

## Instructions for Adding New Initiates

To view this form's due dates go to: [phisigmapl.org/duedates](http://phisigmapl.org/duedates)

Log in to: [chapteradmin.phisigmapl.org](http://chapteradmin.phisigmapl.org)

Select "Initiate Class" and then "Add New Initiates"

Welcome, Suzanne To My Profile

PHI SIGMA PI Chapter Admin Portal

Dashboard Member Roster Chapter Profile **Initiate Class** Chapter Standards of Excellence (CSE) Officer Updates Reports

Dashboard Test Chapter A1

Understanding ChapterAdmin Portal

2019 National Convention

2019 National Convention  
July 31-August 3, 2019 | Orlando, FL  
That's right. We're heading to Disney Springs for the 2019 National Convention.  
Host Resort: Hilton Lake Buena Vista

Chapter Membership Totals

Student Members — 3  
Alumni Members — 0  
Honorary Members — 0  
Nationally Inactive Members — 0  
Total Membership — 3

Chapter Status

Chapter Status: GOOD

Dashboard Member Roster Chapter Profile **Initiate Class** Chapter Standards of Excellence (CSE) Officer Updates Reports Executive

Dashboard

Understanding ChapterAdmin Portal

2019 National Convention

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Chapter Membership Totals

Student Members — 3  
Alumni Members — 0  
Honorary Members — 0  
Nationally Inactive Members — 0

Add New Initiates  
Initiate to Member  
Unclaimed New Members  
Edit Initiate Member Information

Start the 5 Step Process

Step 1: Read through the Directions and then click "Continue".

Dashboard Member Roster Chapter Profile **Initiate Class** Chapter Standards of Excellence (CSE) Officer Updates Reports

Initiate Class > Add New Initiates Test Chapter A1

Overview Selection Additional Info Validation Receipt

Step: Overview Continue (Selection)

Congratulations on your new Initiates this term! Please fill out this form, which is a five step process, to get your Initiates set up in our database. After you fill out the information a Membership Agreement will be sent to the Initiates. This form must be filled out in order to continue the Initiate process.

**Directions:**

1. Press "Continue."
2. Enter the Initiates first name, last name and a current email address for each Initiate. Note: You can only enter Initiates in batches of 10 or less. How you enter the Initiates name will be how it will show up on the Initiates' Shingle once the Initiate becomes a Member.
3. Review the changes, add an effective date (this should be the date the Initiate was Pinned) and press "Continue." Note: If all of your Initiates have the same effective date, you can enter one and press "Apply To All."
4. Validate your submission by e-signing your name and the date exactly as it is read below the text box. Press "Continue."
5. Print your receipt for your Chapter Records.

Note: You may also edit existing records up until the Initiate signs their Membership Agreement.

Step: Overview Continue (Selection)

**Step 2: Add each Initiate by providing the First Name, Last Name and their email address. Then hit "Add Person".**

Initiate Class > Add New Initiates

Test Chapter A1

Overview Selection Additional Info Validation Receipt

Back Step: Selection Continue

(Overview) (Additional Info)

**Directions:**  
Enter the Initiates first name, last name and a current email address for each Initiate.  
Note: PLEASE ENTER NEW MEMBERS IN BATCHES OF 10 OR LESS. THE SITE WILL NOT ACCEPT MORE THAN 10 NEW MEMBERS AT A TIME.

Name: Eldo  
Hendricks  
Contact Info: EHendricks@TestChapterA1.PSP.edu

Add Person

First Name	Middle Name	Last Name	Email
No pending new member to display			

Back Step: Selection Continue

(Overview) (Additional Info)

Only 10 Initiates can be added at a time and then you must click "Continue".

Initiate Class > Add New Initiates

Test Chapter A1

Overview Selection Additional Info Validation Receipt

Back Step: Selection Continue

(Overview) (Additional Info)

**Directions:**  
Enter the Initiates first name, last name and a current email address for each Initiate.  
Note: PLEASE ENTER NEW MEMBERS IN BATCHES OF 10 OR LESS. THE SITE WILL NOT ACCEPT MORE THAN 10 NEW MEMBERS AT A TIME.

Name: First Name  
Last Name  
Contact Info: Email Address

Add Person

First Name	Middle Name	Last Name	Email	Edit Delete
Eldo		Hendricks	EHendricks@TestChapterA1.PSP.edu	

Back Step: Selection Continue

(Overview) (Additional Info)

### Step 3: Add the Pinning Date (the date they were pinned as Initiates) and then click "Continue".

Dashboard Member Roster Chapter Profile **Initiate Class** Chapter Standards of Excellence (CSE) Officer Updates Reports

Initiate Class > Add New Initiates **Test Chapter A1**

Overview Selection **Additional Info** Validation Receipt

Back Step: Additional Info Continue  
(Selection) (Validation)

**Directions:**  
Review the changes, add an effective date (this should be the date of the Pinning Ceremony) and press "Continue."  
Note: If all of your Initiates have the same Pinning date (the ceremony date for when they start the Initiation Program), you can enter one and press "Apply To All." Note: Please be sure that the name appears with correct spelling, punctuation, and capitalization since this information will be used on the New Member Shingle once the Initiate becomes a New Member.

First Name	Middle Name	Last Name	Email	Additional Information
Eldo		Hendricks	EHendricks@TestChapterA1.PSP.edu	* Effective Date: 8/23/2018 Apply To All

Back Step: Additional Info Continue  
(Selection) (Validation)

### Step 4: Type in your name and date as it appears on the bottom and then click "Continue".

Overview Selection Additional Info **Validation** Receipt

Back Step: Validation Continue  
(Additional Info) (Receipt)

**Directions:**  
Review the information you submitted below. Validate your submission by e-signing your name and the date exactly as it is read below the text box. Press "Continue."

First Name	Middle Name	Last Name	Email	Additional Information
Eldo		Hendricks	EHendricks@TestChapterA1.PSP.edu	Effective Date: 8/23/2018

I affirm that the information I am submitting above is accurate and is valid according to the policies of Phi Sigma Pi National Honor Fraternity. \*Please enter your name and the date exactly as it appears below the box.

Suzanne		Schaffer	8/14/2018
Suzanne		Schaffer	8/14/2018

Back Step: Validation Continue  
(Additional Info) (Receipt)

## Step 5: Print the receipt and confirmation page for your records.

Initiate Class > Add New Initiates

Test Chapter A1

Overview Selection Additional Info Validation Receipt

Step: Receipt

Go to Task Center

### Directions:

Print your receipt for your Chapter Records.

Your submission may be subject to approval by National Headquarters. If so, the change will post once that approval has been granted. The Initiates you have just added will receive an email which will ask them to update their personal information. Please ensure that all Initiates update their profiles within one week after receiving this e-mail so they can receive important information from National Office.

If you have any questions about your submission please contact the National Office at [pspoffice@phisigmapi.org](mailto:pspoffice@phisigmapi.org) or 717-299-4710.

Print

### Summary

Batch ID:	1808141-000-7
Created By:	Suzanne
Date:	8/14/2018
Trans Count:	1
Total Amount:	\$0.00

First Name	Middle Name	Last Name	Email	Additional Information	Amount
Eldo		Hendricks	EHendricks@TestChapterA1.PSP.edu	Effective Date: 8/23/2018	\$0.00

Step: Receipt

Go to Task Center

Repeat as needed in batches of 10 Initiates.

**You are finished.**