

Secretary Training Worksheet

Use the checklist and worksheet provided to make the transition of the Secretary position from the outgoing to the incoming Officer smooth. Take notes as needed during the process.

- Review:
 - [Secretary Training Guide](#)
This is an overview of the responsibilities and tools for the position
 - [Due Dates](#)
 - School Registration process
Who to contact, when to contact and how to re-register through the school
 - Any additional local resources needed for the position
 - National Office's [Chapter Admin Portal](#) and [how to update the Member Roster](#)

- Share resources:
 - [Meeting Minutes Template](#) and tips on how to take Meeting Minutes
 - Contact Information for people related to the position
 - Faculty Advisor, University Support
 - Operations Advisor, Phi Sigma Pi Chapter Excellence Board
 - Leadership Development Coordinator, Phi Sigma Pi National Staff
 - Business Manager, Phi Sigma Pi National Staff
 - Chapter Account Usernames & Passwords related to the position (*Ex. where the previous meeting minutes are kept*)

- Additional talking points related to the position