

Instructions for Transferring in a Member

Log in to: chapteradmin.phisigmapi.org

If you are unsure of your username or password email psppoffice@phisigmapi.org

Select “Member Roster” then “Transfer in New Member”

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

Dashboard

- Manage Collegiate Member Roster
- Finalize Graduating Seniors
- Transfer in New Member**
- Add an Honorary Member
- Edit Member Information

Test Chapter for ICE

What's Due When & the Chapter Admin Portal

IMPORTANT UPDATES

Chapter Membership Totals

Student Members — 2
Alumni Members — 8
Honorary Members — 0
Nationally Inactive Members — 0
Total Membership — 10

Start the 5 Step Process

Step 1: Read through the Directions and then click “Continue”.

Member Roster > Transfer in New Member

Test Chapter for ICE

Overview Selection Additional Info Validation Receipt

Step: Overview

CONTINUE
(Selection)

If a Member is transferring into your Chapter 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.

Directions:

1. Press “Continue.”
2. Press “Add Member to List” and enter 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 Member’s record will show. If there are several Members with the same name, use the “Chapter” column and select the right Member based on their past Undergraduate Chapter. Click on the check box next to the Member you would like to add. 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: 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 ● Selection ● Additional Info ● Validation ● Receipt

PREVIOUS (Overview) Step: Selection CONTINUE (Additional Info)

You are now ready to add an already Phi Sigma Pi Member from a different Collegiate Chapter to your roster.

Directions:

1. Press "Add Member to List" and enter the first and last name of the Member you are adding to your Chapter.
2. Press "Search." If the Member is in the Phi Sigma Pi database, the Member's record will show. If there are several Members with the same name, use the "Chapter" column and select the right Member based on their past Undergraduate Chapter.
3. Click on the check box next to the Member you would like to add.
4. Press "Continue."

Note: A Member must be transferred out by their previous Chapter to be transferred into your Chapter.

ADD MEMBER TO LIST Show All Members

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

	First Name	Last Name	Chapter
<input type="checkbox"/>	Eldo	Hendricks	Test Chapter A1

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

● Overview ● Selection ● Additional Info ● Validation ● Receipt

PREVIOUS (Overview) Step: Selection CONTINUE (Additional Info)

You are now ready to add an already Phi Sigma Pi Member from a different Collegiate Chapter to your roster.

Directions:

1. Press "Add Member to List" and enter the first and last name of the Member you are adding to your Chapter.
2. Press "Search." If the Member is in the Phi Sigma Pi database, the Member's record will show. If there are several Members with the same name, use the "Chapter" column and select the right Member based on their past Undergraduate Chapter.
3. Click on the check box next to the Member you would like to add.
4. Press "Continue."

Note: A Member must be transferred out by their previous Chapter to be transferred into your Chapter.

ADD MEMBER TO LIST Show All Members

First Name	Last Name	Member Type	1) Transferred In
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Eldo	Hendricks	AM	<input checked="" type="radio"/> No Action <input type="radio"/> 1

1 member

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

● Overview ● Selection ● Additional Info ● Validation ● Receipt

PREVIOUS (Selection) Step: Additional Info CONTINUE (Validation)

Directions:

Please review the information below to make sure it is correct.

If you decide to not transfer a Member into your Chapter, 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	AM	Transferred In	* Date: <input type="text"/> <input type="calendar"/>

PREVIOUS (Selection) CONTINUE (Validation)

Calendar: August 2021

S	M	T	W	T	F	S
25	26	27	28	29	30	31
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 Validation Receipt

PREVIOUS Step: Validation CONTINUE
(Additional Info) (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	Member Status	Action	Additional Information	Amount
Eldo	Hendricks	AM	A	Transferred In	Date: 08/12/2021	\$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.

MANAGER
Donna Lease 8/17/2021

PREVIOUS Step: Validation CONTINUE
(Additional Info) (Receipt)

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

Initiate Class > Initiate to Member Test Chapter A1

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.phisigmapl.org/joinchapter>
If you feel any mistakes were made with this transaction, please contact the Phi Sigma Pi National Office at pspoffice@phisigmapl.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). You will see your Transfer in Member listed here.