

Instructions for adding Additional Group Members

This membership is for adding more chief officer members (or equivalent) beyond those included in your tier. This additional member must be a chief officer or equivalent to qualify for membership.

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 in the software.

1. Select Additional Group Membership.
2. Click "Next"
3. Enter the email for the additional group member. 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.
4. 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.
5. Click "Next"
6. Enter the fire department/district's full name
7. Enter the primary member's last name
8. Enter the primary member's first name
9. The additional group member's email will auto-populate in the email field from your previous entry on the page before
10. Enter the phone number for the additional group member. The format for the phone number should be ###-###-####.
11. Enter the cellular phone number for the additional group member (optional). Format is ###-###-####
12. You may upload an avatar (picture) of the primary member (optional)
13. Enter the rank or title of the primary member
14. Enter the street address for the organization (numbers, street name and suite)
15. Enter the City
16. Select the state
17. Enter the zip code
18. Select the county the department/district resides in. If the department/district jurisdiction cover multiple counties, select the county the headquarters is located in.
19. Enter the name of the person at your agency who typically processes your

membership initiation or renewals.

20. Enter the email contact for the person named in the "Admin Name" field.
21. 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.
22. **IMPORTANT** – if you are paying by cash/check, you must enter the discount code identified in the previous step (21). It's a 3-digit code. Enter it exactly how it appears in the previous field (e.g. T1D) Note the alpha digits are in capital letters.
23. Click "Next"
24. Review and confirm that the type of membership is accurate. The total amount due will be displayed along with detailed payment instructions.
25. **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.
26. 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 additional group member so you can process the payment.
27. 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 all the related details and pay for your membership. An invoice and receipt will be emailed to the additional group member email provided in the application.
28. If you clicked "**invoice me:**"

You are now done with the additional group member's membership initial application. An invoice will be sent to the additional group 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 additional group member's email and click "forgot password." An email will be autogenerated and sent to the additional group member's email with a link to reset your password.

- **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 your membership(s) will remain in "pending" status until such time as we receive payment for membership dues and approve your membership application. Once payment is received and processed, the membership application will be approved by CalChiefs staff and your membership will become active.

29. 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 will be automatically emailed to the additional group member's email and a receipt will be emailed too, 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 additional group member's membership initial application. 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. If you don't see it, look to your junk or SPAM folder. If you still don't see it, contact CalChiefs office and we can resend a password to you. If the email is received, click the link and create your password and log into your member account and complete the following step:

- **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 NOT receive emails from CalChiefs about important updates for our members and current issues, newsletters and events.

Please note that all your memberships 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 your support of CalChiefs. Watch your email for the remaining notices and enjoy the benefits of CalChiefs Membership.