Preparing for the Data Connector

For local Leagues on ClubExpress, you do not need to update the LWVUS Roster Manager Portal by January 31, 2022. Instead, your task is to go into your ClubExpress system to select the correct Member Type for Data Sharing for each of your Local Member Types (the ones you named in ClubExpress as "member types" when you were setting up your system). By completing this mapping task by January 31, 2022, LWVUS will receive a copy of your ClubExpress membership data, so that LWVUS can bill you for FY2021 Per Member Payments (PMP). If your League will not be live on ClubExpress (your membership data won't be bulk loaded) by January 31, 2022, you will need to update to the Roster Manager Portal as usual.

Below are directions for mapping, details on the new terms, a list of special cases, and a glossary. You can also log on (with your roundtable username and password) to lwvce.clubexpress.com to see a Connector video tutorial, register for upcoming hands-on tutorials, see recaps from meetings, and access a forum to ask questions. The ClubExpress Customer Success team can also help with mechanics – call them at (866) 457-2582 and press 1. Or email support@clubexpress.com.

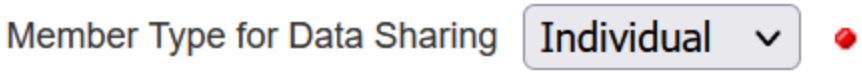
Directions for Mapping

Step 1: Log in to your local League's ClubExpress website.

Step 2: Click **Control Panel**, click **People**, look down to the "Setup" section, and click **Member Types**

*If you do not see a "Set-up" section or you can't click **Member type**, please contact your full administrator and ask to be given "Coordinator access to the function 'Member Types' in the People tab." You can't proceed until you have access.*

Step 3: For each Local Member Type listed, click the pencil icon for it and then scroll down to the last line of the General Settings section. You are looking for this line:



If you AGREE with what is showing, click **Cancel** at the bottom of the screen and go to Step 4 below.

If you DON'T agree with what is showing, choose the best option from the drop-down box, click **Save** at the bottom of the screen, and go to Step 4 below. If you are not sure of the best option, please see page 2 for more information.

Step 4: Repeat Step 3 for each member type until you have completed each listed membership type.

Thank you! You are all done.

More Details on the Member Types for Data Sharing

In the chart below, a description is given for each new ClubExpress "Member Type for Data Sharing" and the traditional LWVUS Roster Manager Portal Member Type to which it correlates.

ClubExpress's Drop-Down Menu options for Member Type for Data Sharing	Description of each Member Type for Data Sharing	LWVUS Roster Manager Portal Member Type and the associated annual Per Member Payment (PMP)
Individual	1 person for whom the local League pays full PMP	Primary is billed full PMP ($32)
Life	1 person who has been an LWV member for 50+ years and for whom the local League now pays zero PMP	Life is billed zero PMP ($0)
Household	2 or more people at the same address for whom the local League pays full PMP on the "primary" person and reduced PMP on each "secondary" and "tertiary" person within this one membership. (If one of the household members is a Lifetime member, please see #3 in Special Cases on page 3.)	Primary is billed full PMP ($32) Additional members are billed reduced PMP ($16)
Student	1 person who is a student for whom the local League pays zero PMP	Student is billed zero PMP ($0)
Staff	Many locals have created test/fake/administrative accounts to help with ClubExpress administration, but for whom there is no LWV membership. As an example, these could be paid office staff, or second "dummy" accounts for administrators in your League. This new member type will **not** be transferred to the LWVUS and so PMP is not applicable.	N/A

Special Cases

With so much variety in Local Member Types, we are encountering many special cases. If the information below does not address your special case, please come to a Data Connector Tutorial or post a question in the Connector Forum. LWVUS has let us know that they are happy to work with Leagues that have concerns about the FY2021 PMP invoice that will arrive in June 2022, and make any adjustments that are necessary. They do not want local Leagues paying incorrect PMP.

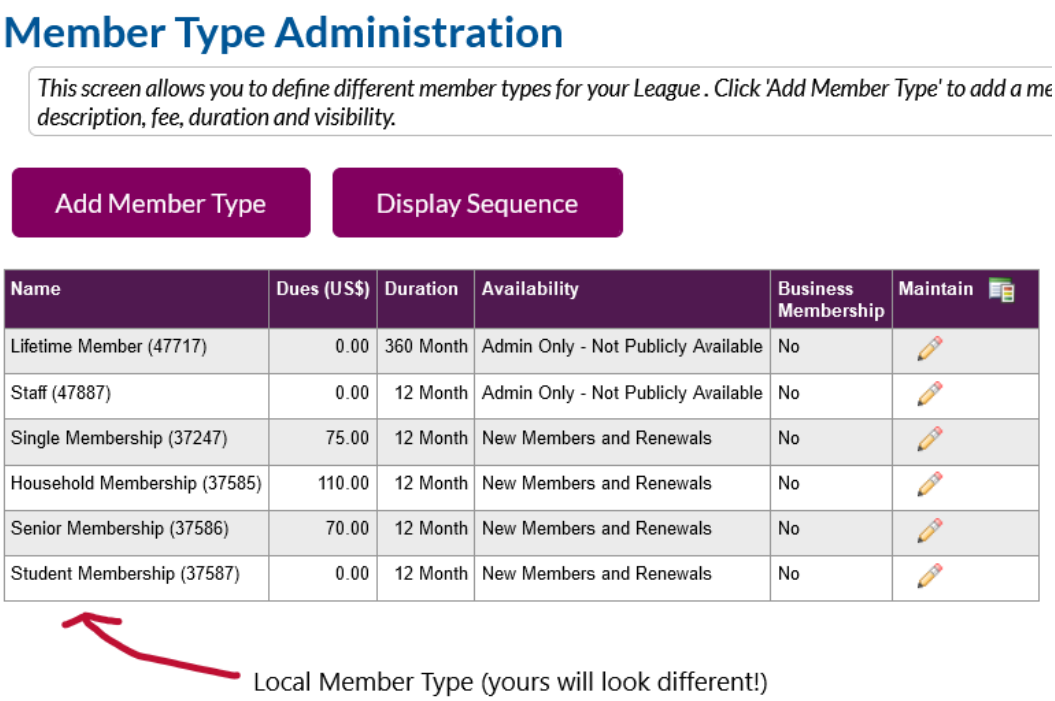
1. **My local League has a Membership that spans more than one year** - Good news! The Data Connector and the Funds Connector can both handle multi-year memberships. You do not need to change these member types. (Note: this is a correction from the original version of this document.)
2. **My local League doesn't have a multi person membership type** - To take advantage of the LWVUS reduced PMP for "additional" members, you will need to create a new Local Member Type that includes "secondary" members and choose "Household" from ClubExpress's drop down menu options. You will need to manually change the Local Member Type for members of the same household so they are all either primary or secondary in your new multi-person Local Member Type.
    a. As an example, Elizabeth Cady Stanton and Henry Stanton use the same mailing address. Their local League offers two Local Member Types that align the LWVUS Roster Manager Portal Member Types of "primary" and "additional." Elizabeth purchased a Individual Primary Membership for herself and an Individual Additional Membership for Henry in October 2021. To get the reduced PMP for Henry, you will need to add a new Local Member Type called "Household Membership" which will cover both Elizabeth (as the primary member) and Henry (as secondary member). You will choose "household" from the drop-down menu for this new Local Member Type. There is no option for "additional" in the drop-down menu.
    b. To change a member's membership type, click on Control Panel -> People tab -> People Manager. Search for the member and click the pencil icon to edit their profile. Under More Member Options, click "Member Type/Expiration/Join Date" and choose the new Membership Type from the drop-down menu. You can merge your additional member to the new primary member by clicking on Control Panel -> People tab -> People Manager. Select "Member Options" (the second silhouette icon toward the top of the page) and then choose "Level Changes." Choose the radio button for "Link a Solo Member to a Primary" and then select both the Member (eg, Henry in the above example) and the Primary Member (eg, Clara in the above example).
    c. If you need help with the steps of this process, please reach out to the ClubExpress Customer Success team – call them at (866) 457-2582 and press 1. Or email support@clubexpress.com.
3. **My local League has a Lifetime member who is part of a household** - Move the lifetime member to a Lifetime membership in your Local Member Types. Move the household member to whatever Local Member Type you have mapped to "Individual" in the drop-down menu of Member Types for Data Sharing. If there is more than one remaining household member, you can keep them together as a household membership. You will then need to contact LWVUS

and request a refund of the $16 PMP for the individual or household member that is now being charged for the full $32 PMP.

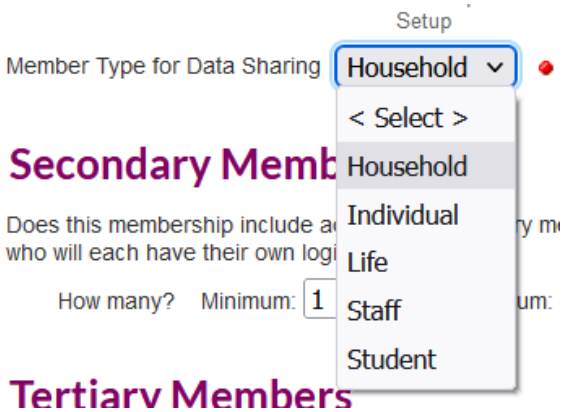
4. **My local League has a grace period for renewals** - This should not affect your PMP invoices. If you have members for whom you do not believe you should be charged PMP for FY2021, but who will be listed as “active” in your ClubExpress roster on January 31st, 2022, you will need to manually move those members to “expired” by January 31st, 2022 or contact LWVUS to correct your numbers for the FY2021 PMP invoice. For subsequent years, PMPs will occur automatically through the Funds Connector and you will only be charged when a member makes a renewal payment. You will not be charged for members who are still shown as “active” beyond their expiration date until they make a renewal payment.
5. **My local League has short term 30-day “trial” memberships** - Choose “staff” from the drop-down menu.
6. **A local League member has died** - Drop the membership with the reason “deceased.” To do this, click on Control Panel -> People tab -> People Manager. Search for the person you want to drop. Click on “Active” or “Expired” in the second column under “Membership” and choose the radio button “Drop.” Use the drop-down menu to choose “Deceased.”
7. **A member has transfered to my local League from another local League** - You will need to get the date the member joined her previous League and manually update this join date in your system. To do this, once the member has joined your League, click on Control Panel -> People tab -> People Manager. Search for the member and click the pencil icon to edit her profile. Under More Member Options, click “Member Type/Expiration/Join Date” and update the League Join Date to the date the member joined her previous League. This is important for Lifetime memberships and other anniversary tracking.
8. **My local League has an auxiliary membership for people who are involved with our Florida League during the winter, but whose main membership is in New York -** The local League in New York is responsible for updating her membership with LWVUS and the paying PMP; your League can have a local Member Type called “Auxiliary” and choose “staff” from the drop down.

Glossary of Terms

Local Member Type is the member type that your local League created in ClubExpress when your local League initially set up ClubExpress. There is a lot of variety here; no two Leagues have these named or set up the same way. The names of Local Member Types are displayed when people click the “Join” or “Renew” button on your ClubExpress site and can be edited by clicking Control Panel -> People -> Member Type.



Member Type for Data Sharing is the (new) member type that helps your members land in the correct spot in the LWVUS Roster Manager Portal for purposes of PMP billing. The five Member Types for Data Sharing are: Household, Individual, Life, Staff, and Student. This term is only seen when you are editing one of your League’s Local Member Types. (See page 2 for descriptions of each of these Member Types for Data Sharing.)



LWVUS Roster Manager Portal Member Type is the member type displayed in the LWVUS Roster Manager Portal. There are four types: Primary, Additional, Student, Life.

LWVUS Roster Manager Portal is the interface that Leagues have historically used to update their membership contact data and label member type. Local Leagues using ClubExpress will only need to use the portal to update names of their officers.

Mapping is the process of pairing your League's Local Member Types to the Member Types for Data Sharing that will be used for PMP billing and Convention votes.

Data Connector is the automatic transfer of membership data from your League's ClubExpress database to the LWVUS membership database. These data transfers are expected to begin during the fourth week of January 2022. The transfer will occur nightly and will be triggered by updates to a member's information including address, phone number, etc. The data transfer will not affect PMPs except for the FY2021 invoice that will be based on a snapshot of your membership data as of January 31, 2021.

Funds Connector is the automatic payment of PMPs (and in some cases credit card fee sharing) from your local League's bank account to LWVUS and your state League, if your state League is also on ClubExpress. These automatic payments are expected to begin in March of 2022.