

PTAEZ: How To Upload Rosters

California State
PTA[®]
everychild.one voice.

Productivity

PTA EZ

- Officer reporting system
- Bulk emails

PTAEZ

- Officer Contact System
 - President must be added after election by previous President/OC Admin
 - Other officers should be uploaded ASAP

Officer Contact

Officer/Board Member Contact

My Organization Council UnitWorking with: Twelfth District PTA (Unit ID: 12)

School Year: 2019-2020 ▼Copy Selected To: 2020-2021 ▼ Copy

<input checked="" type="checkbox"/>	Position	Title	Name	E-Mail	Phone #	Cell #	
<input checked="" type="checkbox"/>	President	President	W	s	(805) [REDACTED]	(805) [REDACTED]	
<input checked="" type="checkbox"/>	Leadership/Organiz...	Vice President	H		(805) [REDACTED]	(805) [REDACTED]	
<input checked="" type="checkbox"/>	Programs	Vice President	de	s	(805) [REDACTED]		
<input checked="" type="checkbox"/>	Membership	Vice President	S	m		(805) [REDACTED]	
<input checked="" type="checkbox"/>	Secretary	Secretary	D	j	(805) [REDACTED]		
<input checked="" type="checkbox"/>	Treasurer	Treasurer	H	l		(805) [REDACTED]	
<input checked="" type="checkbox"/>	Historian	Historian	K	m	(805) [REDACTED]		
<input checked="" type="checkbox"/>	Parliamentarian	Parliamentarian	D	m	(805) [REDACTED]		
<input checked="" type="checkbox"/>	Leadership/Organiz...	Out of Council Coord...	W	e	(805) [REDACTED]		
<input checked="" type="checkbox"/>	Auditor	Auditor	H	c	(805) [REDACTED]	(805) [REDACTED]	

Generate ReportAdd Officer

Displays the current term by default until around March when it transitions to the upcoming year. You can change it by clicking on the school year drop down menu.

The screenshot shows the 'Add New Officer' form with the following fields: 'Position *' (a dropdown menu), 'Name *' (a text input field with the placeholder 'Begin typing to search...'), and 'Title' (a text input field). At the bottom, there are three buttons: 'Save' (green), 'Cancel' (blue), and 'Change Contact Info' (orange).

STEP 1: Click on “Add Officer” to get to this window

STEP 2: Select Position

*Vice president is not a position. You must pick what they are in charge of. You may add the title at the bottom.

The screenshot shows the 'Add New Officer' form with the 'Position *' dropdown menu open. The menu lists various positions such as 'Advisor/Mentor/Liaison', 'Advocacy/Legislation', 'Arts', 'Auditor', 'Awards/Scholarships/Grants', 'Communications/Publicity', 'Community Concerns', 'Convention', 'Diversity/Outreach/Translator', 'Education', 'Executive Vice President', 'Financial Secretary', 'Fundraising/Ways & Means', 'Health & Safety/Red Ribbon', 'Historian', 'Hospitality', 'Leadership/Organization', 'Membership', 'Newsletter/Publications/Website', 'Other', 'Parent Ed/Family Engagement', 'Parliamentarian', 'Principal', 'Programs', 'Reflections', 'Secretary', 'Special Education', and 'Staff'. The 'Other' option is highlighted in blue.

The screenshot shows the 'Add New Officer' form with the following fields filled out: 'Position *' (set to 'Other'), 'Name *' (set to 'Claus, Santa'), and 'Title' (set to 'Vice President of Toys'). At the bottom, there are three buttons: 'Save' (green), 'Cancel' (blue), and 'Change Contact Info' (orange).

STEP 3: Either find existing name in the drop-down menu or add new name.

STEP 4: Confirm name, click Address Info

Update Name Information

Name Info Address Info

Full Name * Santa Claus

First Name Santa

Middle Name

Last Name Claus

Notes

Active?

Save Cancel

STEP 5: Add as much info as possible

Update Name Information

Name Info Address Info

Address 1 Candy Cane Lane

City North Pole

State CA Zip Code 90000

Country USA

Phone (555) 555-5555

Alt. Phone (555) 555-5555

Fax

Email KrisKringle@gmail.com

Website

Active?

Save Cancel









































Presidents should have an address that is not the same as the school unless there is a compelling reason such as an order of protection.

Move A Current Officer To New Year

Officer/Board Member Contact

My Organization Council Unit Working with: Twelfth District PTA (Unit ID: 12)

School Year: 2019-2020 Copy Selected To: 2020-2021 Copy

<input type="checkbox"/>	Position	Title	Name	E-Mail	Phone #	Cell #	
<input checked="" type="checkbox"/>	President	President	W	s	(805)	(805)	   
<input checked="" type="checkbox"/>	Leadership/Organiz...	Vice President	H		(805)	(805)	   
<input checked="" type="checkbox"/>	Programs	Vice President	de	s	(805)		   
<input checked="" type="checkbox"/>	Membership	Vice President	S	n		(805)	   
<input checked="" type="checkbox"/>	Secretary	Secretary	D	j	(805)		   
<input checked="" type="checkbox"/>	Treasurer	Treasurer	H	la		(805)	   
<input checked="" type="checkbox"/>	Historian	Historian	K	n	(805)		   
<input checked="" type="checkbox"/>	Parliamentarian	Parliamentarian	D	n	(805)		   
<input checked="" type="checkbox"/>	Leadership/Organiz...	Out of Council Coord...	W	e	(805)		   
<input checked="" type="checkbox"/>	Auditor	Auditor	H	d	(805)	(805)	   

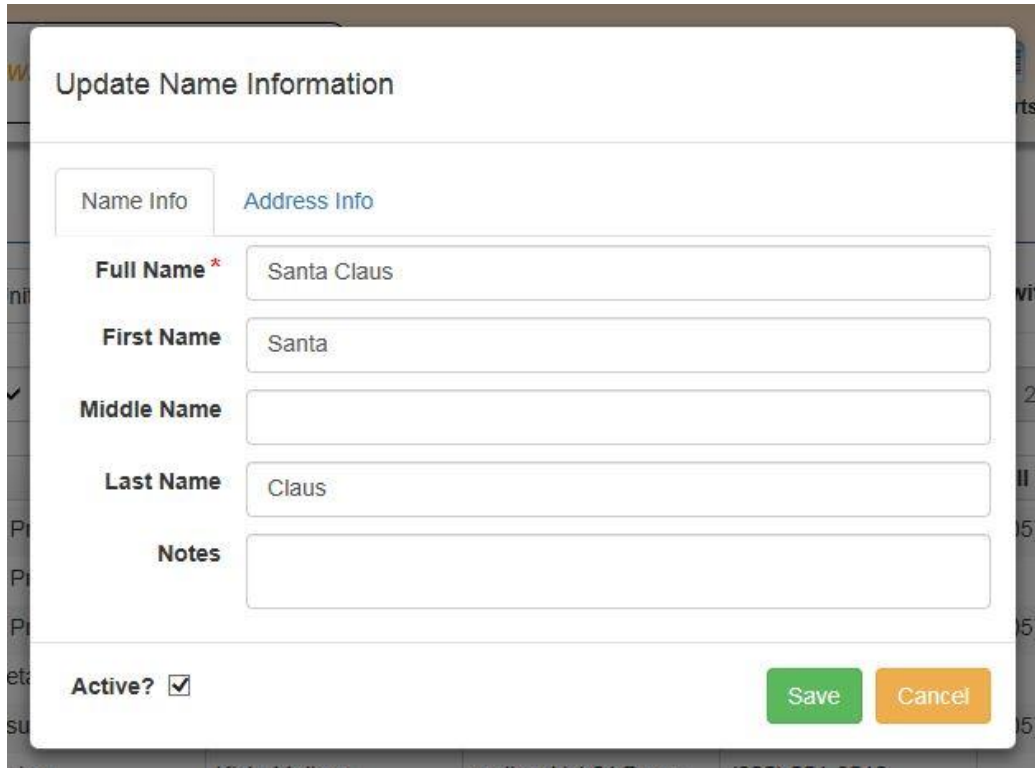
Generate Report Add Officer

Correcting Names/Addresses

Click on the 

STEP 1: Confirm name, click Address Info

STEP 2: Add as much info as possible



Update Name Information

Name Info Address Info

Full Name * Santa Claus

First Name Santa

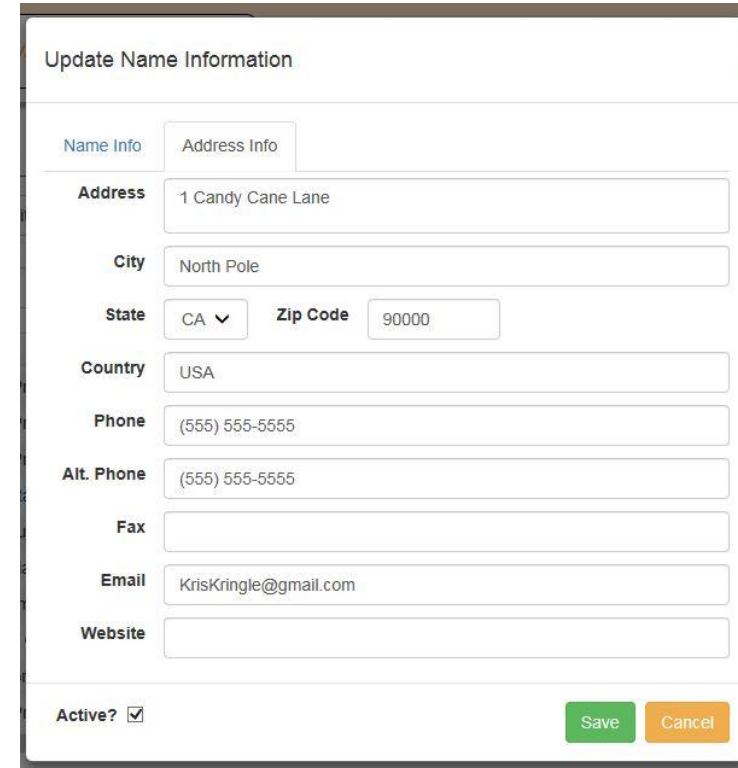
Middle Name

Last Name Claus

Notes

Active?

Save Cancel



Update Name Information

Name Info Address Info

Address 1 Candy Cane Lane

City North Pole

State CA Zip Code 90000

Country USA

Phone (555) 555-5555

Alt. Phone (555) 555-5555

Fax

Email KrisKringle@gmail.com

Website

Active?

Save Cancel

Change An Officer

Click on the



Change Officer

Position *

President

Name *

Sherry Waldman

Title

President

Save Cancel Change Contact Info

- Click on the officer you need to change
- Add the new officer's name
- Click on Change Contact Info
- Follow the same steps to update address as you do to update an existing contact's address/email/phone

Create/Change Login

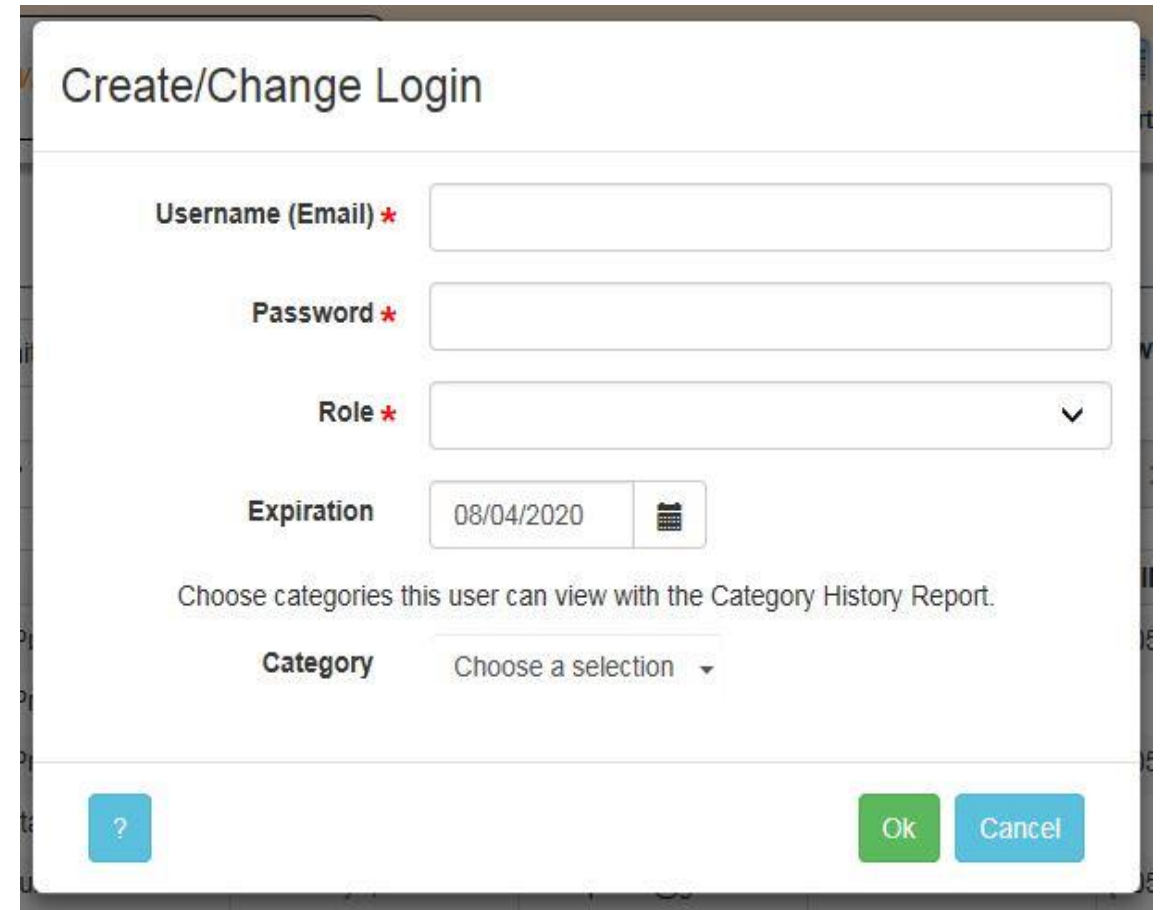
Click on the



Fiduciary Officers are people that can be assigned specific roles if you are using the financial version of PTAez

There are three categories for non-finance version officers:

- OC ADMIN: Can change anything in the reporting system
- OC REPORTING: Can generate reports in the system
- OFFICE MANAGER: PTA employee, not a school employee, who has the same rights as the OC Admin


A screenshot of a web application dialog box titled "Create/Change Login". The dialog contains several input fields: "Username (Email) *" with a red asterisk, "Password *" with a red asterisk, "Role *" with a red asterisk and a dropdown arrow, "Expiration" with a date field showing "08/04/2020" and a calendar icon, and "Category" with a dropdown menu showing "Choose a selection". Below the "Expiration" field, there is a text label: "Choose categories this user can view with the Category History Report." At the bottom of the dialog, there are three buttons: a blue button with a question mark, a green "Ok" button, and a blue "Cancel" button.

Create/Change Login

Username (Email) *

Password *

Role *

Expiration 

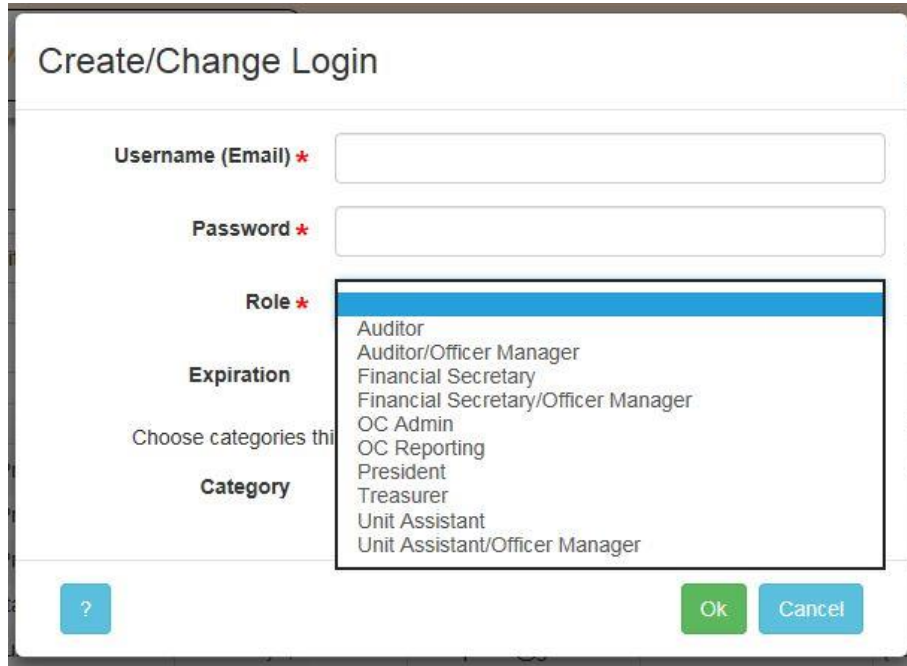
Choose categories this user can view with the Category History Report.

Category

Tips for Successful Log-in Creation

- Assign a unique email address for the username, not their real email
 - JDoe@SunshineElementaryPTA.com or PresidentSmith@SunshineElementaryPTA.com
 - Use the same generic password 0000 or 1111 for the initial set up
 - Walk the new person through the steps to change their password, don't assume they know how to do it.

Create/Change Login Options



Create/Change Login

Username (Email) *

Password *

Role *

Expiration

Choose categories this user can view with the Category History Report.

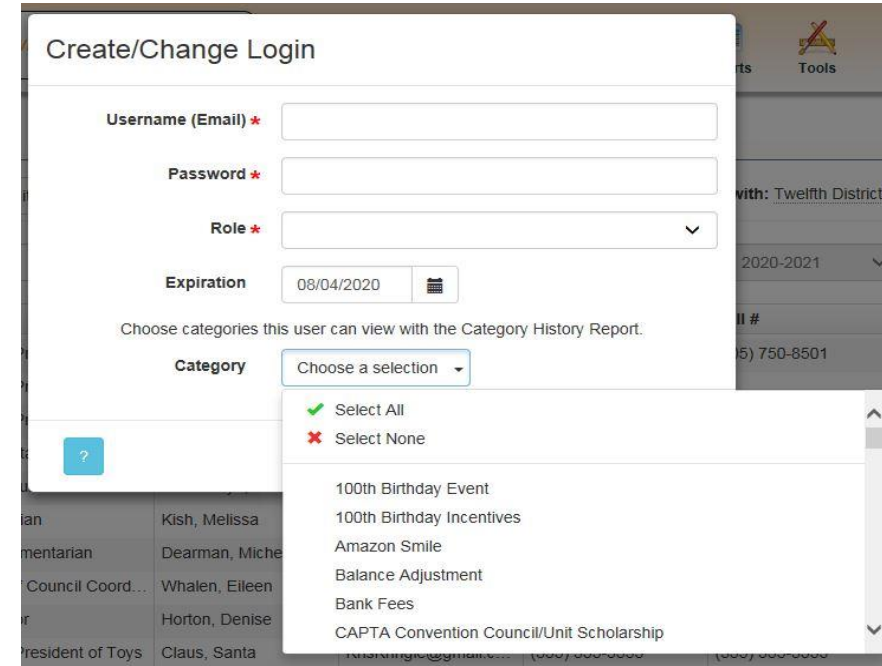
Category

Auditor
Auditor/Officer Manager
Financial Secretary
Financial Secretary/Officer Manager
OC Admin
OC Reporting
President
Treasurer
Unit Assistant
Unit Assistant/Officer Manager

?

Ok Cancel

- Options will depend on what version of PTAEZ you use
- Click on the "?" if you need definitions of roles



Create/Change Login

Username (Email) *

Password *

Role *

Expiration

Choose categories this user can view with the Category History Report.

Category

Choose a selection

✓ Select All
✗ Select None

100th Birthday Event
100th Birthday Incentives
Amazon Smile
Balance Adjustment
Bank Fees
CAPTA Convention Council/Unit Scholarship

?

- Allows you to define what types of documents/reports the person has access to.

Generate Officer Reports

Gives the user the ability to create reports in multiple formats for any units that they have access to.

FOR UNITS:

- Create bulk email list
- Create rosters

FOR COUNCILS/DISTRICTS:

- Create bulk email list
- Create position specific lists

Generate Report For School Year 2019 - 2020

Positions Filter: All Positions Selected

Council Filter: ALL

Unit Filter: ALL

Include PTAs: State Districts Councils Units
 Out-of-Council Units

Include Columns: Position Name Email Phone
 Cell Address Changes

Report Type: Full Report Change Log Only

Format: PDF

Buttons: Change Log, Cancel, Generate Report

Filters

- Specific position or all
- At district level: specific council or all
- At council level: specific unit or all
- Uncheck information you don't need

QUESTIONS?

Need help giving someone login privileges?

- Contact your council/district president first
- If they can't get it to assign a password, contact leadership@capta.org
- The President's contact info (at a minimum) needs to be input by May 1st under normal circumstances.