Member Self-Service Portal Module Checklist

For association managers defining the member-facing portal within membership or association management software.

How to use this checklist

This checklist covers one functional module within a wider membership management or association management system. Mark what your association needs, add your policy decisions, and ask shortlisted vendors to demonstrate the difficult cases using realistic member data.

Association	
Reviewer and date	
Shortlisted system	

Member journeys

Check	Requirement or decision	Notes
[ ]	List the five routine requests that currently create the most email or phone work.	
[ ]	Show current membership type, status, validity period, benefits, and next action.	
[ ]	Decide what active, lapsed, applicant, and former members can each see and do.	
[ ]	Confirm that completed portal actions update the main member record without rekeying.	

Profile changes

Check	Requirement or decision	Notes
[ ]	Mark each profile field as member-editable, staff-reviewed request, or staff-only.	
[ ]	Tell members whether a change is immediate or waiting for review.	
[ ]	Keep previous values and the source of important changes.	
[ ]	Provide a clear route for correcting an official record.	

Renewals and payments

Check	Requirement or decision	Notes
[ ]	Show the membership being renewed, the new period, the fee, and required declarations.	
[ ]	Support the payment methods the association actually accepts.	
[ ]	Keep renewal submitted, payment pending, under review, and renewed clearly separate.	
[ ]	Let members view invoices, receipts, credits, and payment status.	
[ ]	Explain what happens after a failed card payment or unmatched bank transfer.	

Corporate members

Check	Requirement or decision	Notes
[ ]	Identify organisation administrators, billing contacts, voting representatives, and ordinary representatives.	
[ ]	Define which company details and representatives each role may change.	
[ ]	End a departing representative's access without deleting their history.	
[ ]	Show corporate seat or representative limits where they apply.	

Other member activity

Check	Requirement or decision	Notes
[ ]	Show eligible events and the correct member price.	
[ ]	Let members view registrations, attendance, certificates, and cancellations.	
[ ]	Show CPD progress, evidence status, and outstanding requirements in plain language.	
[ ]	Separate personal documents, shared resources, and confidential staff notes.	
[ ]	Provide meaningful communication and directory privacy preferences.	

Access and usability

Check	Requirement or decision	Notes
[ ]	Test sign-in, password recovery, mobile use, keyboard use, and readable form errors.	
[ ]	Check what each role can see after login, not only whether login works.	
[ ]	Set an approval path for sensitive requests and exceptions.	
[ ]	Test seven complete member journeys with realistic data before launch.	

Vendor demonstration notes

Next step

Use the completed checklist to write a short brief: must-have rules, acceptable workarounds, data to migrate, integrations to confirm, and three scenarios every vendor must demonstrate.