Guide to Online Roster Management and Paying Dues 2019-2020

Welcome to SIA’s online dues payment options. Before you begin your online roster and payment updates with the enclosed step by step instructions, please read the following information to help you understand the system.

A. WHAT YOU CAN DO ONLINE

Update club/membership information:

- Manage your club roster: add new members, terminate members, identify the new club president, treasurer and LYD chair, and update contact information for all members, including email. SIA headquarters urges you to manage your roster online, even if you do not wish to pay your dues online. Simply update your member information online, and then determine the amount you owe to headquarters, and remit payment with the dues worksheet, OR you may pay online.
- Discontinue (terminate) gift magazine subscriptions for non-members or Friendship Links.

Make payment for the following, using a credit card (MasterCard, Visa, American Express, Discover Card) bank debit card or PayPal:

- Pay member dues, SI dues. (Clubs paying online will receive an automated detailed receipt at their “@soroptimist.net” club email address.)
- Make contributions to Founders Pennies, Club Giving and other donation types.

Request an electronic copy of your club roster:

- Delivered by email to address of your choice.
- Choice of Word, PDF or Excel

B. WHAT YOU CAN’T DO ONLINE

- Transfer current Soroptimist members into or out of clubs. Please submit form 5010 to headquarters.
- Reinstate members. If members are rejoining within a year of resigning, please submit a form 5008 to headquarters with the appropriate payments.
- Discontinue current magazine subscriptions for Life members or gift subscriptions paid by the club. To discontinue current magazine subscriptions for Life members or gift subscriptions paid by the club.
- Add new members with previous club year join date.
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Connecting with the web site

Type www.soroptimist.org

Connect to the Internet and then open a browser such as Internet Explorer, type www.soroptimist.org in the address bar, then click enter.

Click on Member Login to access the password controlled clubs section

Helping women and girls live their dreams
Entering Username and Password

**Important Change to Club Password:**
If the club’s password has not been changed to be compliance on the website then please read the following information otherwise continue to login and pay club dues.

- Beginning January 9, 2018, all current clubs who login to the SIA website to make dues payments, donations, update their club rosters, club profiles, shop in our store or access any tools that are behind a login screen must change their passwords. These changes are required for compliance on websites that accept credit card payments.
- All passwords must include at least 7 characters, including one letter and one number.
- **Click Here** for instructions to change the club’s password. After changing the password, you will receive an automated email from siahq@soroptimist.org to the @soroptimist.net address we have on file. Please keep this information in a safe place. SIA headquarters cannot access or track changed passwords.

Enter the club’s username and password. (The username is the club number and the password siaxxxxxxx unless the club has changed its password.) Then click the “Sign In” button.
Review/Edit Roster

In “Club/Member Update” area clubs can...
   1. Review/edit the roster
   2. Update club/member profile
   3. Add a member(s)
   4. Terminate a member(s)
   5. Change President and/or Treasurer
   6. Change LYD Chair
   7. Change DIBI Chair
   8. Delete Friendship Links
   9. Change To Without Magazine
  10. Print Club Roster

Detailed instructions will follow.

The first step is to review the list to determine the changes that need to be made to the club’s roster. Clicking on the Club Roster link below will show the club roster information that is in our database.
(1) Review/edit the roster

Determine the changes that need to be made to your club’s roster and begin by reviewing the roster list. The roster list shows each member of the club, ID (member number), name, category, city/state and email address.
Updating the Club Profile

2(a) Updating the Club Profile

Click on the “View Club’s Profile” Link toward the top left side of the screen.

Enter the club’s Social Media information into the “Website” field.

If a change to the Club address is necessary, make the changes and then select the “Update” button. After submitting or viewing your club profile, click on the “Back” button to return to the roster.
(2b) Updating a Member Profile

If necessary, a member’s contact information can be updated. Click on the member number, which is the first field for each member record on the roster. Make the necessary changes. Click on the Birth Date field to add the birth date (mm/dd/yy) and click on mobile phone to add cell phone number. Click on the “Update” to confirm changes and then click on the “Back” link again to get back to the club roster.
Adding a New Member

If you need to add a new member, click the “add a new member to the club” link toward the top left of the screen in the “Club/Member Update” section. (Reference pg. 8 if needed) Fill out all the required fields and then click on the continue button at the bottom of the page. The next page allows you to review/edit your information (not shown in this example) and click the “continue” button to add the new member. Repeat the process if you need to add more members.
Terminating Members / Changing President and/or Treasurer and/or LYD Chair and/or DIBI Chair

4) Terminating members

To terminate a member click on the “Terminate” button next to the member in the “Club Member Update” section. If the member is deceased, please check the “Deceased” box then terminate the member. Terminating a member removes them from the roster and membership from SIA. If you terminate a member accidentally, do not add them as a new member. Send Form 5008 to headquarters, along with payment. If you send the form within two weeks of your online activity, you may waive the reinstatement fee. Contact SIA headquarters if you have any questions.

5) Changing the President or Treasurer

To Change the President, Treasurer, LYD Chair or DIBI Chair of the club, find the member who will become the new club officer and click on the “Make President” button to make the member a President or click “Make Treasurer” to make a member the Treasurer of the club or click “Make LYD Chair” to make a member LYD Chair or click “Make DIBI Chair” to make a member the DIBI Chair.

Note: If a member is incorrectly made a President or Treasurer, find the member in the roster list that should be a club officer and click the appropriate “Make President”, “Make Treasurer”, “Make LYD Chair” or “Make DIBI Chair” button and confirm the change.
Delete Friendship Links

7) Your roster may list Friendship Links if your club pays for a subscription for Best for Women. If your club will not continue providing the subscription to your Friendship Link, you may remove them from your roster by clicking the “Terminate” button. Subscription fees will not be billed in the next step (Pay Dues).

Additional Notes:

If your club purchases any additional domestic or foreign subscriptions for Friendship Links or non-members, you will be billed for them automatically in the next step “Pay Dues”. You may delete these gift subscriptions if your club does not want to continue them by clicking the terminate button. However, you cannot add additional subscriptions through the website.
Printing Club Roster

Select the format, enter the email address you would like the club roster sent to, then click Send Request. Please allow a few minutes for the roster to appear in your email.

<table>
<thead>
<tr>
<th>ID:443001</th>
<th>Full Name: Rafael Test, Shirley</th>
<th>ST/Prov. City:</th>
<th>Contact By: Email!</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Category: Treasurer</td>
<td>Member Type: REG-Regular</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Make President</td>
<td>Make LYD-Chair</td>
<td>Mark Deceased</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID:442999</th>
<th>Full Name: Doe, Jane</th>
<th>ST/Prov. City: AZ, Somewhere</th>
<th>Contact By: Email:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Category: President</td>
<td>Member Type: REG-Regular</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Make Treasurer</td>
<td>Make LYD-Chair</td>
<td>Mark Deceased</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID:443043</th>
<th>Full Name: Blake, Joanne</th>
<th>ST/Prov. City: Philadelphia</th>
<th>Contact By: Email:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Category: Friendship Link</td>
<td>Member Type: FRND-Friendship Link</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID:442999</th>
<th>Full Name: DuesNWWest, Test</th>
<th>ST/Prov. City: PA, Philadelphia</th>
<th>Contact By: Email:<a href="mailto:siahq@soroptimist.org">siahq@soroptimist.org</a></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Category: REG-Regular</td>
<td>Member Type: REG-Regular</td>
<td></td>
</tr>
</tbody>
</table>

View Roster: After you have made all the updates to the roster, you can have your club roster sent to the email address of your choice. Click on “Request a club Roster” then select your format; Word, PDF or Excel and click on “Send Request.” Your roster will be sent from siahq@soroptimist.org.
When finished reviewing, editing and printing the roster, click on “Club Dues” link on the upper portion of screen.

The “Pay Dues” page itemizes the dues. Founders Pennies is a voluntary contribution and the amount in this field can be changed. If you do not want to contribute, uncheck the box. Review the changes, Print This Page for your Records then click “Pay Club Dues” to complete the process.
The Check-Out Basket

Review the check-out total and input your credit/debit card information. If you have a PayPal account, click on the "PayPal" checkout button. If you do not have a PayPal account but would like to create one, instructions can be found on the PayPal.com website at https://www.paypal.com/webapps/mpp/account-setup. When ready click the "Submit Order" button only once. Note: it may take several seconds to verify and complete the transaction.

If the total is not correct click on the "Pay Later" button and go back to the "Pay Dues" page (see page 13). If you need to get to the roster to make changes, click on the "Club Roster" link (see page 13). Proceed to "Club Dues", review items and then click the "Pay Club Dues" button again to get back to the "Check-Out Basket" page.
Purchase Detail

Donations
After printing the Dues Receipt, donations can be made by clicking the “Make a Donation”.

The Order Confirmation page confirms that the transaction and dues for the club have been paid!

Printing this page for your records is recommended.

Receipts:
A detail receipt will be sent to your club’s @soroptimist.net club email address for your financial documentation backup.

Thank you for processing your roster online!

If you have any questions you can send an email to siahq@soroptimist.org or call Headquarters at 215-893-9000.