UMAS User Manual for U3A Members

UMAS Version: 5.46

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Introduction

The UMAS membership management system is widely used by U3As in Victoria. For members, UMAS allows you to manage your U3A membership and course enrolments online.

The manual is divided into two sections: one for current and renewing members, and one for new and prospective members.

<p style="text-align:center">***</p>

For Current and Renewing Members

How to log in

1. In your web browser, navigate to your U3A's website, and from there, find your way to your U3A's membership management system (UMAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to UMAS.
   If you don't know your U3A's website address (URL), try a Google search of the U3A's name. Alternatively, contact the U3A's office volunteers for assistance.

2. Now go to the Login link in the left side menu:

   Login

   Enter your membership number (or email address) and password, and click the Login button.

   Membership number or email: 1377
   Password: ••••••••••••
   Login

3. On successful login, you will see a welcome message, and some additional items will be available in the left side menu.

   Home
   View Member Details
   Edit Member Details
   View or select Courses
   Contact Us-Courses
   Contact Us-General
   Return to Website
   Logout

   Welcome Annie Jones (Member #1377)

   Members
   To view and check Membership details click 'View Member Details'
   To add or change Membership details click 'Edit Member Details'

   Courses
   To select and enrol in Courses click the 'View or Select Courses' menu item

Having trouble logging in?

The following sections in this user manual may help:

- Forgotten password, or need to reset password: See What to do if you have forgotten your password.
- Forgotten membership number: See What to do if you have forgotten your membership number.

How to log out

1. Click the Logout link in the left side menu:

Logout

How to renew your membership

To renew your membership, you need to enrol in one or more courses, and then pay your subscription fee.

1. Log in to the membership management system.
2. If you are not sure whether or not your membership needs to be renewed, click the View Member Details link in the left side menu:

View Member Details

Check the Membership Status near the bottom of the Member Details screen. If it says "Not Active", your membership needs renewing.

Membership Status: **Not Active**

3. Enrol in one or more courses (see How to enrol in this user manual).
4. Retrieve your invoice and pay your subscription fee (see How to pay your fees in this user manual).

When can you renew?

Most U3As offer memberships on a yearly basis.

For most of the year (roughly January to November, depending on the U3A), you can renew your membership and enrol in courses for the current year.

Towards the end of the year (around November or December, depending on the U3A), most U3As will go though a "rollover" process: Memberships and enrolments for the current year will end, and the course timetable for the coming year will be published. During this process, there may be a few weeks where you can't enrol in courses or renew your membership.

After a set date (determined by the U3A), enrolments will be opened, meaning that you can enrol in courses and renew your membership for the coming year. Most U3As will publish enrolment and term dates on their website and/or communicate this information via email.

How to enrol

You must be a member before you can enrol in courses. Your membership does not need to be active before enrolling: If you have an inactive membership, the process of enrolling and paying your subscription fee will activate it.

If you don't have a membership, see the How to join section of this user manual.

1. Log in to the membership management system.
2. Click the View Courses link in the left side menu.

View Courses

A course list similar to this will be displayed:

Select Course for Annie Jones

1. Click on Courses to view additional details
2. Use tick box to select Courses (restrictions may apply)
3. To view a Parent code of Courses e.g. Art, Exercise etc. Use the **Parent code selection** drop down box
   To return to the full list select **All** from the drop down box
4. Courses can be sorted by clicking on any of the column headings e.g. Course, Day etc.
5. Click on **Confirm Selection** button to enrol. You will be advised whether you are successful or wait-listed
6. Any Course can be removed (click on the **Remove** and then the **Go Back** button and you can return to the Course list to make another selection)
7. Maximum standard enrolments are X 20

`Confirm Selections`

SUBS2019   Subscriptions for 2019
Choose Parent code: None ▼   Finished Full New 1 day

Code	Course	Location	Leader	Start	Day	Time	Frequency
☐ ARMCH19	Armchair Travel	Golden Wattle	Sam Tutor	05/02/2019	Tue	13:00	Monthly1
☐ ARTCRA19	Art & Crafts Group	The Court House	Sally Tutor	05/02/2019	Tue	13:00	Weekly
☐ BANJO19	Banjo Club	The Court House	Sam Tutor	06/02/2019	Wed	13:00	Weekly
☐ BEER19	Beer and Cider Alliance	Private Home	Sally Tutor	08/02/2019	Fri	17:00	Monthly2
☐ BIKE19	Bike Riding	Outdoors variable	Sam Tutor	07/02/2019	Thu	9:30	Fort
☐ BUDDH19	Buddhism Discussion Group	The Court House	Sally Tutor	07/02/2019	Thu	9:00	WeeklyT1
☐ BUSH19	Bushwalking Group	Outdoors variable	Sam Tutor	01/02/2019	Fri	9:00	Monthly1

3. If you're unfamiliar with navigating the course list, see the tips in the How to View Course Details Without Joining section.

4. Tick the box next to each course in which you would like to enrol. When you've selected all your courses, click the Confirm Selections button.

`Confirm Selections`

SUBS2019   Subscriptions for 2019
Choose Parent code: None ▼

	Code	Course	I
☑	ARMCH19	Armchair Travel	
☐	ARTCRA19	Art & Crafts Group	
☐	BANJO19	Banjo Club	
☑	BEER19	Beer and Cider Alliance	
☑	BIKE19	Bike Riding	
☐	BUDDH19	Buddhism Discussion Group	
☑	BUSH19	Bushwalking Group	

Note that:

- Some courses may be full, but accepting waitlist enrolments: You can enrol on the waitlist, and the U3A will let you know if a space becomes available.
- Some courses my be finished or closed to enrolments: You can't enrol in these courses.

5. On clicking the Confirm Selections button, you'll see a list of your selected courses, like the example below.
   If you haven't previously enrolled in any courses for this enrolment period, the list will include your membership subscription. The cost of the subscription is your membership fee, and depends on your membership type.
   Most courses other than the membership subscription will incur no charge. However, occasionally a course may have a small additional fee to cover expenses such as supplies or travel costs.

Selected Courses for Annie Jones

You will be automatically subscribed when you enrol. See below for details.

Code	Courses	Start date	Status	Amount	
ARMCH19	Armchair Travel	05/02/2019		No charge	Remove
BEER19	Beer and Cider Alliance	08/02/2019		No charge	Remove
BIKE19	Bike Riding	07/02/2019		No charge	Remove
BUSH19	Bushwalking Group	01/02/2019	Wait listed	No charge	Remove
SUBS2019	Subscriptions for 2019	25/11/2018 - 31/12/2019		$50.00	

`Finalise Courses, and if necessary, Invoice & Payment` You must click this button to enrol

`Remove all selections`

`Go Back`

6. Check the list, and make adjustments if required.
    - To remove a course from your selections, click on the Remove link on the right side of the course.
    - To remove all the courses from your selections, click the Remove All Selections button.
    - To add more courses to your selections, click the Go Back button to return to the main course timetable, where you can select more courses.
7. When you're ready to confirm your course selections, click the Finalise courses, and if necessary, Invoice & Payment button.
    (Note: for some U3As, you may be required to agree to the U3A's terms and conditions before proceeding with this step.)
8. You will be taken to the Member Details screen.
    If you haven't already paid your subscription fee for the current enrolment period, a message like "*Your enrolment has been updated. Please click on the Invoice button to make a payment*" will be displayed near the top of the screen. See How to pay your fees in this user manual for details on how to pay.
    Near the bottom of the screen, you'll find a list of your enrolments, as well as any waitlist enrolments. Most U3As will also send you an email containing this information.

On a Wait list

Start Date	Time	Code	Description
01/02/2019	9:00	BUSH19	Bushwalking Group

Enrolments and subscriptions (Current)   Print Enrolments

Please select ▾

Start Date	Time	Code	Description	Amount		Paid
25/11/2018	0:00	SUBS2019	Subscriptions for 2019	$50.00	Pay Invoice	No
05/02/2019	13:00	ARMCH19	Armchair Travel			
07/02/2019	9:30	BIKE19	Bike Riding			
08/02/2019	17:00	BEER19	Beer and Cider Alliance			

How to pay your fees

For most U3As, you must enrol in one or more courses before you can pay your subscription fee.

Payment methods

Different U3As offer different methods of paying fees: These can range from offline methods such as cash or cheque, to online methods such as PayPal.

If your U3A uses UMAS but does not offer online payment methods, you will still be able to enrol online, but will need to download or print out your invoice and pay it separately.

1. After you have enrolled in at least one course, a membership subscription for the current enrolment period will be added to your account, and an invoice will be generated.
    To access your invoice, log in if you're not already logged in, and then click the Vew Member Details link in the left side menu.
    View Member Details
2. Scroll down to the bottom of the screen to find your list of enrolled courses.

On a Wait list

Start Date	Time	Code	Description
01/02/2019	9:00	BUSH19	Bushwalking Group

Enrolments and subscriptions (Current)   Print Enrolments

Please select ▾

Start Date	Time	Code	Description	Amount		Paid
25/11/2018	0:00	SUBS2019	Subscriptions for 2019	$50.00	Pay Invoice	No
05/02/2019	13:00	ARMCH19	Armchair Travel			
07/02/2019	9:30	BIKE19	Bike Riding			
08/02/2019	17:00	BEER19	Beer and Cider Alliance			

3. Click the Pay Invoice button.

5. Your invoice will open in a pop-up window. Payment options will be listed at the bottom of the invoice: **These will depend on the payment methods offered by your U3A.**
The following screenshot shows an invoice from a U3A that allows payments by PayPal or by bank deposit/EFT.

Total Amount to pay: $50.00

SUBJECT TO RECEIPT OF YOUR PAYMENT YOU ARE AN ACTIVE MEMBER

Paypal and bank transfer accepted for payment.

Paypal

How to Pay Using your PayPal account or using your Visa, MasterCard or Debit Card
We recommend that you pay your subscription via PayPal, which is safe and secure. You can use either a PayPal account or your Visa, MasterCard or debit card. Click on the **Submit Payment** button which will take you to the PayPal payment page.
After being transferred to PayPal, (below the Log In button) there is an option **Pay with a Card**. Use this button if you do not have a PayPal account.
When you have paid, your enrolment will be confirmed when the PayPal transaction is complete. You will be returned to the member screen where you can verify the payment has been accepted. You will receive a separate email from PayPal confirming your payment.
Alternative payment options are shown below.

Submit Payment

Bank transfer

Pay anyone:- Test Bank, BSB 000 000, Account 1234 123456
Reference: 1377
The Reference number must be entered with your payment to ensure your subscription is processed correctly.

○ **To pay offline, or by EFT (electronic funds transfer):**
Click the Print button in the top right corner of the invoice, to print the invoice. Pay the invoice according to the payment methods offered by your U3A.

○ **To pay online using PayPal**, you will need either a PayPal account or a credit card:
Click the Submit Payment button near the bottom of the invoice: You will be taken to the PayPal website, where you can choose to either log in and pay with your Pay Pal account, or select Pay with a Card to use a credit card without a PayPal account.
After paying, be sure to wait while you are returned to UMAS.

6. Once your payment has been conirmed, the status of your invoice in UMAS will update to Paid. You will usually also receive an email confirming your payment.

How to print your name badge

Some U3As provide an option for members to print their own name badges.

1. To access your name badge, log in if you're not already logged in, and then click the Vew Member Details link in the left side menu.

   View Member Details

2. Scroll down to the bottom of the screen, and click the Create a Name Badge button underneath your enrolments list.

   Create a Name badge

3. Your name badge will be generated as a Word document. A popup window will open, containing a button, Download Name Badge docx: You can download the document and print it at home.

> **If you can't see the "Create a Name Badge" button...**
> - Have you enrolled and paid your membership fee for the current year? If not, you will need to do this first: See the How to renew your membership section of this user manual.
> - Your U3A may not have turned this feature on. Some U3As will provide name badges to members using a different method, such as by mail or email. Check with your U3A if unsure.

What to do if you have forgotten your password

If you know your membership number and if you provided your email address when you joined up, a password reset link can be emailed to you:

1. Go the Login link in the left side menu:

   Login

2. Click the I have forgotten my password link below the login form.

   Membership number or email: [ ]
   Password: [ ]
   Login

   - I have forgotten my password
   - I know my password but not my member number
   - I am a member, but have forgotten my details
   - **I would like to join**
   - Return to the Website

3. Fill in your membership number and surname, then click the Send email link to reset password button.

   You can reset your password here.

   Member number: 1377
   Surname: Jones

   When you click 'Send email link to reset password' an email will be sent to you.

   Send email link to reset password   Close

4. You will receive an email from the U3A including a "Click here to reset your password" link: Click on the link.
5. Your web browser will open on a password reset form: Enter your new password, then click the Click here to reset your password button.

Annie Jones please enter your new password and confirm.

Password Reset.

Minimum of 5 and maximum of 20 characters. Do not use < > \ & characters.

Click here to Reset Your Password

6. You can now return to the login screen, and enter your membership number and new password to log in.

Login

If you don't know your membership number, or if there is no email address associated with your membership, then the U3A's memberships coordinator or office volunteers will assist you: Follow the steps in this user guide under What to do if you have forgotten both your password and your membership number.

What to do if you have forgotten your membership number

Firstly, it may help to do a quick search of your emails, looking for past correspondence from the U3A: Emails such as your New Membership email and subsequent course enrolment emails will usually include your membership number. If you can't find it, follow the steps below:

If you know your password and if you provided your email address when you joined up, you can quickly retrieve your membership number:

1. Go the Login link in the left side menu:

Login

2. Click the I know my password but not my membership number link below the login form.

Membership number or email:

Password:

Login

- I have forgotten my password
- I know my password but not my member number
- I am a member, but have forgotten my details
- **I would like to join**
- Return to the Website

3. Fill in your password, first and last name and year of birth, then click Retrieve.

Password: ●●●●●●●●●●

First name: Liz

Surname: Member

Year of Birth: 1955 (yyyy)

Retrieve

4. Your membership number will be emailed to you: After receiving the email, you can return to the login screen, and enter your membership number and password to log in.

Login

If you don't know your password, or if there is no email address associated with your membership, then the U3A's memberships coordinator or office volunteers will assist you: Follow the steps in this user guide under What to do if you have forgotten both your password and your membership number.

What to do if you have forgotten both your password and your membership number

U3A office volunteers will need to assist in retrieving your details. You can follow the steps below to send a message to the memberships coordinator. Alternatively, you can contact your U3A office directly.

1. Go the Login link in the left side menu:

Login

2. Click the I am a member, but have forgotten my details link below the login form.

Membership number or email: _____

Password: _____

Login

- I have forgotten my password
- I know my password but not my member number
- I am a member, but have forgotten my details
- **I would like to join**
- Return to the Website

3. Fill in the form. (This information is needed so that U3A volunteers can find you in the membership database.) Fields marked with an asterisk (*) are required.
If you don't have an email address, enter "No email" or similar in the Email field. Make sure you provide at least one phone number, though, so that the U3A can contact you.
Click Send when finished.

4. Your message will be sent to the U3A memberships coordinator. U3A office volunteers will contact you and reset your membership details for you.

How to update your details

1. Log in to the membership management system.
2. Click the Edit Member Details link in the left side menu:
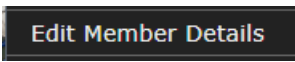
3. On the Edit Member Details screen, you can change details including:
   - Preferred name, address, phone and email
   - Emergency contact person
   - Password

   For most U3As, you cannot update your member number, name, gender or member type: If any of these need adjustment, please contact your U3A's office to make the change for you.

4. After making your changes, click the Save button near the bottom of the screen.

Need to change course enrolment details?

You can enrol in more courses, so long as enrolments are open: See How to Enrol in this user manual.

For all other enrolment-related changes, you'll need to contact the course coordinator or U3A office volunteers to make the changes for you.

What courses am I enrolled in?

This information is available on the View Member Details screen:

1. Log in to the membership management system.
2. Click the View Member Details link in the left side menu:

   View Member Details

3. Scroll down to find your list of current enrolments near the bottom of the screen. You will also see your list of waitlisted enrolments, if any.

   On a Wait list

Start Date	Time	Code	Description
01/02/2019	9:00	BUSH19	Bushwalking Group

   Enrolments and subscriptions (Current)   [Print Enrolments]

   Please select ▾

Start Date	Time	Code	Description	Amount		Paid
25/11/2018	0:00	SUBS2019	Subscriptions for 2019	$50.00	[Invoice]	Yes
05/02/2019	13:00	ARMCH19	Armchair Travel			
07/02/2019	9:30	BIKE19	Bike Riding			
08/02/2019	17:00	BEER19	Beer and Cider Alliance			

4. If you'd like to print out your enrolments, use the Print Enrolments button.

When does my course start?

This information is available in the course timetable:

1. Click the View Courses link (if you are not logged in), or View or Select Courses link (if you are logged in) in the left side menu.

   View Courses

2. Find your course in the list.
   If you are logged in, the course codes of courses in which you are enrolled will be coloured red: This may make your course easier to find.

   Choose Parent code: None ▾

Code	Course	Location
ARMCH19	Armchair Travel	Golden Wattle
☐ ARTCRA19	Art & Crafts Group	The Court House
☐ BANJO19	Banjo Club	The Court House
BEER19	Beer and Cider Alliance	Private Home
BIKE19	Bike Riding	Outdoors variable
☐ BUDDH19	Buddhism Discussion Group	The Court House
BUSH19	Bushwalking Group	Outdoors variable
☐ BUSHD19	Bushwalking Group D	Outdoors variable
☐ BUSHW19	Bushwalking Group W	Outdoors variable

3. Click on the course title to open the Course Details screen: On this screen you can find all key details including dates, frequency, times, and venue.

Course Details

Course Code:	**ARMCH19**
Description:	**Armchair Travel**
Frequency:	**Monthly1**
Leader:	**Sam Tutor** **Phone: 0400 000 000**
Leader2:	**None**
Type:	**None**
Location:	**Golden Wattle**
Start Date:	**05/02/2019 Tue**
Finish Date:	**13/12/2019**
Start Time:	**13:00**
Finish Time:	**14:00**
Maximum enrolments:	**50**
Number Enrolled:	**2**
Comments:	Armchair travel explores Australian travel and history and is currently offered to Golden Wattle for their senior people and U3A members are welcome to join. The sessions are approx. one hour once a month at Golden Wattle from February to December.

Print

4. If you are logged in, the course tutor/leader's phone number and/or email address may be displayed as well, and you can contact the tutor/leader for more information if required. If tutor/leader contact details are not displayed, you can contact the U3A office or course coordinator for more information.

Where is my course held?

This information is available in the course timetable. See When does my course start?, above.

How do I cancel my enrolment in a course?

Please inform your U3A's course coordinator or office volunteers, and they will cancel your enrolment for you. Contact details are usually available by clicking the Contact Us - Courses link in the left side menu, or by checking the U3A's website.

Contact Us-Courses

How do I report my absence from a course?

Class tutors/leaders appreciate a warning if you know you will miss a class.

Some U3As provide an option for members to report absences through UMAS. If available, you can do this through the Report Absence link in the left side menu.

Report Absence

If this option is not available, your U3A will have a different method of reporting absences (such as informing the Course Coordinator or class tutor/leader directly). Check with your U3A if unsure.

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For New and Prospective Members

How to join

First, you need to sign up as a new member. After you have joined, you will be able to enrol in courses and pay your subscription fees.

Most U3As also allow offline joining, however online joining is the recommended method where possible.

Note for previous members

If you are or have ever been a member of this U3A, even if your membership has lapsed, **do not** join up as a new member. Instead, you should renew your membership: See the How to renew your membership section of this user manual.

1. In your web browser, navigate to your U3A's website, and from there, find your way to your U3A's membership management system (UMAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to UMAS.
   If you don't know your U3A's website address (URL), try a Google search of your U3A's name. Alternatively, contact your U3A's office volunteers for assistance.

2. Click the Enrol as New Member link in the left side menu.

3. Fill in the form. Fields marked with an asterisk (*) are required.
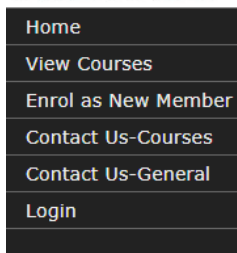
Choosing a password

As part of the form, you will need to enter a password. Make sure you choose a password that is difficult to guess: A combination of upper and lowercase letters, numbers, and symbols is good.

Keep your password safe: You will need it to log in to UMAS.

4. When you've finished, click the Submit button at the bottom of the form.

1. On successful submission, a message like this will be displayed:

> ### Your membership number
> The message will include your new membership number. You will need this number in future, so write it down.

2. Now go to the Login link in the left side menu:

Enter your new membership number and password, and click the Login button.

3. On successful login, you will see a welcome message, and some additional items will be available in the left side menu.

4. Congratulations, you have joined the U3A.
Your next step is to enrol in one or more courses, and then pay your subscription fees. See the How to enrol section of this user manual for details.

How to view course details without joining

1. In your web browser, navigate to your U3A's website, and from there, find your way to your U3A's membership management system (UMAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to UMAS.
   If you don't know your U3A's website address (URL), try a Google search of the U3A's name. Alternatively, contact the U3A's office volunteers for assistance.

2. Click the View Courses link in the left side menu.

   View Courses

   A course list similar to this will be displayed:

3. **Some tips on using the course list:**
   - Some courses may be highlighted in different colours. The colour denotes the status of the course: Whether the course is finished, full, a new course, or a one-day course.
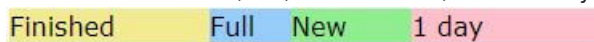
   - If you are using a mouse, you can hover over parts of the timetable to get more information:
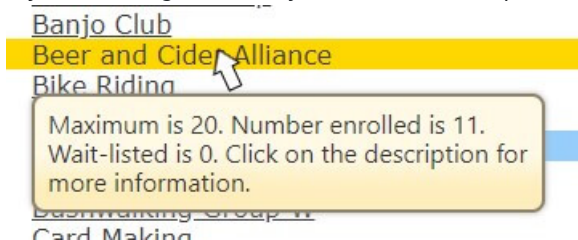
     - Hover over a course name to get the number of available spaces in this course.
     - Hover over a location name to get the venue address (if available).
     - Hover over a frequency name to get a more detailed description of that frequency.
   - Use the Choose Parent Code selector to filter the displayed courses by category.
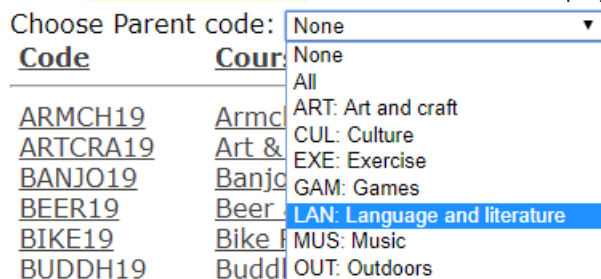
   - Click on any column header to sort by that column.
   - Click on a course title or course code to see a detailed description of the course.

Course Details

Course Code:	**ARTCRA19**
Description:	**Art & Crafts Group**
Frequency:	**Weekly**
Leader:	**Sally Tutor**
Leader2:	**None**
Type:	**None**
Location:	**The Court House**
Start Date:	**05/02/2019 Tue**
Finish Date:	**13/12/2019**
Start Time:	**13:00**
Finish Time:	**15:00**
Maximum enrolments:	**22**
Number Enrolled:	**15**
Comments:	The Arts and Craft Group share an interest and passion in many forms of artistic visual expression. Members currently practise water colour, acrylic and oil painting, pastel and pencil drawing and even quilt making. The range of skills varies, from beginner to

Print

If you decide that you would like to enrol in a course, you need to first make sure that you are a member (see the the How to join section of this user manual if required), and then log in to enrol.