

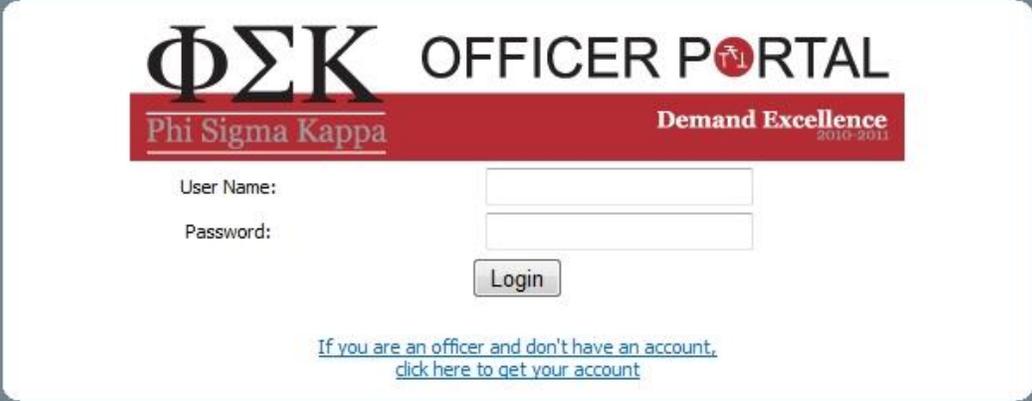
# Instructions for Creating Initiates on Officer Portal

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**\*\*Only the President, Secretary, and Inductor  
may create and report Initiates\*\***

Steps to create and report initiates:

1. One of the above officers must log into the Officer Portal



The screenshot shows the login interface for the Phi Sigma Kappa Officer Portal. At the top left is the Phi Sigma Kappa logo (ΦΣΚ) and the text "Phi Sigma Kappa". To the right is the text "OFFICER PORTAL" with a small icon of a person. Below this is a red banner with the text "Demand Excellence" and "2010-2011". The login form consists of two input fields: "User Name:" and "Password:". Below the password field is a "Login" button. At the bottom of the form, there is a link: "If you are an officer and don't have an account, [click here to get your account](#)".

2. Click on the 'Members' icon on the left side of the screen:

Phi Sigma Kappa OFFICER PORTAL  
Value Brotherhood Above Self

Kenneth Rogers  
resident  
Phi Sigma Kappa

Switch User Change Office Role Administration Form Admin I Need Help Logout

Recent Portal Messages (0 messages)

My Officer Calendar July 2012

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------|---------|-----------|----------|--------|----------|
| 24     | 25     | 26      | 27        | 28       | 29     | 30       |
| 1      | 2      | 3       | 4         | 5        | 6      | 7        |
| 8      | 9      | 10      | 11        | 12       | 13     | 14       |
| 15     | 16     | 17      | 18        | 19       | 20     | 21       |
| 22     | 23     | 24      | 25        | 26       | 27     | 28       |
| 29     | 30     | 31      | 1         | 2        | 3      | 4        |

Community Service/Philanthropy

Chapter Community Service/Philanthropy Report

3. Under membership changes, click create new initiate batch

Membership Changes

[Report New Associates](#) [Report Initiation](#) [Change Membership Status](#)

Only show classes from the current year

Provide the following information:

- a. Specify the term: fall or spring
  - b. Specify the current year
  - c. Specify the initiation date (XX/XX/XXXX)
- d. Click create initiate batch

**Enter initiate batch information**

Specify the semester for these initiates: **a** Fall

Specify the year for these initiates: 2010 **b**

What is the initiation date?: **c** 12/11/2010

Please provide a shipping address. Do not use a PO box!

Phi Sigma Kappa  
2925 East 96th Street  
Suite 100  
Indianapolis, IN 46240

**d**



4. Verify the following:
  1. Initiation date
  2. Click on the following icons for each row  below the edit column
  3. Check the box for the member you wish to initiate
  4. Click the Initiate The Selected Men once you have checked all members to include.

Select initiates from the list below. Initiate The Selected Men

Select and edit your initiation class below.

Member Record for Mega Tron Updated Successfully

What is the date of initiation?:  ← 1 ↑ 4 2

| Reference ID | Initiate Name | Self-Validation Results | Include in Initiation?                      | Edit  |
|--------------|---------------|-------------------------|---|---|
| 354752       | Rubber Maid   | Validated on 1/5/2011   | <input checked="" type="checkbox"/> ← a →   |  |
| 354754       | Optimus Prime | Validated on 1/5/2011   | <input checked="" type="checkbox"/> ← 3 b → |  |
| 354753       | Mega Tron     | Validated on 1/5/2011   | <input checked="" type="checkbox"/> ← c →   |  |

### Member Details For Captain Crunch

Please provide the information for the member in the fields below. Fields marked with "▶" indicate a required field.  
Take care to enter information accurately and with proper case observed (do not enter information in ALL CAPS).

|  |   |
|--|---|
| <p><b>Member Information</b></p> <p>First Name: ▶ <input type="text" value="Captain"/></p> <p>Preferred First Name: ▶ <input type="text" value="Captain"/></p> <p>Middle Name: <input type="text"/></p> <p>Last Name: ▶ <input type="text" value="Crunch"/></p> <p>Email Address: ▶ <input type="text" value="psk270-26@hotmail.com"/></p> <p>Cell Phone: ▶ <input type="text"/></p> <p>Home Phone: ▶ <input type="text"/></p> <p>Birth Date: ▶ <input type="text"/></p> <p>Expected Graduation: ▶ <input type="text"/> <input type="text"/></p> | <p><b>Parent/Guardian Information</b></p> <p>Parent/Guardian Name: ▶ <input type="text"/></p> <p>Address: ▶ <input type="text"/></p> <p>City: ▶ <input type="text"/></p> <p>State: ▶ <input type="text"/></p> <p>Zip: ▶ <input type="text"/></p> <p>Country: ▶ <input type="text" value="USA"/></p> <p>Badge Style Requested by Initiate:<br/>▶ <input type="text" value="Gold Plated Plain Badge (\$290.00)"/></p> <div style="text-align: center;">  </div> |
|--|---|

OK Cancel

Enter all information. Make sure each initiate has all the required filed filled in, and then click 'ok'

5. Click on the boxes below Include in Initiation?
  - i. If there, is no box next to an associates name click the link to [Resend Validation Link](#) and have the associates validate themselves in the email sent to them.

Select initiates from the list below. Initiate The Selected Men

Select and edit your initiation class below.

What is the date of initiation?:

| Reference ID | Initiate Name  | Self-Validation Results   |  | Include in Initiation?    | Edit |
|--------------|----------------|---------------------------|--|---------------------------|------|
| 354748       | Captain Crunch | Outstanding Validation! ↙ | <a href="#">Resend Validation Link</a> | Not available to initiate |      |
| 354747       | John Doe       | Outstanding Validation!   | <a href="#">Resend Validation Link</a> | Not available to initiate |      |
| 354749       | Scooby Doo     | Outstanding Validation!   | <a href="#">Resend Validation Link</a> | Not available to initiate |      |

- ii. Please be aware that we cannot initiate an associate until they validate through the email.

6. Click “Initiate The Selected Men”

5. Reorder the list of initiates to match the desired roll number order by clicking on the box next to the associate you would like to change and dragging his name to the correct spot in the order (1). When finished, click the "Submit these initiates in this order" button to submit your list of members in order of initiation. (2)

Order these initiates in the desired roll number order 2 → Submit these initiates in this order

Reorder the list of initiates to match the desired roll number order by clicking on the box next to the associate you would like to change and dragging his name to the correct spot in the order. When finished, click the "Submit these initiates in this order" button to submit your list of members in order of initiation.

- 42 Rubber Maid
- 44 Mega Tron ← 1
- 43 Optimus Prime

6. Submitting the batch will automatically create an invoice which is automatically sent to OmegaFi, you may also print
  - a. This invoice will have all the charges for your new initiate class that the chapter is required to pay
  - b. You have 4 options for payment
    - i. Pay through OmegaFi (preferred)
    - ii. Pay online at <http://www.phisigmakappa.org>
    - iii. Send a check with the invoice
    - iv. Call headquarters at 888-846-6851 and pay over the phone by check or credit card.