



# **LWV Member Portal Administrator Guide**

**Updated 1/7/2026**

# Table of Contents

<b>League Membership</b> .....	<b>4</b>
<i>Member Types</i> .....	4
<i>Joining More than One League</i> .....	4
<i>Join and Expiration Dates</i> .....	5
<b>LWV Member Portal Overview</b> .....	<b>5</b>
<i>Logging In and Navigating the Portal</i> .....	5
<i>Admin Privileges</i> .....	7
<i>Additional Access for State Leaders</i> .....	8
<b>Joining and Renewing</b> .....	<b>9</b>
<i>Renewal Reminders</i> .....	9
<i>Online Join/Renew Form</i> .....	10
<i>Joining/Renewing Online for Second Person</i> .....	12
<i>Online Payment Options</i> .....	13
<i>Failed Payments</i> .....	14
<i>Notifications</i> .....	15
<i>Join Form FAQs</i> .....	15
<i>Auto-Renewal</i> .....	16
<i>Members Paying by Check</i> .....	16
<i>Gift Membership</i> .....	17
<i>League-Paid Dues</i> .....	18
<i>Transferring Members</i> .....	19
<i>Member Survey</i> .....	20
<b>Administrative Features</b> .....	<b>21</b>
<i>View Roster</i> .....	21
<i>Frequently Asked Roster Questions</i> .....	22
<i>Administrative Updating of Member Information</i> .....	23
<i>Reviewing Survey Answers</i> .....	25
<i>Leadership Updates and Changes</i> .....	26
<i>League Profile</i> .....	27
<i>League Resources</i> .....	27
<i>Case Management</i> .....	28
<b>Financial Information</b> .....	<b>28</b>

<i>Dues</i> .....	28
<i>Stripe</i> .....	28
<i>Bill.com</i> .....	29
<i>Refunds</i> .....	30
<i>Tax Receipts</i> .....	30
<b>Optional Features</b> .....	<b>30</b>
<i>Emailing through the LWV Member Portal</i> .....	30
<i>Website Editor</i> .....	31
<b>Transition Implementation Information</b> .....	<b>34</b>
<i>Per-Member Payment (PMP)</i> .....	34
<i>Shortfall Mitigation</i> .....	34
<i>Linking From League Websites</i> .....	35
<i>Updated Bylaws</i> .....	36
<b>Further Resources</b> .....	<b>36</b>
<i>Support</i> .....	36
<i>Troubleshooting Common Issues</i> .....	36
<i>Sample Newsletter Template for Renewals</i> .....	38

In 2025, the League of Women Voters implemented a unified member management system, called the “LWV Member Portal.” This membership platform is used by members across the country to join, pay dues, and update their contact information. Members can join the local or state League of their choice from any League website.

This guide is intended to help League administrators understand and navigate the LWV Member Portal. If at any time you have questions or issues, please submit your question using [this form](#) (which can also be found within the Portal under the ? icon).

## League Membership

### Member Types

All voting members of the League of Women Voters are **Primary** members. There are no joint/household memberships. There are also no distinct student memberships. As has always been the case, anyone who has been a member for at least 50 years will be exempt from dues. They will be classified as **Primary - Life**. For more detail about who qualifies as a Life member, see Administrative Updating of Member Information below.

Non-voting members of LWV are also known as Associate members. Associate members of a League are those who are under 16 years of age or are voting members of another League. Associate members should not be entered into the Portal.

### Joining More than One League

Anyone joining the League of Women Voters is a member at all three levels (local, state, and national), but a person can only be a member of one local League. A member of one League is welcome to volunteer with or donate to additional Leagues but cannot be reflected as a member of the second League.

In explaining this, we often use the comparison to voting – in the same way that none of us can be registered to vote in more than one state, we can’t be a member of multiple local Leagues, both because we as individuals would be overrepresented at the state/national level, and also because that would overstate our total membership as an organization.

A member who lives near more than one League is highly encouraged to engage with the Leagues in both places and is, of course, welcome to make a contribution to the additional League in lieu of dues. However, the individual may not be a voting member of the second League or serve on the League's board.

## Join and Expiration Dates

When a member joins, their expiration date is one year from joining. In order to accommodate long-time members who may have changed Leagues, join dates are editable in the Portal by both League administrators and the member themselves. This can be done on the member's profile (see Administrative Updating of Member Information).

Expiration dates are automatically updated in conjunction with payment, either an online payment or a check being entered by the member's League. If the payment is made online, the renewal occurs at the time the payment is complete. If the payment is made by giving a check to the League, the renewal occurs at the time the payment is entered into the Portal by the League. If a member's expiration date is incorrect, an update can be requested from the roster (see Administrative Updating of Member Information).

If a member renews before their expiration date, the expiration date is pushed ahead one year. This is also true if a member inadvertently renews twice – the expiration date is pushed ahead one year per renewal, so a member with duplicate renewals will have their membership extended for multiple years.

If a member renews after their expiration date, their new expiration date will be one year from the date of renewal. Even if a member renews after becoming inactive, the system will recognize them as a past member as long as they are using the same email address as the one listed on the roster.

## LWV Member Portal Overview

### Logging In and Navigating the Portal

Members log into the Portal at [portal.lwv.org](http://portal.lwv.org), using the email address listed for them on the roster as their user ID. The member then receives a verification code which they enter on the login screen of the Portal. A video describing this process is available [here](#).

Alternatively, members can choose to set a password rather than use a verification code. This can be done after logging in under Profile → Security.

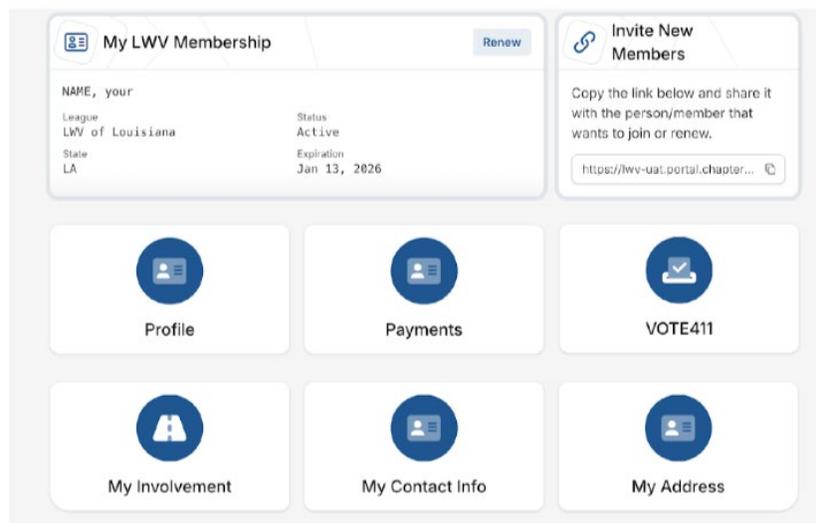
**The system requires a unique email address for each member.** Whenever possible, these should be functional email addresses so that the member can receive renewal reminders and log into the Portal. If a member doesn't have their own email but shares an inbox with another member, the member can establish a similar email address for the second member by simply appending an add-on after the primary email address. For example: *MemberA@gmail.com* and *MemberA+MemberB@gmail.com* could both go to the same mailbox. For instructions on how to do this, see this: [Gmail blog](#). (Note: this does not work for all email providers.) As a last resort, a "fake" email address can be established for a member who does not have an email address or who shares an email address with a

family member. However, those using a “fake” email address will be unable to receive email, log into the Portal, or receive the automatic renewal reminders. For these members, League leaders will need to handle all renewal outreach and roster updates.

The first time a member logs in, they will be asked to complete a member survey, which includes questions from LWVUS and may include questions from their local League (see Member Survey). The member will then see a screen with information pertaining to their membership, including a virtual membership card which shows their member status and expiration date. It will also give them the option to renew. Finally, this page offers a link to the join page that members can share with others who may want to join.

Note: if a member logs in with an email address that is different from the one previously listed for them on the roster, this screen may say they are not an active member. They can reach out to their League’s roster manager to find out which email address was previously listed for them.

From this screen, a member can click **Profile** to update their personal information, **Payments** to see any payments they have made, and **My Address** to add or change an address. It is also possible for members to add a second address if they spend part of the year in one place and part of the year in another. Finally, this screen links to VOTE411.org so members can easily see their voting information.

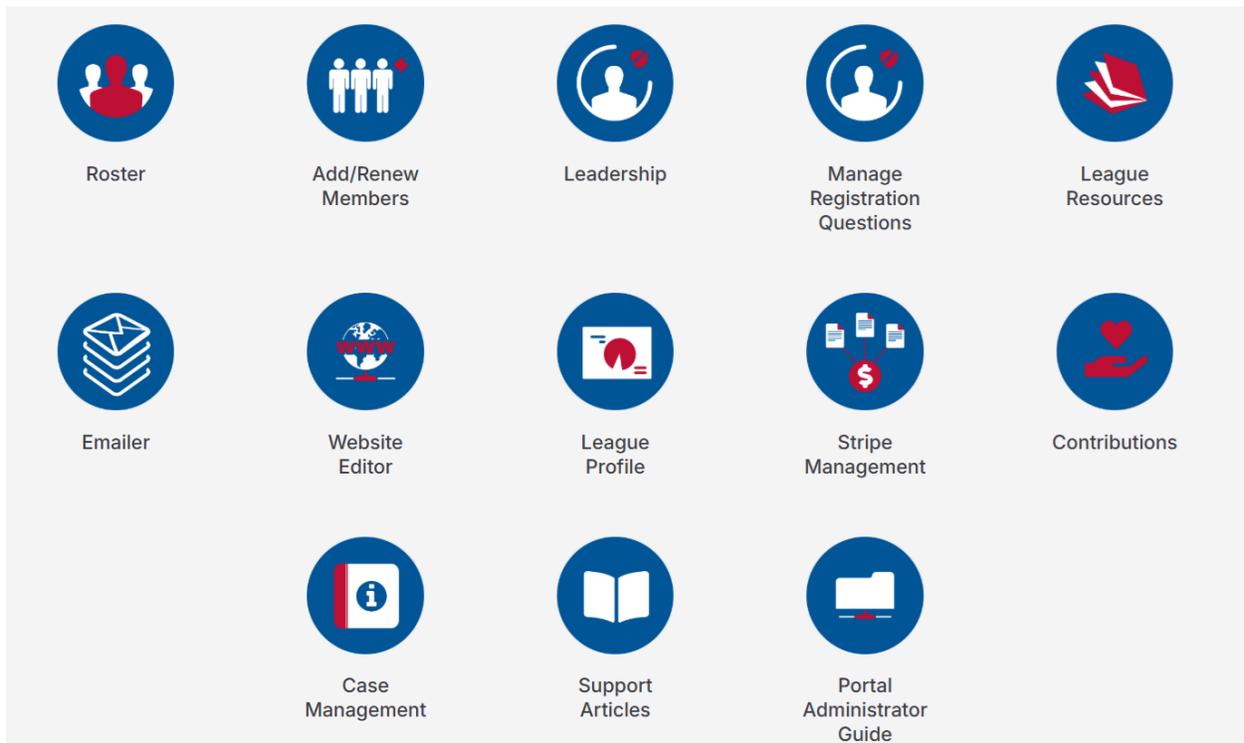


At the top of the screen, members can click on the name of their League to see options that pertain to the local League. For a general member of the local League, this will show a list of League leaders, a folder of any League documents, and a link to the League’s website. **Note:** on a phone, or other small or zoomed-in screen, the options at the top right may appear at the bottom of the screen. If this is happening, click My League to get to your League.



## Admin Privileges

For anyone in a League Admin role as described below, there will be additional functions visible from this screen. (State League Leaders have additional function buttons.) Depending on a person’s role, they will see some or all of the below icons.



Shown below is a list of leadership roles and the access that each role has in the Portal. If you’re in a role that should see these features but you don’t see them, check the top left to see if it says View: League Member. If so, change it to View: League Admin.

Privileges	Leadership Role in LWV Member Portal
All Access – all buttons shown above including Stripe Management; all Roster Access	<ul style="list-style-type: none"> <li>• President</li> <li>• Treasurer</li> <li>• Executive Director</li> <li>• Current Employee</li> <li>• Vice President</li> <li>• Stripe Manager</li> </ul>
Roster Access – all buttons shown above except Stripe Management; ability to edit Roster and Leadership list and use the E-mailer tool	<ul style="list-style-type: none"> <li>• Membership Chair</li> <li>• Communications Chair</li> <li>• Roster Manager</li> </ul>
Admin Access - some of the buttons shown above, including Manage Registration Questions, League Profile, League Resources, and Website Editor	<ul style="list-style-type: none"> <li>• Secretary</li> <li>• Webmaster</li> </ul>

While some of these are elected positions at a League, Stripe Manager and Roster Manager can be assigned as roles to anyone who needs the level of access they confer based on the responsibilities the person has at their League. It is a best practice to give each person the minimum level of access required to perform their role.

Note that other roles appearing on the leadership list will not have additional access within the Portal. The local League must assign other leaders one of the roles above if they would like to grant additional privileges. The proper expiration date should be set consistent with the expected term of the individual in the leadership role. Multiple individuals can hold the same role. Note: League leaders must stay current with their membership to retain access to these functions.

### Additional Access for State Leaders

For state leaders, when you log in there will be a few additional things to note. First, instead of seeing only your own League listed in the top right of the screen next to your name, you will see a search function where you should be able to view any League in your state.

There is also an extra button on the admin view called Local Leagues, which houses a leadership list for local Leagues in the state, as well as a list of the members of all local Leagues in the state.

Note: if you see admin access for all local Leagues except the one for which you are a member, there is a dropdown in the top left that may be set to League Member view instead of League Admin view.

# Joining and Renewing

## Renewal Reminders

All members will receive multiple reminders to renew at the email address in their profile. The table below shows the timing of renewal reminders. This does not replace the need for Leagues to do their own outreach to members to encourage them to renew but should lessen the number of members that the League will need to contact.

60 Days Before Expiration	All members will receive a renewal reminder email 60 days before their expiration date. To see which members have received this email, you can go to the Roster and select the 60 - 31 Days Until Expiration view.
30 Days Before Expiration	Members who do not renew in response to the first email will receive a second renewal reminder email 30 days before their expiration date.
<b>Local/State League Action</b>	After the second email, the member's League is encouraged to reach out directly to the member to remind them to renew. This can be done via any method with which your League has found success in the past (e.g. phone call, text message, direct email, physical mail, etc.). You can see which members are in this pre-expiration window by going to the Roster and selecting 30 - 0 Days Until Expiration.
Expiration Date	If the member does not renew before their expiration, they will receive another reminder email on their expiration date.
<b>Local/State League Action</b>	Members who still have not renewed should be sent a second reminder directly from their League.
45 Days After Expiration	Lapsed members will receive a final reminder email 45 days after their expiration date.
60-Day Grace Period	There is a 60-day grace period after a person's expiration when they are still considered an active voting member of the League (lapsed). After 60 days, they will be considered inactive and any League leader will be unable to continue to serve. The member's data will be preserved in the Portal, and Leagues are encouraged to reach out to recently inactive members.

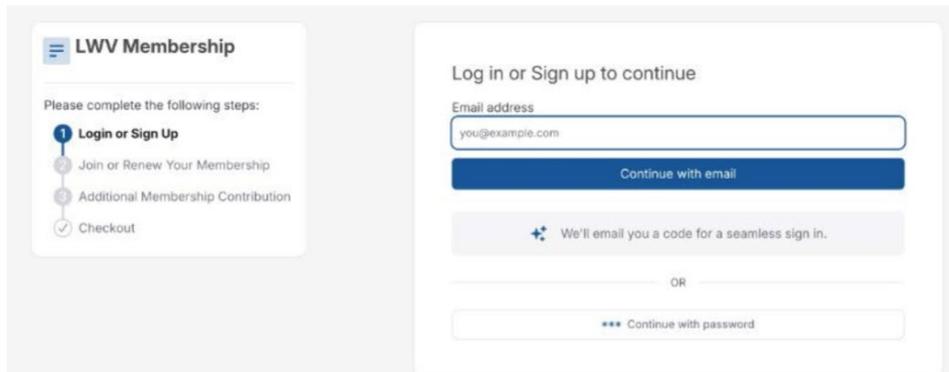
There is a column on the roster indicating if a member has signed up for autorenewal. If they have, they will not receive a notice 60 days before expiration. Auto-renewing members do not need to be included in direct renewal outreach unless their payment does not go through, in which case the member and the League will be notified. For more information, see Auto-Renewal.

## Online Join/Renew Form

Members are encouraged to join and renew online. This [video gives a step-by-step overview of the join/renew form](#). There is also a [Member User Guide](#) available to distribute to members.

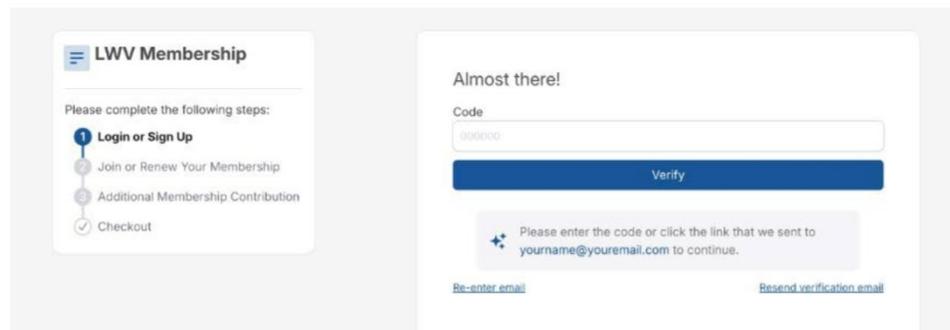
The identification for an individual is their email address. For existing members, this must be the email address in their Portal account. Any questions regarding the email address should be directed to the Roster Manager. Use of an email address not already associated with the member on the roster will result in the creation of a duplicate account.

The first step to begin the form is to enter the email address. For those who would prefer to set a password, this can be done after logging in under Profile → Security.



The screenshot shows the 'LWV Membership' portal. On the left, a sidebar lists the steps: 1. Login or Sign Up (highlighted), 2. Join or Renew Your Membership, 3. Additional Membership Contribution, and 4. Checkout. The main content area is titled 'Log in or Sign up to continue'. It features an 'Email address' input field with the placeholder 'you@example.com' and a blue 'Continue with email' button. Below this is a message: 'We'll email you a code for a seamless sign in.' An 'OR' separator is followed by a 'Continue with password' button with three asterisks indicating a password field.

A verification code will be sent to their email address, which can be entered into the screen below:



The screenshot shows the 'LWV Membership' portal. The sidebar is the same as in the previous screenshot. The main content area is titled 'Almost there!'. It features a 'Code' input field with a placeholder '000000' and a blue 'Verify' button. Below this is a message: 'Please enter the code or click the link that we sent to yourname@youreemail.com to continue.' There are two links: 'Re-enter email' and 'Resend verification email'.

Once logged in, the individual will complete the following form, if not already completed. Existing members can update their information.

The screenshot shows a web form titled "LWV Membership" with a sub-header "Join or Renew Your Membership". On the left, a progress indicator shows four steps: 1. Login or Sign Up, 2. Join or Renew Your Membership (current step), 3. Additional Membership Contribution, and 4. Checkout. The form fields include: First Name, Last Name, Email, Phone (with a country code dropdown set to +1), Street Address, City, Country (dropdown), State/Province (dropdown), and Postal Code.

Below the member information, individuals will be asked to select a dues amount and they can choose from either a pre-set option or "Choose Your Own Amount." If the latter, they can then enter any amount for dues, to a minimum of \$20. Here they can also check a box to indicate if they would like their membership to auto-renew annually.

On the next page, individuals will be asked if they would like to make an additional donation. This will go exclusively to the local League, unless the person is joining/renewing as a member-at-large of the state League, in which case it would go to the state League. This can also be made to recur annually.

The screenshot shows a web form titled "LWV Membership" with a sub-header "Additional Membership Contribution". On the left, the progress indicator shows three steps: 1. Login or Sign Up, 2. Join or Renew Your Membership, and 3. Additional Membership Contribution (current step). The main content area contains the text: "If you choose to add an additional contribution it will go to your chosen League 'LWV of Louisiana'" followed by a checkbox labeled "Would you like to make an additional contribution?". At the bottom right, there are "Back" and "Continue" buttons.

## Joining/Renewing Online for Second Person

Members are also given the option to join or renew on behalf of a second person. If they would like to do so, they can check the box on the join/renew form that indicates that, and additional fields will appear to fill out information for the second person.

The screenshot shows a web form for LWV Membership. On the left, a sidebar titled 'LWV Membership' lists four steps: 1. Login or Sign Up, 2. Join or Renew Your Membership (highlighted), 3. Additional Membership Contribution, and 4. Checkout. The main form area is titled 'Second Person' and includes a note: 'Please note that if you opt to add a second person to this purchase the dues amount you choose below will be doubled.' Below this is a checked checkbox: 'Would you like to join or renew on behalf of another person?'. The form contains several input fields: 'Secondary First Name', 'Secondary Last Name', 'Secondary Email', and 'Secondary Phone' (with a country code dropdown set to '+1'). There is also a dropdown menu for 'Secondary Relationship'. At the bottom, the 'Membership' section displays two tables of dues distribution percentages.

When joining a local-level League, your membership payment will be shared as follows:	
20%	to the local League
47%	to the state League
33%	to the League of Women Voters of the United States

When joining a state-level League, your membership payment will be shared as follows:	
67%	to the state League
33%	to the League of Women Voters of the United States

Some important things to note about this process:

- The member can specify whether the second member lives in a household with them or not. This function can be used for gift memberships, in addition to replacing what was formerly household membership. Note: household membership is no longer an official membership type.
- When the member chooses the dues amount, **that will be the dues amount for each member.** For example, if the recommended dues amount of \$75 is selected, the total transaction will be \$150. A member can choose a lower dues amount, if desired.
- Each member is identified by their unique email address. **It is important that a member not enter their own email address a second time for the second member.** If member A is renewing on behalf of member B, then member A needs to ensure that they are entering the same email address already in the database for member B. (Note: For accounts with “fake” email addresses, the member should contact the local League for the email address.)

## Online Payment Options

Next, the payment method is selected. Your League may want to encourage members to pay by ACH because the fees are lower. A video describing how to pay by ACH is available [here](#).

The screenshot shows two main sections: "Review and pay" and "Choose your payment method".

**Review and pay:** A table lists the items to be purchased. The first item is "State-National Membership (75)" with a price of \$75.00 and a "Remove" link. The total amount is \$75.00.

Item	Remove	Price
S State-National Membership (75)	Remove	\$75.00
Total		\$75.00

**Choose your payment method:** The user is prompted to select a payment method. The "American Express" option is disabled with a warning: "If you're paying with a card, American Express isn't accepted. Please use a different card type." The "US bank account" option is selected and highlighted with a blue border. Below this are input fields for "Email", "Full name", and "Search for your bank". A grid of bank logos is displayed, including Bank of America, PNC, WELLS FARGO, CHASE, USAA, and NAVY FEDERAL Credit Union. A link "Enter bank details manually instead (takes 1-2 business days)" is also present. At the bottom, there are "Cancel" and "Add Payment Method" buttons. A security notice at the very bottom states: "All transactions are secure and encrypted."

The payment method is confirmed. If the member has chosen to auto-renew, they can save their payment method by checking the "Save Payment" box. Otherwise, the payment information is not saved in the Portal. Saved payments not associated with auto-renewals can be removed by logging into the Portal, going to Payments → Payment Methods, clicking the three dots next to the saved payment method, and clicking Remove. If a member wants to cancel their auto-renewal in order to remove a payment method, they can go to Profile → Auto-Renewals.

The screenshot shows the same two main sections as the previous image, but with a different payment method selected.

**Review and pay:** The table now shows a total amount of \$150.00.

Item	Remove	Price
S State-National Membership (75)	Remove	\$150.00
Total		\$150.00

**Choose your payment method:** The "Bank of Love...1776" option is selected in a dropdown menu. Below the dropdown is a checkbox labeled "Save payment method for future use." A large blue button labeled "Pay \$150.00" is visible. Below this is an "OR" separator and a button labeled "Enter new payment details". A security notice at the bottom states: "All transactions are secure and encrypted."

The new member will then be taken to a screen with a receipt, which can be printed. After joining, the member will also receive a receipt email. If the local or state League is a 501(c)(3), this can serve as a tax receipt. If your League's 501(c)(3) status is incorrect, that can be updated under League Profile.

When a member adds their credit card, it says "By providing your card information, you allow re:Members to charge your card for future payments in accordance with their terms." This is standard language that comes from Stripe that basically means "you'll be charged for whatever you're signing up for with this company. (Re:members is the same as ChapterSpot, they were acquired and rebranded.) For members who are concerned about what this may mean, they can be reassured that they'll only be charged for what's in their card, unless they signed up for auto-renew, in which case they'll be charged the same amount in subsequent years. Members can also remove any saved payment method by going to Payments → Payment Methods, clicking the three dots to the right of the payment method, and clicking Remove.

Note that the dues payment will reflect three payment components: a payment to the local League, a payment to the state League, and a payment to the national League.

## Failed Payments

In some cases, credit card companies will flag a payment transaction as a duplicate, meaning that not all three charges are completed. These members will receive automatic emails with instructions for how to complete their dues payments, and the League will be copied on that email. Once the member has paid the remainder, they will appear on the League's roster and the League will receive an email notification that the payment has been resolved. The text of the message and steps to resolve the issue are noted below:

Thank you for your membership with the League of Women Voters. Our records indicate that there was an issue with a recent dues payment you made on [DATE] for \$[AMOUNT].

To resolve this issue and complete your payment please follow the steps below:

1. Log in to the LWV Membership Portal (<https://portal.lwv.org>)
2. In the top right corner, next to your name click on the "Inbox" icon
3. Click "Checkout"
4. Complete payment for the portion of your dues payment that did not go through

**IMPORTANT:** if you believe that you have already been completely charged for membership, either because you made a second purchase or you see a charge for this transaction already, please do not attempt a payment again or respond to the email. Please contact national through the [help form](#).

## Notifications

New members will receive an email inviting them to visit the Portal. The following day, the member will receive a welcome email. The text of the Welcome email is available [here](#). Leagues are encouraged to send their own welcome emails to new members as well.

An email notification for all new, renewing, or transferring members will be sent to the local League's president, treasurer, membership chair, and roster manager.

## Join Form FAQs

### **My League's name is showing up in an unexpected place on the dropdown list of Leagues in my state.**

The Portal automatically alphabetizes the Leagues in any given state. If a League's official name begins with the word "the," the "the" is part of the alphabetizing. For example, LWV of Cape Ann is among the Cs and LWV of the Cape Cod Area is among the Ts. For this reason, the state League is not listed in a consistent place on the list (i.e. at the top or bottom). This underscores the importance of encouraging members to join/renew using the join link that is unique to your League and auto-populates your League's name.

If your League name is incorrect, please fill out [this form](#) to request an update.

### **My League's name isn't showing up at all on the dropdown list of Leagues in my state.**

The join form is populated based on each League's billing address. As long as there is an address listed for the League, it should show up in the dropdown list of Leagues when the state is selected. If there is no state listed for a League in their address under League Profile, that League will not appear in the dropdown and cannot be chosen for a member to join. Check League Profile and make sure there is a state listed for your League.

### **A member wants to pay by check. How can I collect the join form information for this new member?**

To collect the necessary information from a new member, the following sample join forms can be used. The standard form is in PDF format and available in red/blue and black/white. Note: it is not required to have a member fill out a form – this is just an optional tool that Leagues can choose to use. The form does not need to be mailed in with dues checks.

**[DOWNLOAD: STANDARD "JOIN LWV" FORMS](#)**

Leagues can also customize this form using the Canva template linked below. [To learn more about how to use Canva templates, please click here.](#)

## Auto-Renewal

As part of the join/renew process, members can choose to sign up to auto-renew annually. When a member signs up to auto-renew, a payment for the same amount to the same League (with the same second member, if applicable) will be processed the following year.

The member will receive an email 30 days before they are set to auto-renew letting them know that their renewal is approaching and that they will be charged dues on that date, as well as giving them instructions for how to change or cancel their renewal. The auto-renewal will happen on the same date as the transaction the previous year. On their renewal date, their saved payment method will be charged the same dues rate they have previously paid, and they will be sent a receipt. If the payment fails, the member and the League will be notified. Members who have transferred will have their auto-renewal cancelled.

To update the dues amount or cancel an auto-renewal, go to Profile → Auto Renewals. Any upcoming auto-renewals will be listed there with an option to cancel or change the amount. This screen is also where a member can edit any annually-renewing contributions made through the join/renew form.

## Members Paying by Check

Members are encouraged to join and renew through the online join/renew form when possible. Online renewal simplifies the process for members and the League. Members can still join and renew in other ways, as needed. The local League handles the offline renewal process.

A member who chooses to pay by check should give the check to the local League; checks should not be sent directly from members to LWVUS. Checks should be made payable to LWVUS, although checks made out to the local League accidentally may also be sent. If a member would like to make a donation that goes exclusively to the League, the contribution should be written as a separate check and deposited locally – any checks sent will be considered dues and payment will be split by percentage between each level of League.

To enter a check payment:

- From the Admin view of your League in the Portal, click Add/Renew Members.
- Choose “I want to register/renew them myself and will mail a check to LWVUS.”
- If this is a new member, enter their name and contact information on the form. If this is a renewing member, search for the member's name under “Select Existing Member”, and their information will automatically populate the form.

- In the dropdown, choose the dues amount the member paid. When you click “Add/Renew Member,” it will take you to a screen that says "Success! Your offline payment has been recorded!" If you have more to enter, click “Add Another Offline Payment.” If you're finished, click “Continue to Offline Payment Management.”

You will now be at the “Manage Members with Pending Payments” screen. This will list any payments that have been entered that have not yet been received and confirmed by LWVUS. Export this list by clicking “Export” and then “Download.” Print this list and mail it along with the check(s) to:

**League of Women Voters of the United States  
PO BOX 200539  
PITTSBURGH PA 15251- 0539**

Members are considered active and will show up on your League’s roster from the time they are **entered into the Portal**, not when the check is deposited or written. If there is an issue with a payment, LWVUS will reach out to the League’s Treasurer. If a member has been entered and no payment is received within 3 months, it will be deleted, the member’s expiration date will revert to what it was before the check was entered, and the League will be notified.

Once the payment is received by LWVUS, it will be deposited, and the local and state Leagues will be notified at the email addresses listed under Financial Notifications Email in the League Profile in the Portal. State and local Leagues will be sent the appropriate portions of dues via direct deposit from Bill.com, the bill pay system LWVUS uses.

If your League has not received direct deposit from LWVUS before, you will be asked to fill out a DocuSign form with your League’s banking information.

## Gift Membership

In addition to members signing up on their own, members and non-members can purchase a gift membership on behalf of someone else. To do this, they can either log into the Portal and click Gift on the home screen, or they can go directly to [portal.lwv.org/membership\\_gift](https://portal.lwv.org/membership_gift).

As with joining directly, the person purchasing the gift membership can choose any League or dues amount. The recipient will receive a notification of the gift and the purchaser will get a receipt. The purchaser will be notified 90 days before the recipient’s expiration date in case they would like to renew for the member again; if they do not, the member will receive the usual set of renewal reminders.

## League-Paid Dues

League leaders can also make payments for members online within the Portal. Cases where this may happen include:

- A member paid by check and instead of mailing the check, the League would prefer to deposit it locally and forward the member's dues via online payment. This reduces the chances of a check being lost or stolen in the mail.
- A member would like to pay by credit card without logging into the Portal and would prefer for their payment to be entered by a League leader.
- The League would like to subsidize a member's dues and collect little or no payment from the member directly.

To pay dues online on behalf of someone else:

- From the Admin view of your League in the Portal, click Add/Renew Members.
- Choose "I want to register/renew them myself and will pay online."
- If this is a new member, enter their name and contact information on the form. If this is a renewing member, search for the member's name under "Select Existing Member", and their information will automatically populate the form.
- Under "Type of purchase," indicate if this dues payment is coming from a member or if the dues are being subsidized by the League. If the member paid, either by check or credit card, they will be emailed a receipt, but subsidized members will not.
- In the dropdown, choose the dues amount to be paid for the member. If the dues are being paid by the member, list the amount the member chose to pay in dues. If dues are being subsidized by the League, you can choose \$20 as the dues amount.
- Click Continue. This will take you to the screen where a member can make an optional contribution that goes exclusively to your League. This is available in the case of members paying by credit card through a League leader, but if the payment is coming from the League, skip this step.
- Click Continue. This will take you to the payment screen, which works the same way as for an individual membership.

If you are paying for multiple members, it's recommended that you go back to the form and add more members to the same cart and only do the checkout once – this will reduce fees.

Note: for subsidized members, the League will be notified 90 days before their expiration date that their membership is expiring and can choose to subsidize the member for another year. If their membership hasn't been renewed by their League prior to 60 days before expiration, the member will receive the usual renewal reminders that any other member does.

## Transferring Members

When a current member is not yet up for renewal but would like to become a member of a different League (or joined the wrong League by mistake), there are several ways to initiate a transfer.

First, the member can initiate a transfer themselves. To do this, they can log into the Portal and click the ? icon in the top right, between their name and name of their League, which will take them to the Support page. One of the support requests listed on the page is Request League Transfer. When they click that option, it will take them to a form that has their name pre-filled out, and all they need to add is the name of the League they would like to transfer to and click Submit Request.

Note: if the member is nearing the end of their membership year, they can also just join the new League directly by filling out the join/renew form. If they enter the new League as the League they would like to renew with, it will automatically end their membership with the previous League.

The member's League can also initiate a transfer. To do this, a League leader with roster access can go to the Roster and click the three dots at the end of the line with the member's name. On that menu, choose the Request Transfer option. This will display a similar form to the one a member sees when they are doing this themselves, with their name filled in and a dropdown to enter the League they are transferring to. There is also a field to fill out a reason why this member is changing Leagues.

The state League can also initiate a transfer. Someone at the state level with roster access would go to the Roster for the member's League and perform the same process listed above. It is recommended that transfers are initiated by the state League because these are processed automatically, while transfers requested at the local level need to be manually approved by LWVUS.

When a transfer is complete, the member, the League they are transferring to, the League they are transferring from, and the person who requested the transfer are all notified.

There is currently no way for funds to automatically transfer from one League to another. It is up to the two Leagues to coordinate transferring the member's dues, which is generally done by one sending a check to the other. Some considerations:

- A member who joined the wrong League by accident who wants to transfer immediately should likely have the full amount of their dues forwarded, while dues for a member who has spent a significant amount of the year with the previous League may be pro-rated or entirely kept by the previous League.
- If two or more Leagues find that their members regularly join the wrong League and transfer to the other, it may make sense for these Leagues to do a quarterly or

annual accounting of dues that should be forwarded rather than sorting them out one-by-one.

- The League the member is transferring to may waive the dues transfer, e.g. if the member paid the minimum dues rate of \$20 and the local League portion is \$4, the new League may determine that the time spent coordinating, receiving, and depositing the check is not worth the dues amount.
- If a member is transferred between states, the state portion of dues should also be forwarded, and the League initiating the transfer should alert their state League to process the dues forwarding.

## Member Survey

When a member logs into the Portal for the first time, they will be asked to review their profile and add additional demographic information, including birth year, gender, pronouns, and race/ethnicity. Demographic data on individual members will not be shared with League leaders. Data will be shared in aggregate when it can be reasonably understood as anonymous.

Note that each question is required (\*red star), but all questions include a “prefer not to answer” option. For race and ethnicity, the Portal uses the [federal government’s list of options](#). More information about how this data will be used and accessed is available in the [Data Use FAQs](#).

After the screen that collects demographic information, any survey questions from the member’s League will be displayed. The following member questions are initially included for each local League:

- Do you have any accessibility needs for attending meetings/events? **(Text)**
- What ways do you think you might like to get involved (e.g. voter registration, collecting and disseminating candidate information, planning candidate forums)? **(Text)**
- When are you generally available (e.g. weekdays, weekends, evenings)? **(Text)**
- Do you prefer in person, virtual, or type of meeting? **(Dropdown)**

If your League would like to add, delete or change member questions, you are able to do so. The **Manage Registration Questions** screen is where you can enter the questions your League wants to ask members or otherwise remove the default questions. The recommended number of questions is around six. When deciding on questions to ask, it is important that your League has a plan for using the data collected. Questions will be reviewed for alignment with League policies, including nonpartisanship and Diversity, Equity, and Inclusion.

To add or remove questions, click on the **Add/Update Questions** button. This will take you to a list of the questions currently included for your League. To add one or more questions, click Add a Question. Types of answers to questions can only be:

1. **Text:** Members can give free-form answers
2. **Checkbox:** Members can check a box or not. This is good for yes/no or opt-in/opt-out questions, e.g. Would you like to sign up for our newsletter? or I understand that my contact information may be shared with other League members.
3. **Dropdown:** Dropdown questions allow you to define a list of possible answers for the member to **choose just one**. If you are creating a dropdown question, list the options in the Dropdown Options field and separate the options with commas.

After entering a question, if you would like to create another question, check the Create Another Question box at the bottom and click **Next**. If you are finished adding questions, leave this box unchecked and click **Next**. After adding or removing any questions, click **Save**.

**Note:** it is not possible to add multiple-select questions (e.g. Which of the following...) where a member can choose more than one answer. If you would like to ask a question such as "Which committees might you be interested in serving on?" this can be done in several other ways. This could be a text question where the member can type in the answers, or each committee could be listed as a separate checkbox question.

Questions cannot be edited after they are added, but they can be deleted and replaced with substitutions. Previously submitted answers to deleted questions will still be available to review.

Members will only see this survey once – the first time they log into the Portal. If you would like your members to see it again, please contact [membership@lwv.org](mailto:membership@lwv.org). For an overview of how to see the answers given to these questions, see Reviewing Answers.

## Administrative Features

### View Roster

The Roster will default to the view of all active members, but it can be filtered to view a subset of members. To do this, click **Views** and choose the filtered list of members you would like to see.

The filtering options are:

- **All Members:** this is the default view and shows all active members.

- **60 - 31 Days Until Expiration:** this shows members who are between 60 and 31 days from their expiration date and have therefore been automatically sent a first renewal reminder email. These members also appear on the All Members view.
- **30 - 0 Days Until Expiration:** this shows members who are between 30 and 0 days from their expiration date and have therefore been automatically sent a second renewal reminder email. These members should be contacted to renew by the local League. These members also appear on the All Members view.
- **Past Expiration, Renewal Needed:** this shows members who are within the grace period of 60 days after their expiration. These members should be contacted again by the local League. These members also appear on the All Members view.
- **Inactive Within Last 4 Years:** this shows former members who have become inactive within the last four years. These former members do not appear on the All Members view but are available to view if your League would like to follow up with recent members to encourage them to rejoin the League.
- **Active in Another League:** this shows former members of your League who have become active with another League. These members are not included on the Inactive Within Last 4 Years view because they do not need to be encouraged to rejoin.
- **All Active + Inactive Within Last 4 Years:** this shows all active and inactive members, both from the All Members view and the Inactive Within Last 4 Years view for ease of searching all contacts at once.

**Filtering:** The list of members can also be filtered by using the search bar (e.g. if you wanted a list of all members with an address in a certain city, you could search on the name of the city).

**Downloading:** This list can be downloaded to your computer by clicking Export. The export is in the form of a CSV file. You can then save the CSV file as Excel file or another format if you wish.

**Searching:** To search for an individual member, you can type their first, last, or full name in the search bar. You can also search by part of their name followed by an asterisk and any record with that string of letters will come up (e.g. searching kath\* will return any members named Kathy, Kathleen, Katherine, etc.).

## Frequently Asked Roster Questions

**I tried to change a member's email address on the roster, but I got an error message. What should I do?**

LWVUS can help with any data corrections for individual members. Please fill out this [support form](#) with the member's name and email. When the email is changed, this changes both the member's contact email and login email.

## **A member is appearing in the Portal roster but not in the ClubExpress roster. How can I fix this?**

There is some delay in the time between a member joining through the Portal and when their information is sent to ClubExpress. If it has been more than two days after the member joined and they're still not appearing in ClubExpress, go to the member's name on the roster and click the button with three dots at the end of the line with their name. From the menu, choose Report Missing From External Database.

## **One of our members just reached 50 years - how do I indicate that they're a Life member?**

To indicate that they're a Life member, go to the roster and click on the three dots at the end of the line with their name. Choose Update Status from the menu. From there you can change their status from Primary to Primary - Life. Also, to celebrate this change, LWVUS would like to email you a certificate to print and present to this member at an upcoming event. Please email [membership@lww.org](mailto:membership@lww.org) with the member's name, the name of your League, and the date when you plan to present the certificate.

## **Why do deceased members show up on the roster?**

Deceased members who were active within the last 4 years are included on the Inactive view of the roster. This is intended to reduce confusion so members marked as deceased do not fully disappear. If a member is incorrectly marked as deceased, please reach out to [membership@lww.org](mailto:membership@lww.org).

## **A member's contact information changed but I didn't change it. Who did?**

First, the member could have logged in and updated it themselves. Alternatively, it could have been updated through one of the external platforms that Salesforce (the database that houses member information) connects with. For example, Salesforce also connects to the email platform LWVUS uses, so if a member's email address is updated there, that will be transmitted to the Portal.

## **Administrative Updating of Member Information**

From time to time, League administrators may wish to update member information, such as when a member changes a phone number but does not report the change in the Portal or when a member passes away. To make a change, select the member from the roster and click the box with three dots on the far right of the line where the member's name is listed. A menu with a scroll bar will pop up, which includes the following options:

- **View Contact:** this is where you can edit most of a member's information, including their join date and contact information. Note: if a member's email address is already listed in the database, it may give you an error trying to update it. If this happens, choose the Request Email Update option on this menu.
  - On the line with the member's name, click the three dots on the far right.
  - From the menu that pops up, click View Contact.
  - From here, on the top right, click Edit Profile.
  - After updating the information, on the top right, click Save
- **Update Contact's Status:** this function allows you to change a member's status from Active to Inactive, Lapsed, or Primary – Life. See below for a description of each status.
- **Add Role Assignment:** this function allows you to update the role assignment of a leader.
- **Send LWV Member Portal Invite:** this function sends a Portal invite to the member. The text of the invite email is available [here](#).
- **Send SMS:** if you click this option from the Portal on your phone, it will open a text to the phone number listed for this member
- **Send Email:** clicking this option will open an email to the email address listed for this member.
- **Report as Deceased:** this is where you can indicate if a member is deceased.
- **Request Expiration Date Update:** if a member's listed expiration date is incorrect, you can indicate that here. Generally speaking, expiration dates update automatically when members renew, but this should be useful for correcting any initial errors with the data.
- **Request Email Update:** if you are unable to update a member's email address because it is already listed elsewhere in the database, please fill out this form.
- **Transfer Member:** if a member has joined your League in error or otherwise needs to be transferred to another League, that can be indicated here (see Transferring Members). Note: this will not automatically transfer member dues. If a member is transferring from one local League to another, the two local Leagues should coordinate if/how to forward the local League portion of dues. For members that joined the state League and should be associated with a local League, the state should determine the best way to forward the local League portion of dues.
- **Report Missing from External Database:** if your League uses ClubExpress and a member in the Portal is not appearing in ClubExpress or has misaligned information, this can be reported here.
- **Answer Custom Questions on Behalf Of:** if your League uses the Member Survey feature of the Portal and you would like to enter answers to those questions on behalf of a member who has not logged into the Portal, you can do that here.

To change a person's status:

- On the line with the member's name, click the three dots on the far right.
- From the menu that pops up, click Update Contact's Status.

- This will take you to a page where you can choose a new status from the ones listed below by clicking on the Select Status dropdown and choosing the Member Status.
- **Member Status:** A person on the roster can be classified as any of the following:
  - **Primary:** anyone who is an active member, for less than 50 years.
  - **Primary - Life:** anyone who has been a member for 50 or more years.
  - **Lapsed:** any member whose membership has expired but is still within the grace period of 60 days after their expiration date – done automatically by the system.
  - **Inactive:** any member who has not paid dues after the 60-day grace period – done automatically by the system. The person is no longer a voting member of the League. You can proactively change a member’s status to Inactive if they have indicated they want to leave the League to prevent them from receiving renewal reminders.
  - **Volunteer Leader:** a person who is an active member of another League but serves in a leadership role at a second League (e.g. their state League).

Note on changing a member to **Primary – Life** status: Leagues are expected to use reasonable judgment when determining whether a member has reached the 50-year membership milestone. LWVUS does not have rigid criteria for this determination. Membership years are cumulative, meaning all years of membership are added together over time, even if there were breaks, and they do not need to be consecutive. For example, a member who served 25 years, had a two-year lapse, and then served another 23 years would have a total of 48 cumulative years.

Because reaching 50 years of membership is a significant achievement, minor discrepancies—such as differences of a month or so—should not be a concern. Leagues should focus on recognizing the member’s long-term commitment rather than strictly counting exact dates.

## Reviewing Survey Answers

To review answers from the Manage Registration Questions screen, click **View Member Responses**. All responses are available in a list that can be filtered by first name, last name, question, or answer. This list can also be downloaded. For anyone who did not answer the questions, anyone at your League with roster access can enter responses that have been collected from the member another way (see Administrative Updating of Member Information).

- To view answers for a specific member, you can search by the member's name by setting the first dropdown to either First Name or Last Name.
- To view answers to a specific question, you can set the first dropdown to Question.
- To view only a specific answer (e.g. anyone who listed a specific interest), set the first dropdown to Answer and set the second dropdown to Contains to see any answers that contains a given word.

## Leadership Updates and Changes

The leadership screen lists anyone with an additional designation in the League, such as Webmaster or Membership Chair. Only those listed on this page as leaders will have access to the Admin functions on the Portal. These role assignments will also indicate to LWVUS who to contact for things like the Annual League Survey.

The leadership list is different when viewed by a member than it is when viewed by a League admin. Anyone with admin access will see All Previous League Leadership as an option under Views to see former leaders.

To add a new leader:

- Click the Leadership button
- On the top right, click Add Role
- On the Add Role Assignment screen, in the Contact field, begin typing the name of the person. (They should already be on the roster. If they aren't, they can be added as a Non-Member Leader using the button at the top of the screen.)
- Next, choose the role this person is in.
  - The list of roles available cannot be edited by your League, but if there are roles that are common to many Leagues, that may be able to be added to the list. If you wish to suggest a role not currently available, email [membership@lww.org](mailto:membership@lww.org).
- Finally, add the dates of the leader's term. Any elected roles with explicit terms should include the correct end date. If the role does not have a predetermined term (e.g. Webmaster), the end date can be set to a date well in the future.

**Note:** the system will not allow you to enter two overlapping terms of the same role for the same person (e.g. adding a person a treasurer from January through June and adding them as a treasurer from May through December). If you try to enter a role and get an error message, check the All Previous League Leadership view to see if the same person was entered in the same role with overlapping dates.

To add or update end dates for existing officers or other leaders:

- On the Leadership page, click the three dots on the far right of the person's record you are updating.
- On the menu that pops up, click "Edit Term Dates."
- There you can extend a leader's term.
- Alternatively, you can choose End Role Assignment to immediately end the role, or you can choose "Replace Role Assignment" to both end one role and add a new role.

## League Profile

The League Profile screen is where the basic information about your League is housed. This includes:

- **Community/Communities Served:** this field can be filled out to indicate what area your League serves. This is optional but can be useful if your League's name does not clearly describe where it is located.
- **Tax ID and Membership Dues Routed To:** these fields can be updated if your League's tax ID or tax status changes. This field is what informs whether the receipt to a member indicates that the dues paid to your League are tax-deductible.
- **Direct Deposit Status:** this field generally indicates if your League has been set up to receive direct deposits of your portion of check-paid dues. If you have mailed in checks on behalf of members and not received the portion due back to your League, look to see if this field says Direct Deposit Inactive, and that may be why you haven't received payment.
- **Public Contact Email and Phone:** this email address and phone number are shared publicly with those who may want to contact your League. These fields are optional.
- **Financial Notifications Email:** this email address is where notifications from LWVUS regarding payments are sent. This includes notifications related to dues payments made by check and notifications when a member's payment has failed.
- **Annual League Survey Contact Email:** this email address is where your League's link to the Annual League Survey will be sent.
- **Billing Address:** this address is where your League will appear on the map at [lww.org/join](http://lww.org/join). It's important to have an address listed here – it will not be shared publicly.
- **Website and Social Media:** a link to your League's website will appear in welcome emails to new members and in the member view of the Portal. Social media links will appear on your website if your League uses a Portal website or in the footer of emails sent from the Portal email tool (see Optional Features).

To edit any of this information, click the box that says “Have an update to your League's profile?” in the top right.

## League Resources

The League Resources feature is where Leagues can upload files to share. There are four folders within this feature: Governing Documents, Meeting Minutes, Communications, and Other. To share documents with members of the League, upload them into one of these four folders. Note that files are visible to all members.

Roles with access to upload files include:

- President
- Co-President

- Vice President
- Roster Manager
- Treasurer
- Executive Director
- Communications Chair
- Membership Chair
- Current Employee

Please note: the League Resources feature on the Portal should not be considered secure file storage. This is a tool for sharing documents with League members, but anything uploaded to the Portal should be considered a public document.

## Case Management

Case Management is a feature in the Portal where a League admin can see cases that have been submitted on behalf of the League that are still outstanding. The Cases tab lists any cases that have been submitted via the support form or through a form on the roster. The Membership Update Requests lists any expiration date or email update requests. A League admin can edit or cancel a request by clicking Update Request from this screen.

## Financial Information

### Dues

In the Portal, new and renewing members choose their dues amount. The recommended dues amount is \$75, but a member can choose to pay any amount higher than that, or any amount lower than that to a minimum of \$20.

Under the dues model, each member's dues will be split by percentages:

- Local Leagues will keep **20%** of member dues,
- State Leagues will keep **47%**,
- LWVUS will keep **33%**.
- If a member joins as a member-at-large of the state League, the state League will also keep the 20% of dues that would have gone to a local League.

### Stripe

Stripe is the payment processor that the Portal uses to collect member dues paid online. Each League must set up a Stripe account in order to receive dues, and this needs to be an account connected to the Portal. This account can only be used with the Portal. Instructions for setting up Stripe are available [here](#).

Dues will be split at the time a member pays (see the percentages described above). A payment processing fee will be deducted from each portion – each level of League will bear the fees on the portion of dues they receive.

- The credit card fee is 3.9% + \$0.80 for each level
- The fee for ACH (electronic payment) is 1.8% + \$0.50 for each level. A [video describing the process](#) of paying by ACH is available to share with members.

Each payment made through the Portal is listed under Stripe Management, which Presidents and Treasurers should be able to view. The payments are listed with the name of the member. If you click on the payment, it also lists the portion of the payment that was deducted as fees and any portion that was designated as a donation to your League. This information can also be exported from this screen.

There are some additional functions that can only be completed within Stripe itself. To go to Stripe, someone with a login for the League's Stripe account (not the same as the Portal login) can go to [dashboard.stripe.com](https://dashboard.stripe.com). To adjust your account settings, such as the frequency of deposit from Stripe into your League's bank account, go to Settings → Business. To add additional users to your Stripe account, go to Settings → Team and Security.

To see a list of the members included in any given deposit to your League's bank account, log into Stripe and click Reports in the column on the right. Click Payout Reconciliation. On the line with the Payout Reconciliation report, click Download. From there it will give you options of what columns to include in the download – under Metadata select Customer Name.

Payments for members who have paid by check are not included through Stripe. Those are sent through Bill.com (described below).

## Bill.com

As described above, when a member pays by check, the League should enter the member on the roster and mail the check to LWVUS. Once the check is received, the following steps occur:

- The check is deposited by the lockbox on the day it is received. Information from the deposit is sent to LWVUS.
- LWVUS staff pairs the received check with the pending payment listed in the database. At this point, on the Members with Pending Payments screen, the member will move from the Members with Pending Payments list to the Paid/Resolved Payments list.
- Two invoices for each member are sent to Bill.com – one for the local League portion of the dues payment and one for the state League portion. The local and state League are notified of the invoice number and the name of the member.
- If your League isn't yet set up for direct deposit from Bill.com, LWVUS will send a DocuSign to the treasurer to fill out your League's banking information.

- LWVUS staff approves the invoices and payments are sent corresponding to the portion of dues that your League should receive. Note: no fees are deducted from check payments, so a local League will receive a full 20% of dues paid.

## Refunds

Generally, if a member has made a duplicate payment, it's a good idea to encourage them to use the additional payment to extend their membership for an extra year. If they would prefer a refund, each level of League needs to initiate a refund of their portion of dues through Stripe. The local League should notify the state League to refund their portion and email [membership@lww.org](mailto:membership@lww.org) to have the national portion of dues refunded.

To refund your League's portion of dues, go to [dashboard.stripe.com](https://dashboard.stripe.com) and search for the payment under Transactions. Click on the payment and click Refund in the top right.

## Tax Receipts

After a member joins or renews, they will receive an emailed receipt indicating which portion, if any, of their dues are tax-deductible, and this can be used as their tax receipt. Only portions going to 501(c)(3) organizations are tax-deductible.

- LWVUS - the 33% of member dues going to the national organization goes to the national 501(c)(4). This amount is **NOT** tax-deductible.
- State League - if the state League is 501(c)(3), the 47% of member dues going there will be tax-deductible. Check with your state League to find out if the state portion of dues is tax-deductible.
- Local League - if the local League is a 501(c)(3), the 20% of member dues going there will be tax-deductible.

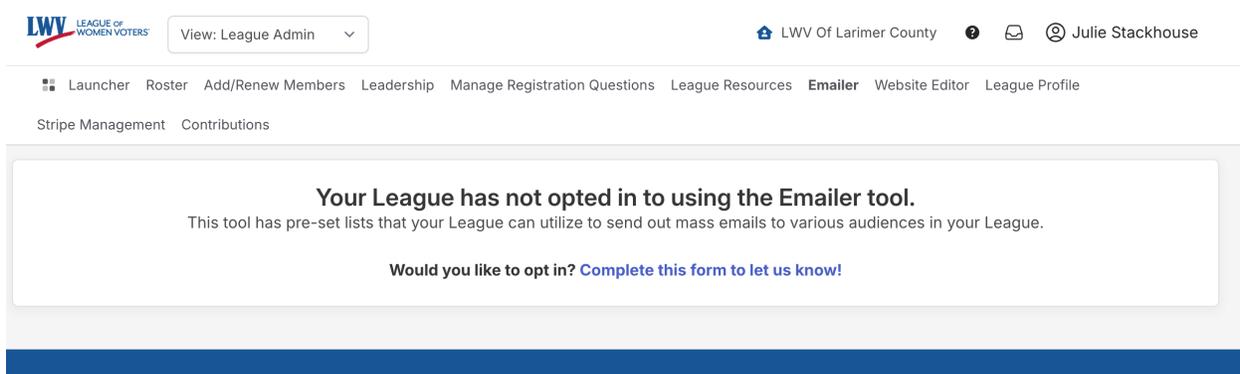
When your League was set up in the Portal, someone at your League was asked to provide the EIN (tax ID) and 501(c)(4) or 501(c)(3) tax status. If either of these changes, this can be updated by going to **League Profile**.

Members cannot pay dues from Donor-Advised Funds or other accounts that must go entirely to 501(c)(3)s. Members can continue to make donations to your League from these accounts if your League is a 501(c)(3).

## Optional Features

### Emailing through the LWV Member Portal

Any local or state League can opt in to use the Portal Emailer tool. Using the email tool, you can send emails to the full roster of members, or a subset as needed. To opt in, complete the following request under "emailer."



Once your League has opted in and been granted access, the following roles will have access to the Emailer tool:

- President
- Treasurer
- Employee
- Vice President
- Communications
- Membership Chair
- Roster Manager

To create a new email, click “New Email Campaign” in the top right. The email will come from your League’s name but from the email address [noreply@notifications.chapterspot.com](mailto:noreply@notifications.chapterspot.com). You can enter your League’s email in the Reply To field so that any replies will go to you.

There are a couple of options for letterhead that you can choose from in the letterhead dropdown. For the recipient list, All Active Members will email all members, or this can be filtered down with another of the listed options. It is not possible to add emails on an individual basis; this can only pull from the roster. Also note that options for filtering are currently limited to the same categories as the roster views and relate to member status.

To view a recording of a training on using this feature, click [here](#). The password is 0vVrj%+N.

## Website Editor

Any local or state League can choose to use the Portal website feature; it is free of charge to Leagues. It is designed to be simple for Leagues that don’t currently have a website and can be launched with minimal editing. Not all Leagues will need the Website Editor feature activated, but if you would like to use a Portal website, email [membership@lww.org](mailto:membership@lww.org). You can watch a video on this feature by clicking [here](#). The password is dUy82Q^%.

The website will have a series of standard pages, many of which can be hidden if you don't want to show them. Under Design Elements you can indicate which, if any, pages you would like to hide. From here you can also enter the communities your League serves.

Each page has photos that are automatically included but can be replaced with any other photos the League has the rights to use, including those from the [LWV Flickr account](#). To upload photos, click Choose New File and upload an image to replace the default photo. Note that the size of the file should be large enough not to be blurry or distorted – ideal minimum image size is indicated under each photo upload.

Many of the default pages include textboxes where you can edit the text you want to appear on the page. To add text, you can type normally in the box, but if you want the text on these pages to include any formatting, there are two ways to do that:

- If you want simple formatting, you can include html tags in the text as you type it in. Some basic ones you may want to include are:
  - Bold: to make text bold, include `<b>` before the text you want to be bold and `</b>` after the text you want to be bold.
  - Italics: to italicize, include `<i>` before the text you want to be italicized and `</i>` after the text you want to be italicized.
  - Link: to include a link in the text, enter `<a href="yourlinkhere">` before the word(s) you want to be the link (with the link you want to use where it says yourlinkhere), and `</a>` after the word(s) you want to be the link. For example, if you wanted to link to the LWV Member Portal, you would include `<a href="portal.lwv.org">LWV Member Portal</a>` in the text, and it would appear as [LWV Member Portal](#).
  - Line break: to start a new line, include `<br>` in the text.
- If that feels daunting, or you want more complex formatting, you can create a custom page (described below) and use the formatting tools available there. When the text looks the way you want it, click View → Source Code. Copy the text shown in the box and paste it into the text box on the page you're trying to edit. Then delete the custom page.

To update the individual pages, click Pages and then click into the page that you would like to update.

**Home:** The homepage will be automatically populated with the League's logo and name. Default text is included that incorporates the information from the Design Elements page, or you can replace this text with your own under Welcome Message.

**About:** The About page includes language about our nonpartisanship, DEI policy, and federated model, which can be retained or replaced with information specific to your League.

**Leadership:** The Leadership page will include the names and contact information for the League's leaders. To choose which leaders should appear here, go back to Website Editor and click Show/Hide Roles.

**Contact:** The contact page will direct visitors to the Contact form at the bottom of the site. Messages will be sent to an email address defined by your League in the Website Editor, under Contact Form. Additional contact information can be added to the text of this page.

**Membership and Volunteer:** Both pages have general text about volunteering and being a member of the League, but these can be edited to include information that is specific to your League.

**VOTE411.org:** This is a direct link out to VOTE411.org. If your League has a VOTE411 white label page, it will link to that page rather than the general site.

**Calendar:** The calendar page allows you to embed a Google calendar into your website to list public-facing events. If your League doesn't have one already, first [create a Google account](#). Once you are logged in, you can use the [calendar feature](#) by clicking into the 9-dot menu in the top right and clicking Calendar. This is where you will add events to the calendar. To add your calendar to your Portal website, go to calendar settings, click on Integrate calendar in the column on the right, and copy the Public URL to this calendar. This can be entered on the Calendar page in the website editor in the Portal.

Note: if some of your members are unable to see the calendar, this is likely an issue with their security settings in Google Chrome. We recommend having them access the website from a different browser or change their settings.

**Custom Pages:** You can also create custom pages for your site. To do this, go into **Pages** from the **Website Editor** and click New Page on the top right. These pages will appear under More in the top navigation. When adding a new page, under Path indicate the word(s) you would like to appear at the end of the URL to designate this page. E.g. if you want to create a page about your annual meeting, you could enter annual-meeting. From the Website Editor page, you can go to Main Navigation to reorder any custom pages you have created. Default pages cannot be moved.

To add a link where visitors to your site can donate to your League, go to Donations and enter a link there. If LWVUS houses Ed Fund money for your League and you would like an Ed Fund donation link to include here, please reach out to [npullen@lww.org](mailto:npullen@lww.org).

If you currently have a website and plan to keep the domain, you can go to your domain registrar and change the site that your domain refers to. If you would like a custom domain but do not have one, you can find guidance about purchasing one [here](#). If you do not have or purchase a custom domain, the URL for your website will be something like YOURLEAGUE.lww.org.

Once your website is set up, you can make it live by toggling the switch at the top of the screen under Settings. If there is no domain listed there, please reach out to [membership@lww.org](mailto:membership@lww.org) to get one set up. There is no preview feature of the website editor, so if you want to see what your site looks like, you can make it live and then toggle the switch back off if it isn't ready.

## Transition Implementation Information

### Per-Member Payment (PMP)

The FY25 (fiscal year 2025) invoice was issued and mailed to Leagues and was due by June 30, 2025. At LWVUS, FY25 runs from July 2024 through June 2025. The final PMP invoice (FY26) was also issued and was based on the January 2025 member count. This included all members immediately prior to launch. This invoice is due by June 30, 2026, but Leagues may request an extension of this deadline if needed. Further explanation of this process is available in the [FY26 Budgeting Guidance](#).

### Shortfall Mitigation

LWVUS is committed to making up any potential shortfall in dues revenue for the first two years after launching the Portal. Below is an overview of how this process will work. More detail on the steps of this process is available in the [Make-Whole Process description](#).

Leagues will be made whole up to the amount of dues revenue calculated as the “base year.” The base year will be the amount that the Leagues would have collected (and likely did collect) with the members counted in January 2025 paying the base amount of dues (i.e. not higher dues tiers). The data we will need to make this calculation and how that data will be collected is as follows:

- **Pre-launch dues rates:** LWVUS will need to know the base rate for individual, household, and student members. Leagues were asked to provide this information as part of the Portal setup.
- **Pre-launch member count:** As usual, all members were counted in January 2025. Roster managers were asked to ensure that League rosters were updated prior to launch.
- **Actual dues taken in through the Portal:** This data will be available through the Portal; Leagues will not be required to provide it.

To determine what the base year is for your League:

- Take the basic dues rate your League charged individual members before launch and subtract \$32 (national PMP) and the amount your state League charged in state PMP for Primary members. Multiply this by the number of Primary members listed on the FY26 PMP invoice you received from LWVUS.

- Take the basic dues rate your League charged for a household and subtract the rate your League charged for an individual. Subtract \$16 (national PMP) and the amount your state charged in state PMP for Additional members. Multiply this by the number of Additional members listed on the FY26 invoice you received from LWVUS.
- Take the basic dues rate your League charged for student members (if anything) and multiply this by the number of Student members listed on the FY26 invoice you received from LWVUS.
- Add these three amounts together (or two amounts, if your League did not collect dues for students). This should be the total amount your League kept in member dues the year before launch of the Portal.

The first year of using the Portal is February 2025 through January 2026. Shortly after this period, Leagues will have the opportunity to request funds. This will require minimal input from Leagues and be based on the above data. The same process will occur after the year between February 2026 and January 2027.

## Linking From League Websites

Each League is expected to have a button on their website linking to the join/renew form. This is particularly important for new members - this is how they will join the League. Current members can renew within the Portal or via links sent to them in the renewal reminder emails, but they can also use the link from the League's website. Each League's unique version of the join/renew link is available in the Portal under League Profile – it's important to use the unique link to ensure that members are joining the correct League.

Each League should also have a link to the Portal itself on the website. This is where current members can go to update their contact information. Optional buttons can be found on the [Membership Renewal Guidance page](#) or in the zip folder linked below. Click the button below to download:

### **BUTTON DESIGNS**

Leagues will also need to ensure that the information shared about membership is up to date. Below are a few sample texts to use as resources when determining what to include on this page. Thank you to LWV of Diablo Valley and LWV of Berrien & Cass County for creating and sharing the first two!

- [Sample 1 - short](#)
- [Sample 2 - long](#)
- [Sample 3 - mission-focused](#)

## Updated Bylaws

Each League needs to ensure that their bylaws align with the changes to membership. Updated Bylaws can be added to the League Resources under Governing Documents. Guidance about what may need to change in your League's bylaws is available [here](#).

## Further Resources

Additional tools for the Portal implementation process are available on the [LWV Membership Portal Resources page](#), including:

- Frequently Asked Questions for [leaders](#) and for [members](#)
- Background information about LWV's [Transformation](#)

## Support

There are several ways to request support. If an individual member's data needs to be updated, the best way to do that is to go to the roster, click the three dots to the right of the member's name, and choose the most appropriate option: Report as Deceased, Request Expiration Date Update, Request Email Update, Request Transfer, or Report Missing from External Database.

If you have a data-related request that doesn't fall into one of those categories, please fill out this support form: <https://www.jotform.com/250306372125144>

If you have a more general question about how the Portal or membership works, you can also reach out to the [Membership Support Liaison](#) for your state to get peer-to-peer support from a knowledgeable League member.

## Troubleshooting Common Issues

**I'm trying to change my email address but it's giving me an error message. Why can't I change my email?**

There is likely a duplicate record for you in the database that already lists your new email. Contact [membership@lww.org](mailto:membership@lww.org) to merge the duplicate records.

**I logged in and my information is missing/it says I'm not a current member.**

The email associated with your membership is likely different from the one you logged in with. Contact your League or [membership@lww.org](mailto:membership@lww.org) to confirm the email listed on the roster for you.

### **I paid for membership but I wasn't emailed a receipt. Did my payment go through?**

It's possible that your receipt went to your junk folder. If it's not there, you can also log into the Portal at [portal.lwv.org](http://portal.lwv.org) and click Payments. Any successful payments would be listed here, and if your payment went through, your expiration date should have advanced one year. It's possible that not every portion (local, state, and national) of your dues payment went through. Any portions that didn't go through should still be in your cart in the Portal. You can access this and pay the remaining portion(s) by clicking the little in-tray icon at the top right of the screen, next to your name.

### **The League received a payment for a member but they're not showing up on the roster.**

It's likely that one or more portions of the member's dues did not go through (see above). The League should have been copied on the notification that went to the member that the dues were not fully processed.

If a member renewed on behalf of someone else and only one of them is showing as having renewed, it's possible that the member who entered the renewal used the same email for both members. You can see if this happened by checking to see if the member who renewed has an additional year of membership beyond what would be expected.

### **I tried to log in but I got a red error message in the bottom right of the screen and it won't let me in.**

This is likely an error that occurred if you changed your email address. Contact [membership@lwv.org](mailto:membership@lwv.org) to resolve this.

### **I already renewed but I'm still getting renewal reminders.**

There are several possibilities here:

You may have a duplicate record. If you renewed with a different email address than the one on the roster, the record on the roster is still sending renewal reminders, because it doesn't recognize you as the same person. Contact [membership@lwv.org](mailto:membership@lwv.org) to get the records merged.

Part of your dues payment may not have gone through. If this happened, you should have received an email notifying you that the payment did not fully go through. You can resolve the outstanding portions of dues by going to the cart in the Portal (clicking the in-tray icon in the top right, by your name).

If you paid in response to a mailing or email solicitation, or if you mailed a check to the LWVUS office, your payment may have been classified as a donation rather than a dues

payment. If you think this is what happened, please contact [membership@lww.org](mailto:membership@lww.org) and your payment can be switched to dues.

### **I used to have admin access to my League but I no longer do.**

Either your role with your League expired in the Portal or your role may be associated with a duplicate account. If you're still appearing on your League's leadership list, contact [membership@lww.org](mailto:membership@lww.org) to merge the duplicate account. If you are no longer on your League's leadership list, another leader with admin access to the Portal for your League can add you or extend your previous term.

## Sample Newsletter Template for Renewals

Below is some sample language to use in your League's newsletter to share the essential information with League members regarding their renewal:

### **Renew Your Membership Online!**

The League of Women Voters Member Portal is our unified membership system for all Leagues!

#### **What do I do?**

- Log in at **portal.lww.org** using your **unique email address**. Not sure of what email address to use? Contact (xxx).
- Click **Renew** on your membership card. If you do not see a membership card, confirm that you are using the correct email address.
- Confirm or update your personal information.
- Enter your state and select your League.
- Choose the dues amount you wish to pay by clicking on an option displayed when you select the ↓ arrow. \$75 is the recommended amount and will be split by the national, state, and local Leagues. You can choose to automatically renew your membership each year!
- Determine if you would like to renew for a second member; the dues rate you chose earlier will apply to this member. Be sure to enter a **unique email address** for the second member.
- On the next screen, determine if you would like to donate to your local League. Your local League will receive 100 percent of the donation!
- Select your payment method; American Express is not accepted.
- Complete the payment. You can save the payment method for future use but you don't need to. If you wish to remove the payment method, go to Payments in the portal and click to the right of the payment method to remove it.

## **Renewal Reminders & Timing**

- Renewal emails are sent starting **60 days before expiration**.
- Renewing early extends your membership a full year from your expiration date.

## **Renewing Online**

Members are encouraged to renew online, although renewal by check is still available through your local League.

## **Questions?**

Please contact (xxx) for assistance—we're happy to help!