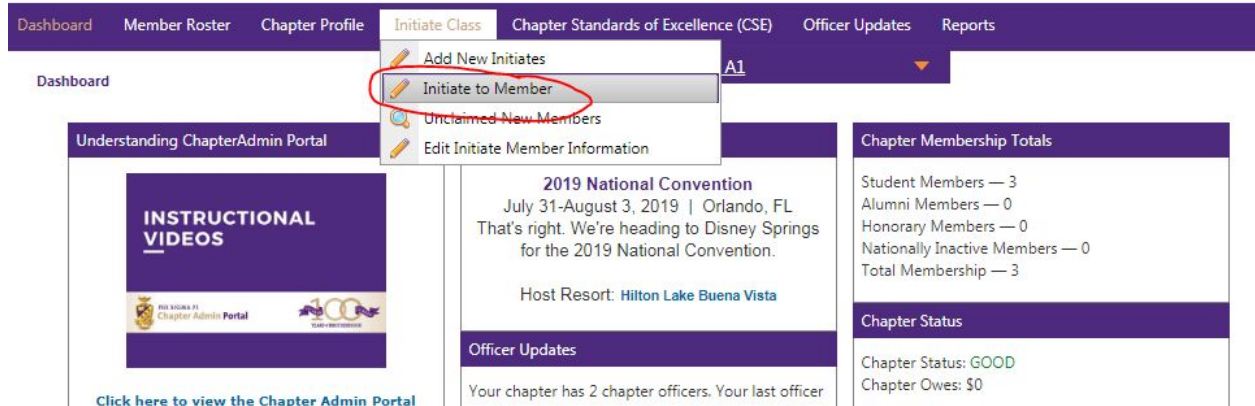


## Instructions for Converting Initiate to Member

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)

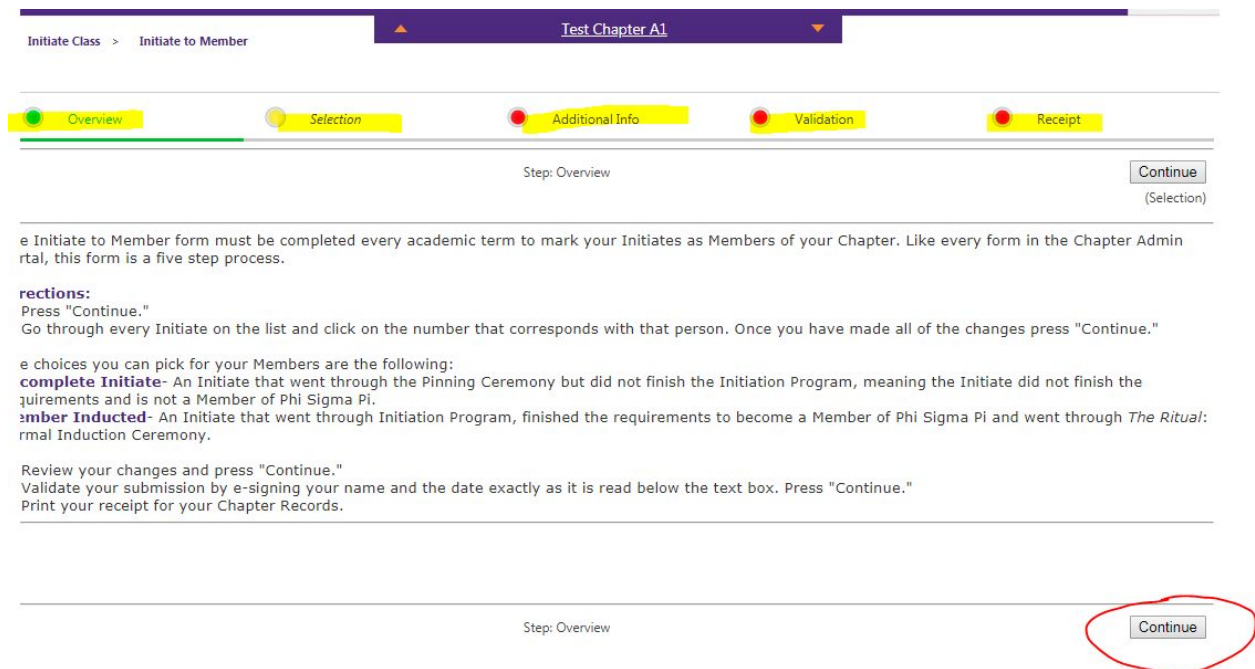
Select "Initiate Class" then "Initiate to Member"



The screenshot shows the Chapter Admin Portal dashboard. The top navigation bar includes: Dashboard, Member Roster, Chapter Profile, **Initiate Class**, Chapter Standards of Excellence (CSE), Officer Updates, and Reports. A dropdown menu is open under 'Initiate Class', with 'Initiate to Member' circled in red. Other options in the menu are 'Add New Initiates', 'Unclaimed New Members', and 'Edit Initiate Member Information'. The main content area features a 'Understanding ChapterAdmin Portal' section with 'INSTRUCTIONAL VIDEOS', a '2019 National Convention' announcement (July 31-August 3, 2019 | Orlando, FL), and 'Chapter Membership Totals' (Student Members: 3, Alumni Members: 0, Honorary Members: 0, Nationally Inactive Members: 0, Total Membership: 3). A 'Chapter Status' section shows 'GOOD' status and '\$0' owed.

Start the 5 Step Process

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



The screenshot shows the 'Initiate to Member' form overview step. The breadcrumb trail is 'Initiate Class > Initiate to Member'. The current chapter is 'Test Chapter A1'. A progress bar shows five steps: Overview (active), Selection, Additional Info, Validation, and Receipt. The 'Continue' button is circled in red. Below the progress bar, the text reads: 'e Initiate to Member form must be completed every academic term to mark your Initiates as Members of your Chapter. Like every form in the Chapter Admin Portal, this form is a five step process. rections: Press "Continue." Go through every Initiate on the list and click on the number that corresponds with that person. Once you have made all of the changes press "Continue." e choices you can pick for your Members are the following: complete Initiate- An Initiate that went through the Pinning Ceremony but did not finish the Initiation Program, meaning the Initiate did not finish the requirements and is not a Member of Phi Sigma Pi. Member Inducted- An Initiate that went through Initiation Program, finished the requirements to become a Member of Phi Sigma Pi and went through The Ritual: Annual Induction Ceremony. Review your changes and press "Continue." Validate your submission by e-signing your name and the date exactly as it is read below the text box. Press "Continue." Print your receipt for your Chapter Records.'

**Step 2: Click "2" for those Initiate Members that have been inducted as Members". Click "1" for Initiates that have not completed the program. Then click "Continue".**

If an Initiate's name does not display or does not permit updating to "Member Inducted" please follow directions on the last page.

Initiate Class > Initiate to Member Test Chapter A1

Overview Selection **Additional Info** Validation Receipt

Back (Overview) Step: Selection **Continue** (Additional Info)

**Directions:**  
 You are now ready to update the status of the Initiates in your Chapter. To do this go through each Member and click on the number that corresponds with that person.

Please note the following definitions of each term below to pick the right one for each of your Members:  
**Incomplete Initiate**- An Initiate that went through the Pinning Ceremony but did not finish the Initiation Program, meaning the Initiate did not finish the requirements and is not a Member of Phi Sigma Pi.  
**Member Inducted**- An Initiate that went through Initiation Program, finished the requirements to become a Member of Phi Sigma Pi and went through *The Ritual*: Formal Induction Ceremony.

If "Member Inducted," number 2, is not available, it is because they are still listed on the Unclaimed New Members Report. Please have them complete this process, with the link provided in that section next to their name, to make them eligible.

Once you have updated the Chapter Roster press "Continue."

Show All Members

First Name	Last Name	Member Type		
Eldo	Hendricks	IN	No Action	1) Incomplete Initiate 2) Member Inducted 2

**Step 3: Add the Induction Date and each Initiate's Roll Number, then click "Continue"**

Initiate Class > Initiate to Member Test Chapter A1

Overview Selection **Additional Info** Validation Receipt

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

**Directions:**  
 Please review the information below to make sure it is correct. You will notice you might need to fill in extra information for the Initiates that are changing statuses.

If you decide to not move forward with a membership change for an Initiate, then press the "Back" Button and unselect the person.

Once you have verified that the information below is correct, press "Continue."

First Name	Last Name	Member Type	Action	Additional Information
Eldo	Hendricks	IN	Member Inducted	* Date Inducted: 8/15/2018 <b>Apply To All</b> * Roll Number: 001 <b>Apply To All</b>

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

**Step 4: Type in your name and date as it appears on the bottom and then click "Continue".**  
 You will see that only the Initiation Fee appears on this screen. The term dues will show on the Financial Report.

Initiate Class > Initiate to Member ▲ Test Chapter A1 ▼

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Overview Selection Additional Info Validation **Receipt**

Back Step: Validation Continue  
(Receipt)

(Additional Info)

**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	Last Name	Member Type	Action	Additional Information	Amount
Eldo	Hendricks	IN	Member Inducted	Date Inducted: 08/15/2018 Roll Number: 001	\$100.00
Total Amount: \$100.00					

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	8/16/2018
Suzanne	Schaffer	8/16/2018

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

Initiate Class > Initiate to Member ▲ Test Chapter A1 ▼

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Overview Selection Additional Info Validation Receipt

Step: Receipt Go to Task Center

**Directions:**  
Please print this receipt for your Chapter's records.

These changes may be subject to approval by National Office. If the change requires approval, the change will post once the approval has been granted.

The total amount below includes only the Initiation Fee. Keep in mind that New Members are also responsible the semester/quarter and insurance fees (\$66 and \$44 respectively). To see the detailed fees Check out: <http://www.phisigmapi.org/joinchapter>

If you feel any mistakes were made with this transaction, please contact the Phi Sigma Pi National Office at [pspoffice@phisigmapi.org](mailto:pspoffice@phisigmapi.org) or 717-299-4710 Immediately.

**Print**

**Summary**

Batch ID: 180816I-000-3  
 Created By: SCHAFFER, SUZANNE  
 Date: 8/16/2018  
 Trans Count: 1  
 Total Amount: \$100.00

**You are finished.**

**To verify that actions were received, go to "Reports > Student Members" (it may take a minute for the system to sync). The Initiates that have just been converted to Student Members should have a "SM" as their Member Type instead of their previous type of "IN".**

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

Reports > Student Members Test Chapter A1

- Exec Board Roster
- Advisor Roster
- Student Members**
- CEB Advisor Roster
- Alumni Roster
- Honorary Member Roster
- Financial Report
- Officer/Chair Roster
- Form 110 Reports

**Information:**  
 The report below is a roster of Members currently in your Chapter. If this needs updated, you may need to update your submission. If you have any questions about your submission please contact the National Office at [pspoffice@phisigmapi.org](mailto:pspoffice@phisigmapi.org).

Refresh

1 of 1 Find | Next

### Student Members

Member Type	First Name	Last Name	Work Phone	Home Phone	Cell Phone	Email	Roll Number	Chapter
SM	Eldo	Hendricks					001	Test Chapter A1

If an Initiate's record does not display it is very possible that the Initiate still needs to claim their account. To see all Unclaimed New Member/Initiate accounts, go to "Initiate Class > Unclaimed New Members". Those listed must be provided the link again. This can be done by copy and paste into an email addressed to them. This will take them directly to their account.

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

Initiate Class > Test Chapter A1

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

Initiate Members receive an email to claim their account once they are added as a new Initiate. The link to create the account is included below and may be shared with the new Initiate if the email was not received. The link is unique to each member.

You may also direct the initiate to the following address: <https://chapteradmin.phisigmapi.org/public/NewMemberSignup.aspx>

They will need your Affiliated Chapter name and the Invite Key included below to claim their account.

1 of 1 Find | Next

### Unclaimed New Members August 16, 2018

MIS ID	Name	Email	Trans #	Transaction Date	Invite Key	Link to Create Account
00091670	Eldo Hendricks	twitter1@phisigmapi.org	93545	8/14/2018	6B4B5974	<a href="https://chapteradmin.phisigmapi.org/public/NewMemberSignup.aspx?invitekey=6B4B5974-B845-48E5-B96C-567034C26D93">https://chapteradmin.phisigmapi.org/public/NewMemberSignup.aspx?invitekey=6B4B5974-B845-48E5-B96C-567034C26D93</a>

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