LWV Member Portal

Administrator Guide

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Overview

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.

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.

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 LWV Member Portal under the **?** icon).

Logging Into and Navigating the LWV Member Portal

Members log into the LWV Member Portal at portal.lwv.org, using their email address as their user ID. The member then receives a verification code which they enter on the login screen of the LWV Member 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. 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 LWV Member 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. (Refer to the Survey section of this document for more information.) 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.
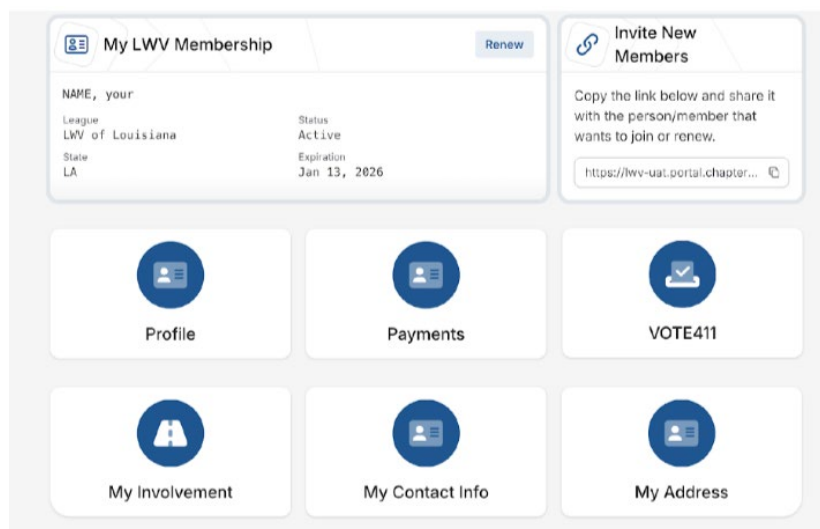
At the top of the screen, members can click on the name of their League to see options that pertain to the local League. For a general member of the local League, this will show a list of League leaders, a folder of any League documents, and a link to the League's website.
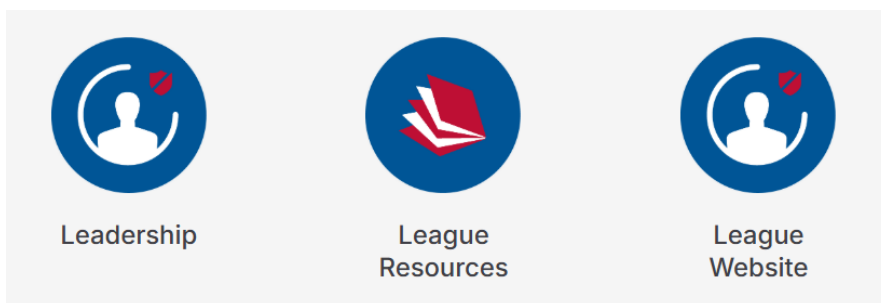
Admin Privileges

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.)

Shown below is a list of leadership roles and the access that each role has in the Portal.
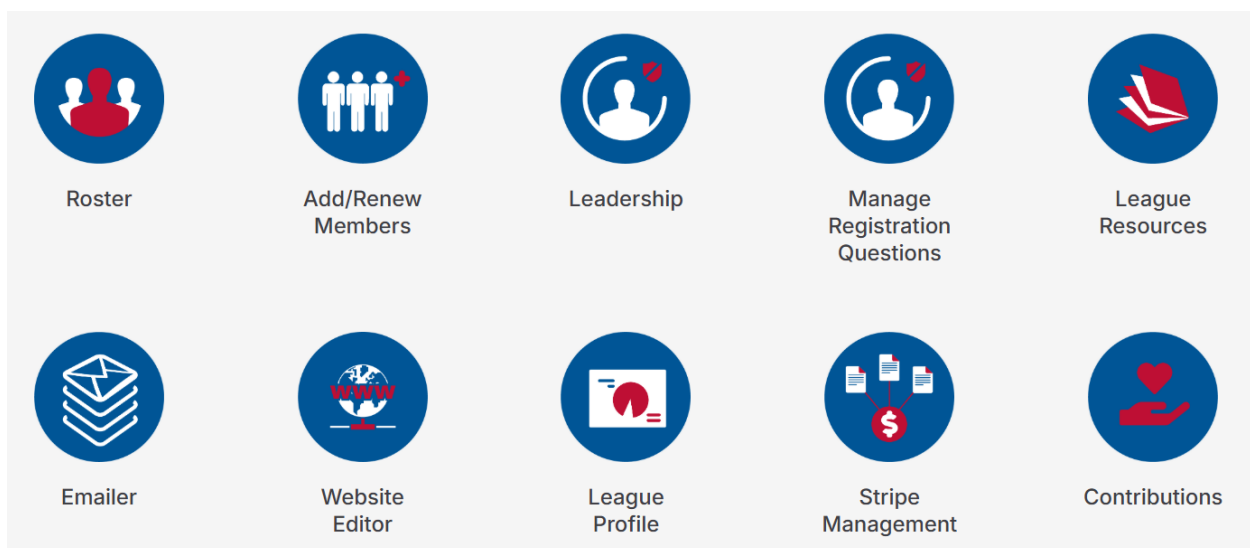
Privileges	Leadership Role in LWV Membership Portal
All Access – all buttons shown below including Stripe Management; all Roster Access	• President • Treasurer • Executive Director • Current Employee • Vice President
Roster Access – all buttons shown below except Stripe Management; ability to edit Roster and Leadership list and use the Emailer tool	• Roster Manager • Membership Chair • Communications Chair
Admin Access - some of the buttons shown below, including Manage Registration Questions, Emailer, Website Editor, and Contributions	• Secretary • Webmaster

Roster | Add/Renew Members | Leadership | Manage Registration Questions | League Resources

Emailer | Website Editor | League Profile | Stripe Management | Contributions

Note that other roles appearing on the leadership list will not have additional access within the LWV Member 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: this does not currently include members-at-large of the state League, so for a list of all members in the state, you'll need to download both the local League list and the roster at the state level.

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.

Membership Functions

Member Types

All 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**.

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.

Important Note: If a member renews **prior** to or on their expiration date, their expiration date will be pushed forward one year. If a member renews **after** their expiration date, their new expiration date will be one year from the date of renewal, even if they renew within the 60-day grace period.

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.
League Action Required	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 with 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 Days or Less Until Expiration.
Expiration Date	If the member does not renew before their expiration, they will receive another reminder email on their expiration date.
League Action Required	Members who still have not renewed should be sent a second reminder directly from their League.
45 Days After Expiration	Unrenewed 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. 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 LWV Member Portal, and Leagues are encouraged to reach out to recently inactive members.

Joining/Renewing Online

Online Process

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 process for joining or renewing is easy! The identification for the individual is their email address. For existing members, this must be the email address in their LWV Member Portal account.[1] 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.

After entering their email, a verification code will be sent to their email address, which the individual can enter into the screen below:

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

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[1] For those wanting to set a password, please see the "Logging into and Navigating the LWV Member Portal" section of this document.

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Joining/Renewing Online for Second Person

Members are given the option to join or renew on behalf of a second person.

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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.
- 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. 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 Donations to Local Leagues

Individuals will then be asked if they would like to make an additional donation. This will go exclusively to the local League.

Online Payment Options

Next, the payment method is selected:

The payment method is confirmed. If the member has chosen to auto-renew, they can save their payment method by checking the "Saved Payment" box. Otherwise, the payment information is not saved in the LWV Member Portal.

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. 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.

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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. Once the member has paid the remainder, they will appear on the League's roster. 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 LWV Member Portal. The following day, the member will receive a welcome email. The text of the Welcome email is available here.

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

Troubleshooting the Join Form

In some cases, a League's name isn't easily findable in the dropdown list of Leagues on the join/renew form. There are two common reasons why a League's name might not be seen where expected.

Alphabetizing League Names

The LWV Membership 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 using your League's unique join link whenever possible.

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

Missing League Addresses

The join form is populated based on each League's 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.

Offline Join/Renewal

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 offline, as needed. The local League handles the offline renewal process.

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](#).

CANVA TEMPLATE: "JOIN LWV" PRINTABLE FORM

At this time, offline members can only pay by check. 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.

Active Members

- From the Admin view of your League in the Portal, click Add/Renew Members.
- 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."

Expired Members

- Go to your League roster and search for the individual on the inactive within last 4 years list. Take note of their email address, spelling of first name, and spelling of last name.
- Return to the "Add/Renew Members" function and select "I want to register/renew them myself."
- Type in the member's first name, last name, and email. Do not search under "Select Existing Member" function.
- 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."

Best Practice: Confirm with the expired member that they have not changed their email address. If their email address has changed from the address in the portal, a local League member with roster access should update the email address for the member.

- Occasionally, a member may have been inactive for more than four years. In these situations, it is recommended that the League contact the member to obtain their email address and then follow the steps noted above. If the email address is in the system, the renewal will occur. Otherwise, a new account will be created.

You will now be at the "Manage Members with Pending Payments" screen. From here, click on "View All Pending Offline Payments." 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 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.

Once the payment is received by LWVUS, it will be deposited, and the local and state Leagues will be notified. 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.

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 LWV Member 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.

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.

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 LWV Member 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 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, please email membership@lwv.org or fill out the support form.
    - 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**: this function sends a text to the member.
- **Send Email**: this function sends an email to the 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.
- **Report Missing from External Database:** if your League uses ClubExpress and a member in the LWV Member Portal is not appearing in ClubExpress or has misaligned information, this can be reported here.
- **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. 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.

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.
    - **Active Volunteer:** any non-member who engages with the League as a volunteer (for Leagues that allow non-members to volunteer). If a member is also a volunteer, they should be classified as Primary or Life.
    - **Inactive Volunteer:** any former volunteer.
    - **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).

Roster Reports and Other 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.
- **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.
- **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.
- **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.

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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.

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.

- 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 whom to contact for things like the Annual League Survey.

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@lwv.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: when a leader is added, they will only appear immediately on the leadership list if their term was set to include that day's date. Otherwise, they will appear on the first day of their term, which is also when they will get admin access.

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:
- A field where you can update your League's website – this is important because this link will appear in welcome emails to new members and appears in the member view of the portal
- A field where you can update your League's tax ID if there are any changes to your League's tax status
- The QR code that you can use for enabling members to go directly to your League's join form

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.

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.

A member is appearing in the LWV Member 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 LWV Membership 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@lwv.org with the member's name, the name of your League, and the date when you plan to present the certificate.

Financial Information

Dues

In the LWV Membership 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 LWV Member 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 LWV Member Portal. This account can only be used with the LWV Member 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 LWV Member 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 LWV Member Portal login) can go to 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.

Offline Payments

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.
- On a weekly basis, the database sends an email with a consolidated list of the members who have been added that week to a given League. This list is sent both to the League's general email and to Bill.com, the bill pay system LWVUS uses.
- These lists are entered as invoices in Bill.com. 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.

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. Email membership@lwv.org to have the national portion of dues refunded.

To refund your League's portion of dues, go to 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.

Changing your 501(c)(3) tax status

When your League was set up in the LWV Membership 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 LWV Member 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."
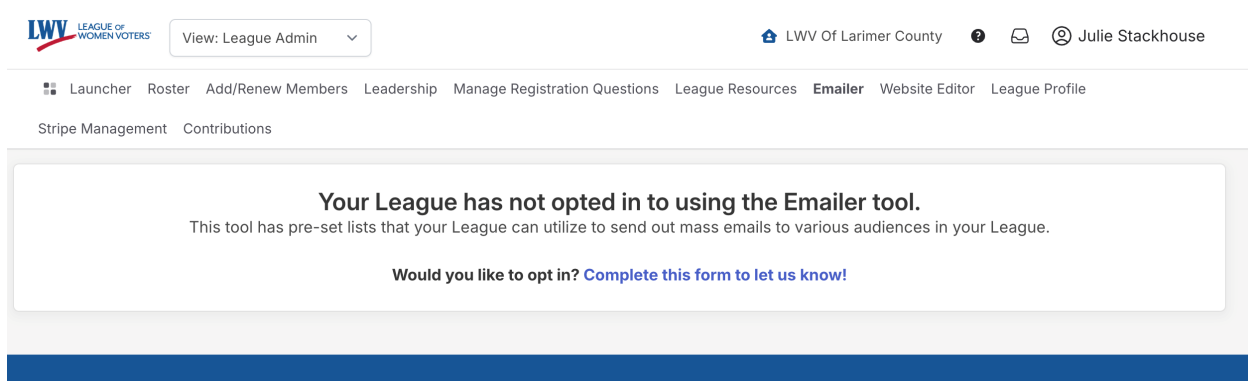
Once your League has opted in and been granted access, the following roles will have access to the Emailer tool:

- 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. 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, Primary 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.

LWV Member Portal Website Editor

Any local or state League can choose to use the Membership 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@lwv.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.

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.

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 LWV Membership Portal page, 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 LWV Member Portal.

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 on 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@lwv.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 purchase a custom domain, the URL for your website will be something like YOURLEAGUE.lwv.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@lwv.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.

This training from May 2025 covers the [website setup process]() described above (password: dUy82Q^%).

Transition Implementation Information

Per-Member Payment (PMP)

The FY25 (fiscal year 2025) invoice has been issued and mailed to Leagues and is due by June 30, 2025. At LWVUS, FY25 runs from July 2024 through June 2025. There will be one final PMP invoice after launch of the LWV Member Portal - this will be based on the January 2025 member count and include all members immediately prior to launch. Those members will be included on the invoice that will be sent to Leagues in August 2025. This invoice will be 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 LWV Membership Portal. Below is an overview of how this process will work.

Revised June 2025

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 LWV Membership Portal setup.
- **Pre-launch member count:** As usual, all members were counted in January. Roster managers were asked to ensure that League rosters are updated prior to launch.
- **Actual dues taken in through the LWV Membership Portal:** This data will be available through the Portal; Leagues will not be required to provide it.

The first year of using the LWV Membership Portal will be 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.

If Leagues are experiencing a significant shortfall, they may reach out to request funds before the year is complete. These requests will be reviewed on a case-by-case basis and can be sent to membership@lwv.org.

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 below.

Revised June 2025

Leagues can find a variety of buttons to use on their League website 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 to your League's bylaws is available here.

Further Resources

Additional tools for the LWV Membership 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
- A Member Contact Toolkit for considering how to communicate these changes to members

If further assistance is needed, please use this request form:

https://www.jotform.com/250306372125144

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