

TSA Membership System

Chapter Advisor Instructions

Once you have received your chapter login, these instructions will guide you through your chapter site

How to login as a Chapter Advisor:

Login for Chapter Advisors and State Advisors

Chapter Membership

Chapter ID / User Name:

User Name

Password:

Password

Login

Forgot Password

Note: To login to the membership system, use the Chapter ID/User Name and Password that you received in your confirmation email.

1. Go to the membership login: tsamembership.registermychapter.com (Chrome browser recommended)
2. Type the chapter ID in the "**Chapter ID/User Name**" field
3. Type the password in the "**Password**" field
4. Click on the "**Login**" button

IMPORTANT: Within the Membership System, any fields that are in **RED** are Required Fields

Login Instructions Continued

How to use the “Forgot Password” function:

Login for Chapter Advisors and State Advisors

Chapter Membership

Chapter ID / User Name:

User Name

Password:

Password

Login

Forgot Password

Note: If an account was found that matches the Chapter ID and Email Address on file, you will receive an email with your new temporary password.

1. Click on the “**Forgot Password**” button

Enter All The Information Below To Have Your Password Reset and Emailed To You

Back

Chapter ID / User Name:

User Name

Email:

Email

First Name:

First Name

Last Name:

Last Name

Reset My Password

1. Type the “**Username**” in the appropriate field
2. Type the “**Email Address**” in the appropriate field
3. Type the “**First Name**” in the appropriate field
4. Type the “**Last Name**” in the appropriate field
5. Click on the “**Reset My Password**” button

Login Instructions Continued

Chapter Advisor Instructions:

When you login for the first time, you will be asked to confirm User Information

CHAPTER ADVISOR, PLEASE CONFIRM YOUR INFORMATION.

User Information

Prefix: Select... First Name: Sally Middle Name: Middle Name Last Name: Ride Suffix: Select...

Office Phone: Office Phone Extension: Extension Fax Number: Fax Number

Email: sally@gmail.com Alternate Email: Alternate Email Cell Phone: Cell Phone

LinkedIn Link: LinkedIn Link

Principal's Information

Addresses

Save And Logout Confirm Information

TSA Membership System Administration

1. Click on the “**User Information**” accordion
2. Confirm or Change the “**User Information**” fields

Principal's Information

Principal's First Name: John Principal's Last Name: Brown Principal's Email: jb@gmail.com

Addresses

Save And Logout Confirm Information

TSA Membership System Administration

3. Click on the “**Principal's Information**” accordion
4. Input the “**Principal Information**” fields

Addresses

Copy Chapter Addresses

HOME ADDRESS

Address 1: Address 1

Address 2: Address 2

Address 3: Address 3

City: City State: AK Zip: Zip

Save And Logout Confirm Information

This information is Optional

1. Click on the “**Addresses**” accordion
2. Type the appropriate “**Address Information**” in the “**Home Address**” fields
3. Click on “**Save and Logout**” to exit the system OR click on “**Confirm Information**” to confirm and continue

Login Instructions Continued

Chapter Advisor Instructions:

If you clicked on "**Confirm Information**", you will then see a "**Confirm Affiliation Information**" screen

CHAPTER ADVISOR, PLEASE CONFIRM YOUR AFFILIATION INFORMATION

Student Password: 

PLEASE UPDATE YOUR PRINCIPAL'S INFORMATION

Principal's First Name:

Principal's Last Name:

Principal's Email:

Is this a Title One School?

School Area

Free and reduced lunch percentage (FRL)

Are you planning to participate in the Middle School Junior Solar Sprint competition?

Membership Type

- ☐ **Red Chapter Affiliation Program (Red CAP)** - This program allows a chapter to pay for a minimum of ten members for a flat fee (additional members may be added during the year for a fee). The membership fee for Red Cap is \$100 at the national level plus state dues.
- ☐ **White Chapter Affiliation Program (White CAP)** - This program allows a chapter to affiliate eleven or more members by paying the Red CAP flat fee plus additional White CAP dues for over ten members.
- ☐ **Blue Chapter Affiliation Program (Blue CAP)** - This program allows a chapter to affiliate an unlimited number of members in a school for a flat fee. Blue CAP members pay a national membership fee of \$350 plus state Blue CAP dues.

Number of Members (10 Minimum)

Confirm

Log Out

Student Member Password: This is the default password assigned to student members. The password will be used to log into the Student Member Site. The student member has to first request parental consent via email. When consent is granted, the student member will be required to change this password as soon as he/she logs in.

1. Confirm or change the "**Principal's Information**" fields
2. Select the appropriate answer from the "**Is this a Title One School?**" field dropdown list
3. Select the appropriate school area from the "**School Area**" field dropdown list
4. Select the appropriate information from the "**Free and reduced lunch percentage (FRL)**" field dropdown list
5. Select the appropriate answer from the "**Are you planning to participate in the Middle School Junior Solar Sprint competition?**" field dropdown list
6. Use the Radio Button to select the appropriate "**Membership Type**"
 - a. **Red Chapter Affiliation Program (Red CAP)** - This program allows a chapter to pay for a minimum of ten members for a flat fee (additional members may be added during the year for a fee). The membership fee for Red Cap is \$120 at the national level plus state dues.
 - b. **White Chapter Affiliation Program (White CAP)** - This program allows a chapter to affiliate eleven or more members by paying the Red CAP flat fee plus additional White CAP dues for over ten members.
 - c. **Blue Chapter Affiliation Program (Blue CAP)** - This program allows a chapter to affiliate an unlimited number of members in a school for a flat fee. Blue CAP members pay a national membership fee of \$400 plus state Blue CAP dues. (Exception: Colorado charges a per member fee for Blue CAP membership.)
7. Type the appropriate number in the "**Number of Members (10 Minimum)**" field
8. Click on the "**Confirm**" button to continue

Login Instructions Continued

Chapter Advisor Instructions:

1. Confirm or change the “**Primary Advisor Information**” fields
2. Select the appropriate checkbox(s) for the “**Primary Advisor**” from the “**Optional Information boxes**”
3. Click on the “**Save**” button

PRIMARY ADVISOR

Email

Alternate Email

Cell Phone

OPTIONAL INFORMATION

I am a (check all that apply):

☐ Computer Science Teacher

☐ Engineering Teacher

☐ Technology Teacher

Other: (please list)

I use the following curriculum (check all that apply):

☐ Engineering by Design

☐ PLTW

Other: (please list)

I am a professional member of (check all that apply):

☐ ACTE

☐ CSTA

☐ ITEEA

☐ NISTA

Other: (please list)

Save

Members Tab and Screens

How to Add a Student Member:

Once a student name is added to the chapter roster, that student is a TSA member for the year. Substitutions or refunds for membership are not permitted.

1. Click on the **"Add Members"** tab

The screenshot shows a navigation bar with the following tabs: Members, Chapter Information, Chapter Advisor(s), Total TSA, Invoice History, Quick Links & Help, Notifications, Surveys, Email, State Information, and National TSA Conference. Below the navigation bar are three large buttons: "Add Members" (blue), "Email All" (blue), and "Submit Membership" (red).

1. Click on the **"Add Members"** button

Note: There are Three (3) ways to Add a Student Member

Individual Member Entry Accordion: Use this method to manually enter individual student members

For help please click on the ? icon.

The screenshot shows the "Individual Member Entry" form. It contains the following fields and options:

- First Name:** Text input field.
- Middle Name:** Text input field.
- Last Name:** Text input field.
- Suffix:** Dropdown menu with "Select..." option.
- Grade:** Dropdown menu with "Select..." option.
- Gender:** Dropdown menu with "Select..." option.
- Demographic:** Dropdown menu with "Select..." option.
- Member Title:** Dropdown menu with "Select..." option.
- Years As A Member:** Text input field.
- I have a disability, and may require special accommodations:** Checkboxes for Audio, Visual, Mobility, Dietary, and Other.
- Please specify special accommodations requested:** Text area.
- Buttons:** "Save And Finish" and "Save And Add Next Member".

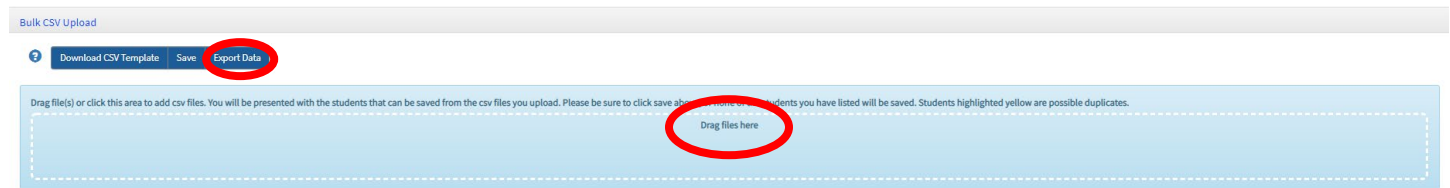
1. Type the member name in the **"First Name"** field
2. Type the member middle name in the **"Middle Name"** field (optional)
3. Type the member last name in the **"Last Name"** field
4. Select the suffix from **"Suffix"** the field dropdown list (optional)
5. Select the member grade from the **"Grade"** field dropdown list
6. Select the member gender from the **"Gender"** field dropdown list
7. Select the member demographic from the **"Demographic"** field dropdown list (optional)
8. Select the membership title from the **"Member Title"** field dropdown list
9. Click on the **"Save and Finish"** button **OR** Click on the **"Save And Add Next Member"** if you want to enter another Student Member

Members Tab and Screens Continued

How to Add a Student Member:

Bulk CSV Upload Accordion: Use this drag and drop method to upload student members from a .CSV (Excel) file

1. Click on the “**Bulk CSV Upload**” accordion



Download CSV Template: Download the template to your local machine to add all of the members that you want upload for membership. The template format **MUST** be used for the drag and drop method to work.

1. Click on the “**Download CSV Template**” button
2. Type the appropriate “**Member Information**” in the template spreadsheet

(Note: First Name, Last Name, Grade, Gender, Demographic, Member Type (Chapter Member or Chapter Officer) are Required fields)

3. Once you have entered all of the Members that you want to upload, save the file to your local machine
4. Locate the Member file that you saved on your local machine
5. With your mouse, Left-Click and Hold the Left-Click on the Member file and Drag it to the “**Drag Files Here**” area of the screen and release the Left-Click on your mouse
6. Once you have Dragged the file to the screen and released the file, a screen will be displayed with all of the Members from the spreadsheet for your review
7. Click on the “**Save**” button

(IMPORTANT: If you do NOT click on the Save button, your data will NOT be Saved to the Membership system)

(Note: If you have any student member information incorrect, it will be highlighted in Red and will not be Saved. If you have Members highlighted in yellow, that is an indication that the information is a duplicate)

Members Tab and Screens Continued

How to Add a Student Member:

Bulk Member CSV Entry Accordion: Use this method to copy and paste student member information from a spreadsheet **OR** you can type the information directly into the on-screen form

- 1. Click on the **“Bulk Member CSV Entry”** accordion
- 2. Complete the required **Member information** in the on-screen form field

Note: First Name, Last Name, Grade, Gender, Demographic, Member Title (Chapter Member or Chapter Officer are Required fields

IMPORTANT: If you do NOT click on the Save button, your data will NOT be Saved to the Membership system

Note: If you have any member information incorrect, it will be highlighted in Red and will not be Saved. If you have Members highlighted in yellow, that is an indication that the information is a duplicate

Bulk Member CSV Entry

Incomplete information entered on this screen will not be saved if you do not fully complete the process.

?

Download CSV Template

Save

Export Data

	First Name	Middle Name	Last Name	Suffix	Grade	Gender	Demographic	Member Title
1				▼	▼	▼	▼	▼

Members Tab and Screens Continued

How to remove unsubmitted member names

[Members](#) [Chapter Information](#) [Chapter Advisor\(s\)](#) [Total TSA](#) [Invoice History](#) [Quick Links & Help](#) [Notifications](#) [Surveys](#) [Email](#) [State Information](#) [National TSA Conference](#)

[Add Members](#) [Email All](#) [Submit Membership](#)

[Membership Download](#) [Members With Access To Portal](#) [Print Membership Cards](#) [Print Membership Certificates](#) [Previous Year Count](#)

[Select All / Deselect All](#) [Delete Selected](#)

Search:

Status	Select	Membership ID	Last Name	First Name	Gender	Grade	Member Title	Submitted Date	Membership Date	Invoice Number	Edit	Request Change	Transfer History	Delete
	☐	499941	Again	Test	Male	9	Member							
PENDING AFFILIATION		499940	One	Student	Male	9	Member	07/30/2020		M13809				

Membership System Administration
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1. Click on the **“Delete”** icon located on the right-hand side of the Member name OR:
2. **Select** the Member(s) by selecting the corresponding checkbox(s) on the left-hand side of the Membership ID
3. Click on the **“Delete Selected”** button

Note: If the student has not been submitted, you will have the option to delete the Member. If the Member has been submitted, the Delete Icon will no longer be displayed on the screen

How To Edit a Member:

1. Click on the **“Edit”** icon located on the right-hand side of the Member name

Note: If the member has not been submitted, you will have the option to Edit ALL Member Information . If the Member has been submitted, you will have the option to Edit some of the Member Information

Members Tab and Screens Continued

1. Click on the “Members” tab

Members

Chapter Information

Chapter Advisor(s)

Total TSA

Invoice History

Quick Links & Help

Notifications

Surveys

Email

State Information

National TSA Conference

Add Members

Email All

Submit Membership

Membership Download

Members With Access To Portal

Print Membership Cards

Print Membership Certificates

Previous Year Count

Select All / Deselect All

Delete Selected

Search:

Status	Select	Membership ID	Last Name	First Name	Gender	Grade	Member Title	Submitted Date	Membership Date	Invoice Number	Edit	Request Change	Transfer History	Delete
	☐	499941	Again	Test	Male	9	Member							
PENDING AFFILIATION		499940	One	Student	Male	9	Member	07/30/2020		M13809				

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Status

Pending: Member has been submitted; however, the membership invoice has not been Paid

Member: Member has been submitted and the membership invoice has been Paid

1. If the status field is blank, the members have not been submitted. Unsubmitted members can be edited and deleted.
2. Submitted members can be edited; however, they cannot be deleted
3. Click on the “**Membership ID**” link to display detailed Student Member Information. This link also gives you the option to print the “**Membership Card**” if the student is a member

MEMBER DETAILS

Membership ID:
499832

First Name:
Ben

Gender:
Male

Email:

MN/MI:

Grade:
11

Cell Phone:

Last Name:
Jones

Membership Course Type:
High School

Home Phone:

Student Type:
Student

Demographic:
American Indian/Alaskan Native

Years As Member:
3

Close

Print Membership Card

4. **Submitted Date** is the Date the Member was Submitted for Membership
5. **Membership Date** is the Date the Membership was Paid On
6. Click on the “**Edit**” icon next the Member Name to “**Edit**” the Member information
7. Click on the “**Request Change**” icon to make a “**Name Change**” Request for a Submitted Member

Note: When you make a Name Change Request, National TSA will be notified via email and will have to approve the name change request before you will see the name change on your screen)

Members Tab and Screens Continued

How to Submit Members:

1. Click on the “**Members**” tab

Members

Chapter Information

Chapter Advisor(s)

Total TSA

Invoice History

Quick Links & Help

Notifications

Surveys

Email

State Information

National TSA Conference

Add Members

Email All

Submit Membership

Membership Download

Members With Access To Portal

Print Membership Cards

Print Membership Certificates

Previous Year Count

Select All / Deselect All

Delete Selected

Search:

Status	Select	Membership ID	Last Name	First Name	Gender	Grade	Member Title	Submitted Date	Membership Date	Invoice Number	Edit	Request Change	Transfer History	Delete
	☒	499941	Again	Test	Male	9	Member							
PENDING AFFILIATION		499940	One	Student	Male	9	Member	07/30/2020		M13809				

Membership System Administration
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1. Click on the “**Submit Membership**” button
2. Read the National Disclaimer
3. Click on the “**I have Read and Agree Disclaimer**” checkbox to continue
4. Click on the “**Confirm**” button
5. Once you click on the “**Confirm**” button, a Confirmation Membership Fee Summary will be displayed on the Screen for your review
6. Once you have reviewed the Confirmation Membership Fee Summary, click on the “**Confirm**” button

Pay Or View Invoice(s) Now?

View Invoice(s)

Pay Invoice(s)

Pay Invoice(s) Later

Close

7. Click on “**View Invoices**” if you want to “**View**” the invoice that was created when you submitted membership **OR** click on the “**Pay Invoice(s)**” button, to pay the invoice that was created when you submitted membership **OR** click on the “**Pay Invoice(s) Later**” button, if you want to review the Invoice that was created when you submitted membership at a later time

NOTE: If you choose to Pay Invoice(s), please see the “**Invoice History**” section of this document for instructions on how to make a payment on an Invoice

Invoice History Tab and Screens

How to Pay Invoices:

1. Click on the “**Invoice History**” Tab

[Members](#) [Chapter Information](#) [Chapter Advisor\(s\)](#) [Total TSA](#) [Invoice History](#) [Quick Links & Help](#) [Notifications](#) [Surveys](#) [Email](#) [State Information](#) [National TSA Conference](#)

Pay Invoices

Historical Invoices

Invoice Payment History

Membership Statement

PAY INVOICES

Pay All	Invoice #	Date	Invoice Type	Paid Status	Terms	Amount Due	Items
☒	M13790	06/29/2020	Membership	Unpaid	Net 30	\$36.00	National Total TSA Curriculum Total: \$36.00 State Total TSA Curriculum Total: \$0.00 Balance: \$36.00 Balance: \$0.00 No Balance

<

Subtotal: \$36.00

Convenience Fee: \$0.00

Total Payment: \$36.00

Select the invoices you are paying above, then select a payment type:

Pay By Credit Card

Enter PO Number

Save

TSA Membership Custom

3. Select the appropriate checkbox(s) located in the **Pay All** column on the left-hand side of the invoice that you want to pay
4. Click on the “**Pay by Credit Card**” Accordion if you want to pay by Credit Card **OR** Click on the “**Enter PO Number**” Accordion to record your PO information.
5. Follow the On-Screen Instructions based on what Payment Method you have chosen
6. Click on the “**Pay**” button

Members Tab and Screens Continued

How To Edit a Submitted Member Name:

1. Click on the **“Request Change”** icon located on the right-hand side of the Member name

The screenshot shows a form titled 'CURRENT NAME' with fields for Prefix, First Name (Jill), Middle Name, Last Name (Bing), and Suffix. Below this is a 'NEW NAME' section with a Prefix dropdown (set to 'Select...'), First Name (Jillian), Middle Name, Last Name (Bing), and Suffix dropdown (set to 'Select...'). A 'Reason For Change' field contains the text 'Changing to formal first name'. A blue 'Save' button is at the bottom left.

2. Select the prefix from the **“Prefix”** field Dropdown list (optional)
3. Type the member first name in the **“First Name”** field
4. Type the member middle name in the **“Middle Name”** field (optional)
5. Type the member last name in the **“Last Name”** field
6. Select the suffix from the **“Suffix”** field Dropdown list (optional)
7. Type the reason for name change in the **“Reason For Change”** field (optional)
8. Click on the **“Save”** button

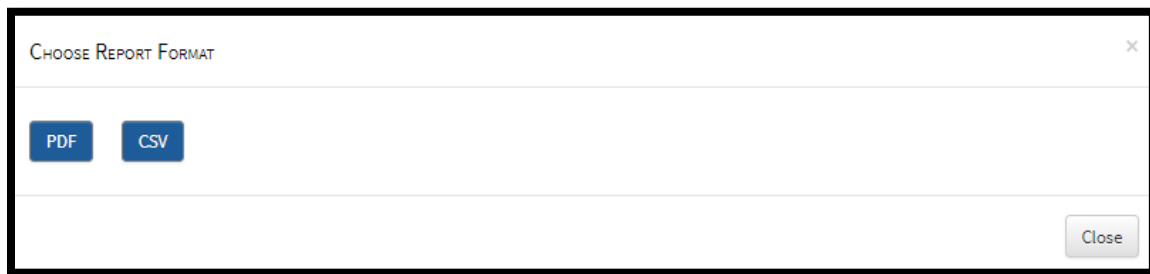
Members Tab and Screens Continued

How to Download a Membership Report:

1. Click on the “**Members**” tab



2. Click on the “**Membership Download**” button



3. Select “**PDF**” if you want the Membership Information displayed in a “**PDF**” file format **OR** Select “**.CSV**” if you want the Membership Information displayed in a “**.CSV (Excel)**” format

Note: The Membership Download displays both affiliated AND Non-Affiliated Members

Members Tab and Screens Continued

How to View Members with Access to the Student Member Site:

1. Click on the “**Members**” tab



2. Click on the “**Members with Access to Site**” button
3. Select “**PDF**” if you want the Student Member Site Access Information displayed in a “**PDF**” file format **OR** Select “**.CSV**” if you want the Student Member Site Access Information displayed in a “**.CSV (Excel)**” format

How to Print Membership Cards:

1. Click on the “**Members**” tab



2. Click on the “**Print Membership Cards**” button
(Only paid Members will be displayed on the Membership Cards)
1. Select the appropriate checkbox or checkboxes located on the left-hand side of the Membership-ID for the Members that you want to Print Membership Cards for **OR** Click on the “**Select**” link at located under the “**Back**” button to Print ALL Membership Cards
2. Click on the “**Print Membership Cards**” button

Members Tab and Screens Continued

How to Print Membership Certificates:

1. Click on the “**Members**” tab



2. Click on the “**Print Membership Certificates**” button
(Only paid Members will be displayed on Certificates)
3. Select the appropriate checkbox or checkboxes located on the left-hand side of the Membership-ID for the Members that you want to Print Membership Certificates for **OR** Click on the “**Select All**” link located under the “**Back**” button to Print ALL Membership Certificates
4. Click on the “**Print Membership Certificates**” button to print the Membership Certificates
5. Click on the “**Print Chapter Certificate**” button to print the Chapter Certificate
6. Click on the “**Print Principal Certificate**” button to print the Principal Certificate

Chapter Information Tab and Screens

How to Update Chapter Information:

Members Chapter Information Chapter Advisor(s) Total TSA Invoice History Quick Links & Help Notifications Surveys Email State Information National TSA Conference

Chapter Information

Addresses

1. Click on the “**Chapter Information**” tab
2. Click on the “**Chapter Information**” accordion

Chapter Information

School Name: Alaska Test HS Chapter Name: Alaska Test HS - 7037

Phone Number: (555) 555-5555 Extension: Extension Fax Number: Fax Number Student Password: Student Password

Principal's First Name: Head Principal's Last Name: Guy Principal's Email: Hguy@bottle.com

Chapter Website: Chapter Website School Website: School Website

Is this a Title One School? Unsure School Area: Rural Free and reduced lunch percentage (FRL): N/A

Rate Color: Red # of Members: 10

Addresses

3. Type the phone number in the “**Phone Number**” field (optional)
4. Type the phone extension in the “**Extension**” field (optional)
5. Type the fax number in the “**Fax Number**” field (optional)
6. Type the student member password in the “**Student Password**” field (optional)

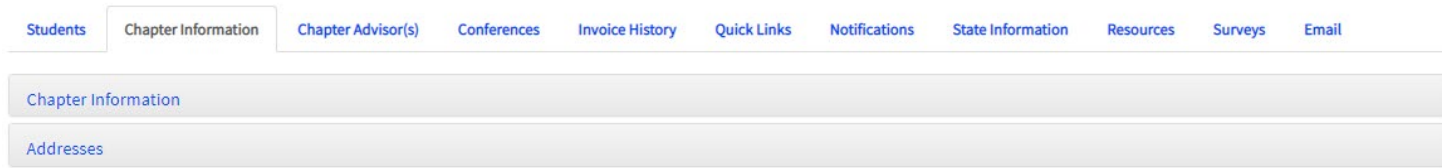
IMPORTANT: The student password is the default password assigned to student members. The password will be used to log into the Student Member Site. The student member has to first request parental consent via email. When consent is granted, the student member will be required to change this password as soon as he/she logs in.

7. Type the principal first name in the “**Principal's First Name**” field
8. Type the principal last name in the “**Principal's Last Name**” field
9. Type the principal email address in the “**Principal's Email**” field
10. Type the chapter website URL in the “**Chapter Website**” field (optional)
11. Type the school website URL in the “**School Website**” field (optional)
12. Select the appropriate response from the “**Is this a Title One School?**” field dropdown list
13. Select the school area from the “**School Area**” field dropdown list
14. Select the percentage number from the “**Free and reduced lunch percentage (FRL)**” field dropdown list
15. Click on the “**Save**” button

Chapter Information Tab and Screens Continued

How to Update Chapter Information:

1. Click on the “**Chapter Information**” tab
2. Click on the “**Addresses**” accordion



3. Complete the **Shipping Address** fields and the **Billing Address** fields
4. Click on the “**Save**” button.

Chapter Advisor(s) Tab and Screens

Chapter Advisor(s) Tab and Screens Continued

How to Add Chapter Advisor(s):

Members Chapter Information Chapter Advisor(s) Total TSA Invoice History Quick Links & Help Notifications Surveys Email State Information National TSA Conference

1. Click on the “**Chapter Advisor(s)**” Tab

Show All Email All Add Chapter Advisor

2. Click on the “**Add Chapter Advisor**” button

User Information

Addresses

Optional Information

3. Click on the “**User Information**” accordion
4. Enter all the required information

IMPORTANT: There can ONLY be One (1) Primary Advisor. Any additional Chapter Staff Added MUST be Secondary Advisors. If you choose Primary, it will change the Primary Chapter Advisor to a Secondary Advisor

User Information

First Name: 	Middle Name: 	Last Name: 	Suffix:
Office Phone: 	Extension: 	Fax Number: 	
School Email: 	Alternate Email: 	Cell Phone: 	
Password: 	Advisor Type: 		

5. Select the checkbox to agree “I understand that all secondary advisor access is equal to that of the primary advisor”
6. Click on the “**Save**” button

NOTE: Work Address and Billing Address are required fields. If you click on the “Copy” links at the top of each section, you can copy the address if it is the same address

Chapter Advisor(s) Tab and Screens Continued

How to Email All Chapter Staff:

1. Click on the “**Chapter Advisor(s)**” Tab



2. Click on the “**Email All**” button

A screenshot of a web form titled 'NEW EMAIL' with a close button (X) in the top right corner. The form has three input fields: 'From:' with the value 'DLGtest@test.com', 'Subject:' with the value 'Subject', and 'Attachments:' with a 'Choose File' button and the text 'No file chosen'. Below these fields is a rich text editor with a toolbar containing icons for source, undo, redo, bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent, quote, unquote, decrease indent, increase indent, link, unlink, and a help icon. The text editor area is empty.

1. The “**From**” field will be populated with the Primary Chapter Advisor's email address
2. Type the subject text in the “**Subject**” field
3. Click on the “**Choose File**” button to attach a File (optional)
4. Type your email message in the “**Text Editor**” field
5. Click on the “**Send**” button

Total TSA Tab and Screens

The information contained in 2020 - 2021 Total TSA resources is copyrighted and intended for use only with your TSA chapter. Beyond that use, it may not be shared or reproduced in any form or by any means without documented permission of national TSA. Providing your TSA Membership System login credentials to other individuals for the purpose of downloading Total TSA content is a copyright violation. By checking the box below, you acknowledge and agree to these terms. Once you agree to the terms, you will have access to the information in the Total TSA resources.

1. In order to see the accordion selections, select the checkbox to agree to the above statement.
2. Total TSA resources will only be available once your chapter is affiliated for the current school year.

Invoice History Tab and Screens Continued

How to View Invoices:

1. Click on the **“Invoice History”** Tab



2. Invoice Screen

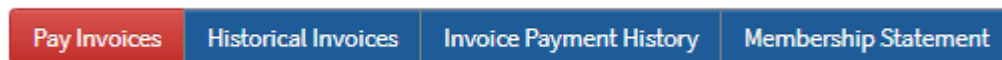
The screenshot shows the 'Invoice History' screen. At the top, there are tabs: Students, Chapter Information, Chapter Advisor(s), Conferences, Invoice History (selected), Quick Links, Notifications, State Information, Resources, Surveys, and Email. Below these are sub-tabs: Pay Invoices, Historical Invoices, Invoice Payment History, and Membership Statement. A search bar and date filters (Begin Date, End Date) are present. The main table lists invoices with columns: Invoice Number, Invoice Type, Conference, Total, Balance Due, Paid On, Created, Special Code, Payments, P.O.'s, and View. Two invoices are shown: M13789 (Membership, \$140.00 total, \$0.00 balance due, paid on 06/29/2020) and M13790 (Membership, \$36.00 total, \$36.00 balance due, unpaid as of 06/29/2020). Each row has an 'Apply' button under 'Special Code', a 'Payments' button under 'Payments', and a 'View' icon under 'View'. The footer text reads 'TSA Membership System'.

Invoice Number	Invoice Type	Conference	Total	Balance Due	Paid On	Created	Special Code	Payments	P.O.'s	View
M13789	Membership		\$140.00	\$0.00	06/29/2020	06/29/2020	Apply	Payments		View
M13790	Membership		\$36.00	\$36.00	Unpaid	06/29/2020	Apply			View

1. Click on the **“Payments”** button to view **“Payments”** that have been made
2. Click on the **“PO’s”** button to view **“P.O.”** information
3. Click on the **“View”** icon to view the Invoice

How to View Historical Invoices:

1. Click on the **“Invoice History”** Tab

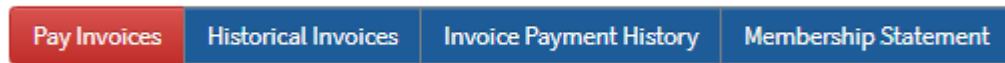


2. Click on the **“Historical Invoices”** button
3. Click on the **“Payments”** button to view **“Payments”** that have been made
4. Click on the **“PO’s”** button to view **“P.O.”** information
5. Click on the **“View”** icon to view the Invoice

Invoice History Tab and Screens Continued

How to Invoice Payment History:

1. Click on the “**Invoice History**” Tab



2. Click on the “**Invoice Payment History**” button

***NOTE:** The Invoice Payment History screen includes the following: payment information, date paid, pay type, check number, invoice number, payment total, overpayment amount, refund amount and refund date*

Quick Links & Help Tab and Screens

[Members](#)[Chapter Information](#)[Chapter Advisor\(s\)](#)[Total TSA](#)[Invoice History](#)[Quick Links & Help](#)[Surveys](#)[Email](#)[State Information](#)[National TSA Conference](#)

QUICK LINKS & HELP

Chapter Advisor Step by Step User Guide

Chapter Advisor Step by Step User Guide Video

[Student/Parent Consent and Release Form](#)

TSA Websites:

TSA Website: <https://www.tsaweb.org/>

Shop TSA: <https://tsastore.mybrightsites.com/>

Affiliation Questions: register@tsaweb.org

General Questions: general@tsaweb.org

1. Click on the “**Quick Links**” Tab

NOTE: Quick Links are setup by National TSA. These links will take you to 3rd Party Websites outside of the Membership System

Notifications Tab and Screens

Home

Logout

Membership Information

Members

Chapter Information

Chapter Advisor(s)

Total TSA

Invoice History

Quick Links & Help

Notifications

Surveys

Email

State Information

National TSA Conference

Title	Sent	View
Testing the Membership Notification System	06/29/2020	

NOTE: System Messages (Notifications) are sent through the Membership by National TSA. When you log into the Membership System, the System Message will appear on your screen. Once you click on the Confirm button, the System Message will no longer appear on your screen. If you want to go back and review the System Message, you would click on the Notification Tab – See Example Below. System Notifications can have expirations dates that are setup by National TSA. Once the notification has expired, you will no longer be able to see the System Message under the Notifications Tab

CONFIRM NOTIFICATION

This is a test message to all Chapter Advisors

Confirm

How to View Notifications:

1. Click on the “**Notifications**” tab

Title	Sent	View
Testing the Membership Notification System	06/29/2020	
Message to Chapter Advisors	06/29/2020	

2. Click on the “**View**” icon located on the right-hand side of the System Message
3. Click on the “**Back**” button to return to the “**Notifications**” page

Surveys Tab and Screens

How to View/Continue A Survey:

1. Click on the “**Surveys**” tab

Members Chapter Information Chapter Advisor(s) Total TSA Invoice History Quick Links & Help Notifications **Surveys** Email State Information National TSA Conference

2. Click on the appropriate “**Accordion**” from the Survey Accordion list

NOTE: Surveys are developed by National TSA. You may see multiple Accordions under the

3. Click on the appropriate “**View/Continue Survey**” Icon located beside the “**Survey**” that you want to take
4. Complete the appropriate questions on the “**Survey**”
5. Click on the “**Save**” button to save the survey to finish later **OR** Click on the “**Submit**” button if you are finished and want to submit the survey

SELECT A CATEGORY

Chapter Test Survey

Survey Name	Name(s)	Status	Conference	Event	Team	View/Continue Survey
Survey Test	Sally Ride	Not Started				

TSA Membership System

Email Tab and Screens

How to Send an Email to Student Members:

You will only be able to email student members that have signed into the Student Member Site

1. Click on the “**Email**” tab



NOTE: : The Email options allows you to send ALL Student Members an email or you have the option to select specific Student Members to send an email to. ONLY students that have email address in their student member record will appear on this screen. Click on the Select/Deselect All option to select All Student Members or Deselect All Student Members

1. Click on the checkbox located on the left-hand side of the member(s) that you want to send an email to
2. Type the subject in the “**Subject**” field
3. Type your message in the “**Message**” field
4. Click on the “**Send**” button

Select Members to send Email to:

Select/Deselect All

☒ Sally Sue (Student)

☒ Anne White (Student)

Subject:

Subject

Message:

A rich text editor interface for composing an email. It features a top toolbar with icons for undo, redo, bold, italic, strikethrough, bulleted list, numbered list, link, unlink, insert image, insert table, insert link, and source code. Below the toolbar is a text area for the message body. The text area is currently empty.

Send

State Information Tab and Screens

How to View State Information:

1. Click on the “**State Information**” tab

Members	Chapter Information	Chapter Advisor(s)	Total TSA	Invoice History	Quick Links & Help	Notifications	Surveys	Email	State Information	National TSA Conference
STATE DUES										
Fee Type	Membership Type	Rate Expires	Amount	Minimum Affiliants	Flat Rate	New Chapters	Per District	District / Region / Area	Rate Type	

The State Information tab will display the following information:

1. State Advisor Contact Information
2. State Dues
3. Current State Membership Dates
4. State Conference Dates and Conference Registration Link

Membership System Navigation

Action Buttons are located throughout the Membership System and when clicked on, these buttons allow you to perform membership related actions

Tabs are located across the main page and groups like information and actions together

Accordions are located within a Tab and groups like information and actions together

Search When you see a “**Search**” field on a screen, this will allow you to search the information listed in the columns on that screen to filter your data on the screen

Show Entries When you see a “**Show Entries**” field on a screen, this will allow to set the number of entries on a screen

Sort Columns Click on the Column that you want to sort the information by on the screen



Action Buttons:

Home Action Button: When you click on the “**Home**” button, it will return you to the Main Page

Logout Action Button: When you click on the “**Logout**” button, it will log you out of the Membership system

Membership System Navigation Continued

Membership Information Dashboard Toggle Button: When you click on the “**Membership Information**” button, it will open a Membership Information Dashboard with membership information for your chapter. When you click on the “**Current**” number, it will display more detailed membership information. If you want to close the Membership Information Dashboard, Click on the “**Membership Information**” button

Membership Information ↑		
Membership Date:	Expiration Date: 06/30/2019	Original Join Date: 07/30/2020
		Current
Number of Members Submitted But Not Yet Affiliated		10
Total Number of Members Affiliated		

Membership Chart Definitions:

Membership Date is the Date the Chapter was Created

Expiration Date is the Membership Expiration Date for the Current Year

Original Join Date is the Original Date the Chapter joined Membership

Number of Members Submitted But Not Yet Affiliated is the Total Number of unpaid Members

Total Number of Members Affiliated is the Total Number of Members Paid

National TSA Conference Tab and Screens

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