

Membership Application Approval Module Checklist

For association managers comparing or configuring the application and approval module inside membership 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	

Application scope

Check	Requirement or decision	Notes
☐	List every application type: new individual, corporate, upgrade, reinstatement, credential, or other route.	
☐	Define which applicant answers select a different form or review route.	
☐	Confirm whether applicants can save a draft and return later.	
☐	Decide when an incomplete draft expires and what the applicant is told.	

Information and evidence

Check	Requirement or decision	Notes
☐	List the fields, declarations, references, and documents required for each application type.	
☐	Separate information the system can validate from evidence a person must assess.	
☐	Define how staff request one missing item without asking the applicant to start again.	
☐	Keep the original submission and later corrections together as one case.	

Review and decisions

Check	Requirement or decision	Notes
[]	Name the owner of the completeness check, specialist review, final decision, and any committee step.	
[]	Define which applications staff may approve and which require escalation.	
[]	Decide whether a second reviewer is required and how disagreement is resolved.	
[]	Record the reviewer, date, decision, reason, evidence considered, and any exception.	
[]	Show staff exactly what each application is waiting for.	

Payment and activation

Check	Requirement or decision	Notes
[]	Choose whether the application fee or membership fee is collected before or after approval.	
[]	Define refund rules for unsuccessful or withdrawn applications.	
[]	Keep approval, invoice, payment, and active membership as separate results.	
[]	Set a payment deadline for approved but unpaid applications.	
[]	Define the exact condition that activates membership benefits and portal access.	

Applicant experience and reporting

Check	Requirement or decision	Notes
[]	Write the message and next action shown at every stage.	
[]	Let applicants see requests for information, deadlines, decisions, and payment status.	
[]	Set reminders and escalation rules for overdue applicant or reviewer actions.	
[]	Report waiting for applicant, reviewer, committee, payment, and activation separately.	
[]	Test one routine application and one exception from start to finish.	

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.