



E-Membership Processing Information

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Submitting Members *Electronically: E-Membership*

Our E-Membership Program enables chapters to submit their new and renewing memberships electronically. The following sections will walk you through the specific guidelines to follow in order to successfully submit memberships via e-mail. All Chapters are to send their memberships electronically.

Before You Can Participate Electronically:

You must have:

- An email address with attachment capability.
- Member IDs for RENEWING members.
- Excel software

Things to know before processing and sending memberships:

1. Membership Processors for Chapters are encouraged to have access to the “For Chapters” Section of The Arc US website - www.TheArc.org. (The “For Chapters” link is at the bottom left on the website). *To access “For Chapters” you must have “Log-In” (which is found on the top right side of the website. If you do not have access/a first time user, click on “Log-In” and it will allow you to create your own password.* Please remember your User name and Password so that you can return when needed.
2. In the “For Chapters” section under “Chapter Resources” you can learn more about processing memberships by clicking “Membership Processing.” There is an FAQ and the membership Processing Guidelines and instructions available.
3. In order to complete the reporting and transmittal of members you must know your Chapter Number. It is available by going to The Arc US website www.TheArc.org, Click on “Find a Chapter” and go to Indiana and click and then scroll down to your chapter and click the link and it will take you to your chapter that will Number (as well as local contact information which is always good to double check to make sure it’s accurate and up-to-date).
4. Sample Templates (New Members, Renewing Members, Changing Member Information) are available from The Arc US “For Chapters Only” Section as well as from Mark Kevitt at The Arc of Indiana.
5. Attached is an Excel file with column labels and a few sample entries. Delete the samples and use these column headings. Fill in one line per new member. If a particular member has no information for a field, simply leave it blank, but do not delete the column.
6. Name the file in Excel according to the following pattern:
Chapter number New date of submission.xls
For example: 2987 New 8.31.12
7. Please do not delete any columns. If there are fields you do not use you can make them very narrow in Excel or hide them, but because we will be consolidating files from many chapters, it is important that the columns be consistent.
8. Please pay close attention to the distinction between a renewal and a new member, including only new members in this file. Note that if the person was EVER a member (whether last year, or 10 years ago), they are NOT a new member. Please list them as a renewing member. Eventually we would like to get to a point where you can download your entire list, then we can compare it to the national database and deal only with the

changes (whether they be renewal or new member or change of address). However, we are not there yet and if you submit renewals as new members we will have to spend some time finding and deleting the duplicate entries.

E-Membership Processing Guidelines: Submitting New Members

1. Attached is an Excel file with column labels and a few sample entries. Delete the samples and use these column headings. Fill in one line per new member. If a particular member has no information for a field, simply leave it blank, but do not delete the column.
2. Name the file in Excel according to the following pattern:
Chapter number New date of submission.xls
For example: 2987 New 3.31.13
3. Please do not delete any columns. If there are fields you do not use you can make them very narrow in Excel or hide them, but because we will be consolidating files from many chapters, it is important that the columns be consistent.
4. Please pay close attention to the distinction between a renewal and a new member, including only new members in this file. Note that if the person was EVER a member (whether last year, or 10 years ago), they are NOT a new member. Please list them as a renewing member. Eventually we would like to get to a point where you can download your entire list, then we can compare it to the national database and deal only with the changes (whether they be renewal or new member or change of address). However, we are not there yet and if you submit renewals as new members we will have to spend some time finding and deleting the duplicate entries.

Explanation of Particular fields: (only for NEW members)

- National ID - Unless you include a unique ID for each NEW member, The Arc will assign a National ID #. Although you can use The Arc's preferred numbering system which is...
 - 44E0912-1
 - Chapter# E Date - # (beginning with 1 and continuing for each new member):
 - Chapter Number 44 (The Arc of IN)
 - Date 0912 (September 2012)
 - -Dash -
 - Numerical sequence beginning with 1 and continuing with 2, 3, 4, etc. depending on the number of members being submitted.
 - This member ID system allows a chapter to record and remember when the member first became a member (example, in September of 2012).
- Title - You can leave this blank or include Mr., Mrs, Dr., etc. What you enter here determines the Addressee and Salutation Codes later
- First Name - Leave blank for organizational members. (For example, if Joe's Barber Shop chooses to be a member and Joe Smith is the owner, leave the first and last name fields blank, put "Joe's Barber Shop" in the Organization field
- Last Name
- Suffix - Such as Jr, III , etc.

- Organization Name - Use only if the organization is a member. If Joe Smith of Joe's barber Shop is the member, then include Joe's name in the First & Last names field and insert Joe's Barber Shop on Address Line 1.
- Title for Second Household Member (i.e. spouse, partner, child, etc.)
- First Name of Second Household Member
- Last Name of Second Household Member
- Addressee and Salutation Codes -
 - For records with a title (the Addressee Code is 01 and the Salutation Code is 16: 01 and 06
 - For records without a title the Addressee is 53 and Salutation is 28: 53 and 28
 - Exception - records with a second household member whose last name is different from the last name for the member. The Addressee is 02 and Salutation is 28. 02 and 28
 - No codes are needed for organization records.
- Address Line 1
- Address Line 2 - if applicable/there is one
- City
- State - Please use the 2-letter postal code abbreviation (i.e. IN for Indiana)
- Zip Code
- Mail2Snd - For records that are NOT to receive mail, type the word "none." Otherwise leave blank. (Mail is The Arc US magazine)
- Chapter Number
- Age Group - Please use the following five categories. We encourage you to collect and pass on this information. Leave the field blank if you do not collect this information.
 - 1 to 24
 - 25 to 34
 - 35 to 44
 - 45 to 54
 - 55 to 65
 - 66+
- Age of Relative with an Intellectual Disability - This can be used for both parents and siblings. Used the same categories as listed above.
- Chapter Name
- Membership Expiration Date - Generally this date will be about a year from when you are submitting but it should always be at least six weeks ahead of when you are submitting. We cannot import records with an expiration date that has already passed. The expiration date should ALWAYS be the end of the expiring month (e.g. March 31, 2009, not March 12, 2009).

- Membership Classification - Please use the following five categories. We encourage you to collect and pass on this information. Leave the field blank if you do not collect this information. If you use other categories in your local chapter, please let us know.
 - Self-Advocate
 - Interested Citizen
 - Professional in the field of intellectual disabilities
 - Parent/Relative of a person with intellectual disabilities
 - N/A
- Telephone Number
- E-mail
- Special Dues Rate - This field only needs to be filled in if your chapter uses our Renewal Notice Service . If your chapter is on the Renewal Notice Service, organizations and individuals that do not list a second household member will be charged the Individual rate while individuals with a second household member will be charged the family rate. The Special Dues Rate only needs to be filled in for exceptions to this rule, for example if your chapter charges self-advocates a lower rate
- For those chapters on the Renewal Service, if you wish the submitted member NOT RECEIVE A RENEWAL NOTICE, in the Special Dues Rate Section enter RNWNO.
- Also in the body of the email, make a notation that “Some Attachments Don’t Want/Need Renewal Service”
- See below for more information about the Renewal Service.

Sending Memberships

- Please send file to e-membership@thearc.org , attention: Robin.
- Copy Mark Kevitt at mkevitt@arcind.org.

Submitting *Renewing Members: E-Renewal*

Simple Basic Instructions to Renew Members The process to renew members is simple! It’s an easy Excel spreadsheet format. Every chapter maintains their own member data base; yet The Arc US only requires some simple information for renewing members:

Template for Renewing Members with sample data

First Name	Last Name	National ID Number	New Expire Date
Darlene	Daniels	54463	12/31/13
Mark	Smith	752E1112-2	12/31/13
Marjorie	Williams	WILLIME.0003	12/31/13

If you do not track first and last names separately it is fine to have just one column with the member’s name.

Use your own data base or the quarterly reports from The Arc US. If you are not sure of the member’s national ID Number, it’s part of the reports. Search members by Renewal Date to see who needs to be renewed and insert a new expiration date and send it off to e-membership@thearc.org and please send a copy to mkevitt@arcind.org.

- The Renewal files should be sent as an Excel file and should always contain the following columns in this order:

First Name
Last Name
National ID number
New expire date

If you do not track first and last names separately it is fine to have just one column with the member's name. This information is not imported back into our system but is useful for us to check the data. It is not necessary to label the columns in the file that you send.

- It is also not necessary to put a header indicating that this is a renewal file. Cell A1 should contain the first name of your first renewal. This makes our processing much more efficient
- The name of the renewal file should contain your chapter number, the word "renew" and the date you are sending the information to us. For example: 532 Renewals 012812.xls. You can write the date with dashes if you prefer - the important thing is to have the info in the same order for each file submitted.
- If you are submitting for several different chapters, it is not necessary to put the renewals into separate files. Each member id # applies to that particular individual membership in a particular chapter. So it is permissible to put all in together.
- Please send file to e-membership@thearc.org , attention: Robin.
- Any additional information you would like to communicate to us can be put in separate file in Word or Excel or you can put it in the body of the e-mail. We do accept address changes via e-mail. If you send these with your renewals, please attach them as a separate file. .(See next page for more information)
- To change an address, e-mail the corrections to e-membership@thearc.org. Please include the member's ID number (when possible), the old information, and, then, the new information

MAKING CHANGES - Spreadsheet Template

When making changes/corrections to individual membership information/Data/records, this information could be submitted in an Excel spreadsheet.

Electronic Format that can be used to make changes to individual memberships

Member ID	Title	First Name	Last Name	Chapter Number	Expiration	Change(s) to be made
HARRIMYV0001	Mrs.	Mary V.	Harris	2034	09/30/06	Add Ms. Alice H. Blair
008912A		Tom	Ziegenfelder	1861	09/30/06	Add Mrs.
005013A		Carol	Jones	1861	09/30/06	Change Address to 134 Main Street
STOKECE.0001		Charlotte	Stokes	1861	08/31/05	Delete entire membership Deceased
PIERCCE		Judy	Pierce	750	10/31/06	Delete Claude deceased

E-Rosters

The Arc of the US sends chapters quarterly (by email) a listing of reported members. Please be sure that The Arc of the US has the correct information where to email the rosters. And if the membership processor changes his/her email please let The Arc US and Mark Kevitt at Indiana know. And if you are a new processor please let us know this. You can e-mail membership@thearc.org and include the following:

- Chapter name
- Chapter number
- Membership Outreach Processor's/Coordinator's name
- E-mail address
- Your preference of format: Excel or Word (It is recommended that you receive both Word and Excel formats)

Renewal Service

When a membership record is due to expire, many chapters handle contacting that member individually to encourage the renewal of membership. The National office offers a service to chapters whereby the National office sends annual membership renewal notices to individual members on behalf of chapters enrolled in this program, priced on a per piece amount.

The tiers of fees for renewal processing are as follows:

- 1 - 100 Members: \$1.00/piece
- 101 - 250 Members: \$0.90/piece
- 251 - 500 Members: \$0.80/piece
- 501 - 1,000 Members: \$0.70/piece
- 1,001+ Members: \$0.60/piece

Only one annual renewal notice will be sent out per record; National will not send out updates or reminders to same record multiple times.

Membership Processing FAQs

What is (individual) membership?

Membership is the body of members of The Arc and its affiliated chapters. A membership organization, such as The Arc, grants its members specific rights to participate in the governance of the organization, as well as access to particular member-only benefits, discounts and offers.

Who is a member?

Affiliated chapters define membership in a variety of ways. A member can be an individual with an intellectual or developmental disability, a family member, a professional in the field, a donor, a supporting corporation or business, or just an interested citizen.

Why is membership important to The Arc?

Through our vibrant membership, we are able to impact policies and legislation important to our core values. Maintaining a strong membership is important to developing new

leadership, stable sources of funding, and education about the issues important to our members. Our members are our source of strength and community impact.

What is the amount for Membership Dues?

The local Chapter determines the dues amount that members pay. The full amount (100%) is kept at the local level. No dues are forwarded to the state or national.

How do chapters submit membership information to the National office?

To the state chapter: Please copy your membership rosters that are sent to The Arc of the US to mkevitt@arcind.org

To the National office: Send your membership information directly to the National office for tracking and maintenance.

Why do chapters send membership information to the National office?

Chapters submit information on their membership for several reasons. One is to assure that their members receive the many from The Arc. Chapters also submit information for credentialing for the annual meeting of The Arc. Affiliated chapters receive a set number of votes based on membership totals, as well as other [criteria](#).

Chapters send not only their membership lists, but are also encouraged to send all lists kept by the chapter. This would include business and community contacts, as well as donor lists. **National does not fundraise to, or sell these lists.** Only membership lists are used to market corporate partner benefits to active members.

What does National do with membership information?

The Arc uses membership information for several purposes. They include:

Advocacy - It is important to communicate our "strength in numbers" to legislators and other key decision makers at all levels of government. We refer to our current membership totals to impress upon key officials the power in our advocacy. This is done not only at the federal level, but can be important when communicating at the state and local levels the number of active members who are registered voters in certain districts.

Funders- Corporate and private foundation funders want to know what impact we are able to have through our membership. We refer to our membership numbers when working with outside funders for topical grants or programs that affect our membership and constituency.

Membership Benefits - Our corporate and affinity partners make discounts and offers available to our active members. We assure that those benefits reach our active membership.

Credentialing - Each year at The Arc's annual meeting, chapter leaders have the opportunity to vote on issues impacting governance and position statements that affect our chapters and the people they serve. The number of votes allotted to a particular chapter is determined partially through the number of active members at the local level.

What does a chapter need to do to submit information?

A local chapter submitting membership information must use a preset format. All information should be entered either in an Excel spreadsheet, or an Access database. The information must be submitted electronically, via email. No hard copies of membership information will be accepted.

To submit information or for assistance in filling out the template, email e-membership@thearc.org

Contact Information

The Arc of the United States Membership Department Contact Information:

Membership Department
Phone: 800-433-5252 membership@thearc.org

Processing Email Address e-membership@thearc.org

Robin Henschien, Membership Assistant
henschien@thearc.org

Solomon Lissanu, Database Manager
lissanu@thearc.org

Mailing Address

The Arc of the United States
Membership Department
1825 K Street, NW, Suite 1200
Washington, DC 20006
800-433-5255

The Arc of Indiana Contact Information

Mark Kevitt, Director of Program Services
mkevitt@arcind.org
800-382-9100 or 317-977-2386 (direct line) or 317-625-6300 (cell)
The Arc of Indiana
107 N. Pennsylvania St., Suite 800
Indianapolis, IN 46204

E-MEMBERSHIP “CHEAT SHEET”

E-Membership enables chapters to submit their new and renewing memberships using an Excel spreadsheet. This “Cheat Sheet” summarizes the steps to complete & submit memberships. Please refer to the Electronic Processing Instructions for complete details.

Basic Information/Instructions:

1. Fill in one line per new member. If a particular member has no information for a field, simply leave it blank, but do not delete the column.
2. Name the file in Excel : Chapter number New date of submission.xls,
For example: 2987 New 3.31.12
3. Do not delete any columns. If there are fields you do not use you can make them very narrow in Excel or hide them, but because files are consolidated files from many chapters it is important that the columns be consistent.
4. Please pay close attention to the distinction between a renewal and a new member, including only new members in this file.

E- Membership Data Entry Excel Spreadsheet - New Members

* Items marked are required for each separate member entry/record

- National ID/Membership Number. Create this #: *your chapter number, the letter E, two digits for the number of the month you are submitting, two digits to indicate the year you are submitting, dash and then a unique number for each member you are submitting.*
For example, The Arc of Indiana chapter number is 44 and 32 records/members are submitted in June of 2008, the ID for the first record would be 44E0608-1 and the last ID would be 44E0608-32. If new members submitted again in July, simply start with 44E0708-1.
So its: 44(Chapter #) E 07 (Month) 08 (Year) - Consecutive Numbers
44E0708-1 for first member, for second member 44E0708-2
- Title . Mr. or Mrs. Or Ms. Or Dr., etc. Title is for the primary member only. For couples to be addressed as Mr. and Mrs., type “Mrs.” in the field labeled “Title for Second Household Member”. Can be left blank
- First Name
- Last Name
- Suffix - Examples Jr., III
- Organization Name - use only if the organization/business is a member and not an individual name.
- Title for Second Household Member (i.e. spouse, partner, child, etc.)
- First Name of Second Household Member
- Last Name of Second Household Member
- Addressee and Salutation Codes -
 - For records with a title (the Addressee Code is 01 and the Salutation Code is 16: 01 and 06
 - For records without a title the Addressee is 53 and Salutation is 28: 53 and 28
 - Exception - records with a second household member whose last name is different
 - from the last name for the member. The Addressee is 02 and Salutation is 28. 02 and 28
 - No codes are needed for organization records.
- Address Line 1
- Address Line 2
- City

- State
- Zip
- Mail2Snd - For records that are NOT to receive mail, type the word “none.” Otherwise leave blank.
- Local Chapter Number
- Age Group - If known, one of five categories: 1-24, 25-34, 35-44, 45-54, 55-65, 66+ or leave blank
- Age of Relative with Disabilities: Same as above or Leave Blank
- Chapter Name*
- Membership Expiration Date - Dates are *always* the last date of the month.
- Membership Classification - One of following 5 categories: Self-Advocate, Interested Citizen, Professional in the Field, Parent/Relative of a Person with A Disability, N/A or Leave Blank
- Telephone Number
- E-mail Address
- Special Dues Rate - Only for Chapters on The Arc’s Renewal Service. If chapter is on the Renewal Service and does not want the member to receive the Renewal Notice enter **RNWN0**

Submitting New Members

When preparing the email submission of the new members, attach the Excel file (identified as: Chapter number New date of submission.xls. For example: 2987 New 3.31.12) to the email. In the *SUBJECT* line of the email also enter this same File name.

In the body of the email you may wish to recap what is being submitted and local contact information... such as: *“Attached is the latest excel listing of New Members of The Arc of Indiana, Chapter # 44. For more information contact Mark Kevitt at mkevitt@arcind.org or call 317-977-2375”*

E- Membership Data Entry Excel Spreadsheet - Submitting Renewed Members

The Renewal files should be sent as an Excel file and should always contain the following columns:

- First Name
 - Last Name
 - National ID/Membership number
 - New expiration date
- If you do not track first and last names separately it is fine to have just one column with the member’s name.
 - It is not necessary to label the columns in the file that you send.
 - It is also not necessary to put a header indicating that this is a renewal file. Cell A1 should contain the first name of your first renewal.
 - The name of the renewal file should contain your chapter number, the word “renew” and the date you are sending the information to us. For example: 44 Renewals 062808.xls. (Include this in the “Subject” line of the Email as well.
 - Any additional information you would like to communicate to us can be put in separate file in Word or Excel or you can put it in the body of the e-mail. We do accept address changes via e-mail. If you send these with your renewals, please attach them as a separate file.
 - Please send the file to e-membership@thearc.org
 - To change an address, e-mail the corrections to e-membership@thearc.org. Please include the member’s ID number (when possible), the old information, and, then, the new information.