

Data Reporting Changes: Membership Application and More

September 25, 2018
Webinar for Affiliate Leaders and
Community Administrators



Purpose

The purpose of this webinar is to provide NASN affiliate leaders and community administrators with an understanding of the changes NASN's new association management system (AMS) has on the reporting of customer and member data. Further, NASN looks to these leader groups for support in getting this information out to others who need it and providing NASN will feedback that leads to better membership data collection and reporting.



Your NASN Contacts

- Sharon Conley sconley@nasn.org
- Jenelle Cooper jcooper@nasn.org
- Ashley Tillman atillman@nasn.org

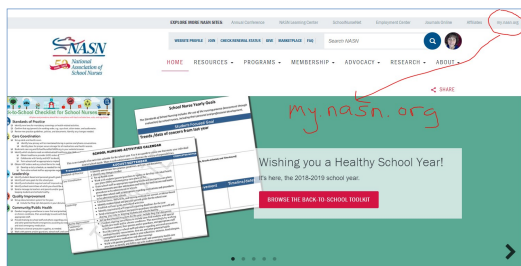


Agenda

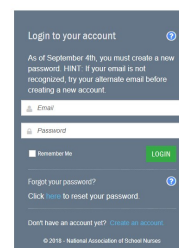
- Overview of system changes
 - my.nasn.org
 - Login
- Affiliate records: How these are managed in the database
- Changes in membership report terms and labels
- Updates to membership reports and queries
- Preview of the Chapter App



my.nasn.org



Login



Affiliates Records > Governance Committees

Colorado Association of School Nurses

Apps > Committees App > Committees

Overview Details Members Committees Minutes Documents

Members

Add Committee Member Share on Facebook Email Committee Create Appointment

Name	Position	Organization	Representing	Start Date	End Date	Email	DOB
Click, Susan	Secretary			5/30/2019			
Click, Susan	Treasurer			6/1/2018	5/30/2019		
Proffitt, NASH	Membership Contact	NATIONAL ASSOCIATION OF SCHOOL NURSES		9/20/2018			
Roper, Patricia L.	President			6/1/2018	6/1/2019		
Chelmsworth, Catherine	Membership Contact			6/5/2014	12/31/9999		



Affiliates Records > Organization

Colorado Association of School Nurses

Apps > Customers App > Organizations

Overview Account Purchases Documents Custom Buy

Organization Info Contact Info Relationships

Add New Relationship to an individual

Name	Relationship	Primary	Title	Start Date	End Date	DOB
Click, Susan	Susan is Billing Contact of Colorado Association of School Nurses		Treasurer	6/1/2018		
	Colorado Association of School Nurses is Employer of Susan					



Report Terms and Labels

FORMERLY	NOW
Ind_Ce_Status	Designations
Status ID	Record Number
Status Flag	National Membership Status
R, N, C	MIGS, Cancelled
Membership_Dues_Category	National Membership Type
Bad_Address	Congressional District
Ind_dob	Birth Date
Enroll_Date	Join Date
Membership_Deposit_Date	National Membership Promote Date
S Reports (MIGs, Paid, New, Lapsed) Soon to Lapse (by email)	All reports available in the portal (MIGs, New, Lapsed, RN License, Other Licenses) Other reports can be added in the future Member Retention Report (Available in the new portal)
Designations	Regions
Expiration Date (MM/DD/YYYY)	Expire Date (MM/31/YYYY)



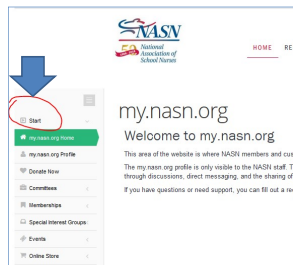
Report Nuances

MEMBERS CAN RENEW AT ANY TIME. WE ARE STILL SENDING NOTICES ON THE SAME SCHEDULE.

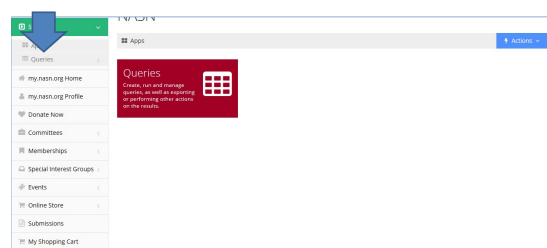
THE DROP PROCESS HAPPENS 31 DAYS AFTER EXPIRATION DATE. THERE IS A 31 DAY GRACE PERIOD BEFORE A MEMBER IS DROPPED/TERMINATED.



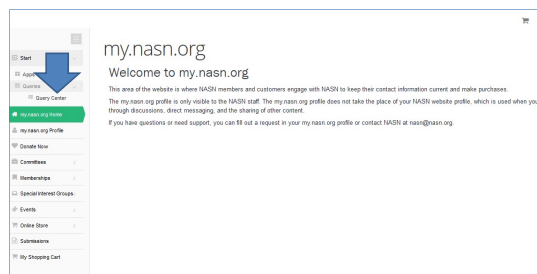
Find reports: 1. Choose START



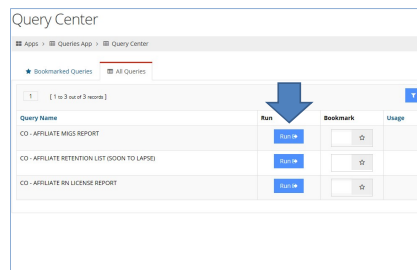
2. Choose QUERIES



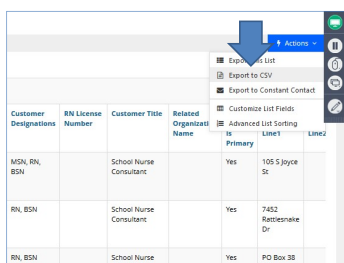
3. Choose QUERY CENTER



4. Click RUN



5. Choose ACTIONS > EXPORT to CSV



Updates to Membership Reports

Reports:

MIGS (Members in Good Standing) REPORT

NEW MEMBERS REPORT

OTHER LICENSES REPORT

PAID MEMBERS

RN LICENSE REPORT

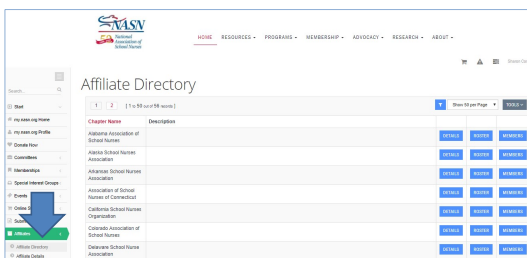
Retention List (formerly SOON TO LAPSE) REPORT

TERMINATED MEMBERS REPORT (Formerly Lapsed Members)

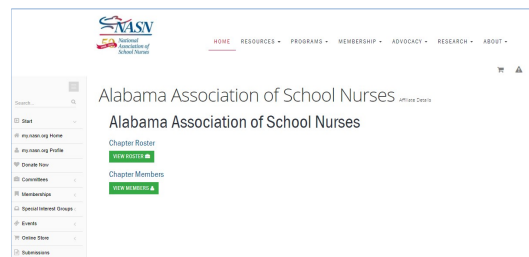
[RED=AVAILABLE NOW; BLACK=COMING SOON]



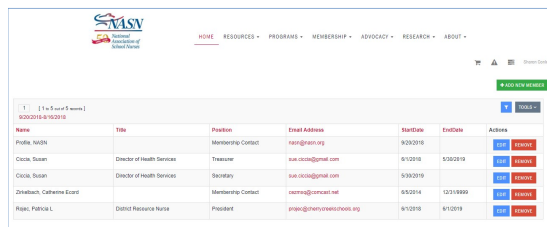
Chapter App Affiliates > Affiliate Directory



Chapter App Affiliate Details



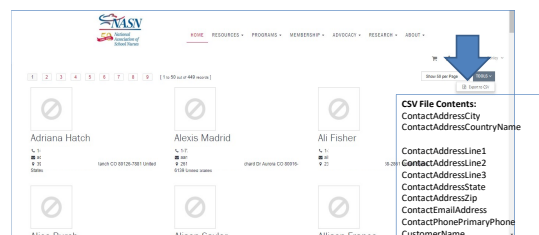
Chapter App Affiliate Roster



Name	Title	Position	Email Address	Start Date	End Date	Actions
Kristin Nash		Membership Contact	kash@nasn.org	9/20/2018		View Edit
Chris Swan	Director of Health Services	Treasurer	swan.chris@gmail.com	6/1/2015	5/30/2019	View Edit
Chris Swan	Director of Health Services	Secretary	swan.chris@gmail.com	5/30/2019		View Edit
Zlatibach Catherine Eard		Membership Contact	ceard@concent.net	6/30/2014	12/31/9999	View Edit
Papa Patricia L	District Resource Nurse	President	ppapa@metromeritcheek.org	6/1/2018	6/1/2019	View Edit



Chapter App Affiliate Members



CSV File Contents:

- ContactAddressCountryName
- ContactAddressLine1
- ContactAddressLine2
- ContactAddressLine3
- ContactAddressState
- ContactAddressZip
- ContactEmailAddress
- ContactPhonePrimaryPhone
- CustomerName



Recap

- my.nasn.org: for engaging with NASN
- Login: email address plus new password
- Chapter Governance Committee
- Chapter organization record
- New report terms and labels
- Membership reports and queries
- Chapter App teaser



What's Next?

- Membership minute videos for our members
- User profile webinar
- October Membership Campaign and Drive



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