

# CIPM Membership System

## 1. CIPM Membership Onboarding Process

The **Chartered Institute of Personnel Management Sri Lanka (CIPM)** Membership Management System allows individuals to register, apply for membership, and progress through approval and activation stages in a structured, transparent process.

### 1. Registration (System User Creation)

- When a visitor accesses the official CIPM website, they will find a “**Member Login/Register**” button.
- **Existing members** can log in directly to their dashboard.
- **New users** must go through the registration process by entering their **basic personal details** (such as name, contact information, etc.).
- Once the initial registration form is submitted, the user is **created in the system** but is **not yet a member**.

*(At this stage, the user is recognized as a registered applicant.)*

### 2. Membership Application

- The next step requires the applicant to complete the **membership application form**.
- The applicant must **select a membership tier** (e.g., *Affiliate, Associate, Chartered, Chartered Fellow*).
- Once a tier is selected, the system displays:
  - The **required CPD points** for that level.
  - The **qualification criteria** that must be met.
- The applicant fills in the required details and uploads all **supporting documents** (e.g., certificates, transcripts, proof of experience).
- After submission, the system:
  - Creates a **temporary membership code**.
  - Sets the application **status to “Pending”**.

### 3. Admin Review & Interview Process

- From the **Admin Portal**, administrators can view the list of **pending membership applications**.

- Applications, along with the uploaded documents, can be **reviewed and printed** for use by the **Interview Panel**.
- The **Interview Panel** then:
  - Schedules interviews.
  - Conducts applicant evaluations.
  - Prepares a **list of recommended candidates** for council review.

#### 4. Council Approval

- The **approved list** from the interview panel is submitted to the **Monthly Council Meeting** for final consideration.
- Upon **Council approval**, the system administrator updates the applicant’s record to reflect **“Approved”** status.
- At this stage, the applicant becomes **eligible for membership**, but the membership is **not yet activated**.

#### 5. Membership Payment & Activation

- Once approved, the system automatically sends an **email notification** to the applicant that includes:
  - An **award letter** with their **official membership code**.
  - A **payment link** and **payment details** for the membership registration fee.
- The applicant can:
  - **Pay online** via the integrated payment gateway, **or**
  - **Upload a bank deposit slip** if payment is made manually.
- After successful payment:
  - The system updates the member’s status to **“Active”**.
  - If the payment was made via bank deposit, the admin must **verify and approve** the uploaded slip before activation.
- Alongside the payment, the applicant must also **upload the signed “Code of Conduct”** form.
- Once both **payment and Code of Conduct submission** are confirmed, the **membership becomes fully activated**.

## Summary Flow

1. **Register** → User created (not a member yet)
2. **Apply for Membership** → Submit tier & documents → Status: Pending
3. **Admin Review** → Interview Panel → Council Approval
4. **Approval** → Award letter + Payment link sent
5. **Payment & Code of Conduct** → Verification → Membership Activated

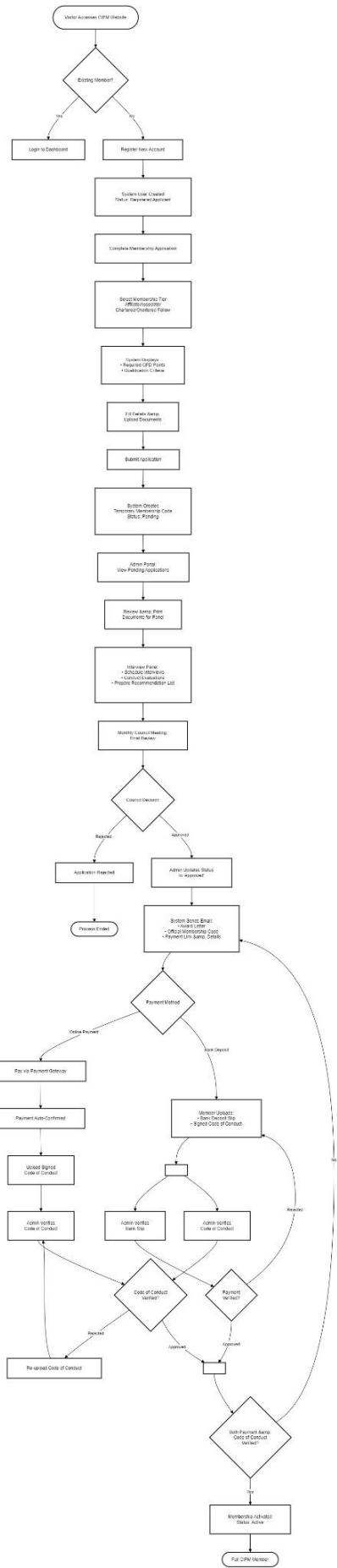


Figure 1: Member Onboard Flow

## 2. Member Functionalities via Dashboard

### 1. Profile Management

- Registered members can **update and maintain their personal information** such as contact details, address, and other relevant data.
  - The system ensures that member profiles are always **up-to-date and accurate**.
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### 2. Membership Renewal

- Members can **renew their membership package (tier)** directly through the dashboard.
  - Renewal payments can be made via:
    - The **online payment gateway**, or
    - **Bank deposit**, which requires verification and approval by the finance team.
  - Upon successful payment, an **e-invoice** is automatically generated for the member's records.
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### 3. Membership Tier Upgrade

- Members can submit a **Tier Upgrade Request** by filling out the **Tier Upgrading Form** available in the dashboard.
  - The system records and tracks the **upgrade approval process**.
  - Once the upgrade is **approved**, the member can **proceed with the payment** for the new tier.
  - The entire upgrade history is stored and displayed in the **member's profile** for transparency.
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### 4. Event & Workshop Management

- Members can view a list of **upcoming events, seminars, and workshops** organized by CIPM.
- Members can **register** for these events directly through the system.
  - If the event has a **fee**, it can be paid online or via bank deposit.
- After registration, members can **download their event ticket or entry pass**.

- Members can also view their **past event participation history** and **download participation certificates** from the dashboard.
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## 5. Notifications & Reminders

- The system provides **real-time notifications** through:
    - **Dashboard notification panel (in-app)**
    - **Email alerts**
    - **SMS messages**
  - Notifications include:
    - Membership expiry and renewal reminders
    - Due payment alerts
    - Event date reminders
    - Announcement updates
    - Profile and payment status changes
  - All notifications and communications are **automatically logged** for audit and tracking purposes.
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## 6. Payment Management

- Members can view all **due payments** with direct **payment links** for easy settlement.
  - The dashboard provides access to the **complete payment history**, including invoices and receipts.
  - **E-invoices** are generated automatically for all transactions.
  - The **Admin/Finance Team** has the facility to **enter or update payments** on behalf of a member, if necessary.
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## 7. CPD (Continuing Professional Development) Tracking

- Members can view their **CPD points history**, including:
  - The **current total CPD points** accumulated.
  - A detailed breakdown of **how and when each point was earned** (e.g., through events, workshops, contributions).

- This feature supports members in tracking their progress towards **membership upgrades** and professional development.
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## 8. Support & Communication

- Members can submit **support inquiries** or **contact the admin team** directly through the dashboard by writing an email.
  - All **communication activities** (emails, messages, notifications) are **systematically logged** for future reference.
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## 9. Public Member Profile View

- Each member has a **public profile page** displaying:
    - Personal and professional details
    - Current membership tier
    - Tier upgrade history
  - The profile can be accessed via:
    - A **unique QR code**, or
    - By entering the **membership code** on the website.
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## Summary

- Profile and membership management
- Renewals and tier upgrades
- Event participation and CPD tracking
- Notifications and support communication
- Secure payment handling with audit trails



### 3. Administrator and Team Functionalities (Admin Dashboard)

#### 1. Member Management

- View and manage all **new member registrations**.
  - **Schedule interviews** for new applicants and **notify** the respective members of interview details.
  - After **Council approval**, generate and send **Awarding Letters** with **membership codes** and **payment links** for registration fees.
  - **Activate memberships** upon successful payment verification and after confirming the **signed Code of Conduct**.
  - Administrators can also **manually add new members** through the admin panel when necessary.
  - View the **complete list of members** with access to:
    - Personal and membership details
    - **Activity history** and **payment history**
    - Ability to **update member status** (e.g., pending, approved, active, suspended)
    - Adjust or update **CPD point balances** where applicable
  - View and process **membership tier upgrade requests**, including reviewing documentation, updating status, and approving or rejecting upgrade applications.
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#### 2. Payment Management

- Access a comprehensive **payment list** for all types of transactions, including:
  - New membership registrations
  - Tier renewals
  - Tier upgrades
  - Event or workshop registrations
- **Verify and approve payments**, including:
  - **Online payments** received via the integrated payment gateway
  - **Bank deposit payments**, with uploaded proof of deposit for manual verification

- Create **manual or offline payments** on behalf of members when necessary.
  - View **due payment information** per member, including outstanding balances and payment deadlines.
  - Maintain a complete **audit trail** for all payment updates and verifications.
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### 3. Event and Workshop Management

- Manage all **events and workshops** organized by CIPM.
  - Maintain details such as:
    - Event title, description, date, venue, audience and fee
    - **CPD point values** associated with each event
    - Participant lists and registration statuses
  - Track payments for **paid events** and verify attendance records.
  - Generate reports on **event participation** and **CPD contribution**.
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### 4. CPD Points Management

- Manage and update the **CPD point structure** used for member assessments and upgrades.
  - Modify and maintain point values for:
    - **Educational qualifications**
    - **Work experience criteria**
    - **Professional contributions** and other CPD categories
  - Ensure that changes in CPD allocation are reflected throughout the system for accurate member evaluations.
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### 5. Membership Package (Tier) Management

- Create, edit, and manage **membership tiers (packages)** such as *Affiliate, Associate, Chartered, and Chartered Fellow*.
- Define and update:
  - **Tier titles and fees**

- **Eligibility criteria**
  - **Required CPD points** and other qualifications
  - Control the **upgrade flow** between membership tiers.
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## 6. Notifications and Communication Management

- Create and manage **announcements** visible to members through the dashboard or email.
  - View all **notifications** generated from member activities (registrations, payments, renewals, event participation, etc.).
  - Edit and maintain **email and SMS templates** used for system-generated communications (e.g., reminders, approval notices, payment confirmations).
  - Send **bulk notifications** or **mass communication campaigns** to members.
  - Manage and monitor the **bulk member import module**, including validation and data mapping.
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## 7. Reporting and Analytics

Generate and export detailed reports and analytics for administrative insights, including:

- **Membership Reports** – total members, new registrations, active/inactive status, tier distributions, and area-wise member distribution.
  - **CPD Reports** – member CPD point summaries and activity-based point allocations.
  - **Event Reports** – attendance records, event participation rates, and CPD contributions from events.
  - **Financial Reports** – payment summaries by type, source, and verification status.
  - **Notification & Communication Reports** – logs of messages sent, delivery success, and member engagement metrics.
  - Provide **data analytics dashboards** for visual summaries and decision-making support.
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## Summary

- Efficiently manage the entire **membership lifecycle**
- Oversee and verify **payments and events**
- Maintain accurate **CPD and membership data**
- Streamline **communications and reporting**

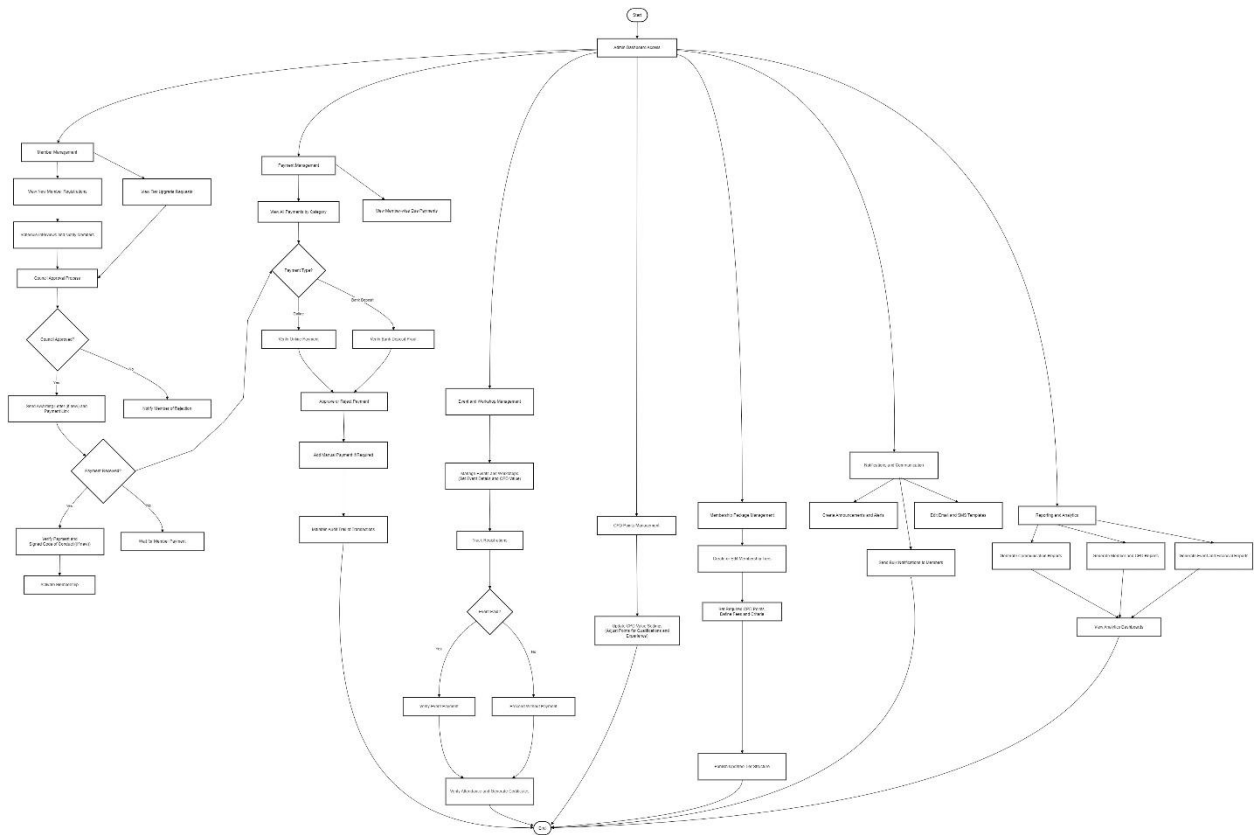


Figure 4: Admin Dashboard Flow