



Electronic Membership FAQ's

1. What is the electronic membership system?

- The electronic membership system is an electronic platform that allows people to join PTA at their local unit online.
- The system (TOTEM) was developed specifically for California State PTA. It collects the dues payment, provides a receipt and an electronic membership card, and simultaneously distributes the per-capita dues payments among the various levels of PTA.
- The electronic membership card can be stored on a smartphone and has the potential to link to member perks.
- The system allows for automatic membership renewals on July 1 and many other features.

2. What are some of the benefits to a local PTA?

- Local PTAs will be able to let members join online with a credit or debit card.
- Local PTA leaders and members will be able to invite friends and family to join with a just a click.
- The system will reduce the need to print out forms, collect checks and make trips to the bank.
- Membership campaigns will be able to utilize social media to increase awareness and membership.
- Anyone, anywhere will be able to join any PTA that participates in the program.

3. How do members know their credit card information is secure?

- The electronic membership system (TOTEM) uses Stripe, a well-known and well-regarded payment processing system. The storage of card data will comply with the [Payment Card Industry Data Security Standards](#) (PCI DSS). Stripe has been audited by an independent PCI Qualified Security Assessor (QSA) and is certified as a [PCI Level 1 Service Provider](#). This is the most stringent level of certification available in the payment industry.
- We will not store any credit card information on our California State PTA servers.

4. How much will this cost?

- There is no cost for a local unit to use the system.
- Each member that joins using the electronic membership system will pay a \$1 convenience fee per membership. This will cover all the processing fees and other costs of the system. This dollar will be paid by the member and it is added on to the membership dues so it will not reduce the portion of dues deposited in the local PTA unit bank account.

- This may save local PTA units money if they are currently mailing membership cards or paying bank fees on cash and check deposits.
- Members still have the option to join with cash, check or any other payment system used by a local PTA.
- There is a 5% fee for donations, so a person donating \$100 would pay \$100 and \$95 will go to the unit and \$5 covers fees and services.

5. Do PTAs need to change their bylaws to reflect the \$1 fee in the dues?

- No the convenience fee is an outside charge - not a dues increase.

6. Can a unit opt out of using the donation part of the program to avoid the 5% fee?

- TOTEM can set up an account to eliminate offering the donation options to members.
- We believe that offering donations here will increase overall donation amounts to units because of the ease of to donate, and that the 5% fee will be outweighed by the increased donations. Also, TOTEM is working on giving members the option to pay the 5% in the near future to allow your units to keep 100% of the donations amount.

7. How will local PTA unit leaders know who the members are?

- The electronic membership system (TOTEM) will generate a list of members, which local leaders will be able to access and keep track of members in the system.
- The leaders will be able to manually enter non-electronic members (those who paid with cash or check) into the system and there is no charge to enter these members.
- Leaders will also be able to download a member list to Excel to be used with any membership tracking system they like.

8. Can I enter and manage members who join with check or cash? Will the members receive an electronic membership card?

- Yes to both. As long as the local PTA is participating in the electronic system, and the member is willing to give an email address, PTA leaders can manually upload member's names and emails into the system, and they will receive the PTA electronic membership card.

9. Can members who do not have an email join?

- Members will need an email to participate in the electronic membership system.
- Members who do not have an email can join with a check or cash and they will receive a paper membership card.

10. Will a unit leader know who the child of the member is?

- This part of the system is still under development.

11. Can members still join at a back to school table?

- Of course! You can share your join link at back to school night and at every PTA event and you can still collect cash and checks from members who prefer to join that way.
- You can also print out a "Join PTA" poster with a QR code that will take potential members right to you.

12. On the mobile versions of the card, it shows a “member since” date. Will there be a way to put the original date of membership (from the old paper way)?

- Not yet. This will be first date the member joined electronically.

13. Can I use the system if my unit has different dues and membership levels?

- Eventually yes, but currently the system is set for one dues amount per unit.

14. How will a member search for the PTA they would like to join?

- Each PTA using the electronic membership system (TOTEM) will have a unique link. That local PTA can post the link of their website and social media sites.
- The link can also be sent in welcome letters and emails from the PTA and/or the school (if the school is willing)
- The system will use geo-location and addresses to help people find the right PTA so they do not have to scroll through a long list of PTA’s.
- We currently post all the links to PTA on our blog about e-membership on the California State PTA website and we share the links on social media.
- A printable poster with a QR code is available to download. Post it in the office, at the back to school table and at every PTA event you have.

15. Can you join more than one association in the same transaction?

- Yes, a member can join more than one association in the same transaction.

16. Can a member sign up for multiple memberships with a single checkout?

- Yes, the member will have the ability to sign up more than one member during a session such as two parents, or parents and grandparents.

17. Is the sign up process available in Spanish?

- Currently it is not, but we plan to include Spanish (and other languages) soon.

18. Sometimes people change schools after joining PTA and making a donation to their school, will PTA membership or donation be refundable?

- No, our current rules will still apply. No refunds for memberships will be given after the money has been remitted.
- If there is an incorrect charge or mistake on TOTEMs part refunds will be made

19. What happens with the change in PTA presidents in July?

- Outgoing officers should pass along electronic membership information to incoming officers as you would with anything else (banking information, passwords, social accounts, etc.) We will invite new officers when their term starts, but you can work with them now for an easy transition.

20. How would setting up electronic membership benefit the council or district level since we do not accept members’ dues?

- If the units in a council want electronic membership, then the council would want to support its units by linking to the system.
- The council's purpose is to support the units within the council. This is one way of doing that. Additionally, the council and district would not have to deposit membership checks and write checks through channels for those dues. Councils and districts will also be able to identify members in units.

21. What are the steps PTA leaders will complete to connect and verify a bank account?

- The electronic membership system will use a two-factor authentication to connect a bank account.
- There is a visible record for the user who creates or modifies any account information.
- The electronic membership system requires a second authorized leader to confirm new account information.

22. Does the auto renew occur at the beginning of the school year or one year from purchase date?

- California State PTA's membership year is July 1 to June 30. An auto renew notice will be sent to the members the last week in June and auto renew will occur near July 1 (depending on holidays).

23. If the TOTEM system codes the membership rates into the program, when a unit makes changes to their membership dues, who is responsible for notifying TOTEM of the new amounts?

- The PTA leaders will be responsible for making changes in the system. The changes will be implemented immediately upon the unit PTA leader updating the dues on the leader dashboard.
- All other requirements to change dues will continue (bylaws change, submitted through the state parliamentarian and association adoption)

24. When a PTA receives deposits, will it be individual deposits or a batch of deposits at a time?

- Currently the default setting is for the TOTEM system to deposit (sweep) membership funds to all levels on the 25th of each month. There is also an option for a local leader to "sweep" funds into the PTA bank account any time they would like.

25. Do units, councils or districts need to account for the \$1 convenience fee or the 5% fee for donation as "funds not belonging to the unit, council/district in the accounting process"?

- The \$1 convenience fee does not enter into the PTA/PTSA bank account and it is not part of its income.
- We will have instructions about the 5% charge on donations

26. Do we need to add a new line to our budgets for electronic membership?

- Membership is membership. For accounting you will want two columns because some members will have dues to be forwarded and others will not.
- Sample budget formats, step by step treasurers' reconciliation at all levels and financial reports will be coming soon.

27. Will treasurers and presidents both get reports?

- All the PTA leaders will have access to the same reports. And all of the information will be on the platform in real time. There is also a transaction view to see money in real time.