## Instructions for Transferring in a Member

## Log in to: <u>chapteradmin.phisigmapi.org</u>

## If you are unsure of your username or password email pspoffice@phisigmapi.org Select "Member Roster" then "Transfer in New Member"

Dashboard 🗸	Member Roster 🐱	Chapter Profile 🗸	Initiate Class 🗸	Chapter Standards of Excellence (CSE) $\checkmark$	Officer Updates 🖌	ecutive 🗸
Dashboard	Manage Collegiate Finalize Graduating	Member Roster Seniors				
Test Chapter for	<ul> <li>Transfer in New Me</li> <li>Add an Honorary M</li> <li>Edit Member Inform</li> </ul>	mber ember nation				•
What's Du Admin Por	e When & the ( tal	Chapter	IMPORTAN	IT UPDATES	Chapter Memb	pership Totals
Detailed inform Operations Man most commor Chapter	Due Dates are posted lation can be found in the ual or check out our FAQ questions regarding dire Admin Portal Guides & In	Virtual Chapter s to answer your ct processing! structions	Whether you arr role as a Nati Member, a information rela Sch	Welcome Back! e studying virtually or in-person, our onal Office is to support you, as a nd your Chapter. For up-to-date ted to COVID-19 please see the New wool Chapter Operations.	Student Members — 2 Alumni Members — 8 Honorary Members — 0 Nationally Inactive Mem Total Membership — 10	0 nbers — 0 )

#### Start the 5 Step Process

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

Member Roster > Transfer in	n New Member	
Test Chapter for ICE		-
	Selection Additional Info	
U UVCINICI		COIPT
	Step: Overview	
		(Selection)
If a Member is transferring into your Chap Directions:	pter from another Chapter you will want to use this form. Like every form in the Chapter Admin Portal, this form is a five step process.	
<ol> <li>Press "Add Member to List" and enter t there are several Members with the same add. Press "Continue."</li> </ol>	the first and last name of the Member you are adding to your Chapter. Press "Search." If the Member is in the Phi Sigma Pi database, the Me e name, use the "Chapter" column and select the right Member based on their past Undergraduate Chapter. Click on the check box next to th	ember's record will show. If The Member you would like to
3. Review your changes and press "Contin	inue."	
<ol> <li>Validate your submission by e-signing y</li> <li>Print your receipt for your Chapter Rec</li> </ol>	your name and the date exactly as it is read below the text box. Press. "Continue." cords.	
Note: A Member must be transferred out	by their previous Chapter to be transferred into your Chapter.	
	Step: Overview	CONTINUE

(Selection

# Step 2: Click "ADD MEMBER TO LIST" to search by name of the member you wish to transfer in.

Overview	Select	tion 🦲 A	dditional Info	Validation	Receipt
PREVIOUS			Step: Selection		CONTINUE
(Overview)					(Additional Inf
You are now ready to add a	an already Phi Sigma Pi Membe	r from a different Collegiate Chapter t	o your roster.		
1. Press "Add Member to L 2. Press "Search." If the M on their past Undergradual 3. Click on the check box n 4. Press "Continue."	ist" and enter the first and last ember is in the Phi Sigma Pi da te Chapter. lext to the Member you would li	name of the Member you are adding I tabase, the Member's record will shov ike to add.	to your Chapter. v. If there are several Me	mbers with the same name, use the "C	Chapter" column and select the right Member base
Note: A Member must be t	ransferred out by their previous	s Chapter to be transferred into your (	Chapter.		
ADD MEMBER TO	LIST				Show All Member
First Name	Last Name	Member Type		1) Transferred In	

## Search by First Name and Last Name, Click "Search". Select the Member you want to transfer in.

First Name Eldo				
Last Name Hendricks SEARCH				
$\sim$	First Name	Last Name	Chapter	
$\square$	Eldo	Hendricks	Test Chapter A1	

## Click "1" to transfer in the member and then click "Continue".

Overview	Se	lection	Additional Ir	nfo 🕚	Validation	Receipt	
PREVIOUS (Overview)			Step: Se	lection		CONTINU (Additiona	JE al Infr
You are now ready to a	add an already Phi Sigma Pi Mer	nber from a different	Collegiate Chapter to your rost	er.			
Directions: 1. Press "Add Member 2. Press "Search." If th on their past Undergra 3. Click on the check b 4. Press "Continue." Note: A Member must	to List" and enter the first and i te Member is in the Phi Sigma P duate Chapter. Iox next to the Member you wou be transferred out by their prev	ast name of the Mem i database, the Memb Id like to add. ious Chapter to be tra	ber you are adding to your Cha er's record will show. If there a ansferred into your Chapter.	pter. re several Members with th	e same name, use th	e "Chapter" column and select the right Member I	based
ADD MEMBER	TO LIST					Show All Me	embers
First Name	Last Name	Membe	ег Туре	1) Transfe	rred In		
	₹	Ŧ	₹	_			
Eldo	Hendricks	AM	No	Action O1	)		
				1 member			

## Step 3: Add the Transfer Date, then click "Continue"

Overvie	W	Selection	۲	Additiona	al Info				0	Validati	on	Receipt
PREVIOUS (Selection)	5			Step: Ad	ddition	al Info						CONTINUE (Validation)
Directions: Please review th	ne information below t	o make sure it is corre	ct.									
Once you have	not transfer a Member verified that the inform	r into your Chapter, pr	ess the "Back" button a , press "Continue."	ind unselect	the pe	erson.						
First Name	Last Name	Member Type	Action	Ad	ditiona	al Inforr	nation					
Eldo	Hendricks	AM	Transferred In	*	Date:			_				Apply To All
					•	A	just 2	021	×	₩	)	
PREVIOUS	5			s s	М	т	W	Т	F	3		CONTINUE
(Selection)												(Validation)
				1	2	3	4	5	6	7		
				8	9	10	11	12	13	14		
				15	16	17	18	19	20	21		

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

Overview		Selection		Additional Info	۲	Validation	Receipt
PREVIOUS (Additional Info)				Step: Validation			CONTINUE (Receipt)
Directions: Review the information	tion you submitted bel	low. Validate your submi:	ssion by e-signing y	our name and the date exactly as	; it is read below	/ the text box. Press "Cont	tinue."
First Name	Last Name	Member Type	Member Status	Action	Additional I	nformation	Amount
Eldo	Hendricks	AM	А	Transferred In	Date:	08/12/2021	\$0.00
							Total Amount: \$0.00
I affirm that the infi "Please enter your MANAGER Donna	ormation I am submitt name and the date ex	ing above is accurate an actly as it appears below	d is valid according the box. Lease	to the policies of Phi Sigma Pi Na	tional Honor Fra	8/17/2021	
PREVIOUS				Step: Validation			

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

Initiate Class > Initiate t	o Member	Test Chapter A1	<b>•</b>	
Overview	Selection	Additional Info	Validation	Receipt
		Step: Receipt		Go to Task Cent
rections: ease print this receipt	for your Chapter's records.			
ese changes may be su	bject to approval by National Offic	ce. If the change requires approval	, the change will post once the a	approval has been granted.
e total amount below ir 4 respectively). To see	ncludes <u>only the Initiation Fee. Kee</u> the detailed fees Check out: <b>http</b>	ep in mind that New Members are a ://www.phisigmapi.org/joinac	also responsible the semester/qu hapter	uarter and insurance fees (\$66 and
you feel any mistakes v mediately.	vere made with this transaction, p	lease contact the Phi Sigma Pi Nati	onal Office at pspoffice@phisign	napi.org or 717-299-4710
rint				
immary				
tch ID: 180816I-000-3				
eated By: SCHAFFER, SU	ZANNE			
ate: 8/16/2018				
tal 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). You will see your Transfer in Member listed here.