



Member Portal Admin Manual

Current Revision 11/25/2024

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Glossary

The Member Portal uses a few terms that are new to America's Boating Club | United States Power Squadrons.

Chapter Administrator: Chapter administrator refers to someone who manages data and membership for the squadron, club or district. These tasks also include sending emails, creating events, adding new members, running dues or membership reports and more.

By default, chapter administrator rights are given to the bridge members. If you should have administrator rights and don't, please contact a member of your squadron, club or district bridge for access or have a bridge member email hilly@hq.usps.org to get permissions activated. Permissions usually take 24 hours to become effective.

Primary Member: In the member portal, primary member refers to anyone who manages finances for a family unit, squadron, club or district.

In families, primary member rights were given to one or more members of the family unit to pay dues. All members of a family can be primary members. Any primary member, can make another member a primary member.

In a squadron, club or district, the commander is the primary member and can set dues pricing. A primary member can grant primary member privileges to another member, such as a treasurer or IT person, to manage this task. See next page for details.

Committee Administrator: Committee Administrator privileges are given to the committee chair or commander of the squadron or district by default. However, a current committee administrator can share these permissions with someone else designated to manage the committee's roster. Committees are where job histories are stored.

Assigning Permissions

Chapter Administrator Permissions

If you are a chapter administrator, you can assign chapter administration permissions to another active member. To do so, go to "Squadron & District" on your "Participation" tab and click the "Chapter Administrator" hyperlink.

Squadron & District

[Milwaukee Sail Power Squadron – Member, Chapter Administrator](#)



This will take you to the squadron's chapter dashboard. From there, scroll down and highlight the "Member list" tab.

To assign chapter admin permissions, click on "Member" (highlighted).

Find members Member list Member engagement

- Karen Beckmann – Member
- Mike Beckmann – Member
- Gary H. Bush – Member

Then, click "Add new" (highlighted) and add the Chapter Administrator role to the selected person. Then click "Save & Close."

Milwaukee Sail Power Squadron

Add new

Role	Title	Begin	End	Status
Member				Active

Note: Assigning a user to the Chapter Administrator role will give that user permission to view and update contact details of all members in this group.

*Karen's Role Chapter Administrator

Save & Close Save Cancel


Primary Member Permissions

If you are a primary member, you can assign someone else, such as the treasurer, to administer dues pricing for your squadron, club or district, like the treasurer.

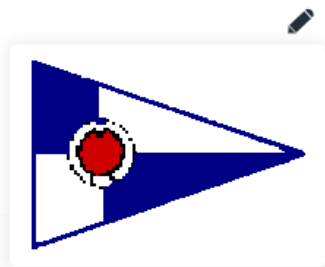
To do so, go to your account "Participation" tab, scroll to "Family & Organizations" and click your chapter's primary member link.


Next, go to the "Contacts" tab for your squadron or district, and click "add contact" and add a primary member you'd like to administer squadron or district pricing.

Family & Organizations

[E097905 – Member, Primary Member](#) 

[Milwaukee Sail Power Squadron – Primary Member](#)



Milwaukee Sail Power Squadron 

Status Active

Details

Contacts

Participation

Transactions

Preferences

Pricing Panel

Milwaukee Sail Power Squadron

[Add contact](#)

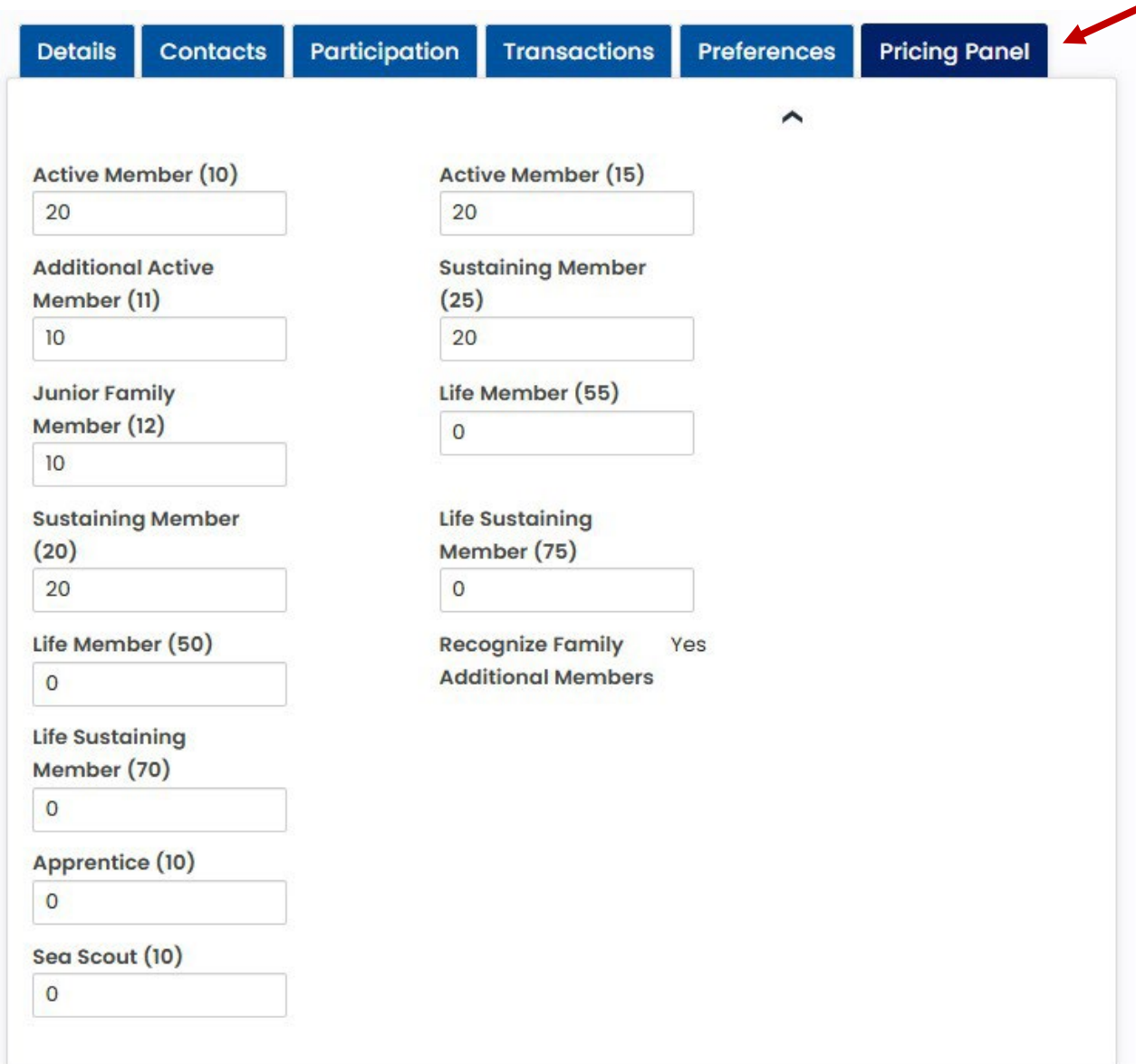
▶  [Kim Wiedel – Primary Member](#)

▶  [Michael S. Wiedel – Primary Member](#)

Primary Members: Changing Dues Renewal Pricing

Squadron or District Primary Members should see a pricing panel on their chapter screen.

If you click on the “Pricing Panel” tab, you’ll be able to edit the district or squadron dues for membership renewals. **Changes will be applied to the next dues billing run; they will not be applied to invoices already generated.** Don’t forget to click save when done.



The screenshot shows a web interface with a navigation bar at the top containing six tabs: Details, Contacts, Participation, Transactions, Preferences, and Pricing Panel. A red arrow points to the Pricing Panel tab. Below the tabs is a pricing panel with two columns of membership categories and their corresponding dues amounts in input fields. The categories and their current dues values are:

Membership Category	Count	Dues Amount
Active Member	10	20
Additional Active Member	11	10
Junior Family Member	12	10
Sustaining Member	20	20
Life Member	50	0
Life Sustaining Member	70	0
Apprentice	10	0
Sea Scout	10	0
Active Member	15	20
Sustaining Member	25	20
Life Member	55	0
Life Sustaining Member	75	0

At the bottom of the panel, there is a checkbox labeled "Recognize Family Additional Members" which is currently checked (Yes).

Chapter Administrators: Creating Events

To create events for your district, squadron or club, click the word “Manage” in the main menu of the portal site.

Join About ▼ Events ▼ Give Now Contact Us **Manage ▼**

Next, click the button “To Manage ...” your squadron or district. If you are chapter administrator for your district and squadron, you may see two buttons. Click the appropriate button.

Then, click the gray “Management Page” button to go to the page where you can add members, events, and send emails.

**To Manage
Milwaukee Sail
Power
Squadron**

Click Here

Milwaukee Sail Power Squadron

Management Page

Click “Add Events” and add an event title, image, description, start and end date and other information for your event. You can create an event ahead of time and leave it pending, but no one can register for your event while it’s pending. **You must set the event to “active” to accept registrations.**

What if I want to delete an event?

Currently the option is to hide the event by marking it in the past or by changing the status of the event to Pending. Pending allows Staff and Chapter Admins to see the event in iMIS but the event will be hidden from public view. There is a request to add this feature to the product, but no ETA on implementation.

Add Events

Edit Events

Add Member

Chapter

Milwaukee Sail Power Squadron

The Chapter this event will be associated with.

Event Title

Event Image URL

Enter Brief Description of Your Event

File Edit View Insert Format Tools Table

↶ ↷ Paragraph System Font 12pt **B** *I* U ~~S~~ ...


p

0 words 

Start Date

mm/dd/yyyy --:-- -- 

End Date

mm/dd/yyyy --:-- -- 

Number of Spaces

Virtual Meeting Link (optional)

Mark Active When Registration is Open

Pending

Event Address

Address Line 1

Address Line 2

Address Line 3

City

State

(None)

Postal Code

Country

(None)

Once an event has been created, you can edit an event, using the “Edit Events” tab by clicking the event hyperlink. (See “Winneconne Rendezvous” below.)

Edit Squadron Events

<u>Title</u>	<u>Begin Date Time</u>	<u>Description</u>	<u>Status</u>
Winneconne Rendezvous	8/6/2024 3:00 PM	<p>Tuesday: The event begins Tuesday evening with a cocktail gathering at the home of Geoff and Suzanne Carman. After we will enjoy our evening meal at the famous Fin 'n Feather in downtown Winneconne. Order off the menu and individual checks for this event.</p> <p>Boating: Wednesday Bring your own boat and invite others to join you on your boat or rent a pontoon boat from the Wolf River Resort in Winneconne as an individual, or for more fun as a group. Click Here for Wolf River Boat Rentals. We will be traveling upriver to Freemont, WI where we will stop for a visit,</p>	Active



Chapter Administrators: Adding Members

After logging in, click “Manage” in the main menu of the portal site.

Join About ▼ Events ▼ Give Now Contact Us **Manage ▼**

Next, click the button to manage your squadron or district. If you are chapter administrator for your district and squadron, you may see two buttons. Click the appropriate one.

**To Manage
Milwaukee Sail
Power
Squadron**

Click Here

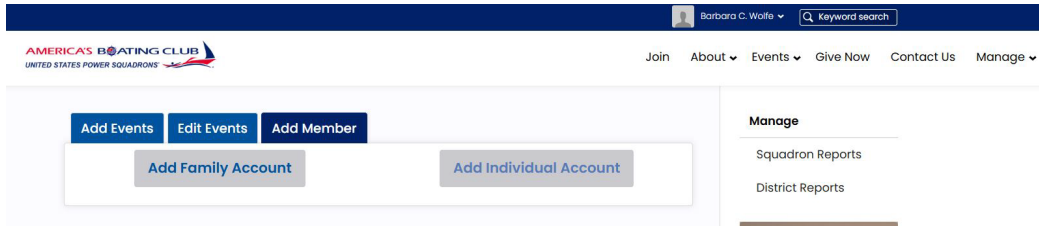
Then, click the “Management Page” button to go to the “Add Events,” “Edit Events,” and “Add Member” page.

Milwaukee Sail Power Squadron

Management Page

Add an Individual Member

From the “Add Member” tab, select “Add Individual Account.”



Next, fill in the information for your new member.

Please fill in all the fields below to create an account.

*FirstName

*LastName

*Email

*Chapter

HomePhone

MobilePhone

Address1

Address2

Address3

City

StateProvince

PostalCode

BirthDate

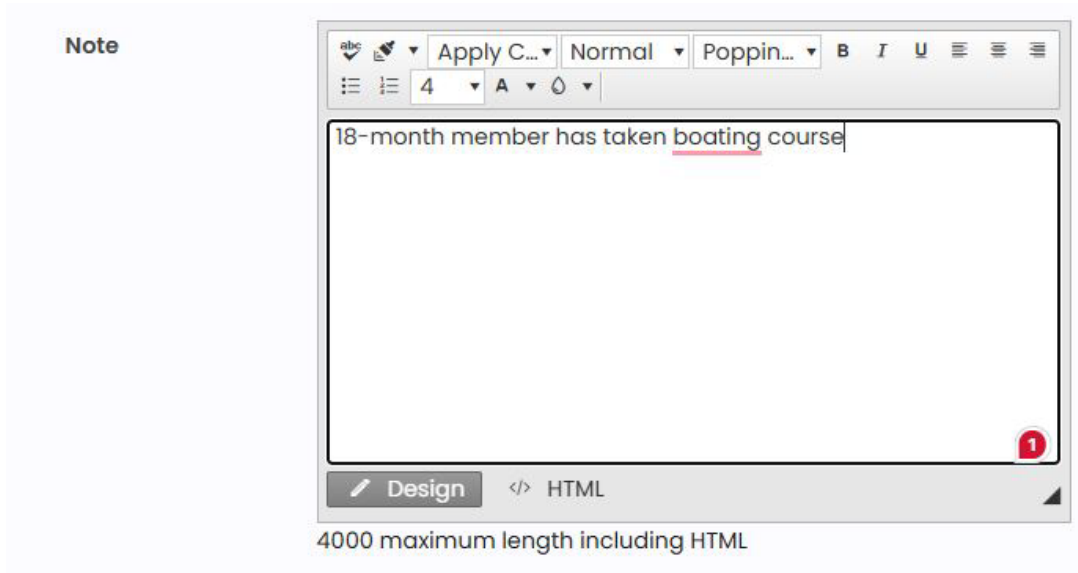
Gender

Note

abc Apply C... Normal Poppin... B I U

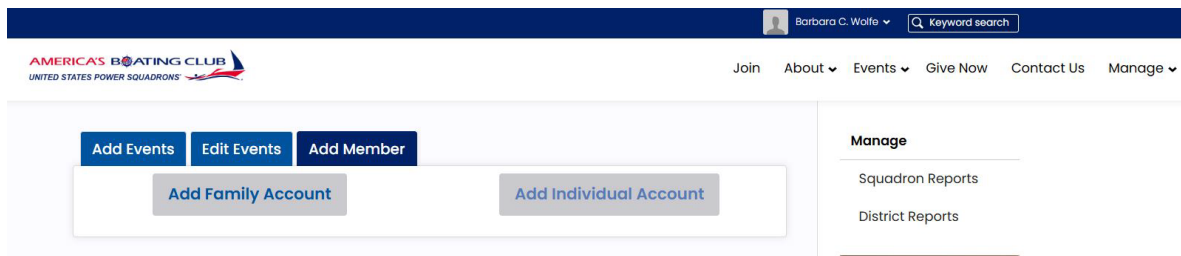
Size A

If you have additional information about the new member, please use the “Note” box. For example, when a person has taken and passed ABC and is eligible for an 18-month membership, you would include their student number and “18-month member” in the “Note” field.



Add a Family

To add a family, start by selecting “Add Family Account”.



Next, create a family account by creating a name suitable for addressing a mailing. You can also hyphenate two names. Click create account.

Create a Family Account.

Please enter a Family name to create the Family account. The next page will allow you to add details to the family account.

• Family Name

• Join Date

Then, add the address and squadron for the family. Click submit.

Enter in the details of the Family record. The next page will allow you to create a family member.

*Chapter ▾

Address 1

Address 2

Address 3

City

Postal Code

StateProvince ▾

Notes

Next, create a family member using a name and email, and click submit.

Create a Family Member

On the next page you will have the opportunity to enter the members details.

*FirstName

*LastName

*Email

On the next screen, enter the first member's details.


Check the primary member box to give the person the ability to pay dues on behalf of the family. Consider checking this box for all adults in the family.

Next, click add another member and repeat the process until finished adding members. Then click "Finish Adding Family Members."

Please allow at least two business days for these new members to show up in your roster.

Certificate numbers are created from iMIS IDs by adding an E to the ID number. This process happens overnight.

Add individual details.

Chapter	Sarasota Power Squadron ▾
Home Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
City	<input type="text"/>
PostalCode	<input type="text"/>
StateProvince	(None) ▾
Birth Date	<input type="text"/> 
Gender	(None) ▾
Primary Member	<input checked="" type="checkbox"/>
Notes	<input type="text"/>

Add Another Member

Finish Adding Family Members

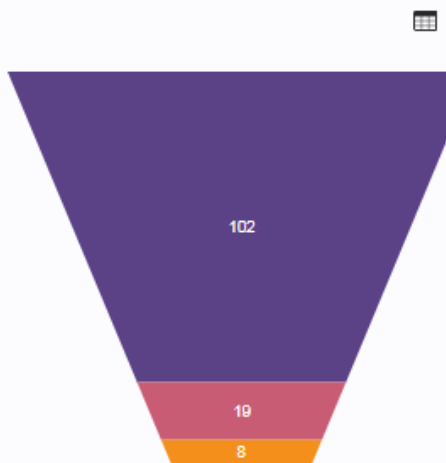
Chapter Administrators: Editing Member Information

From your chapter dashboard, search for a member whose information needs to be updated.

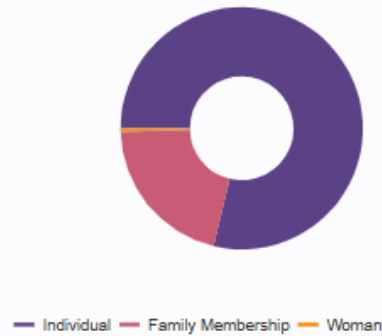
Sarasota Power Squadron

342 active members	43 new members last year's count: 0	161 lapsed members	0 event registrations
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Members by engagement



Members by type



- Clifford Feldman joined this month.
- Jeffrey Gold joined this month.
- Richard Josephson joined this month.
- Russell Holloway joined this month.
- Lois McKenzie joined this month.
- Vivienne Grep joined this month.
- Renee Nativ joined this month.
- Carol Hippenmeyer joined this month.
- Jolene Barton joined this month.
- Paul Hippenmeyer joined this month.

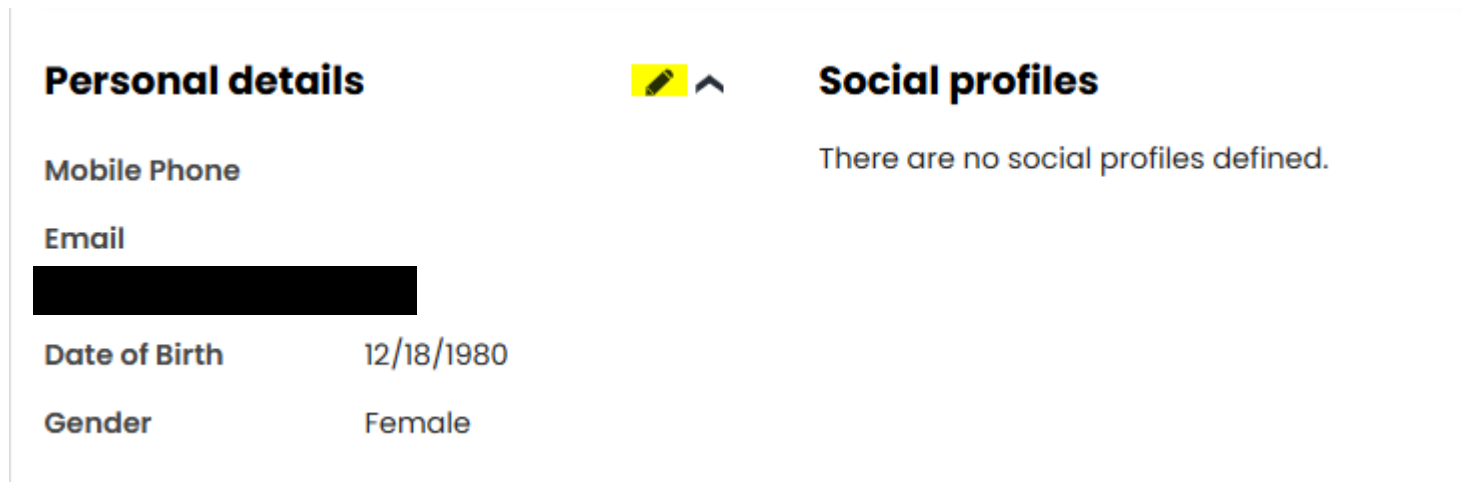
- Find members**
- Member list**
- Member engagement**

Select a query
Active members

Member name contains

Find

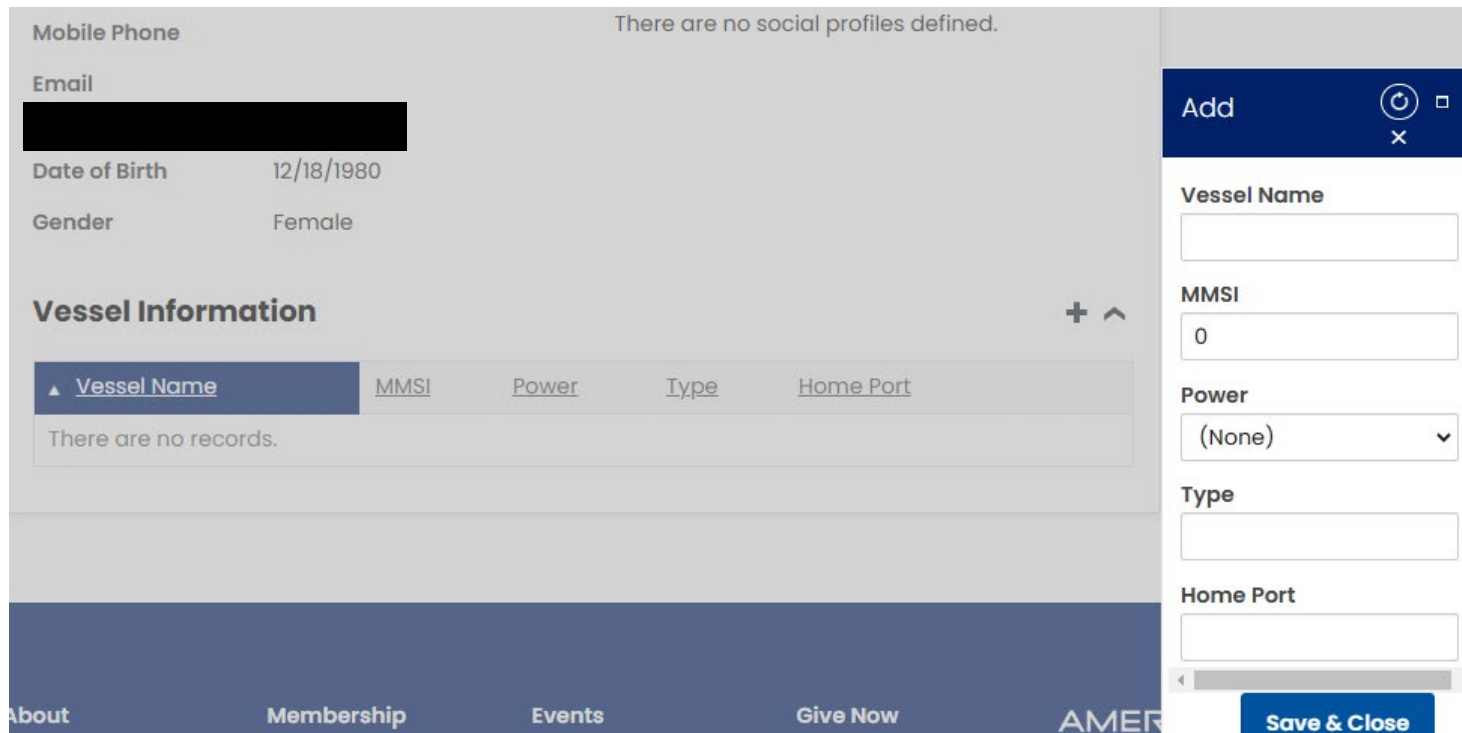
Click on the member's hyperlinked name to pull up their account page, where you can update phone, email, addresses and other information. Edit information by clicking the pencil icon. A record of what was edited and who edited the record is saved in the member's profile. Please take care when editing members' personal information.



The screenshot shows a member's profile page with two main sections: "Personal details" and "Social profiles".

- Personal details:** This section includes fields for "Mobile Phone", "Email" (redacted with a black box), "Date of Birth" (12/18/1980), and "Gender" (Female). A yellow pencil icon and an upward arrow are visible to the right of the "Personal details" header.
- Social profiles:** This section contains the text "There are no social profiles defined."

If an area has a plus sign beside it, you can click that to add data to a record, such as a vessel name, type, MMSI, and home port.



This screenshot shows the same member profile page as above, but with a "Vessel Information" modal open on the right side. The modal has a dark blue header with "Add" and a close button. The modal contains the following fields:

- Vessel Name:** An empty text input field.
- MMSI:** A text input field containing the number "0".
- Power:** A dropdown menu currently set to "(None)".
- Type:** An empty text input field.
- Home Port:** An empty text input field.

At the bottom of the modal is a "Save & Close" button. The background profile page is dimmed, showing the "Vessel Information" section header with a plus sign and an upward arrow, and a table with columns for "Vessel Name", "MMSI", "Power", "Type", and "Home Port". The table currently contains no records.

Chapter Administrators: Downloading Reports

Reports are available under the Manage button in the main menu. These reports are for official club business. Any unauthorized use will result in revocation of your permissions. Please make every effort to safeguard your members' information.

[Join](#)

[About](#) ▾

[Events](#) ▾

[Give Now](#)

[Contact Us](#)

[Manage](#) ▲

Squadron Reports

Reports are continually being updated and added. If you need additional information not found in these reports, please email a request to hilly@hq.usps.org.

Current and Former Members

This report can be narrowed to include a range of paid through dates or you can run it without filters to see both current members and everyone with a renewal notice.

Current Members

This report lists all members in your squadron with a paid through date greater than or equal to today. *Members get two months' grace period, which is not reflected in this report.*

Expiration Pending

This report lists those members who membership will expire in the next few months.

Lapsed Members

This report lists members whose membership has expired.

Squadron Dues Report

Search for all squadron dues payments (no filters) or by date range. These monthly payments are sent to your squadron's bank account.

Women Certificate Holders

This report lists the current Women's Certificate holders associated with your squadron.

Managing Change of Watch and Updating Jobs

In the member portal, squadron and district jobs are managed by “committee.” Each squadron and district has a committee, which holds current and past job history. This is how we determine rank and maintain a history of jobs served.

The Committee Administrator for your squadron or district has the ability to add and remove people from jobs. Initial Committee Administrator rights were given to the squadron and district commanders, but these roles can be shared with the commander’s designee.

To get to the Committee Admin page, go to your “My account page” and click the hyperlink under Committees.

Committees

[Sarasota Power Squadron Committee – Squadron Membership, Squadron BOC Training, Squadron Roster Contact, Committee Administrator](#)



Sarasota Power Squadron Committee

Sarasota Power Squadron

Print roster

Members

Minutes

[Add a member position](#)

Export -

◀ 1 2 ▶▶

Page: 1 of 2 **Go**

Page size: 20 **Change**

Item 1 to 20 of 23

[Show all 23](#)

<u>Full Name</u>	<u>Position</u>	<u>Term Start</u>	<u>Term End</u>	<u>Organization</u>	<u>State Province</u>	<u>Country</u>
Austin L. Dickinson	Squadron Commander	1/1/2024		Dickinson Family	FL	

Updating Squadron or District Jobs

If someone is going out of office, click the pencil beside the person going out of office. (See image on previous page.) Put your change of watch date in the "Term End" field and click "Save & Close." You can use notes to indicate a reason if one is needed.

Type

Position

Term Start

Term End

Notes

To enter someone new in that job, click "Add a member position" and search for the person who will be taking the new role.

Members **Minutes** [Add a member position](#)

Page: of 2 Page size: Item 1 to 20 of 23

[Show all 23](#)

<u>Full Name</u>	<u>Position</u>	<u>Term Start</u>	<u>Term End</u>	<u>Organization</u>	<u>State Province</u>	<u>Country</u>
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Click on the hyperlinked name of the member to bring up the position screen. Add in the new position. This is where you can share Committee Administrator permissions as well. Add a start date or your change of watch date to have permissions start when your change of watch starts.

Select a query

Individual

Name contains Rush, B

Organization contains

Find

<u>Name</u>	<u>City</u>	<u>State Province</u>	<u>Company</u>	<u>Included in F</u>
RUSH, BARRY	Sarasota	FL		No

Barry Rush

Type: Committee

Position: Committee Administrator

Term Start: 11/30/2024

Term End:

Notes:

Save & Close Cancel

Squadron Positions

Committee Administrator	Cooperative Charting Web Administrator
Squadron Commander	Squadron Auditing
Squadron Administrative Officer	Squadron BOC Training
Squadron Educational Officer	Squadron Information Technology
Squadron Secretary	Squadron Law Officer
Squadron Treasurer	Squadron Member at Large
Squadron Executive Officer	Squadron Merit Mark Chair
Assistant Squadron Educational Officer	Squadron Nominations
Squadron Advanced Grades Division	Squadron Roster Contact
Squadron Boating Activities	Squadron Rules
Squadron Cooperative Charting	Squadron Ship's Store
Squadron Elective Courses Division	Squadron Teaching Aids
Squadron Historian	Squadron USPS Guides
Squadron Member Benefits	Squadron USPS Seminars
Squadron Membership	Squadron Video Boating Contact
Squadron Member Involvement	Squadron Vessel Safety Check Chair
Squadron Newsletter	Webmaster
Squadron Operations Training	Parliamentarian
Squadron Public Relations	Port Captain
Squadron Safety	Public Contact
Squadron Flag Lieutenant	Aide to the Squadron Commander
Squadron Chaplain	Editor
Past Squadron Commander	First Aid Support Team Member
Past Squadron Lieutenant Commander	Jump Start Coordinator
Assistant Squadron Treasurer	Local Board of Boating
	Liaison

District Positions

Committee Administrator	Aide to the District Secretary
District Commander	District Flag Lieutenant
District Administrative Officer	Past District Commander
District Educational Officer	Past District Lieutenant Commander
District Secretary	District Audit
District Treasurer	District Budget and Finance
District Executive Officer	District Boat Operator Certification Training
Assistant District Administrative Officer	District Chaplain
Assistant District Educational Officer	District Development
Assistant District Secretary	District Educational Fund Representative
Assistant District Treasurer	District Homeland Security
Assistant District Executive Officer	District Information Technology
District Boating Activities	District Meetings and Conferences
District Cooperative Charting	District Merit Mark Chair
District Ensign Correspondent	District Nominations
District Historian	District Roster Chair
District Law Officer	District SEO Training
District Legislative	District USPS Guides
District Member Benefits	District USPS Seminars
District Membership	District Vessel Safety Check Chair
District Member Involvement	Aide to the District Executive Officer
District Operations Training	Cooperative Charting Web Administrator
District Planning	Editor
District Public Relations	Jump Start Coordinator
District Publications	Local Board of Boating
District Rules	Liaison
District Safety	Parliamentarian
District Ship's Store	Port Captain
Aide to the District Commander	Public Contact
	Webmaster

FAQ

What do member types and billing codes mean?

AC 10 Active member

AC 11 Additional active member

AC 12 Junior family member, under 18

AC 15 Active member with family members

AC 20 Sustaining member

AC 25 Sustaining member with family members

AC 50 Life member

AC 55 Life member with family members

AC 70 Life and sustaining member

AC 75 Life and sustaining member with family members

SC 10 Sea Scout, under 23

AP 10 Apprentice, under 23

WC 10 Women's Certificate Holder

How do I tell if someone is past due?

The new system doesn't have the same dues statuses as the old system. In iMIS, you determine active members by paid through date. Keep in mind we have a two-month grace period in iMIS. So if someone's paid through date is 9/30/2024, they will remain "active" until 11/31/2024.

When search by paid through date, it is always the last day of the month. February paid through will always be 2/28.