

NAC MEMBERS WORKING WITH WILD APRICOT

INTRODUCTION

Welcome to your online membership management system!

While membership is registered at the National level, Branches retain the responsibility for managing their local membership categories and dues in conjunction with National guidelines. This online tool offers a modernized means for basic membership management common to NAC members across the country. There are additional integrated features available to the extent that any branch wishes to take advantage of as well. For members that cannot use on-line services, their Branch will continue to manage their membership accounts manually.

GENERAL USE

At present, in addition to information on their own Branch, members have access to the national membership directory and can see details of major NAC activities and events. All members have basic self-service features to tailor their personal membership account – including its status, information contained and shared, and how they may be contacted.

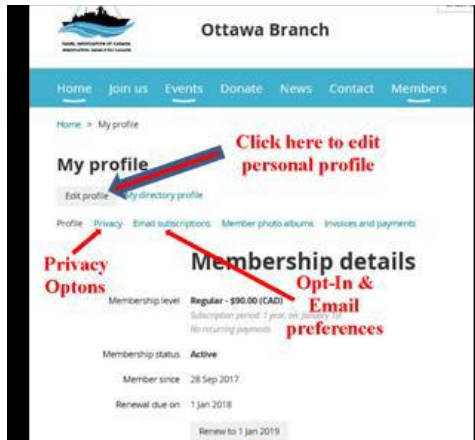
A few Branches have adopted this system as their membership management platform as well and are using more of the online features available with it. These include being able to register for events, complete payments for renewals, donations, and fees online directly with immediate effect.

A short video at <https://youtu.be/OikL8lqroc> outlines all of these features. It is also included with the more detailed Help File embedded on your Branch site. Generally, all the features on the various pages are generally user friendly and easy to navigate to– they will not be further elaborated upon here.

YOUR PERSONAL PROFILE

However, many of the important options available to all members are accessed from their personal profile. While included in the introductory video mentioned above, a member's personal profile is seen and edited over three somewhat unique pages – **Profile**, **Privacy** and **Email Subscriptions**. These will be expanded on in this article.

NOTE: At this stage, the option in the Personal Profile to “***Renew to dd Mmm yyyy***” online is only used by members whose Branches have adopted this system for managing their memberships. Members at other Branches wishing to renew must do so through their Branch procedures.



The primary information - “*Membership details*” - is shown on **Profile** page - the first page you are taken to. The important options and preferences particular to your profile are shown on two other pages that must be specifically selected using the hyperlinks shown. The “Edit profile” action button at the top of each page is common to all of them and opens the editing function appropriate to that page. Remember to “save” any changes made when done before returning.

The “Edit profile” button on the **Profile** page opens data entry boxes for the “*Membership Details*” fields that members can update. Ensuring your profile information is current and correct is particularly important after the initial roll-out for existing members as much has been on old records for some time.

While your personal profile contains much information, most is used only for internal administrative purposes. By default, very little of the personal information is made available to other members through the common Directory. The sharing of profile items can be tailored by selecting the “**Privacy**” hyperlink to open the “*Details to show*” page. From there, the edit button allows members a choice of whether to allow any item to be seen by anybody, just members, or no one (other than administrators).

Also important are the options on the “**Email subscriptions**” page. This is an increasingly complex requirement as elements of the Canadian Anti-Spam Law (CASL) take effect requiring your consent to be sent commercial or promotional emails. Under CASL, consent is implied for members and other users in an association or voluntary organization. As such, except for a few who request no emails, members are set by default to “opted-in” and will receive all NAC emails. The “Edit profile” button here allows members to refine the category of emails they wish to receive (automated notifications and/or manual informational emails).

Members can also choose to “opt-out”. If opted-out, members will still receive “workflow” messages essential to membership management and selected registrations but will lose much of the news and informational email services that come with membership. New applicants must make their own initial “Opt-in”/“Opt-out” choice.

CONCLUSION

These are the principal actions and options that members are asked to visit and review in their accounts after they have logged in and learned how to navigate through the site.

In general, Branch pages are started in a formative stage, and more features can be added as their use evolves. There will be ongoing developments and improvements as the Branches, directors and members learn to use the system and exploit its full potential. Your feedback and ideas are most welcome. Problems and challenges should be brought to the attention of your Branch membership director or other OPI assigned to manage it.