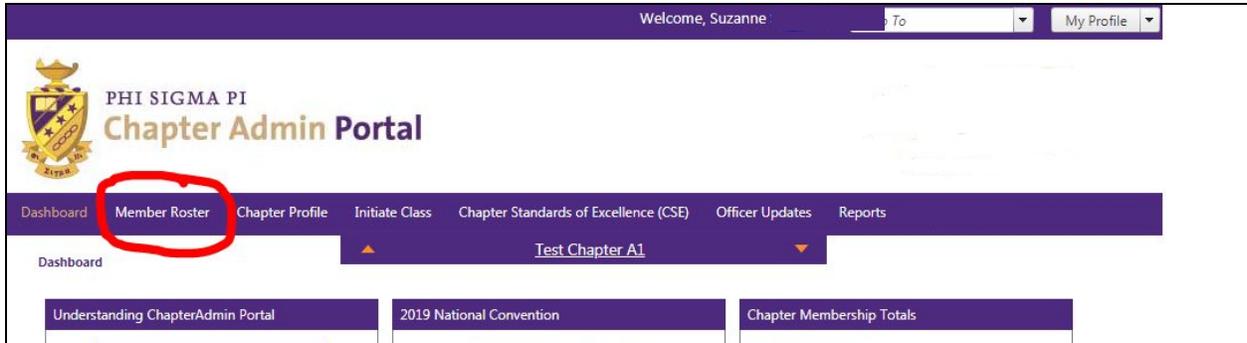


Instructions for Updating the Chapter Member Roster
This is to be done prior to billing date (www.phisigmapi.org/duedates).

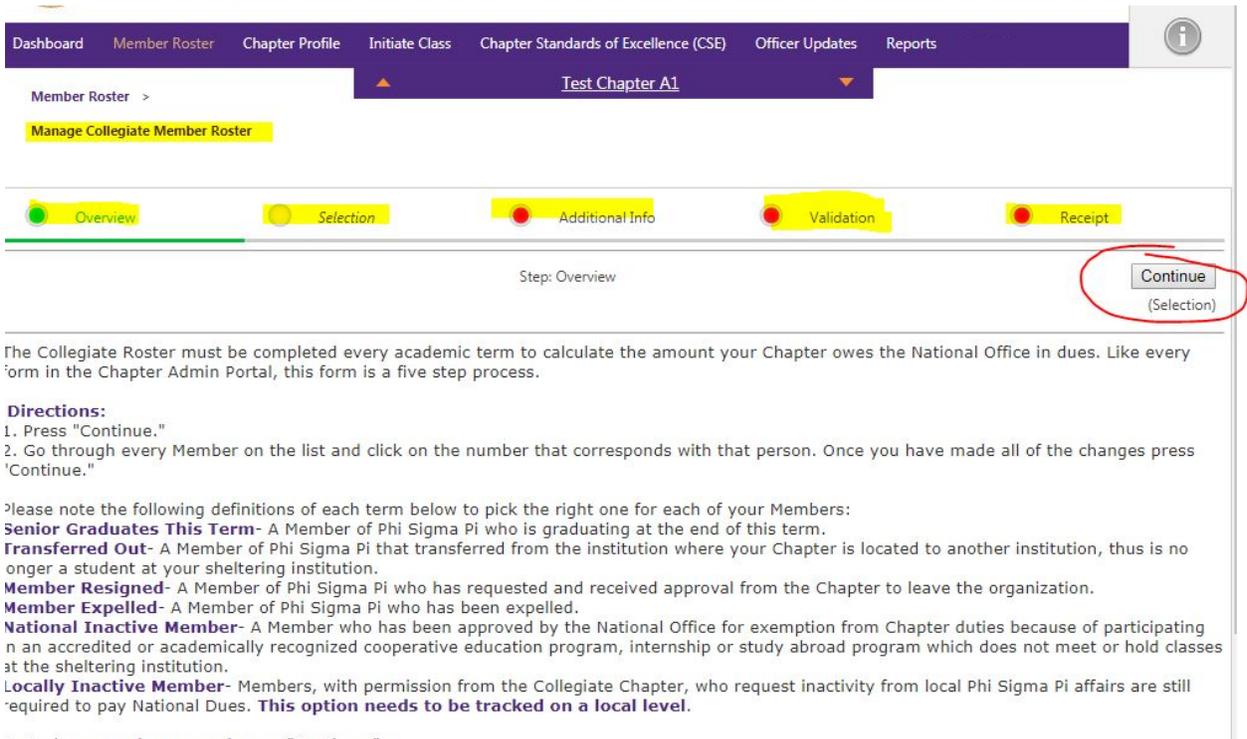
Log in to: chapteradmin.phisigmapi.org

Select "Member Roster" > "Manage Collegiate Member Roster"



Start the 5 Step Process

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



Step 2: Update Member Status as necessary. If there are no changes, keep the "No Action" checked. Then click "Continue."

Overview Selection Additional Info Validation Receipt

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

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

Please note the following definitions of each term below to pick the right one for each of your Members:
Senior Graduates This Term- A Member of Phi Sigma Pi who is graduating at the end of this term.
Transferred Out- A Member of Phi Sigma Pi that transferred from the institution where your Chapter is located to another institution.
Member Resigned- A Member of Phi Sigma Pi who has requested and received approval from the Chapter to leave the organization.
Suspended Member- A Member of Phi Sigma Pi who has been suspended from the National Office.
Member Expelled- A Member of Phi Sigma Pi who has been expelled.
National Inactive Member- A Member who has been approved by the National Office for exemption from Chapter duties because of participating in an accredited or academically recognized cooperative education program, internship or study abroad program which does not meet or hold classes at the sheltering institution.

If there is no change to a Member make sure "No Action" is selected.

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

Show All Members

First Name	Last Name	Member Type	Category	
Anika	Jackson	Student Member		<input checked="" type="radio"/> No Action <input type="radio"/> 1 Senior Graduates This Semester <input type="radio"/> 2 Transferred Out <input type="radio"/> 3 Member Resigned <input type="radio"/> 4 Member Expelled <input type="radio"/> 5 National Inactive Member
Alexandra	Schaffer	Student Member		<input checked="" type="radio"/> No Action <input type="radio"/> 1 Senior Graduates This Semester <input type="radio"/> 2 Transferred Out <input type="radio"/> 3 Member Resigned <input type="radio"/> 4 Member Expelled <input type="radio"/> 5 National Inactive Member
Ryan	Smith	Student Member		<input type="radio"/> No Action <input checked="" type="radio"/> 1 Senior Graduates This Semester <input type="radio"/> 2 Transferred Out <input type="radio"/> 3 Member Resigned <input type="radio"/> 4 Member Expelled <input type="radio"/> 5 National Inactive Member

3 members

Back Step: Selection Continue

Step 3: For Members that have updates, confirm those updates by placing today's date (the date you are completing the form) and click "Continue."

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

Member Roster > Test Chapter A1

Manage Collegiate Member Roster

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.

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

Please add today's date. This is the first step in a two-step process.
 For Semester Schools - Complete task by October 1st for the Fall and January 30th for the Spring.
 For Quarter Schools - Complete task by October 14th for the Fall, January 14th for Winter, and April 14th for Spring.

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

First Name	Last Name	Member Type	Category	Action	Additional Information
Ryan	Smith	Student Member		Senior Graduates This Semester	* Today's Date: 9/7/2018 Apply To All

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.”

Member Roster > Test Chapter A1
 Manage Collegiate Member Roster

Overview Selection **Additional Info** Validation Receipt

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

Directions:
 Please review the statement below before signing and submitting this important membership information.

First Name	Last Name	Member Type	Member Status	Category	Action	Additional Information	Amount
Ryan	Smith	Student Member	A		Senior Graduates This Semester	Today's Date: 09/01/2018	\$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 8/14/2018
 Suzanne Schaffer 8/14/2018

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

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

Member Roster > Test Chapter A1
 Manage Collegiate Member Roster

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: 180814I-000-1
 Created By: SCHAFFER, SUZANNE
 Date: 8/14/2018
 Trans Count: 1
 Total Amount: \$0.00

Transaction Number	Request	Affected Member	Attachment Count	Effective Date	Amount
93392	Senior Graduates This Semester	Ryan Smith	0	9/1/2018	\$0.00
					Total Amount: \$0.00

Step: Receipt Go to Task Center

You are finished.

To verify that actions were received, go to “Manage Collegiate Member Roster.” For seniors that have been marked as graduating this term, it will read “Pending/Future change.” If graduating seniors do not appear on the roster, click “Show All Members”. Please note at the end of this term the graduating senior list needs to be finalized. This is found under the “Member Roster” dropdown.

● Overview
 ● Selection
 ● Additional Info
 ● Validation
 ● Receipt

Step: Selection (Ac)

Directions:

You are now ready to update the status of the Members 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:

Senior Graduates This Term- A Member of Phi Sigma Pi who is graduating at the end of this term.

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Member Expelled- A Member of Phi Sigma Pi who has been expelled.

National Inactive Member- A Member who has been approved by the National Office for exemption from Chapter duties because of participating in an accredited or academically recognized cooperative education program, internship or study abroad program which does not meet or hold classes at the sheltering institution.

If there is no change to a Member make sure "No Action" is selected.

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

[Show Applicable Members](#)

First Name	Last Name	Member Type	Category	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1) Senior Graduates This Semester 2) Transferred Out 3) Member Resigned 4) Member Expelled 5) National Inactive Member
Anika	Jackson	Student Member		<input checked="" type="radio"/> No Action <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Alexandra	Schaffer	Student Member		<input checked="" type="radio"/> No Action <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Ryan	Smith	Student Member		<input checked="" type="radio"/> No Action <input checked="" type="radio"/> Pending/Future change...

If someone has been accidentally marked as graduating, please contact the National Office and we will make the needed update for you.