



HQ800 Trial Membership—How To!

What Membership Chairs Need to Know about Trial Membership

The HQ800 system gives each squadron the ability to add or update their ABC3® boating course, seminars, and advanced course information on-line. Each Squadron Educational Officer, or authorized designate, can **provide information for the squadron's public offerings**, register students on-line, and provide Headquarters with the information needed for successful course completions information. The information given to Headquarters will provide historical data to afford tools for entering missing completions and for printing replacement cards and certificates to previous students.

Both the HQ800 and Boating Course Assistant (BCA) were created to gather information regarding students taking USPS courses and seminars. On completion of a course, the information can be used to create Trial Membership entries into the DB2000 without having to re-enter the data via the "New Members Processing." **The question was often asked "in this day and age, why can't the programs communicate?"**

Now they can!!!!

The procedure for processing dues paying members who join remains the same - BUT - the procedure for the new members

who take an ABC course and accept the six month free membership must be processed using the new system beginning 15 June 2011. This issue of MemComments gives instructions for processing those members via the HQ800.

Also included are answers to the following questions:

1. Once the ED 27 is filed – how do I change some information?
2. How do I add students using the 6 month free membership?
3. **How do I 'hook up' family units?**
4. How do I add family members?

If the answer to your question is not found here, please feel free to contact your District National Membership Representative or any member of the National Membership Committee for assistance.

Kudos need to go to D/Lt Evie Eibach and Stf/C Sandy Krupa for helping to publish this MEMCOMMENTS. Also, thanks to PC Dan Bartell, P/D/C Ken Guscott, P/V/C Dave Hinders and R/C Peter Mitchelson for their time and energy in creating the BCA700, HQ800 and Family Units Processing systems.

Verify and change your applications for membership

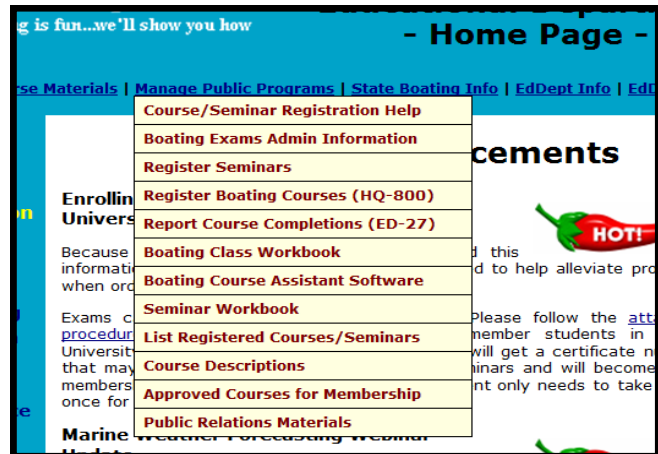
1. Divide applications into two categories
 - a. Applications with corrections.....
 - b. Applications without corrections.



2. After the ED27 has been submitted, Go To:

<http://www.usps.org/national/eddept/main.htm>

then choose *Manage Public Program*
And then click on "Register Boating Courses (HQ800)"



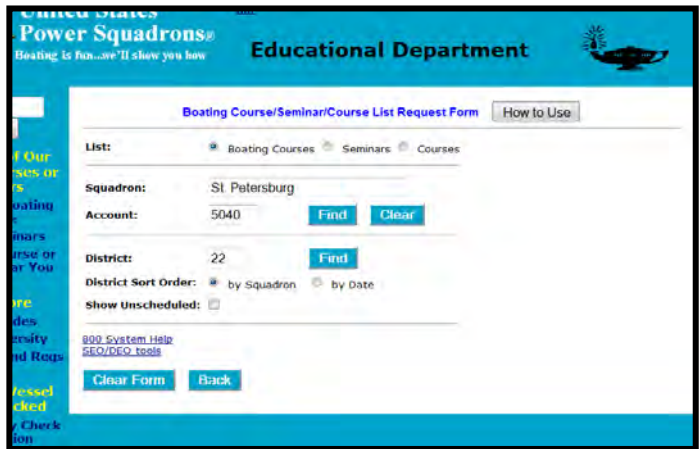
3. Boating Course/Seminar/Course List Request Form

Click on the *Boating Courses* Button

Type your *Squadron Name*

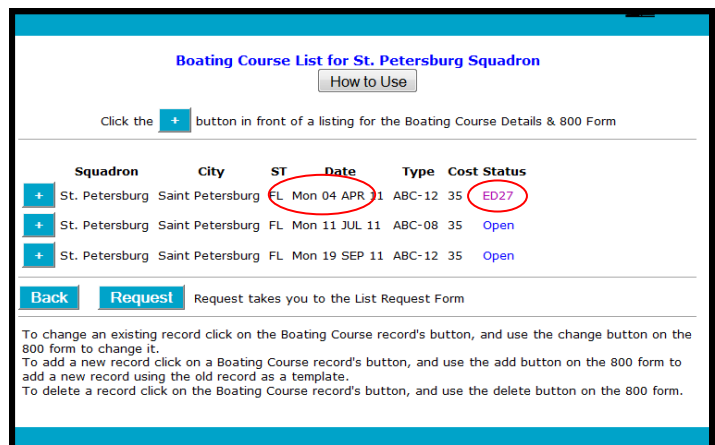
Type your *Account Number*

Click on "Find".



4. Find the Class with the correct start date and a status of ED27.

Click on the corresponding "+" sign.



4. Again, ensure that you have the correct course, check the end date and *ED status*.

Click on "Enrollment Management Tools"

Boating Course Details 800 Form [How to Use](#)

Use this form and a button below to change/add/delete an Online Boating Course Record. This information is Emailed to BoatUS, State Boating Law Administrators (BLAs), and your DEO for distribution to internal and external promotional sources. You must be a Squadron Cdr, SEO, DEO, or ChLB to make changes. You must be a Squadron Cdr, SEO, DEO, or ChLB to make changes.

SQUADRON INFORMATION
 Squadron: St. Petersburg Power Squadron
 Account: 5040
 District: 22

BOATING COURSE INFORMATION
 Status: Automatic ED27 Filed
 ED27 26 MAY 11
 Students: 19 Passed: 14 Failed: 1

Enrollment Management Tools

Mo / Day / Yr
 Start Date: 4 / 04 / 2011 Monday
 Registration Date:

5. As Membership Chair or part of the membership committee you will be interested only in "Student Management" and "Trial Mbrs".

Student Management is needed to change any information that varies from the Membership Application(MEMCOM1). **IF YOU HAVE RECEIVED DUES FOR THE FIRST YEAR, use "New Member Processing" to enroll this new member.**

Course Enrollment Management Tools

CRSID: 50401104041900A12 America's Boating Course-12hr Status: ED27 Report Filed
 Squadron: St. Petersburg Sail & Power Squadron Allow 6 Mo Trial: Yes
 Place: Sailing Ctr, Demens Landing Adr: 250 1st Ave SE [Show Course record](#)
 City: Saint Petersburg State: FL Zip: 33701 Date: 04 APR 11 Time: 7:00 PM

Student Management Manage Student Enrollment or Post Grades for this course.

Import Import students from BCA 6, the Workbook or a spread sheet.
Certs/Cards Print Certificates and Wallet Cards for this course.
List/Mail List Students or Send Email to students for this course.
Spread Sheet Present data in a form which can be copied into a spread sheet application.
Trial Mbrs Make passing students Trial Members.
Back

[Go To SEO/DEO Tools Page](#)

Note the message telling how many students were uploaded.

CRSID: 50401104041900A12 America's Boating Course-12hr Status: ED27 Report Filed
 Squadron: St. Petersburg Sail & Power Squadron Allow 6 Mo Trial: Yes
 Place: Sailing Ctr, Demens Landing Adr: 250 1st Ave SE [Show Course record](#)
 City: Saint Petersburg State: FL Zip: 33701 Date: 04 APR 11 Time: 7:00 PM

Course has 19 Students

First Name:
 Address:
 City:
 State:
 Phone:
 Email:
 Sex: M F DOB (mm/dd/yyyy): / / Last 4 SSN:
 Hair Color: Eye Color: Height: ft in G
 BOAT TYPE: None Outboard I/O Inboard SAIL PWC Pad
 BOAT LEN: ft in 10-15 16-25 26-35 36-50

6. Scroll down to see the student's listing, lick "Clear"

CRSID: 50401104041900A12 America's Boating Course-12hr Status: ED27 Report Filed
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 Hair Color: Eye Color: Height: ft in G
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Clear

We suggest you look at the [tips for using web based forms](#). [Check Tips](#)

Clear Save before leaving the page or all changes will be lost

Please click on "Clear" to populate this list

7. The following steps should now be followed to correct data in error:

- A. Check to make sure all students who have filled out an application are on the list with a grade and certificate number.
- B. If any student is not listed, ask the person responsible for uploading the grades to check on the reason why.

JSPS Home Page
 Join USPS

Learned: News/Mag TV Radio Web Booth Word Poster/Lit Other
 Description: Cert#: Grade:
 Validation:

Add **NCopy** **CCopy** **Show** **Update** **Delete** # **Clear**

We suggest you look at the [tips for using web based forms](#). [Quick Tips](#)

Save Save before leaving the page or all changes will be lost

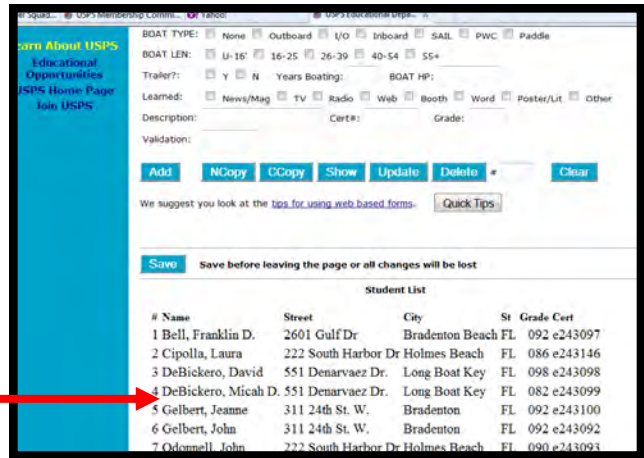
Student List

#	Name	Street	City	St	Grade	Cert
1	Bell, Franklin D.	2601 Gulf Dr	Bradenton Beach	FL	092	e243097
2	Cipolla, Laura	222 South Harbor Dr	Holmes Beach	FL	086	e243146
3	DeBickero, David	551 Denarvaez Dr.	Long Boat Key	FL	098	e243098
4	DeBickero, Micah D.	551 Denarvaez Dr.	Long Boat Key	FL	082	e243099

8. To change a specific student's information:

1. Note the students "#"
2. Enter this number in the box between "Delete" and "Clear".
3. Click "Show"

This example will use John Gelbert—#6.

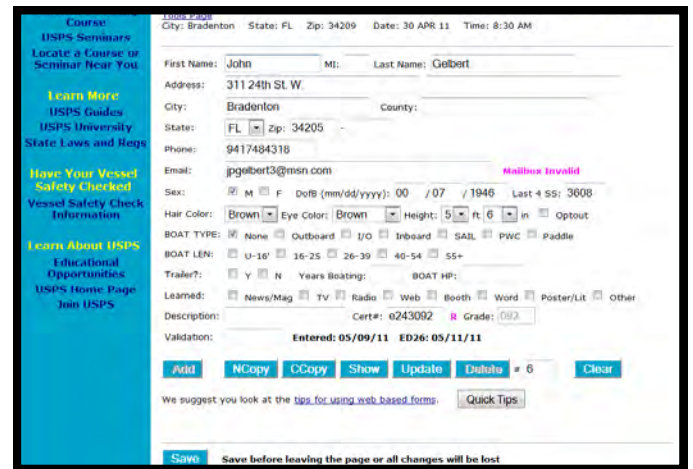


9. Change the information that is incorrect. In this case the email and month of birth.

After changing the necessary fields,

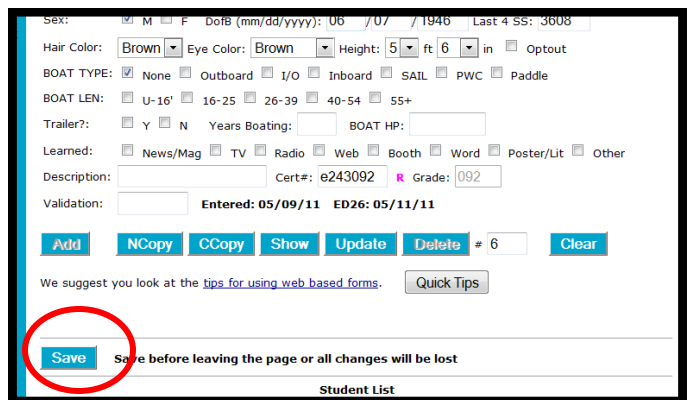
Click **update**. This is a must or the record will not be updated.

Continue correcting application information by repeating these steps until all students' information is corrected.



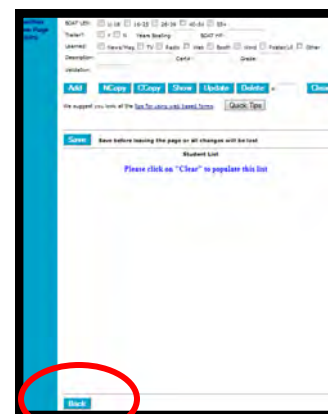
10. When all applications are corrected, click **"SAVE"**. This will save all data that has been changed.

IF YOU DON'T CLICK ALL DATA CHANGED WILL BE LOST



11. To go back to add trial membership information :

Click **"Back"** at the bottom of the of this web page.



Add applicants as trial members

Put all the applications in alphabetical order. Don't forget that in order to take advantage of the trial membership a person must pass the ABC3 course.



1. Follow steps two—five which should bring you to this screen.

This time click "Trial Mbrs"

A screenshot of a web interface titled "Course Enrollment Management Tools". It displays course information for "America's Boating Course-12hr" and a list of management options. The "Trial Mbrs" option is circled in red.

Course Enrollment Management Tools

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City: Saint Petersburg State: FL Zip: 33701 Date: 04 APR 11 Time: 7:00 PM

Student Management Manage Student Enrollment or Post Grades for this course.

Import Import students from BCA 6, the Workbook or a spread sheet.

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Trial Mbrs Make passing students Trial Members.

Down

[Go To SEO/DEO Tools Page](#)

There are three enrollment choices for each student who has passed the ABC3 course. Upon opening this screen each student has a "D" shown. If a student has a certificate number that begins with an "E", they will not be shown on this screen as they are already members of USPS.

By clicking on "Y" opposite a name, the student will be enrolled as a Trial Member with a new membership record being created in your squadron roster within 24—48 hours.

By clicking on "N" opposite a name, a student's information will be added to UPSP University.

By leaving them an "D", a student's information will be added to USPS University but the name will remain in the HQ800 system until 30 days after the ED27 is closed. After 30 days students may not take advantage of the trial membership.

A screenshot of a web interface titled "Trial Membership Enrollment". It displays course information for "America's Boating Course-8hr" and a table of student enrollment options. A red arrow points to the "Y" column header in the table.

Power Squadrons® Educational Department

Trial Membership Enrollment How to Use

CRSID: 51001104230830A08 America's Boating Course-8hr Status: ED27 Report Filed
Squadron: San Carlos Bay Sail & Power Squadron Allow 6 Mo Trial: Yes
Place: Squadron Class Room Adr: 16048 San Carlos Blvd.
City: Fort Myers State: FL Zip: 33908 Date: 23 APR 11 Time: 8:30 AM

Click on Enrollment Options for each Student to set their Trial Options.

Trial	Student	UU
Y N D		
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Joseph A Hartmann	X
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Joe Irwin	X
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Robert O Kellogg	X
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Blair Lipscomb	X
<input type="radio"/> <input type="radio"/> <input type="radio"/>	Diane B McGee	X
<input type="radio"/> <input type="radio"/> <input type="radio"/>	James T Post	X

6 Students qualify

Enroll **Back**

Double check to ensure that all students have the proper column clicked.

Click "Enroll"

Clicking "Back" will cause you to leave this screen without changing the "D" status.

Power Squadrons® Educational Department

Trial Membership Enrollment

CRSID: 51001104230830A08 America's Boating Course-8hr Status: ED27 Report Filed
Squadron: San Carlos Bay Sail & Power Squadron Allow 6 Mo Trial: Yes
Place: Squadron Class Room Adr: 16048 San Carlos Blvd.
City: Fort Myers State: FL Zip: 33908 Date: 23 APR 11 Time: 8:30 AM

Chose Enroll Options for each Student to set their Trial Options.

Trial?			Student	UU
Y	N	D		
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Joseph A Hartmann	X
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Joe Irwin	X
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Robert O Kellogg	X
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Blair Lipscomb	X
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Diana B McGee	X
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	James T Post	X

Enroll Back

The following report is generated. You can highlight and copy this report for copying and pasting into a text document for printing.

Within 24—48 hours your new membership should appear in DB2000 when you download a new roster.

Power Squadrons® Educational Department

Trial Membership Enrollment

Darius Allison - Made a Trial Member
Karl Allison - Made a Trial Member
Robert Hirx Jr. - Made a UU Student Member
Joseph Santacroce - Made a UU Student Member
Gary Stark - Left as Deferred
Liz Tropin - Left as Deferred

These actions have been queued and should be performed shortly.

Back [Go To SEO/DEO Tools Page](#)

Notes: People who have not taken or passed the ABC3 course or who paid the required amount of dues up with their application cannot be entered using Trial Membership. They **MUST be entered using "New Member Processing" from either www.usps.org—Member Stuff or from the Membership page at www.usps.org/national/membership.**

It usually takes 24—48 hours for the students enrolled as member using HQ800 to appear in DB2000. **If this doesn't happen, notify your membership contact at headquarters.**

All queries sent to membership@usps.org will be answered within 48 hours if you remember to include your name, squadron and phone number. **If you don't hear from someone within this time frame, call the Rear Commander at 727 867-3088.**

Combine individuals into family units.

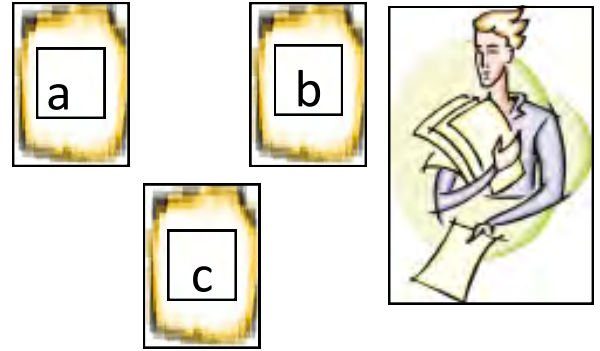
The new members should appear in the squadron's database within 36 hours.

1. When you are ready to finish processing family units Divide the applications into three piles as follows:

A. Applications for individuals—These **members don't have to be combined into family units**. Just keep these applications according to the **squadron's policy**.

B. Applications that show family units where at least one other member passed the course. At this time, it will help if you note the certificate numbers of all additional active members on the applications.

C. Applications that have the primary who passed the course and the only other family members did not pass the course or who did not take the course.



2. To combine individuals who have passed the ABC3 course into the proper family units.

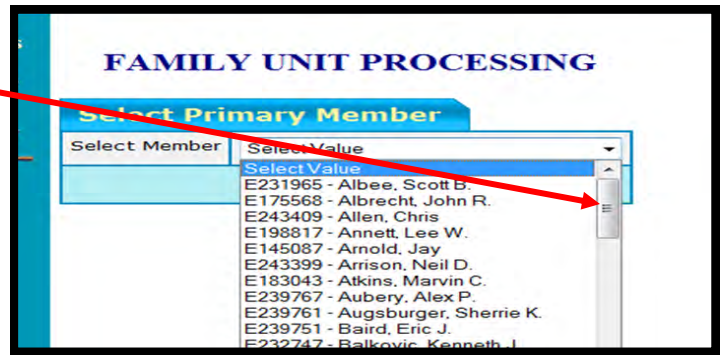
- You need the squadron account code, the squadron password and your certificate number.
- Go to: www.usps.org/php/membership/familyunit.php
- Enter the information required.
- Click "**Login**"

A screenshot of a web form titled "MEMBER PROCESSING LOGIN". The form has a blue header with the title. Below the header, there is a "Login" section with three input fields: "Squadron Account Code", "Password (User, Updater or Master Password)", and "Submitters Certificate No (Note: Must be member of submitting squadron)". A blue "Login" button is located at the bottom right of the form, circled in red.

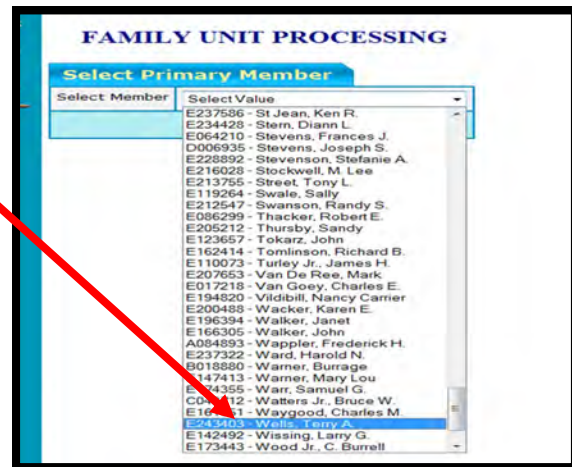
3. The follow screen appears. This screen will allow you to find all squadron members who are classified as Primary Active Members. You will select the Primary Active Members from this screen.

A screenshot of a web form titled "FAMILY UNIT PROCESSING". The form has a blue header with the title. Below the header, there is a "Select Primary Member" section with a dropdown menu labeled "Select Member" and a blue "Select Member" button.

4. Using the scroll bar find the name and certificate number of the Primary member



5. When you find the name move the cursor over the name and then click on the name



6. When you click on the Member Name , the name should appear in the upper portion of the Select Primary Member Screen.



6. Click on the "Select Member" button on this screen.

8. The following screen appears.



9. Enter the Additional Active Member certificate number.

10. When you tab to the next field the member's information will appear. (Note: if there is an error in the Certificate Number an error message is displayed. If you enter the wrong certificate number or the wrong member's name is displayed, go back to the "Certno" and reenter the correct information.)

Do this for each Member in this Family Unit.

Click the "Update HQ Database" button when finished with this family unit.

Certno	First	Last	Sex	DOB(MMDDYYYY)	Email
E243400	Dana	Fitzpatrick	F	04291944	danad429@yahoo.com

11. This message will appear for each family unit entered.

12. If there is another family unit to process click "Process Another Family Unit".

13. When everything is completed, click *Return to Member Processing Page and Log-out*.

Primary Member: E243403 Terry A. Wells

Please allow up to 24 hours for member information to be processed

[Process Another Family Unit](#)

[Return to Membership Processing page](#)

After combining the members who passed the course, if there are other members who have not taken or passed the course, place the application in pile "C" . Enter these members using "New Member Processing".

IF you find any errors in this document, please email Connie Beckman at conniebeckman@rapidsys.com

New Member Processing "How To" as well as an interesting article on squadrons are found on the next page.

Entering New Members Online or Adding Members to a Family Unit Online

This is a very easy process for entering new members online without having to fax or mail applications for membership to Headquarters. The submitter will need the squadron account **code, squadron's user, updater or master password** and his/her certificate number. The following are the steps to be taken:

- ◆ Enter www.usps.org
- ◆ Under **Member Stuff** click through to "New Member Processing"
- ◆ Enter the data requested, squadron account number, squadron password, and certificate number.
- ◆ At this point, you can either add a new member or add an additional record to any existing family unit. Click on the appropriate choice.
- ◆ Enter the data from the application.
- ◆ Click —"Add" at the bottom of the page.
- ◆ You will get an email stating that your data has been received and the master data-base will be updated within five business days.

Meet your Members Needs!

Each year a debate is held whether recruiting or retention is more important. After six **years of working with membership, I can't** definitively say which is more important, or guarantees success.

I do know every squadron needs to take time to address the following issues which help with renewal and retention issues.

Is your education program active and based on what the members want? If you can't answer that question immediately, you need to survey them. Call your members by phone or email and find out what courses they want to study and when. Get creative. Can the squadron offer some independently study with mentors available to give help? .Can the squadron give joint clas-

ses with a neighboring squadron to teach an advanced grade?

Do you have an interesting speaker and hold meetings at fun venues? If your answer is no, get busy and address this need. In some organizations, the chair for each meeting rotates and everyone has a month to find a speaker or plan the meeting activity or location. Give this suggestion a try.

- Does your squadron offer an active rendezvous schedule? If not, consider working with another area boating group or yacht club to share in participating with their boating events. Investigate area boating events that benefit a research project for health or the environment. Organize a squadron group of boaters to participate in that event. Plan a rendezvous where those with boats invite the non-boat owners to go for a ride or met the boaters at a specific time and place. You will instill enthusiasm for our favorite past time. Take some kids fishing or boating. There is grant money available for this.

These three areas must be reviewed and viewed honestly by the leaders of every squadron. By promoting events and activities that encourage members bonding, reinforce camaraderie and just plain fun, go a long way toward helping members decide to renew. An active club is a fun place to be and members look forward to the next event, reading the newsletter and attending events. It promotes good feelings and commitment.

When was the last time your squadron honestly answered the question: **Are we meeting our members' needs?**

Based on an article by P/R/C Roberta Dougherty.

Membership National Chair: Connie Beckman

Email: conniebeckman@rapidsys.com

Phone 727 867-3088

USPS 4 You!