**Instructions for Membership Chair**

**FedEx Retiree Club**

**Sept 25, 2022**

**General Information**

* All of the membership information is maintained in a server database which is accessed via the internet. The other tools used in maintaining the master file are the membership Hotmail/Outlook account and the PayPal dues payment account.
* The database address is: [www.ferc1.org/database/membership/masteredit.php](http://www.ferc1.org/database/membership/masteredit.php)
 User: ferc1; Password : Art$2022$

The mail address is: [www.hotmail.com](http://www.hotmail.com), then fercmembership@hotmail.com

Password: PurplePeople!

The PayPal address is: [www.paypal.com](http://www.paypal.com) then fercpay@hotmail.com

Password: Art$2022$

 The Membership Chair is responsible for the following:

New Applicants:

* + 1. Receiving applications for membership. They will be electronically transmitted to mail, above.
		2. Entering the applicant’s information into the data base and adding their e-mail address and name to the Outlook/People e-mail listing.
		3. Entering dues payments into the database from either PayPal or check (received at our P.O. Box 383001, Germantown TN P.O.) and sending new applicants an e-mail or letter (if no e-mail address has been provided) after activating their membership, welcoming them to the Club and providing login instructions to access the ‘Members Only’ sections of the FERC web page.
		4. Sending a letter to a member (if/when necessary – ie, no valid e-mail address listed or phone number, moved, etc)

5. Processing membership updates (changes in address, e-mail, phone, etc as received)

Renewing existing members or reinstating lapsed members.

This is the same as for New Applicants above, except it will not normally be necessary to send them login instructions. NOTE: Prorated dues do not apply to reinstated members.

Creating Postal Mail Lists as required

1. Generating the Mail Lists by sorting the Excel backup membership database to generate lists for Annual renewal postcards and quarterly Newsletters, below. A backup membership database is provided by the webmaster (Bill Bonk) at the beginning of each month. Forwarding mailing list for all current members for the quarterly Newsletter to Central Printing (John Sanders.) Forwarding mailing lists for annual membership renewal postcards to Central Printing

Answering membership questions which might come in via email and forwarding questions outside of the purview of membership to the appropriate BOD members for resolution.

1. Annual Membership Billing

 Billing all active members annually for dues – done by postcard.

 Billing members expired for a year or more if recommended by the BOD.

1. Attending monthly BOD meetings (these could be Zoom Meetings) and providing a monthly membership report

Instructions are provided for each of these activities; hopefully in some semblance of order as they occur.

**Procedures For Members Joining or Renewing via the Web Page**

**New members** will go to the FERC website ([www.ferc1.org](http://www.ferc1.org)) and click on the MEMBERSHIP/JOIN tab located in the public section of the website to complete and submit a membership application. They will choose their manner of payment (PayPal payment or pay by check) during the application process. Payment by PayPal using our Club account is highly encouraged.

**Inactive Members** will go to the FERC website ([www.ferc1.org](http://www.ferc1.org)) and select MEMBERSHIP/ REACTIVATE" tab and complete the form. Note: Dues Pro-Rating by month is only for new members and does not apply to reactivations.

**Current Members** will go to the FERC website ([www.ferc1.org](http://www.ferc1.org)) and log in, using their employee number and last name and then select RENEW MEMBERSHIP and complete the form.

Note: Unless a member’s dues are current, they cannot log into the web site, but they do net need to log in to join, renew or reactivate.

All will be prompted to specify their method of dues payment – PayPal or mailed check.

1.    The PayPal payment page asks the member to select Memphis area or Outside Memphis area membership. Reactivating members do not receive a pro-rated discount but pay the full annual dues for the remaining months in the FY. In the last three months of the FY, new and reactivating members will automatically be billed for the following FY.

2.    If PayPal has been selected, the member is taken to a secure PayPal payment web page to complete the transaction using the credit/debit card of their choice. A personal PayPal account is not required.

3.   The transaction amount is posted to the FERC PayPal account. PayPal also sends information to the fercpay@hotmail.com email account showing that a PayPal payment has been received with details for that payment. The details contain the name of the payee, their address, e-mail address, employee and employee number. The membership chair confirms the payment has been received before the member’s account is activated. On occasion, a payment notification may be received with the application delayed. There is enough information to activate the membership, but the member must be contacted for the remaining information for the database if the application is not subsequentially received from our webmaster. For all new members, acknowledge payment and send login information. Also, I recommend resending login information to reactivating members in arrears for several years.

**Procedures For Members Joining or Renewing via Mail**

New and reactivating members may also choose to pay by check. New applications are electronically submitted. If not accompanied by PayPal payment, it may be necessary to send an invoice, either electronically or by mail if an e-mail address has not provided.

**Detailed Instructions for the Membership Chair**

1. Log in to the fercmembership Hotmail email account. The user id is fercmembership@hotmail.com. The password is **PurplePeople!**.
2. New applications and renewals should be in the INBOX. However, check JUNK to ensure that there are no valid communications which Outlook thought were JUNK. (Occasionally, applications have wound up there.) If so, move them to the INBOX.
3. Start with the oldest email and process upwards to the most recent if you don’t think you can get all of them done in one sitting. That way, the ones who applied earliest will get processed first.
4. Applications:

Open the individual application e-mail. Open the database. The URL is: <http://www.ferc1.org/database/membership/masteredit.php> The user id is **ferc1**. The password is” **Art$2022$**. I use Google Chrome as a browser and have set tabs for mail, membership and PayPal.

1. An additional tab opened for PayPal is used to check member dues payments, bank transfers and miscellaneous sales such as calling cards. The URL is: www.paypal.com/fercpay@hotmail.com and the password is: **Art$2022**
2. Note: Members are either active (dues are current, coded ‘a’ in the database at the bottom of their individual data sheet, inactive, coded ‘i’ or pending (new member not yet processed, “p” ). We do not delete the inactive members from the full database unless they request it or we learn they are deceased. This facilitates rejoining after a lapse in active membership However, those who have submitted a New Member application but have not paid within a reasonable period of time, three months for example, are assumed to be no longer interested and may be deleted and their e-mail addresses removed. They can always reapply.

In the database, <http://www.ferc1.org/database/membership/masteredit.php>, there are three pulldown tabs under MASTER EDIT. They are **Actives Only**, **Inactives Only** and **View Full Database.** Periodically, the **Inactives Only** database is purged of members inactive for 5 or more years. I purge every 2 years. Inactive members will still appear in the **View Full Database** for historical purposes.

For membership renewals, select the member’s data form in MASTER EDIT/**Actives Only** and verify that the information (address, etc) has not changed.. Locate alphabetically or do a ‘Find’ operation. For example, In IE, select: TOOLS ICON/FILE/FIND ON THIS PAGE and enter applicant’s employee number (or last name) in the “FIND” box. In Chrome, go to the three vertical periods in the top right corner and click on them. For membership reactivations use the **View Full Database** with the ‘Find’ function to locate them.

If the applicant is not in the database and has paid via check or PayPal, add them as follows:

Click on the NEW LISTING heading. A form will pop up.

* + 1. Enter the applicant information as provided and using the following rules:
			1. Member Number is their employee number
			2. Status is the type of membership based on the following:
				1. SAM - Satellite Associate Member (can be active or inactive)
				2. MAM - Memphis Associate Member (can be active or inactive)
				3. SM - Satellite Member (can be active or inactive)
				4. MM - Memphis Member (can be active or inactive)
				5. SMS - Satellite Member Spouse (can be active or inactive)
				6. MMS - Memphis Member Spouse (can be active or inactive)
				7. MAL - Memphis Member At Large (can be active or inactive)
				8. SAL - Satellite Member at Large (can be active or inactive)
				9. MHM - Memphis Honorary Member (only active - there are currently none)
				10. SHM - Satellite Honorary Member (only active - we only have one)

NEWS - Newsletter only - senior officers at FedEx - only accessed by membership chair for mailing list for newsletters

If an applicant is 55 or older and retired with 5 years or more they are considered vested. For FERC eligibility, a retiree must be vested - drawing or eligible to draw a pension or 401k distribution. (Some FedEx companies do not have pensions). Employees retired due to permanent disability with less than 5 years’ service are also normally eligible to join.

If both spouses are retired FedEx employees, only **one** needs to pay. The other will be coded with a spousal membership (MMS or SMS). Fill out a database sheet for both with notes in the Comments section, cross referencing each with employee numbers in the comments section.

If a member dies, the spouse is required to pay dues for subsequent years should they elect to maintain membership, unless otherwise directed by the BOD.

**Note**: The dues are to defray expenses incurred for charitable contributions, post pards, Newsletters, other mailings, printing, postage, door prizes and other expenses incurred in running the club.
Associate Members do not pay dues when their spouse is living, but when he or she passes they pay dues to cover the aforementioned expenses.

Retirement date (optional) is six digits – MMDDYYYY without spaces, slashes, etc. If not provided, just leave it blank. If no day is provided, assume 01.

Former division – whatever they provide. (i.e. Express, Services, Office, Ground, etc.)

**First Name** – self explanatory

**Middle Initial** – self explanatory

**Last Nam**e – **MUST BE ALL CAPS!!!** Or the database won’t recognize it and their login attempts will fail.

**Suffix** – if they provide one – i.e. Jr., Sr., Esq or Your Lordship, is entered there

**Address** – Street Address

**City** – self explanatory

**State**– two digit abbreviation Use full postal code for foreign locations. These vary, use judgement.

**Zip Cod**e - There are three zip code fields. This was done because zip codes are used for multiple purposes. The first is the zip + 4 (if provided); the second is the basic 5 digit zip code and the third is the first three digits of the zip code. This is used for sort purposes, to determine if a person is in the Memphis area and should get the luncheon postcard. Foreign postal codes will vary, use judgement.

Zip codes which are used to designate someone as a Memphis member begin with 375, 380, 381, 386 and 723. This is important, since the ones with those zip codes pay the higher dues!!!

**Country** – self-explanatory.

**Phone** (optional) - if they provide it use the XXX-XXX-XXXX format, including dashes. If they do not provide it, of course it will not appear in the ‘Members Only’ directory.

**E-mail Address** – self explanatory

**Invoice amount** – Used occasionally. With the advent of automatic billing via our web page (either by PayPal or check), we normally don’t need to send invoices unless we receive an application that doesn’t indicate method of payment or does not list an e-mail address. We do send an annual dues reminder post card as the dues date approaches and we may also follow up with e-mails. There is a table at the bottom of the database form which gives the prorated dues by month (**for New Members Only**).

**Expiration Date** – Very important date as it determines whether a member is active (coded “a”) or inactive (coded “i”), see 27 below. It is filled in once the member dues have been paid. The date is the end of our fiscal year which is 0531XX with the XX being the year. **Note: An unadvertised grace period of two months is allowed for members to pay. Those who have not paid by 7/31/XX are inactivated (database code changed to ‘i’) and will not be able to log into the ‘Members Only’ section of the FERC web page.**

**Date of Invoice** – Self Explanatory

**Final Invoice Sent** – No longer used. Final invoices have been discontinued.

**Date Paid** – **Important entry.** Enter by MMDDYR with no breaks. This is the date of activation for a new member and renewal for a lapsed membership.

**Amount Paid** – Enter the appropriate amount from checks or from fercpay@hotmail.com (**password 1FedEx$$) payments.**

**Original Membership Date** – Optional, self-explanatory, four digits, MMYR format. Enter for all new members and backfill others when/if data is available.

There are two comments fields. Anything entered in the first transfers to the second when update is hit so the second field is redundant. I use the first to enter one of four entries: (1.) will pay by cc (2.) will pay by ck (3.) paid by cc (4.) paid by ck This is useful if you have to later check how the payment was made. Remember to change the entry as required when payment is received. I also use this field for any miscellaneous entries deemed necessary.

The active block for new applicants is initially blank or has “p” (pending). Enter a lower case ‘a’ when they pay their dues. Also, renewals and reactivations are changed to an ‘a’ (if they aren’t already) when dues are paid. Applicants pending payment and inactive members are coded ‘i’. Access to the ‘Members Only’ section of our web site requires log-in which requires that an ‘a’ be entered.

Once you have entered all of the information, space down to ‘Record this Update’ and click. The applicant’s record is now established.

You can use the browser ‘Find” function in conjunction with the **Master Edit** ‘**Actives Only**’, ‘**Inactives Only**’ or ‘**View Full Database**’ tabs to find members when necessary. (or else find them alphabetically)

When paid, move the original application to the 20XX New Members or 20XX Renewals folder.

For new applicants who have paid, send an email detailing login procedures. I have one “canned” in the drafts folder which is worded as follows:

(First Name) – Your (application and) dues have been received and your membership activated (reactivated). To access the ‘members only’ section of our web site:

USER ID = Employee Number (No letter prefixes or suffixes)

PASSWORD = last name (***not case sensitive***.)

Contact me if you have any login problems.

Note: Leading zeros will not work with employee numbers.

**Activating New Members or Renewing Existing Members**

Dues paid by mail are retrieved at the Germantown TN Post Office, Box 383001. The fee is paid by the Treasurer. The Membership Chairman has the key. This box should be checked periodically for mail. It should be checked very frequently at renewal time. (May – July)

Dues paid by PayPal are listed and retained on the PayPal site,

Open the Membership Database and enter the payments received by mail or PayPal. Be sure to enter or change the Expiration Date, Date of Payment, Amount Paid and assure an “a” is entered to activate membership for each individual.

**Processing Member Updates**

Sometimes our members notify us when their address, phone number, email address, spouse or whatever changes. Usually, they forget to do so. Update their database sheet as required.

**Creating Mail Lists**

Mail lists have to be created each time you are notified that a newsletter is ready to be printed. Quarterly Newsletters are sent to all members (except foreign members due to Postal bulk mailing restrictions.) Newsletters may also be sent to our Newsletter advertisers as a courtesy. An annual renewal postcard is also sent during the first week of May to all active members except foreign members. To generate a mail list:

Obtain the latest backup database from the webmaster. The database is updated on the first of each month. Using Excel procedures, sort the database. I usually sort using ‘status’ (Memphis or Satellite member or both, depending upon the mailing), active, etc. When the necessary mailing information for the intended group is done, delete the unnecessary columns. Delete those with addresses outside the Uniter States.

Insert the desired Mail List into an e-mail and send to Central Printing (John Sanders in our address book).

**Answering Questions That Come Via Email**

There is no pat set of procedures for this responsibility. Many e-mail are “what is my password” or “I can’t log in”. You have to play it by ear. Sometimes they want to know what the benefits of joining the club are. Sometimes they just want to know if they paid their dues. If they have not, I notify them and direct them to our web site. If you don’t know what to tell them, just email the BOD officers and ask them what should be said in response. Usually the Board member will just take the email and handle it.

**Annual Invoicing of Members**

This is a critical part of your job. Once a year, you have to send members a bill. These are the procedures that I recommend:

In an early Spring, our Newsletter should publish a notice that it is time for dues.

Get a current (May) Excel spreadsheet from Bill Bonk. Sort the spreadsheet by ‘active’. Then sort the worksheet by expiration date. You will see that some members have paid ahead and should not receive an invoice.

Delete the following:

Active members who are not to receive an invoice (already paid up for the next FY)

Honorary members (there are only two right now)

Spousal Retirees. It is easier to do in Excel, because you can sort by address. Send an invoice to the spouse whose record shows MM or SM. The spouse marked MMS or SMS does not have to pay dues, but when the primary spouse pays, both records must be extended for a fiscal year.

Delete remaining columns not required for mailing labels

Send the worksheet to Central Printing (John Sanders). This will be the basis for address labels or postcard labeling.

Provide appropriate renewal wording to Central Printing and have them print enough of the postcards for the number of members you have. You can find the number needed in the Reports section of the database. I Try to have the postcards set during the 1st week of May. Any earlier, and they may be set aside and forgotten.

Sit back and wait for the money to flow in!!!

You will see payments in PayPal. There may be a mix of new applicants, renewals and reactivations. Of course, you may have checks as well, which you pick up from our P.O. Box. For those paying their dues for the first time (i.e., ‘p’ pending in their file), you will need to make sure that you enter their expiration date, activate them (enter an ‘a’) and send them an email to give them access to the web site.

For those renewing their membership, you need to change their expiration date. That normally means just changing the last digit in the expiration date. Don’t forget to update the spouse is there is a married couple, both of whom are members.

An unadvertised grace period of two months (5/31 – 7/31) for payment is sufficiently generous. In August, get a fresh backup membership Excel spreadsheet from Bill Bonk, webmaster. Sort out anyone who is listed as active but who hasn’t paid dues. Access their individual record in the membership database and change them from ‘a’ to ‘i’ effective July 31. I do not send second notices. Over the next month or so, you will get a few of them to pay when they find they cannot access the web page. All you have to do is change them back to active in the database.

**Purging the Database**

Once a year, I purge the database to remove those members who have been inactive for five years or more. Sort an Excel spreadsheet by ‘year paid’ to identify them. Do not eliminate them using the spreadsheet as this will contaminate the database. Access the individual in the database ‘Master Edit/Inactives Only’ and remove the record. The individual record will still be retained in the ‘View Full Database’.