# NYLA **MEMBERSHIP** DATABASE GUIDE



### Welcome to the NYLA Website and Member Database!



Our database launched in January 2024. We strongly recommend users review the information provided in this guide to familiarize themselves with features of our database, new process and procedures, etc. Questions or assistance requests can be emailed to membership@nyla.org

### **Guide Navigation Menu**

Use the buttons below to navigate guide information.







The new NYLA website has three (3) new important menus.

1.) <u>The Main Menu</u> - This menu is at that top of your screen and will be available on each page of the website. It houses all information pages for the entire website.

2.) <u>The Quick Links Menu</u> - This menu will be on the right-hand side of the screen and available on most pages of the website. This menu houses any FAQs, forms, registrations, etc. that the organization wants members to have quick access to. This menu will be updated according to the organization's annual calendar.

3.) <u>The User Profile Menu</u> - This menu will display on the user welcome page when logged into a NYLA profile. It will be listed at the bottom the Welcome banner and contain all information users have available to them within their profile. Members who have an active membership will have more member features in this menu.

## Website Menus

#### Home This wording will bring you back to the homepage

#### <u>ABOUT</u>

- Council Members and Council
   Meeting Information
- Office Staff
- Committees
- Partnerships
- Awards
- Bylaws
- Code of Conduct
- NYLA Policies
- NYLA Statements
- Donations

#### **MEMBERSHIP**

- Membership Categories
- Membership Renewal FAQs
- Membership Benefits
- Volunteer Opportunities
- Forms and Guide Center

#### **OUR UNITS**

- Sections
- Roundtables

#### **ADVOCACY**

- Current Legislative Initiatives
- Legislative Priorities Archives
- Become an Advocate
- Contact NYS Elected Officials
- Contact Federal Officials
- Advocacy Day
- Spring on the Hill

#### **CONTINUING EDUCATION**

- Continuing Education Credit
- Library Skills Academy
- Developing Leaders Program
- Webinars

#### **EVENTS**

- Annual Conference and Conference Information Pages
- Conference Archives
- Tradeshow

#### **RESOURCES**

- JobLine
- Library and Information Science Schools
- NYLA Voice
- Library Use Value Calculator Widget

## The Main Menu

The <u>Main Menu</u> on the website houses all website information. The menu currently consists of the following pages in its drop down.

\*Please note we are still in the process of updating website information. Further instructions for requesting website edits for unit/partner information will be forthcoming.

The <u>Quick Links Menu</u> on the website houses all current forms and information that the organization feels members should have at their fingertips.

It often will consist of any open registration forms for upcoming events or webinars, the Join form for potential members, the Renewal form (during open registration) and much more! We also will house information we want members to be aware of such as new FAQs for the website, process and procedure updates, etc.

Two constants that you will always see in this menu are the Donations forms and access to our new automated JOBLine.

### The Quick Links Menu



### The User Profile Menu

The <u>User Profile Menu</u> is the menu of clickable links available upon logging into a profile just beneath the welcome banner (see arrow below). Every user within the new system will establish a **PROFILE**. This is your individual account where all contact, demographic and member information is stored. All users establish a profile in the system when they complete a form for the first time and enter profile credential information. User profiles will have a limited number of links and content available within their profile.

NEW YORK LIBRARY ASSOCIATION Voice of the Library Community		Home About Membership Our Units	Advocacy Continuing Education Events Resources
Join Now			Member Logout Search our site Search
See something wrong? Update your profile! My Profile Event Calendar	Welcome	Lauren Hoyt Admin	Quick Links Continuing Education Information Join NYLA today! JOBLine Make a Donation
			BACK TO MEN

### The Member Profile Menu

Once a user profile completes a membership form and payment is processed, that profile becomes a member profile. The previous user member menu will expand to and become the <u>Member Profile</u> <u>Menu</u> will include all features and links available for members of the organization (see arrow below).

NEW YORK LIBRARY ASSOCIATION Voice of the Library Community		Home About Membership Our Units Adv	vocacy Continuing Education Events Resources
Join Now		[	Member Logout Search our site Search
See something wrong? <u>Update your profile!</u>	Welcome		Quick Links Continuing Education Information Join NYLA today! JOBLine Make a Donation

NEW YORK LIBRARY ASSOCIATION Voice of the Library Community		Home	About	Membership	Our Units	Advocacy	Continuing Education
Join Now						Memb	er Login Search our sit
lisemano							Quick Links
membership@nyla.org							Continuing Educ
Password	3 4						Become
						Θ	Make a
	Retrieve Username   Reset Password						IOL
5	LOG IN						Become A Lit
							Upcoming Events
							Thu Feb 1, 2024
							Annual Budget For
							Cate
							Tue Feb 6, 2024
							FierAuvocacy Day
							Wed Feb 7 2024

### Profile Login Credentials

**BACK TO MENU** 

Unlike our previous database, login credentials for a user profile are chosen by the user. Upon logging into any form for the first time, a user will provide an email address (**Username, arrow 1**) and a password (**arrow 2**) of their choice.

We strongly recommend using a personal email address for your profile as employment emails often change when employment changes. Users will have a space in their profile to add a work email if they would like.

Usernames can be retrieved from any login page (arrow 3) or updated within a user profile while passwords can only be reset from a login page (arrow 4). Users can also update their username and password by contacting the office by email.

Users can check the keep me logged in box (arrow 5) to maintain access to their profile upon navigating away from it, however we also encourage saving your login credentials to your browser or somewhere safe.

# න Member Profile

Once a member logs in, they will be directed to the welcome page of their *Member Profile*.

The new member profile will allow members far more flexibility with their account features. *Moving forward members will be responsible for maintaining their profile information. We encourage using the annual renewal period to make sure all contact and demographic information is up to date in your profile.* 

From their profile, members will be able to:

- View and Edit all Account Information
- View and Pay Invoices
- View the Calendar
- View and Edit their new CE Tracker
- Search the Member Directory
- Access the Forms Center
- Access JOBLine
- and much more!

\*\*Please note menus are subject to change as new features are still being enabled\*\*



NEW YORK LIBRARY ASSOCIATION Voice of the Library Community Home About Membership Our Units Advocace	y Continuing Education Events Resources
loin Now Merr	ber Logout Search our site Search
My Community My Profile Connections My Features Inbox	Quick Links
Profile Involces Forms I've Taken Email History Settings	Continuing Education Information
Lauren Hoyt Balance: \$0.00 View Invoices	Join NYLA today!
Autor Information Control Cont	JOBLine
	Make a Donation
<u>nge Password</u>	My NYLA Profile
About Me 4	Upcoming Events
Member Number 2	Thu Feb 1, 2024
Member Type Admin 45	Annual Budget Form is Due to the office
Username membership@nyla.org	Tue Feb 6, 2024
Contact Name Lauren Hoyt	Pre-Advocacy Day Category: Advocacy
Full Name Lauren Hoyt	Wed Feb 7, 2024 Library Advocacy Day

## My Profile

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One of the most important menu items in your account will be the <u>MY PROFILE</u> page.

This page will allow members to customize the majority of their profile information and much more. Users may have limited access to what features are available.

The main page of the **PROFILE** will display:

*Member Information and Photo* – Members will be able to upload a photo of themselves using the edit tool in the lower right-hand corner of the photo screen (arrow 1). The Join Date, Last Renewal Date and Expiration Date are all included beneath each member's name and picture (arrow 2).

*Current Balance/Member Status Box/View Invoices*— This box displays in the upper right-hand corner of the profile screen and displays the current balance of the account and the membership status of the account. All account invoices can be viewed by clicking on the dark blue view invoices button. Just beneath this box is where members can change their password. The next screen will allow users to enter an email where a reset link will be sent (arrow 3).

*About Me/ Profile Attributes* – This section of the profile displays all member, contact and demographic information available in the account. This includes Member Number, Member Type, Name, Email (Personal and Work), Address (Home and Work), Phone (Home and Work), Title, Library Type, Library System, Pronouns, Library Function, Birthdate, Certification and Certification Number, etc. (arrow 4). <u>Most fields are completely customizable</u> by clicking on the EDIT PROFILE button on the right-hand side of the screen (arrow 5).

The <u>My Invoices</u> section of a profile can allow users to view, pay, download any invoice made in the system. Please note this page displays all invoices for the profile. Organizational membership Key Contacts looking for organization or included member invoices, must go into the My Organization page to find those invoices.

The Invoices page will display a list of what has been paid or is open for payment in each profile. Using the three (3) dots on the right-hand side of each listing, members can view that specific invoice (**arrow 1**).

Each invoice will provide a download button in the upper right-hand corner (**arrow 2**) for and a payment menu down at the bottom for outstanding invoices (**arrow 3**).

Please note moving forward each member is responsible for all open invoices within their account. While we understand many times billing is completed by organizations, it is the member that must make sure the organization has what is required for payment to be completed. The office is here to support when necessary.



#### Member Logo Join Now Quick Links My Profile **My Features** Profile My Organization Forms I've Taken Email History Lib NYLA Member Status Active Jump To Profile Details About Me Member Type Library/Library System - \$3M-\$10M Budget Organization NYLA Library Type None Website www.lindenhurstlibrary.org Susta Library System None

### My Organization

The <u>My Organization</u> page of a profile allows organizational members to review the organizational membership information that their membership is linked to.

This page provides organizational members the:

- Organizational Membership Type
- Name of the Organization
- Library Type (If included by the Key Contact)
- Website (If included by the Key Contact)
- Library System (If included by the Key Contact)

The <u>My Organization</u> page of the designated Key Contact of an organizational membership provides all organization membership information. Reminder, our system does not provide a separate profile for this information. It lives within the current Key Contact's member profile.

This page provides each Key Contact :

- **Org Profile** This page lists all contact and demographic information for the organization. Key Contacts can edit this information using the blue EDIT button provided (see arrow)
- Org Members This page lists all included members of the organizational membership. Key Contacts can click on each name listed to review the profile of each member. Key Contacts can also assign a new Key Contact for their membership. *Please note Key Contacts cannot:* 
  - Add members from this section. Key Contacts can only add members in a form (join/renewal). To add members outside of a form, Key Contacts should email the office the name, email and included section of each addition.
  - 1. Edit an included member's profile. Profile information is the responsibility of each member.
- **Member Invoice** This page allows Key Contacts to view, download, print, or pay any invoice made by an included member.
- Member Forms This page allows Key Contacts to view any forms submitted by their included members



		My Organization				
Org Profile	Org Members	Member Invoices	Member Forms			
Organization		A			Member Status: Active	
	Jump To Prome Detail	15				
			N			
About Me				Edit Profi	e	
lember Type ibrary/Library Syste	m - \$3M-\$10M Bu	dget			-	
NYLA						
6021 State Fa	rm Road					
Guilderland						
New York						
United States						
mail	enyla.org					
membership@						
membership@						

### Forms I've Taken

**BACK TO MENU** 

# The *Forms I've Taken* page provides all forms submitted by the profile in the system.

Once on this page, a list of all forms (registrations, proposal submissions, renewals, etc.) will display. Using the three (3) dots on the right-hand side of each listing, members can view that specific submission (**arrow**).

Each form submission will display the date the form was taken, and all fields completed.

Please note this feature <u>does not</u> allow submitters to edit the submission form. If there are any issues with a submission, email the office at membership@nyla.org and the form can be updated on the backend.



The **Email History** page displays all communication records from the organization and forms to each member profile.

On this page members can see:

- The subject of the communication,
- Who sent the communication
- Status of the communication (if it has been opened),
- The date the communication was sent
- View the communication itself (arrow).

Please note organizational membership communications do not display in this area for Key Contacts. This feature only displays communications sent to the Key Contact's member profile. If organizational members have an alternate email listed as their contact email within their organizational information, renewal reminders, invoices, etc. will only go to the email address that is listed.

## Email History



My Profile My	Features						
Profile	Invoices	My Organization	Forms I've Taken	Email History	Settings		
Settings							
Change Passwo	ord						
Reset your passwor	<u>d</u>						
Contact Prefere	nces						
Control which type of	of communication you	I receive					
Mailing Lists							
Rece	ive newsletters, anno	ouncements and upo	lates from this organ	ization.			
Forum Subscr	iptions						
Name			Description		Notific	ation	
Global Unsubs	scribe						
Unsubscribing v	will stop all emails tha	at are not form confi	rmations and renewa	al notices, regardless	of settings.		
							Unsubscribe

Member can also Global Unsubscribe on this page.

Clicking the Unsubscribe button (**arrow**) will stop all emails that are not form confirmations and renewal notices, regardless of settings. Please note members who are not receiving communications can review this page to confirm they have not been unsubscribed to communications from the system.

### Settings

**BACK TO MENU** 

The <u>Settings</u> page allows members to change their member password as well as customize contact settings for their member profile.

This includes:

**Contact Preferences** - Control which type of communication the member receives from

- Mailing Lists Newsletters, announcements and updates from this organization.
- Forum Subscriptions We currently do not have this feature enabled.

### **My Features**

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#### The <u>My Features</u> drop down contains:

My Committees – Members who are part of a Committee will have all committees listed on this page. Each committee will include a message portal, a list of member on the committee and a file folder with upload materials.

**E-Lists** - We are currently not using this feature of the website. More information will be provided if enabled.

Please note more features may be provided in this area as we enable them in the system. Updates will be provided to membership through communications and the website.



NEW YORK LIBRARY ASSOCIATION Voice of the Library Community		Home	About	Membership	Our Units	Advocacy Continuing Education	Events Resources
Join Now						Member Logout Search our site	e Search
Continuing Education Tracking							RETURN
= sorr	Hours total: 0 Event / Session total: 0					ADD CRE	EDIT EXPORT PDF
Filter Credits This member has no credits from the filters applied  APPLY FILTERS  RESET FILTERS	2					4	
Date Range							
Choose a start date g							
Choose an end date							
Category (None) CTLE NYLA CE							
Added By Administrator Self							

### **CE Tracker**

BACK TO MENU

The <u>*CE Tracker*</u> provides members the ability to track and archive Continuing Education Credit hours in their profile.

Moving forward all NYLA credit provided (CE and CTLE) will be populated in this section. Members will also receive an email confirmation of credit being added to their profile with certificate attached.

Once on the main page of the tracker members can:

- Add Credit Manually (arrow 1)
- Review current hours total in their account (arrow 2)
   (Please note credit that is for more then type of CE will show up for each type of credit. For example, a webinar that get NYLA CE and CTLE for 2 credit hours will provide a listing for 2 NYLA Credit Hours and 2 NYLA CTLE Credit Hours. Members should use the filter functions to see how much of each type of credit hours their account has.)
- Sort credit listings (arrow 3)
- Filter Credit listings (arrow 4)
- Filter by CE Type (arrow 5)

To <u>Add CE hours to the CE Tracker</u>, click on the "ADD CREDIT" button in the upper right-hand side of your tracker page. A pop-up screen to add all credit information will appear.

Please Note: The only required information for each credit addition is denoted by an asterisk. This includes Event/Session Name (arrow 1) and Date Range (arrow 2). All other information fields listed are optional. Members who have added credit and wish to update/change any information listed must contact the NYLA office at <u>events@nyla.org</u>.

Once all desired information is added, members must click the save button (arrow 3). Failure to do so will not save the information provided.

Members can also upload a certificate for any CE hours added to their tracker. Once credit has been saved and listed on the main page of your tracker, find the "**UPLOAD CERITIFCATE**" button for the credit and upload the desired document. Members can always download any certificate they have uploaded into the tracker for their reference.

Members can also export a PDF of all CE hours listed within their tracker at any time. An "**EXPORT PDF**" button can be found in the upper right-hand corner of your main CE tracker page.

### Adding CE to Tracker

DCIATION nunity		Home About Membership Our Units Advocacy
	Add Education Credit	Membe
	Event / Session Name *	
	NYLA Event	1/1/2024
	Credit Hours	Category
	Credit Hours	Select a Category -
has no cr	Location	Description
	Location	Description
	Instructor	
	Instructor Name	
	Expiration Date	
	Choose an expiration date	<u>م</u>
		BACK TO MENU

NEW YORK LIBRARY ASSOCIATION folce of the Library Community	Home About Membership Our Units Advocacy Continuing Education Events Resources
Join Now	Member Logout Search our site Search
	Quick Links
Member Information	
Name First	Continuing Education Information
	To b MRT A fordeut
Name Last	JUILINTEA (Oday)
	JOBLine
Contact Name	Make a Donation
	My NYLA Profile
Library Information	Upcoming Events
Organization	Thu Feb 1, 2024
	Annual Budget Form is Due to the office
Library Type	Category: Office Announcements
Select an option	▼ Tue Feb 6, 2024
Select an option	Pre-Advocacy Day
Public	Category: Advocacy
Special	Wed Feb 7, 2024
Clear Search	Library Advocacy Day
	Category: Advocacy

1 Results		Me S	ember earch
	Pronouns She/Her Email Organization Job Function School Librarian Job Title Library Media Specialist Library System Organization Website Library School	Member Type Professional Membership – (\$40,000 \$99,999) Member Status Active Committees	-
10 V Per Page of 1		Page 1 v of 1	rst Previous Next Last

The <u>Member Search</u> is a member benefit that allows active profiles to search for any active member in our database.

The new search only allows members to search by (arrow 1):

- Name (First, Last)
- Contact Name (Both First and Last)
- Organization
- Library Type
- Library System

Please note past search directories for unit members will no longer be available in individual profiles. Units will be provided a full list of active memberships twice a year (July 1<sup>st</sup> and December 1<sup>st</sup>) and by request to the <u>membership@nyla.org</u> email. Search results will display all active/graced members currently in the system for the search perimeters.

Each result will list:

- Name
- Pronouns
- Primary Email Address
- Organization
- Job Function/Title
- Library System
- Organization Website (Organizational Profiles)
- Library School
- Member Type
- Member Status Committees (Personal Profiles)

### Forms Center



The *Forms Center* page provides the links to any forms or guides that members or users need access to.

One this page you will find:

#### **Financial Forms**

Reimbursement/Disbursement Form (Fillable PDF)

#### **Membership Forms**

#### **Unit Forms**

Section representative Form Roundtable Representative Form

#### NYLA Manuals and Guides

Digital Membership Card

**BACK TO MENU** 

The <u>Digital Membership Card</u> is available for all active members within their profile.

This card will display:

- Member's Name
- Member Type
- Member Expiration Date
- Signature Line for the Member

A print button have been provided so members can print the card and it loads correctly (arrow). Please note printing the page may cause the image to distort.





### UNIT JOIN FORM

Member can use the form below to add any additional sections and roundtables to their account.

1. Addtional Section(s) - \$15 fee.

2. Roundtable(s) - \$10 fee.

Further information about each <u>Section</u> and <u>Roundtable</u> can be found using the links on their respective website pages. Completion of this form will allow direct payment or will generate an invoice that can be sent to your organization or a billing entity of their choice.

#### Additonal Section(s)

ASLS - Academic & Special Libraries Section - \$15.00 FLS - Friends of Libraries Section - \$15.00 LAMS - Leadership and Management Section - \$15.00 LTAS - Library Trustees Association Section - \$15.00 PLS - Public Libraries Section - \$15.00 SMART - Section on Management of Information Resources & Technology - \$15.00 SSL - Section of School Librarians - \$15.00 YSS - Youth Services Section - \$15.00 Roundtable(s) CLWCRT - Coalition of Library Workers of Color Roundtable - \$10.00 CORT - Correctional and Outreach Resource Team - \$10.00 ENSLYMA - Eastern New York School Library Media Association - \$10.00 ESRT - Ethnic Services Roundtable - \$10.00 IFRT - Intellectual Freedom Roundtable - \$10.00 LHRT - Local History Roundtable - \$10.00 M&PRRT - Marketing & Public Relations Roundtable - \$10.00 MLRT - Municipal Libraries Roundtable - \$10.00 MSRT - Making and STEAM Roundtable - \$10.00 NYBLC - New York Black Librarians' Caucus - \$10.00 PCRT - Pop Culture Roundtable - \$10.00 RLRT - Rural Libraries Roundtable - \$10.00

START - Sustainable Thinking & Action Roundtable - \$10.00

SLST - EAST - School Librarians of the Southern Tier - East - \$10.00

### **Unit Join Form**

The <u>Unit Join Form</u> allows active members to add additional units to their membership. The form displays all active NYLA sections and roundtables (units). Members can make their selections. Once submitted, a check out page will be provided. Members can choose to pay directly in the form (credit card) or create an invoice. Invoices being paid for by organizations should be sent directly to the billing contact.

Please note all members get one (1) included section with the purchase of their membership. This included membership must be selected within the join/renewal form. Included sections cannot be added using this form. Members who did not include a section with their membership, can reach out to the office for further assistance at <u>membership@nyla.org</u>.



# JOBLine

The new <u>JOBLine</u> feature allows all users (members/non-members) to add job postings to our website.

Job postings are free for NYLA Members. Non-members may post to JOBLine with either a 30-day, 60-Day, or 90-Day duration. This fee includes publishing the job posting on JOBLine as well as in our weekly e-newsletter, News You Can Use, which goes directly into the inbox of our statewide membership every Tuesday for the duration selected.

To post a job in this listing, login to your profile (**arrow 1**). Login credentials are the same as your user/member profile. Click the "**Post A Job**" button in the top left corner (**arrow 2**). Follow the instructions to post your job. Please note we do NOT manually post job listings. A salary range is required to post a job to JOBLine as this is best practice. If you are having trouble, please feel free to reach out to **marketing@nyla.org**.

The home screen provides:

- Employers post a job and review resumes (arrow 3)
- Job Seekers browse jobs and upload their resume (arrow 4)
- Sign up for job Alert (arrow 5)
- Review/filter search of current job listing (arrow 6)
- Review pricing (arrow 7)



# **Joining NYLA**

Joining NYLA is available with efficient and streamlined forms. The Join Form can be found on the NYLA website in the navy-blue banner on the upper left-hand side (arrow 1).

Individuals seeking more <u>Membership</u> <u>Information</u> can review on the website before choosing to join the organization.

After navigating to the <u>JOIN FORM</u>, users should choose a Member Type (arrow 2).

Membership structure and fees can be found on the <u>Membership Categories</u> page of the website.



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		<u>Day</u>
Member Type *		Category
Professional Membership (\$40.000 - \$99,999)	<b>0</b> ×	Mon Oct 13, 2025
		The NYLA Office is Closed 1
Membership Options		Indigenous Peoples' Day
		Category
1 year - \$125.00		Wed Nov 5, 2025
N N		2025 NYLA Conference
Included Membership - Profile Name *		View Full Cale
First Name	Last Name	
Organization*		
		1. 1000
Fmail		New York Library Asso
Personal*		2,525 followers
nuontaRaula nen		549 posts
evensijiniya.vrg		
Work		Do you know
		LIBRARY SEILLS public, school,
Billion Contact		FREETY HEALIGHT
Dining Contact		
Birthdate		LIDIAT STILLS public librar
		TRUTY BEREAT
Pronouns		يري هر ڪ هر
She/Her		View full profile on li
He/Him		
They/Them		
Ey/Em/Eir		

your account will need to add a profile for you t	to the system when they complete this form. You should not be comp	pleting this form if you are not paying for a personal	
membership account.			
Member Type*			
Library/Library System - \$1- \$100K Budget		~	Upcoming
Membership Options			Tue Feb 6, 20
I year - \$100.00			Pre-Advoc
			Wed Feb 7, 20
Organization Name*			Library Adv
Organizational Email (This is the email contact	t for the organizational account.)*		Fri Apr 19, 20 2024 YSS
Organizational Email (This is the email contact	t for the organizational account.)*		Fri Apr 19, 20 2024 YSS Thu May 16, 2
Organizational Email (This is the email contact Organization Address*	t for the organizational account.)*		Fri Apr 19, 20 2024 YSS Thu May 16, 3 2024 SSL
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Organizational Email (This is the email contact Organization Address* Une 1 Une 2 City Select Country	t for the organizational account.)*	✓ Zip/Postal Code	Fri Apr 19, 20 2024 YSS Thu May 16, 1 2024 SSL
Organizational Email (This is the email contact Organization Address* Line 1 Line 2 Oty Select Country Website	t for the organizational account.)* Select StateProvince	✓ Zip/Postal Code	Fri Apr 19, 20 2024 YSS Thu May 16, 3 2024 SSL

### Personal vs. Organizational Member Join Form

If a <u>Personal Member Type</u> is chosen, the type and corresponding fee will be noted on the screen (arrow). The user will be directed to complete the remainder of the form with contact and demographic information, unit selections and optional donations. Included contact and demographic information will populate the user's new member profile.

Please note fields that are not required are available for editing within your member profile at anytime.

If an *Organizational Member Type* is chosen, the type and corresponding fee will be noted on the screen (arrow). The user will be directed to complete the remainder of the form with organization contact and demographic information, included member information, optional donations. All included member contact and demographic information will populate organization profile.

Please note fields that are not required are available for editing within each's member's profile at anytime.

Membership		Quic
Individual Name*		_
laure	test	
Organization*		
test		
Email		
Personal*		Upc
Birthdate		Tue
Pronouns		Wec Lib
None		
Phone		Fn A
Mobile	test New York	• 123
Work	United States	
	Address - Work	
Address - Home	Line 1	
test	Line 2	
	City Select State/Province	▼ Zip/
	Select Country	
	Create Linked Profile	
NMA .	Previous Next	
141		_
Join Now	Ment	ber Logout
Membership		Quick
		Со
Flaure test (Sell)		
•	Delete	
Individual Name*		
First Name	Last Name	
Organization*		Upcor
Email		Tue Fel
Personal*		Pre-A
events@nyla.org		Wed Fe
Birthdate		LIDIA
		E. A. A.
		2024
Pronouns		2024
Pronouns • None		2024 Thu Mi 2024
Pronouns  None Phone Mobile		2024 Thu Ma 2024
Pronouns None Phone Mobile		Thu Me 2024

### Adding Key Contact and Included Member Profiles

Once the key contact inputs the organizational profile information, the next fields will require information for the Key Contact's member profile (arrow 1). Key Contacts can include contact and demographic information and unit selections in each member tab.

Please note the Key Contact serves as the membership holder and is required to complete all information for the membership. We strongly recommend the director or someone they appoint be this individual and not billing department employees.

After the Key Contact inputs their member profile information, they can use the arrow on the left-hand side of their name to collapse their profile drop down. There will be a <u>Create Linked Profile</u> button at the bottom of the screen (arrow 2). This button will create new member profiles. Key Contacts should create each included member's profile, inputting their contact information and unit selections. Each member tab requires a name and email. If tabs are created and do not include all required fields, users will not be able to go to the next page. Each tab includes a delete link for any profiles added in error.

Please note currently key contacts must add included sections and any additional sections and roundtable are optional to included member profiles. Included members can also add additional units and roundtables from their personal profile. Members who were not provided an included section can reach out to the office for assistance in getting this added to their profile at membership@nyla.org.

# **Renewing your NYLA Membership**

Approximately 45 days prior to the May 31<sup>st</sup> membership expiration date (May 31<sup>st</sup>), all eligible active members will be sent an email communications that includes the renewal form link and renewal information. The renewal form link can only be found in these email communications.

For organizational members, <u>this communication will be sent to</u> <u>the email listed as the contact email for your organizational</u> <u>membership.</u> This will not be sent to the Key Contact's profile if that email differs from what is listed as the organizational contact email.

Please note for organizational members, only the Key Contacts will be eligible to access the renewal form. Included members are not responsible for completing a renewal form. New Key Contacts can either be designated by a previous Key Contact within the current KC's member profile (My Organization section) or the office an make this change. Requests can be emailed to the office.

*Members* who wish to change between organizational and personal memberships, must reach out to the office for assistance at <u>membership@nyla.org</u>.

A <u>Membership Renewal FAQs</u> page is provided on the NYLA website to assist with this process and answer any questions. Members can also reach out to the office directly at <u>membership@nyla.org</u>.



To open the renewal period for all members, our system creates an automated invoice in each current member's profile. *This invoice is solely based on the previous year's membership selection*. This invoice cannot be changed or customized if paid for. All members should use the *link provided in your renewal notification* to submit the renewal form so they can customize their membership selections for the upcoming year. This includes changes to member type, profile contact and demographic information, included member information, unit selections, donations, etc.

Member renewal forms (organizational and personal) will resemble the Join Form noted previously. Current profile contact and demographic information will automate within the fields provided. Member should review this information to make sure it remains accurate. Any changes made to the automated information will be updated within the member profile(s).

Organizational members will be provided a screen to update their included members. Full instructions for navigating this page will be provided within the form. Key Contacts should review this information and make changes necessary.

## **Renewal Form**

2025-2026 Membership Renewal Information			Quick
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Library/Library System - \$100-\$500K Budget			× ~ L
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year - \$500.00			Весоп
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Once all member information is added, the form will provide a **Donations page**. Below are the current NYLA and Unit funds available for donation. Further fund information can be found in the form. We are so appreciative of all our donors!

#### **NYLA Donations**

NYLA Fund Intellectual Freedom Fund Disaster Relief Fund Legal Defense Fund

#### **Sections Specific Donations**

FLS Randall Enos Conference Scholarship NYBLC Andrew Jackson Scholarship Fund NYBLC Hoke Gethers-Muhammad Memorial Scholarship

SSL Carol A. Kearney Scholarship Fund YSS Ann Gibson Scholarship Fund







NEW YORK LIBRARY ASSOCIATION Voice of the Library Community

lome	About	Membership	Our Units	Advocacy	Continuing Education	Events
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Join Now	Member Logout Search our site
Payment	Quick Links
Total: \$175.00	Continuing Education Information
How would you like to pay?	Join NYLA today!
Select pay option Select pay option Pay now Invoice me	JOBLine Make a Donation
	Upcoming Events
	Tue Feb 6, 2024 Pre-Advocacy Day
	Category: Advocacy Wed Feb 7, 2024 Library Advocacy Day
	Category: Advocacy
	2024 YSS <u>Spring Conference</u> Category: Units
	Thu May 16, 2024 2024 SSL Conference
	Category: Units

Join/Renewal Form Payment Page

> A summary page of all form fields and items chosen will be provided at the end of all NYLA forms. We suggest reviewing this page carefully to make sure the invoice created has all information included correctly. Once all information is confirmed, users should continue to the <u>Payment</u> <u>Page</u>.

> > BACK TO MENU

This will allow members to choose to:

**Pay Now**: Use a credit card to process the invoice with payment.

<u>Invoice Me</u>: This option replaces the previous Bill Later option and allows for an invoice to be created for the form. An email field will be provided for the invoice to be sent to. *Please note if the desired billing contact does not have an email, the member is responsible for providing the invoice to their billing contact for payment*.

Payment policies and information can be reviewed on the NYLA website.

## Reminders

NYLA has been through a lot of change in the last few years. We are extremely excited to continue the process of bringing streamlined, efficient, transparent procedures to our membership.

A few reminders:

- If you are having difficulty understanding a process and procedure and need help completing something in the system or just have questions, DO NOT PANIC! NYLA Staff are available Monday-Friday 8:30 AM to 4:30 PM for assistance and can be emailed at anytime. You can find all office information on the <u>Staff</u> page of the website.
- Communications and guides will be updated as we continue to make updates, and the membership will be notified of these changes.
   Please make sure you are reading all information available.

