# OHC ONLINE MEMBERSHIP SYSTEM
## Instructions for Treasurers & Membership Chairs

All the Chapter Treasurers, and Membership Chairs if applicable, are given read/write permission of the online membership data of your chapter members.  You can log in at https://members.ohconline.com  (or go to the OHC website and click on "Member Site"):

- View your chapter's members' records
- Edit the membership information for any of your chapter members
- Examine membership orders that will show online dues and insurance payments by members
- Add new chapter members
- Download and print a .csv (comma separated value) file of your chapter's members (recommend saving file as an Excel spreadsheet)

★ **Log in:**  You need to create a password <u>only the first time</u> you log in to your OHC online membership account.  Your membership information is already in the system, but to access it:

1. Go directly to the online membership system at https://members.ohconline.com
2. A pop-up box appears, select the green "**My Account - Registered members**" box.
3. Enter your email and password.  If you have not yet created a password, or forgot what it was:
   a. Click on "Reset Password".  An email message will be sent to your email inbox.  Open that message and click on the link (blue type) near the bottom of the message.  That will take you back to the OHC log in page.
   b. Type in your choice of password. (If your preferred password is short, you can duplicate it to make a longer, stronger password.  For example, instead of Abc123, use Abc123Abc123)
   c. Then log in with your email and new password.
4. Your name will appear in the upper right-hand corner of the screen.  A pop-up Renewal box appears.  Click on the "x' in the upper right-hand corner of the box to close it.
   a. To view <u>your own account</u>, click on the OHC logo in the middle of the screen, then click on the "Profile" tab.  You can open and print your own membership and insurance cards.
   b. <u>To view your other chapter members' accounts, click on the blue box "Manage Members"</u> under your name in the upper right-hand corner of the screen.  You'll go to your "Dashboard".  Select the Memberships menu, then Members List.  Click on member's Username to open their profile.

★ **Membership accounts:**  The membership data for current and past members is in the online membership database.  Current and last year members appear on your chapter's Members List.  To view just current year members, select the Membership Year menu and click on current year.  (All other OHC members can be found under "**All Users**".)

- An Individual, Youth, and Associate Group membership account each has one record.
- Each Family membership account has one record.  That record has a "Primary Family Member" and "Additional Voting Member" (Spouse/ Partner/ Other) and Dependents, if applicable.

**The intent of this system is that each primary member logs in to their own password-protected account in the online membership system to join, renew, update their information, or print their own membership and insurance cards, but there will always be those you cannot.**

★ **Three ways for members to join or renew membership with OHC:**

1. **Member logs in to the OHC online membership system themselves and pays online**

   You will receive an email notice from "Ohio Support" when a member joins or renews online themselves and pays with PayPal online (PayPal is a secure program for paying online with a credit card; there is no additional fee to the member to use it. Members can pay with their PayPal account or as a PayPal "guest" with a one-time credit card charge). The member enters their own information and receives confirmation upon successful PayPal payment.

   Their dues payment will be deposited in the OHC State bank account. The State Treasurer will send your Chapter portion to you approximately once a month. (This will continue until we can implement an automatic system that will send the State portion to the State bank account and the Chapter portion directly to each Chapter bank account.)

   To look at the member's payment and/or account information, log in to your account and select Manage Members. In the Dashboard, select the Memberships menu. Click on Orders to see their payment status. Click on Members List, search for member by name, then click on their Username to open their profile (you do not need to know their password).

2. **Member logs in to the OHC online membership system themselves, but pays by cash or check to the Chapter**

   A member may join or renew online themselves but pay you with cash or check. The online Orders screen will indicate their membership status is "pending", meaning the membership is not active until the payment is verified. After you receive their payment, select "edit" after their order and change Status to "success". Be sure to click on "Save Order" at the bottom of the screen.

   ⇨ Include this member's name and payment on the Dues Summary you send to the State Treasurer.

3. **Member completes a paper membership form and pays by cash or check to the Chapter**

   A member may join or renew using the printed paper membership application and paying you with cash or check. Then you process their membership online yourself:

   a. **Renewing current members**:
      i. Log in to your account, select Manage Members, then Memberships, then Members List. Use the Search field to find the member's account. Click on their Username to open (you will not need to know their password).
         ➔ Scroll down and select "Switch to" to begin their renewal.
         ➔ Follow the prompts, selecting "Pay by cash or check".
         ➔ Then select "Switch back to (your name)" at the bottom of the screen to exit their account and return to yours.
      ii. If you've received their payment, go to the Memberships menu, then Orders, select "edit" after their order and change Status to "success". Be sure to click on "Save Order" at the bottom of the screen.

    c. **Entering new members**:

       i. <u>Do not</u> log in to your own account. Instead, select the "Join Now – New Members" option and proceed as the new member.

        ➔ If you're already logged into your account, select "<u>Switch off</u>" under your name in the upper right-hand corner before proceeding to enroll a new member.

      ii. Fill in the fields using the information on the printed membership form.

        ➔ If they do not have an email address, make one up (it's a required field). Example: (their name)@noemail.com.  This member probably doesn't use a computer and would not try to use an email address anyway.

        ➔ Select "Pay by check or cash".  You will be asked to create a Username and Password for this new member.  Make something up!  A possible Username is the first part of their email address (before the "@").  Their phone number will work as a password (no hyphens).  Later, that member can log in using their email address and reset a password of their choosing.

      iii. <u>Log out of the new member's account and log in to yours.</u>  Go to Manage Members, then Memberships, then Orders. Select "edit" after their order and change Status to "success".  Click on "Save Order" at the bottom of the screen.

      ⇨ Include these members' names and payments on the <u>Dues Summary</u> you send to the State Treasurer.

★ **Edit information in a current member's account:**  If a current member's information changes, such as a new mailing address, and they do not update their own account online, it is important that you make those changes for them.  Monthly reports are pulled from the online membership system to send to the *Horsemen's Corral* and Equisure insurance, and it is essential that we have correct information.

- Log in to your account, select Manage Members, then Memberships, then Members List. Use the Search field to find the member's account.  Click on their Username to open (you will not need to know their password).  Edit the information as needed, then click "Update User" at the bottom of the screen.

★ **View and Save a Chapter Membership List:**

1. Log in to your account, select Manage Members, then Memberships, then Members List.
2. Select Membership Year menu, then click on whichever year's list you want.
3. Click on "Export to CSV".  A pop-up box appears at the bottom of your screen asking to Save or Open.  Click on Open.
4. A spreadsheet appears with all your members' information in columns.  Scroll through to view.
5. To save the list, a yellow box near the top of the screen recommends that you save the file as an Excel document.  Click on "Save As", then name the file and save it to the desired folder on your computer.

    An Excel file is very versatile.  Adjust column width to see all the information in the field.  Sort columns, such as alphabetically by last name.  Rearrange columns.  Delete unwanted columns.  Select what information to print, such as names and addresses, to create a mailing list.