

# PSC Online Member Management

Public Safety Cadets is pleased to offer online management of the membership roster of your PSC Unit. Through your Mentor Login (located near the very top of the screen) you now have the choice 'Manage Members'. Information on your members should be kept accurate at all times.

## With this option any of your Mentors can:

1. View/Edit/Deactivate your Mentor profiles
2. View/Edit/Deactivate your Cadet profiles
3. Search for a member
4. Generate lists compatible with Excel and other spreadsheet software

## You cannot Add or Delete Mentors or Cadets through 'Manage Members'

1. Add Mentors through the [Membership page](#) as you do today
2. Add Cadets through the [Mentor Login](#) by clicking 'Register a Cadet'
3. Membership records are never deleted, only deactivated
4. Pay Membership Dues as you do today through the Donate/Pay page under the Join/Donate tab. Only members registered and paid are considered active and covered by PSC insurance. The 'Year Paid' on each member profile indicates if they are paid current for the calendar year.

## Step by Step Instructions for Managing your Member profiles

Click 'Manage Members' and you will be prompted to login again using your same Mentor Login credentials. Most laptops/desktops/mobiles will remember your login credentials and allow simple clicks to login. TIP: there is a day delay between changing your Mentor Login password and having access to Manage Members.

### 1. View/Edit/Deactivate your Mentor profiles

Click 'Mentors' in the list on the left side of your screen

Click 'Search for Mentors' at the bottom of the Mentors selection screen to see all Mentors in your Unit (active and inactive)

Click 'Mentors' again if you want to refine your search by entering search criteria in any of the fields shown.

For example:

Enter an 'S' in last name and you will see all Mentors who have an S in their last name

Click Deactivate 'No' to only see active Mentors

Edit a member's profile by clicking 'Edit' next to the members name

Update appropriate information as needed and click 'Save Changes' at the bottom of the screen

**TIP:** your members are tied together by the PSC Agency Identifier field. If you change that you will no longer be able to see your other members.

**TIP:** if you mess up data, do not click 'Save Changes' but back out of the screen or select 'Mentors' again and it will not save your changes. The system keeps a record of all changes but cannot go and restore previous information.

## 2. View/Edit/Deactivate your Cadet profiles

Click 'Cadets' in the list on the left side of your screen

Click 'Search for Cadets' at the bottom of the Cadets selection screen to see all Cadets in your Unit (active and inactive)

Click 'Cadets' again if you want to refine your search by entering search criteria in any of the fields shown.

For example:

Enter an 'S' in last name and you will see all Cadets who have an S in their last name

Click Inactive 'No' to only see active Cadets

Edit a member's profile by clicking 'Edit' next to the members name

Update appropriate information as needed and click 'Save Changes' at the bottom of the screen

**TIP:** your members are tied together by the PSC Agency Identifier field. If you change that you will no longer be able to see your other members.

**TIP:** if you mess up data, do not click 'Save Changes' but back out of the screen or select 'Mentors' again and it will not save your changes. The system keeps a record of all changes but cannot go and restore previous information.

## 3. Deactivate inactive Mentors

Deactivating inactive Mentors removes their security to view member data. PSC Staff approves all Mentors registered for your Agency and PSC Unit. Ensure that you are operating in accordance with your Agency's Memorandum of Understanding with Public Safety Cadets.

**It is very important to Deactivate inactive Mentors so they no longer have access to private data of your Cadets or Mentors.**

- Click 'Mentors' in the list on the left side of your screen
- Click 'Edit' next to the Mentor's Name that you want to deactivate
- Click the 'Deactivated Yes' button
- Click Save Changes at the bottom of the screen.

## 4. Search for a member

The search function is quite robust and should help you find the member(s) you are looking for quickly. Play with it until you find the members you are looking for.

Search criteria:

**Begins with** – the data you enter must match exactly with the first characters in the field you are searching (i.e. Hou will match to Houston Police but not City of Houston Police Department)

**Contains** – the easiest and most common recommended search. If the data you enter is anywhere in that data field it will be found (i.e. Hou will match to Houston Police and City of Houston Police)

**Is blank** – choose this and enter no data and if this field is blank on any of your members, they will be listed

**Exactly** – the data you enter must match exactly to the data in the field (i.e. Hou will not find either Houston Police or City of Houston Police)

**Match any word** – the data you enter must match an entire word in the field (i.e. Hou will not find either Houston Police or City of Houston Police)

5. **Generate report lists** compatible with Excel and other spreadsheet software

- Set the selection criteria that returns the members you want to report on or leave all search criteria blank and report on them all
- To export, Scroll down to the bottom of the list you just generated and click 'Create CSV Download'
- Then, again, scroll down to the bottom of the list generated and now click 'Press Here for CSV'. This will cause the file to be download to your computer. Typically the downloaded file will appear in the lower left of your screen with the file name 'Dataexport#####.csv'. This depends on how your computer is configured
- Click on the downloaded file or go to your download folder and open the file in Excel or other spreadsheet software.
- Depending on how your computer is configured, this usually automatically opens in your spreadsheet software.
- Save the new spreadsheet you just downloaded. Choose to save it as Excel or file type other than CSV. CSV stands for comma-separated values.