



# Chapter Bundle Membership Roster Update

**Tasked to:** Bundle Coordinator visit [Wild Apricot Bundle Coordinator Guide](#) for full information.

## Definitions

- Bundle Coordinator: (BC) The person tasked with maintaining a State Chapter or BO Chapter PT Subcommittee
- State PT Chapter or BO Chapter PT Subcommittee Bundle: (SCB)

## DATA FIELDS NEEDED visit TipSheet – [Chapter Bundle Import Roster Template](#)

To assist PTN with the import/addition of new SCB members, please review the above Tip-Sheet for *column headers* and include all data requested. PTN respectfully asks that if you do not ask your SCB members for this data, please do. Providing the data will assist PTN with the import and future reporting statistics. Please save your Excel roster as a .csv file type.

## PRO TIPS:

- The column headers wording must match the template wording/sequence exactly.
- Click on highlighted *Row 2 Cell 'NOTES'* and to read complete details.

## RENEWING MEMBERSHIP BUNDLE visit Wild Apricot Help: [Renewing Bundle Members](#)

PTN Membership is Jan 1 through Dec 31; PTN invoice sent annually the beginning of December to BC.

- You are encouraged to review your bundle in November to add new members or archive existing members. This will assist with correct Chapter Level invoicing. NOTE: if your chapter is invoiced and pays for a larger number of members, no refunds will be given. See Maintaining State Chapter PTN Membership Bundle below.
- Upon renewal, **existing** Bundle members will be updated as PTN members.
- You are encouraged to remind your bundle members to update their profile at [permittechnation.org/profile](https://permittechnation.org/profile).

## Maintaining State Chapter PTN Membership Bundle Visit Wild Apricot Help: [Removing a bundle member](#)

It is **critical** you archive bundle members who are no longer members of your SBC. Leaving non-members shown as active in your PTN bundle, will increase your PTN Chapter membership load which may then increase your annual dues amount.

- Complete a review of bundle members annually at a minimum;
- Archived bundle members will remain on the bundle member list until deleted by an Account Administrator. Archived names will be in black font and will not count towards total active members.

## New Bundle Members – visit Wild Apricot Help: [Adding members to a bundle](#)

- Chapter Bundle Coordinators are asked to manually add <5 new members (i.e., please do not send new State Chapter member(s) 1 or 2 at a time to PTN Admin).
- >5 members, send a State Chapter new membership roster as a .csv file to [info@permittechnation.org](mailto:info@permittechnation.org).
- Template listed above; **please save as a .csv file** and include all column headings/data.
- On the above link, *WA Help - Adding members*, read - *Preparing the import file*, then skip down to *Adding or Updating bundle members*.