Instructions for Volunteer Fire Chief Memberships

Limited to the volunteer fire chief of an agency with an annual budget under $250,000. One member only. Cash/Check payment discount applied at checkout.

CalChiefs has moved to a new membership and event management software solution beginning with this 20/21 Fiscal Year membership drive called Wild Apricot. The new software solution will allow for a more automated tracking system for both membership and event registrations. You will no longer log into the old account you previously set up (if you had one). You will also no longer fill out the old membership invoice form. This new software change will require some new steps on your part to get set up.

Here are step-by-step instructions on either joining or renewing. Note that required fields are noted with a green asterisk.

1. Go to our website www.calchiefs.org
2. Hover over "join" in the red banner near the top 1/3 of the page.
3. Click on "Membership", which will take you to our membership application webpage.
4. Read the information contained at the top of the page carefully to understand the CalChiefs membership details. Do not click "Log into Membership" if you have not yet created an account in our new software yet. You need to create an account in the new software by completing the appropriate application for the type of membership you qualify for.
5. Scroll down towards the bottom of the webpage
6. Find the instructions for the type of membership you qualify or for the individual membership you desire below. Follow the steps carefully for application completion and account/profile set up.
   a. **Tier 1 - 8 memberships** are for active public or private fire departments/districts with budgets over $250,000.
   b. **Volunteer Fire Chief** memberships are for fire departments/districts with an annual budget of less than $250,000.
   c. **Additional Group Memberships** are for adding memberships beyond those included in your tier.
   d. **Retiree membership** is for retired CA chief officers.
   e. **Section President** membership is for our section presidents to be members of the parent body.
   f. **Associate membership** is for Individuals or agencies engaged in the manufacture or sale of fire service apparatus, supplies or services and others that are interested in the field of emergency fire or medical services. Cash/Check payment discount applied at checkout.
7. Select the membership type (level) for your agency/company.
8. Click "Next"
9. Enter the email for the primary member, this should be the Fire Chief or Department Head. If it says you already have an email in the system, it's because your email was transferred from our old system. If it tells you that, click "log in" and use your email

and click forgot password and a link will be sent to you to get into your account. If you don't have a current email in our system, follow the balance of the steps to get into the account.

10. Enter the auto-generated security code in the box marked "code" (this is case sensitive). If you are having trouble reading it, click the speak icon next to the code and it will speak it out for you.
11. Click "Next"
12. Enter the fire department/district's full name
13. Enter the primary member's last name
14. Enter the primary member's first name
15. The primary member's email will auto-populate in the email field from your previous entry on the page before
16. Enter the phone number for the primary member. The format for the phone number should be ###-###-####.
17. Enter the cellular phone number for the primary member (optional). Format is ###-###-####
18. You may upload an avatar (picture) of the primary member (optional)
19. Enter the rank or title of the primary member
20. Enter the street address for the organization (numbers, street name and suite)
21. Enter the City
22. Select the state
23. Enter the zip code
24. Select the Full-time Employee (FTE) count from the pull-down list.
25. Select the number of fire stations in the fire department/district
26. Select the population served within the fire department/district boundaries from the ranges provided in the pull-down list.
27. Select the county the department/district resides in. If the department/district jurisdiction cover multiple counties, select the county the headquarters is located in.
28. Select the annual budget range that. Best describes your annual budget allotment.
29. Enter the name of the person at your agency who typically processes your membership initiation or renewals.
30. Enter the email contact for the person named in the "Admin Name" field.
31. Select whether you will be paying for the membership via credit card or cash/check. CalChiefs offers a roughly 3% discount for members paying by cash or check.
32. If you are paying by cash/check, select the discount code for your type of membership you are applying for membership in (e.g. Volunteer Fire Chief enter the discount code **VD**). Make sure you enter the 2-digit code exactly as shown in the previous field. Alpha digits are capital letters. If you are paying by credit card leave this field blank.
33. Click "Next"
34. Review and confirm that the level of membership is accurate. The total amount due will be displayed along with the discount amount if paying by cash/check and detailed payment instructions.

35. **Before** you click either "invoice me" or "pay online" review the application information at the bottom of the page for accuracy. If you find there is an error, click the "back" button and make any corrections.
36. Click "Invoice me" if you desire to pay by cash/check. An invoice will be autogenerated and sent to you via the email of the primary member so you can process the payment.
37. Click "Pay Online" if you desire to pay by credit card. The website will take you to the next page to enter in all the related credit card information. Carefully enter al the related details and pay for your membership.
38. If you clicked **"invoice me:"**

You are now done with the primary member's membership initial application. An invoice will be sent to the primary members email. As well as another email confirming your membership application submittal. In the email regarding your application, it requests you finalize the application by logging into your profile. To do so, click the "log into your profile" link and enter the primary member's email and click "forgot password." An email will be autogenerated and sent to the primary member's email with a link to reset your password. Once you've logged into your account and complete the following steps:

- If you wish to add Additional Group Members beyond those in your individual membership, you will need add each additional group member separately from this process. (See Additional Group Member instructions below)
  Note – these extra members will need to be managed in a separate transaction
- **IMPORTANT** You will also need to ensure you set your privacy settings in your account to allow us to send you member updates. It defaults to "unsubscribed." If the privacy settings are not updated, you will <u>NOT</u> receive emails from CalChiefs about important updates for our members and current issues, newsletters and events.

It's important to note that all your memberships in your tier will remain in "pending" status until such time as we receive payment for membership dues. Once payment is received and processed, the membership application will be approved by CalChiefs staff and your membership will become active.

39. If you click **"pay online:"**

You will be taken to the page to enter all of your credit card info and make payment for your membership. An invoice and receipt will be automatically emailed to the primary member's email if the payment is successfully processed. If there is an issue with the credit card processing, an email will be sent to the credit card holder indicating the payment processing was unsuccessful.

You are now done with the primary member's membership initial application. An invoice will be sent to the primary members email. As well as another email confirming your membership application submittal will be sent, as well. In the email regarding your application, it requests you finalize the application by logging into your profile. To do so, click the "log into your profile" link and enter the primary member's email and click "forgot password." An email will be autogenerated and sent to the primary member's email with a link to reset your password. Click the link and create your password and log into your member account and complete the following steps:

- If you wish to add Additional Group Members beyond those in your tier, you will need to use the Additional Group Membership under the "join us" link and add each additional group member separately from this process. (See Additional Group Member instructions below)
  Note – these extra members will each need to be managed in a separate transaction for each additional member.
- **IMPORTANT** While updating your profile, you will also need to ensure you set your privacy settings in your account to allow us to send you member updates. It defaults to "unsubscribed." If the privacy settings are not updated, you will NOT receive emails from CalChiefs about important updates for our members and current issues, newsletters and events.

Please note that all your memberships in your tier will remain in "pending" status until such time as we receive payment for membership dues and approve your application. Once payment is received and processed, the membership application will be approved by CalChiefs staff and your membership will become active. You will receive an email indicating those steps are completed.

You're done!!   Thank you for supporting CalChiefs. We appreciate it.