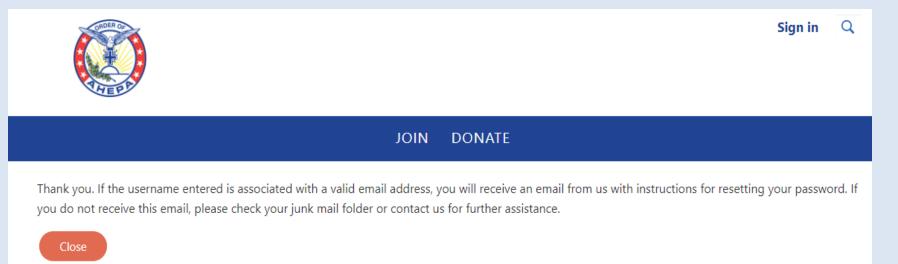
Sign In	
	Username
	Username
	Password
	Password
	Sign In
	Jigh in
	Forgot username?   Forgot password?

- A dialog box will open up see below screen shot
- At the 'Username' field, enter an email address and hit submit (please note, the email address entered will be cross referenced to the email address on file at headquarters to complete your request to activate your online account)

	Sign in	Q
JOIN DONATE		
Password request Enter the Username for your user account, then click Submit. We will email you a link to a page where you can easily create a new passw "Username Submit Cancel	ord.	

### Q. HOW DO I ACTIVATE MY ACCOUNT CONT'D

- Once your email address is submitted, the system validates the address
- Please check your email inbox on instructions for resetting password.



### Q. HOW DO I ACTIVATE MY ACCOUNT CONT'D

### • Click on the link as provided to reset your password.

#### AHEPA Password reset request

AM

membership@ahepa.org <membership@ahepa.org> To: Rosalind Ofuokwu

We received a request to reset the password. If you made this request, go to the password reset page. This link is valid for 20 minutes after the time it was requested.

If you did not request to have your password reset, you can safely ignore this email.

If clicking on the link does not work, you can copy and paste the following link into your browser's address window.

#### https://members.ahepa.org/AHEPA/Contacts/Sign\_In.aspx?

resettoken=OURFeml4U1ImcDRQMTINM3dIWHByZz09dURsWkx4VHIYcTNBMWNDZGtBZjQzRIN2MkJRPW42QWFvYjRzSmtXT2U3ZkZLZCt3YkFIYXJkQUdQOWRRRmJmcGdSdGk5RG9YOWIQ NCsxcEZ2SXdPR3R2blU2cmk0TFdhcDZZVIIHUW9HRStLbkdFT002N29YN0h0NTNuNml6QIJ6R3RaM1Q1bFdHSm5TNDMyWk85bGlpd01kYWIRVzgrcjlwb2Z1aXhJSU9jaTV4M01ic1Z6eTlvdW9ER W5NRnVvdGR3R2dMTE1hR0JQdldLQzNVKzRoNzNxK3ljbkE0SVhtK3ZHdDZLaIJoaGtzYUVzVXc9PQ

Yahoo/Inbox 🄺

Thu, Feb 3 at 1:48 PM 👘

### Q. UNABLE TO LOGIN (SYSTEM NOT RECOGNIZING MY EMAIL)

 Please email <u>membership@ahepa.org</u> and provide your current email address and membership ID. Once email has been updated in the system, you will receive an email to re-activate your account by going to the Signin home page – see below screen shot, click the '<u>Forgot password</u>' link (follow instructions as provided on screen)

		Sign in Q
	JOIN DONATE	
	Sign In Username Username Password Password Sign In Forgot username?   Forgot password?	
<b>Contact Us</b> 1909 Q Street, N.W., Suite 500 Washington, DC 20009, USA Office: 202.232.6300 Fax: 202.232.2140 Email: <u>membership@ahepa.org</u>	Connect With Us f Y in D V	Quick Links About AHEPA AHEPA Shop Downloads & Forms

### FOR CHAPTER OFFICERS: GENERAL INFORMATION ON INITIATING/REINSTATING MEMBER ONLINE

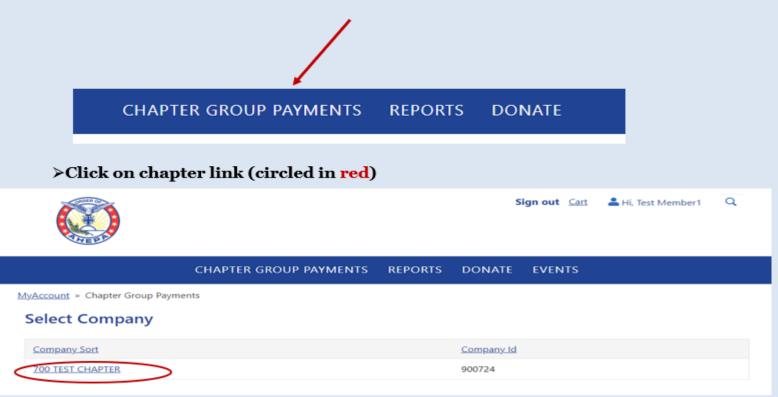
✓ For chapters whose members were initiated online, in order for "Membership Certificates" to be mailed, endorsed application forms <u>MUST</u> be mailed to Headquarters (1909 Q St., NW, Ste 500, Washington, DC 20009) <u>OR</u> emailed to membership@ahepa.org.

#### **Q: CAN HEADQUARTERS COLLECT CHAPTER DUES?**

- According to the IRS, we are a 501(c)(10) operating under a lodge system.
- If Headquarters is to collect chapter and district dues at varied amounts, we would not be operating under a lodge system and would therefore lose our exemption as a 501(c)(10) organization.
- However, if Chapters were to agree on a fixed amount for membership dues, Headquarters would be able to collect the chapter amount and issue the chapter's portion back to the chapter.

#### **CHAPTER DUES PAYMENT PROCESS**

If you are a chapter officer, use your login credentials to log in to your member page
Click on the *"Chapter Group Payment"* tab and click on the Chapter Name



#### **CHAPTER DUES PAYMENT PROCESS - CONT'D**

#### Click on "Pay Members Invoice"

	CHAPTER GROUP PAYMENTS	REPORTS	DONATE
The state of the s	Member type Chapter Category	Status Active	Pay Members Invoice

#### **CHAPTER DUES PAYMENT PROCESS - CONT'D**

- > To begin payment, first **uncheck** the **"Pay"** box for selection
- Click on show all OR you may expand the "Page size" by highlighting the default number and enter number as shown on the "Item section". E.g. below screenshot shows maximum page as 21. Click "Proceed to Checkout" once payment selection is completed

Pary	Member	Description	Balance Due
2	2.	Reinstatement Dues	45.00
		Renewal Dues	45.00
ow all 21	2 3 🕨 🖬	Page: 1 of 3 Go Page size: 10 Chan	ge Item 1 to 10 of 2

### **CHAPTER DUES PAYMENT PROCESS - CONT'D**

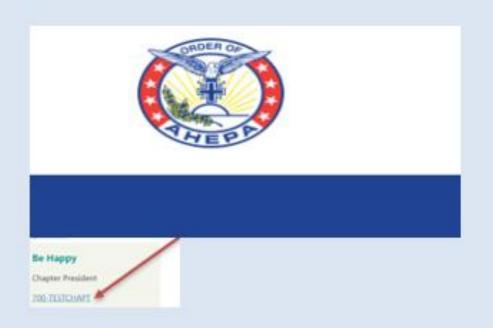
- Payment options include credit card and e-check. A confirmation receipt will be emailed after payment is complete.
- Note: The credit card address entered <u>MUST</u> match the credit card billing address. If the card billing address does not match, before entering card information, please click on *"Choose another address"* at the bottom to update and click *"OK"* when finished

#### PAYING BACK DUES & OFFICER ACCESS

- **Back dues cannot be paid online**. Chapter officer paying back dues (years missed) for members should remit payment to headquarters via postal mail for processing.
- The top four Chapter Officers have access to their chapter reports (Chapter President, Chapter Vice President, Chapter Secretary/Recording Secretary, and Chapter Treasurer).
- The top four District Officers have access to the chapter reports within their district. (District Governor, District Lt. Governor, District Secretary, District Treasurer)

#### **MANAGING MEMBER INFORMATION (Chapter Officers)**

To manage members' information, click on Chapter link (see below screenshot) on the left corner of your page; scroll down to "Chapter Roster" section, click on the member name you wish to update contact information; click on the edit button (looks like a pen), once update is completed click on 'Save' – Note: You cannot edit Title, Date of Birth, Gender, Years of Service, Membership ID and Join Date - these are system administrative functions



#### MEMBER PROFILE – ABOUT ME TAB

- Under the About Me tab, click on the pen in the right hand corner (see arrow) to edit your information.
- Note: You cannot edit: Title, Date of birth, Years of Service, Membership ID or Join Date

About Me	History	
My De	tails	
Work phon	ne	
Home pho	ne	
Fax		
Cell phone		
Email		membership@ahepa.org
Website		
Title		
Date of bir	th	
Gender		
Years of Se	rvice	
Membersh	ip ID	
Join Date		

#### MEMBER PROFILE – HISTORY TAB

- Under the History Tab, you can view recent transactions, interactions and billing history.
- For example, once you pay your membership dues online or any other transaction, you will be able to view the transaction on this tab

		ictions			
Order	Number	Order Date	Туре	Amount	Balance
There a	are no recor	rds.			
Recent		tions Type	Subject	Qw	mer
3			Subject	Ow	mer
Date There	e are no reco	Туре	Subject	Qw	<u>mer</u>
Date	e are no reco	Туре	Subject	Qw	mer

### DOWNLOADING REPORTS AND MORE

 To view/download reports, click the *Reports tab* on the top right corner and then click on the link labeled *Chapter Rosters* which takes you to the report page to download chapter rosters; member labels & chapter billing and more (Chapter Billing download for Chapter Officers only)

	CHAPTER GROUP PAYMENTS REPORTS DONATE	
Reports		REPORTS
Reports		Chapter Rosters
Select a query	Chapter Active - Roster 🗸 🗸	Chapter Billing
	Export -	Member Label
		Membership Cards

#### **EXPORTING THE REPORT TO DOWNLOAD**

- On the report page, the below screen will appear. Choose the reports you wish to view by selecting the report via the **drop down menu** where it says *Select a query*. Select the desired report by clicking on the drop down report menu. Once the report is selected, click on **Export** to download (please note, pop-up must be enabled for reports to download)
- Note: for District or National officers, to select by Chapter number, enter (3) characters- e.g. for chapter 1 enter 001. By District number enter (2) characters e.g. for district 1 enter 01. For International chapters, to select by chapter (5) characters, e.g. Greece to select chapter 001, first enter for 'HJ' followed by the (3) chapter character (HJ001) for Canada 'CJ' followed by the (3) chapter number and so forth

	СНА	PTER GROUP F	PAYMENTS	REPORTS	DONATE
Reports					
Select a query	Chapter Active - Roster	~			
					Export +
	•				X Excel
Show all 41					
DistrictID Chapte	rlD <u>MemberID</u> Prefi	x <u>First Name</u>	<u>Middle</u> <u>Name</u>	<u>t Name</u>	O XML

### **DOWNLOADING DELINQUET ROSTERS**

 Please note when downloading Delinquent Roster, select by member's 'Paid Through Date' (delinquency range starts from "Paid Through Between" 12/31/2010 and 12/31/2021)

### **EXPORTING/PRINT THE CHAPTER BILLING**

• To view/download chapter billing, click the *Reports tab* in the top right corner and then click on the link labeled *Chapter Billing* which takes you to the report page to download the report

		CHAPTER GROUP PAYMEN	TS REPORTS DONATE	
•	Click the <b>PDF</b> icon to the l	eft to download for	printing	
	◀	14 4 1	of 1 ▷ ▷]	Find   Next
٨		ORDER OF	RETURN TO NATIONAL HEADQUA	ARTERS, WITH REMITTANCE
		AHEPA	CHAPTER	BILLING
		Founded July 26, 1922	APPLICATION FOR NEW AND	OREINSTATED MEMBERS
			MUST ACCOMPA	NY THIS FORM
				Page: 1
		DISTRICT	CHAPTER NO. & LOCATION	

### **DOWNLOADING MEMBERSHIP CARDS**

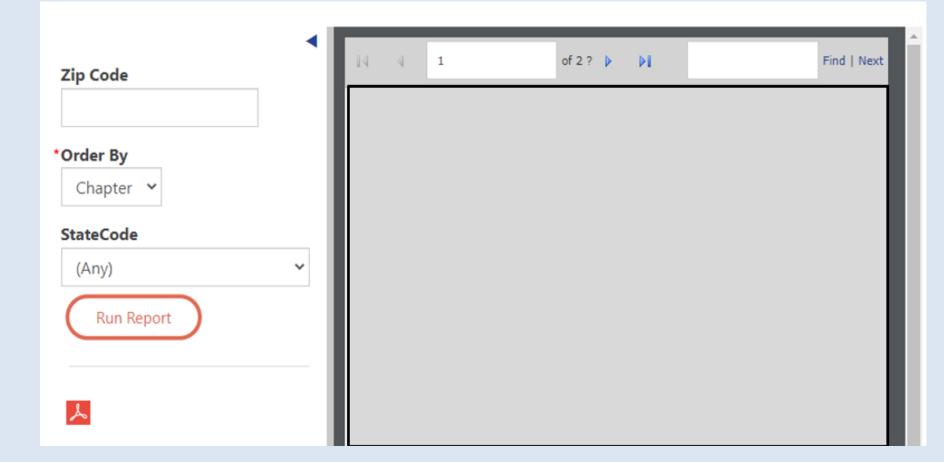
• To print membership cards, click on the **Reports tab** on the right corner of your profile page and click on the link labeled **Membership Cards** 

	CHAPTER GROUP PAYMENTS	REPORTS DONATE
TransactionDate		Find   Next

- You may download cards by: (please note: selection is one field per search)
- <u>MemberID</u>
- <u>Check Number</u>
- <u>**Transaction Date**</u> (This option is **ONLY** for online credit card & E Check payment please enter the date payment was made online)
- Click Run Report (you will see the print preview)
- Click on PDF 🛃 to complete download (please make sure pop-up is enable)
- Please note: paper style (perforated template Avery 5390 or similar dimension) – please make sure to adjust your printer if necessary by going to your printer option "more settings" and on Scale, select "Fit to printable area"

### **DOWNLOADING MEMBERSHIP LABELS**

• To print labels, click on the **Reports tab** and click on the link labeled **Chapter Member Label; click on Run Report to download** Note: for District or National officers, to select by Chapter number, enter (3) characters. By District number enter (2) characters. For International chapters, to select by chapter (5) characters, e.g. Greece to select chapter 001, first enter 'HJ' followed by the (3) chapter character (HJ001) for Canada 'CJ' followed by the chapter number and so forth



### **REPORTS DOWNLOAD – MEMBER LABELS**

Member Labels

- Click **Run Report**; click on PDF icon for download
- Insert Avery 5160 or 5960 return labels in your printer tray and print

Zip Code		
*Search Option		
Chapter Y StateCode		
Run Report		
 ا		

## JOINING NEW MEMBER ONLINE

- Go to <u>https://ahepa.org</u>
- Click on "Membership" tab
- Under Become a member>Chapter>Click on "Start Here"
- Complete information as shown on screen. (PLEASE DO NOT Sign in to your personal account to join a new member)
- On **Organization** field, enter **Chapter Number**. For Local & Europe Chapters, enter chapter (3) numbers - e.g. for chapter 1 enter 001. For Canada, Greece, Cyprus chapters , enter (5) characters, e.g. Greece chapter 001, first enter 'HJ' followed by the (3) chapter numbers (HJ001) for Canada 'CJ' followed by the (3) chapter numbers; for Cyprus "CY" followed by the (3) chapter numbers and so forth.

# **GENERAL INFORMATION**

- Please feel free to contact headquarters at <u>membership@ahepa.org</u> should you have any questions
- AHEPA Membership website: <u>https://members.ahepa.org</u>