

## Frequently Asked Questions & Answers About OMDR

### **1. How can unit presidents get access to OMDR?**

When a local unit president (LUP) is entered into the OMDR (Online Membership Directory Record) system, he/she will receive a welcome email (provided that an email address was entered) that includes his/her individual member ID number. The unit president can then sign on to OMDR using that individual member ID number and the PTA unit's National eight digit ID number. The unit president can also call his/her district PTA or the National PTA office to obtain these numbers.

### **2. How does a unit president get entered into the system?**

In California the district PTAs submit an officer update sheet (a type of Excel spreadsheet) monthly or more frequently to the California State PTA office. These sheets include all contact information provided to the district for the presidents and some other leaders in their district. The California State PTA membership clerk uploads the information from those spreadsheets into the OMDR system.

### **3. What if a PTA Unit's National ID number has less than eight digits?**

If the National unit number is less than eight digits, add enough preceding zeros to make it an eight-digit number. Note that some computer programs don't easily preserve preceding zeros.

### **4. Do all unit board members need to be provided access to get into OMDR?**

No. Only those who will be regular users of the system need OMDR access. This may vary with PTA but may include the local unit president, membership vice president/chairman, and/or treasurer, etc.

### **5. Can council and district leaders sign themselves onto OMDR with their Member ID number and eight-digit National unit ID number just as a unit officer can?**

No. Council and district officers must be given access by a State PTA OMDR user.

### **6. Do councils need access to OMDR?**

Each district should have a discussion about the role of councils in maintaining or using the information in OMDR. If the district wants to delegate some responsibility to councils, then certain council leaders must be given access.

### **7. Can a council leader who has been given access to OMDR download a list of unit presidents with the corresponding member ID numbers?**

Yes. A council must choose "demographic search by position" and pick "Local Unit President" from the pull down menu. This will yield a list of the LUPs on the computer screen with their information including the member ID number for each listed president. Both council and district users have the menu option to conduct a "demographic search by position". The resulting list can be searched or downloaded.



**8. Can a council user find one member ID number without having to download or search through the whole list?**

Yes. The member ID number is in the first column of the list resulting from a "demographic search by position". That list has a search function by "last name" so the user can easily find the member ID number for one person in the list without actually downloading the whole list.

**9. When a list of members is downloaded, why do some people appear twice?**

An officer should appear twice in a list of members, once as the officer and once as a member. If a member is appearing twice, it probably means he/she was entered with different versions of his/her name or different contact information (and then would have two different member ID numbers).

**10. What role do "term dates" play in OMDR?**

A person's access to OMDR as a user ends when his/her term in that position ends. For members, their membership year coincides with their term date but unlike officers, members stay in the system for one year after the end of the membership year to allow for easy renewal of their membership.

**11. Why does it matter what position is used to enter officers?**

The unit level has an email blast function that allows emails to be sent to a particular category/position. If there is news that a local unit president should receive and this function is used, the LUP will not get the information if he/she is entered as a "president". (Council and district users can download a list of a specific category of officer (for example, treasurers) using the "demographic search by position" and then cut and paste the email column into an email.)

**12. Where does one find the membership card template?**

The membership card printing function is accessible at the unit level of OMDR. Units can download a template that includes just their National ID number, the name of their PTA and their membership years. Or once they have entered members, they can select names to be printed on the cards in addition to the foregoing information. One caveat - the date on the card must match the membership years listed in OMDR for that unit. In order for the printed card expiration date to be October 31, the unit must list each member's term end date as October 31 and/or update its membership year to end on October 31.