

## Instructions for Finalizing Graduating Seniors

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

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

Select "Member Roster" > "Finalize Graduating Seniors"

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. The 'Member Roster' dropdown menu is open, and 'Finalize Graduating Seniors' is highlighted with a red circle. Other options in the menu include 'Manage Collegiate Member Roster', 'Transfer in New Member', 'Add an Honorary Member', and 'Edit Member Information'. The main content area shows a '2019 National Convention' announcement, 'Officer Updates' (2 officers, last update 05/09/2018), 'Recruitment Resources' (Planning a Successful Recruitment Guide, Acquiring an Eligible Student Mailing List, Invitational Meeting Presentation, Invitational Meeting Presentation "How To"), 'Chapter Membership Totals' (Student Members: 4, Alumni Members: 0, Honorary Members: 0, Nationally Inactive Members: 0, Total Membership: 4), 'Chapter Status' (GOOD, Chapter Owes: \$172), and 'Leadership in Action Learning Moment'.

## Start the 5 Step Process

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

The screenshot shows the 'Finalize Graduating Seniors' form. The top navigation bar is the same as the dashboard. The breadcrumb trail is: Member Roster > Finalize Graduating Seniors. Below the breadcrumb is a progress bar with five steps: Overview (green), Selection (yellow), Additional Info (red), Validation (yellow), and Receipt (yellow). The current step is 'Overview'. Below the progress bar, the text reads: 'It's graduation time! On this form you must turn the Members that you marked as "Senior Graduates This Term" to "Member Graduated" if they did indeed graduate. This will change their status to Alumni Member. Like every form in the Chapter Portal, this form is a five step process.' Below this is the 'Directions:' section with five numbered steps. A note follows: 'Note: **Member Graduated** is a Member of Phi Sigma Pi who has already graduated that term. You will notice that you can only pick certain options for each Member based off of the Member type.' At the bottom right, there is a 'Continue' button with a red circle around it.

Step: Overview

Continue  
(Selection)

Directions:

1. Press "Continue."
2. Go through every Member on the list and click on the number that corresponds with that person. If there is no change to a Member make sure "No Action" is selected. Once you have made all of the changes press "Continue."
3. Review your changes and press "Continue."
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: **Member Graduated** is a Member of Phi Sigma Pi who has already graduated that term. You will notice that you can only pick certain options for each Member based off of the Member type.

Step: Overview

Continue

**Step 2: Select "1" to mark the Member as a Member Graduated then click "Continue".**

Finalize Graduating Seniors

Overview Selection Additional Info Validation Receipt

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

**Directions:**  
Please complete the final step for this terms Graduation Seniors. If an individual has changed their plans, please notify the National Office to change their status.  
For Semester Schools – Complete task between November 15th and December 15th for the Fall and April 15st and May 15th for the Spring.  
For Quarter Schools – Complete task between November 15th and December 15th for the Fall, January 15th and March 1st for Winter, and May 15th to June 15th for Spring.  
Once you have made all of the changes press "Continue."

Show All Members

First Name	Last Name	Member Type	Category	
Ryan	Smith	SM	GSTS	1) Member Graduated

**Step 3: Complete the required graduation information for each senior and then click "Continue".**

Member Roster > Test Chapter A1

Finalize Graduating Seniors

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 some of the Members that are changing statuses.  
If you decide to not move forward with a membership change for a Member, then press the "Back" Button and deselect the person.  
Once you have verified that the information below is correct, press "Continue."

First Name	Last Name	Member Type	Category	Action	Additional Information
Ryan	Smith	SM	GSTS	Member Graduated	* Graduated Date: 8/24/2018 Apply To All New Email, If Known: RSmith@phisigmapi.org Apply To All * Plans After Graduating: Attending Grad School Apply To All Graduating School Attending (if any): Graduate School University Apply To All Help Establish New Chapter: Yes Apply To All

**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 (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	Last Name	Member Type	Category	Action	Additional Information	Amount
Ryan	Smith	SM	GSTS	Member Graduated	Graduated Date: 08/24/2018 New Email, If Known: RSmith@phisigmapi.org Plans After Graduating: Attending Grad School Graduating School Attending (if any): Graduate School University Help Establish New Chapter: Yes	\$0.00
Total Amount:						\$0.00

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

Back Step: Validation Continue (Receipt)

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

Overview Selection Additional Info Validation Receipt

Step: Receipt Go to Task Center

**Directions:** This is your receipt for submitting membership status changes. 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.

Please print this receipt for your Chapter's records. If you feel any mistakes were made with this transaction, please contact the Phi Sigma Pi National Office at pspoffice@phisigmapi.org or 717-299-4710 immediately.

Print

**Summary**

Batch ID: 180816I-000-6  
 Created By: SCHAFFER, SUZANNE  
 Date: 8/16/2018  
 Trans Count: 1  
 Total Amount: \$0.00

Transaction Number	Request	Affected Member	Attachment Count	Effective Date	Amount
93569	Member Graduated	Ryan Smith	0	8/24/2018	\$0.00
Total Amount:					\$0.00

Step: Receipt Go to Task Center

To confirm that actions have been received, go to "Reports" > "Student Members" the marked graduating seniors will be removed from this report. Please note that it may take a minute for the system to sync.

**You are finished!**