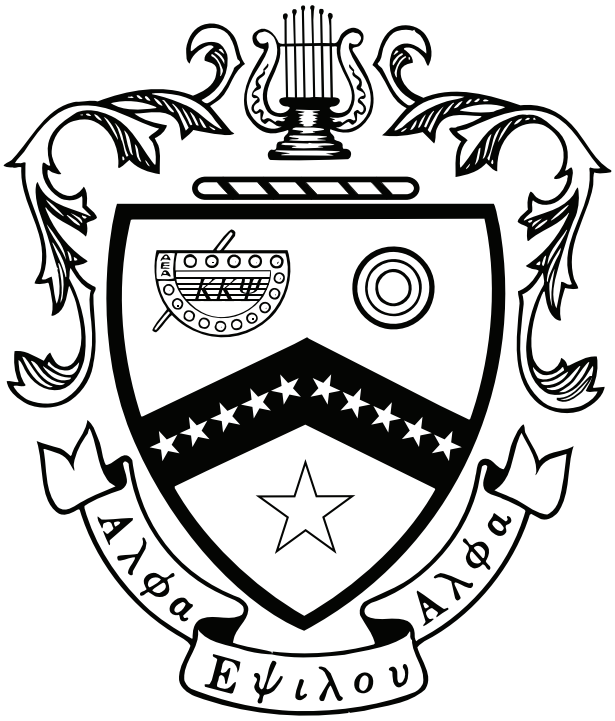
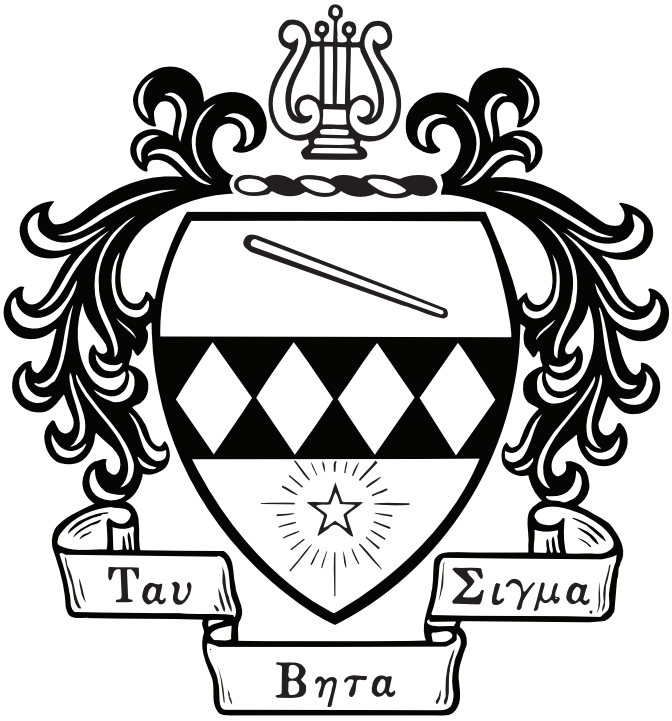
ΚΚΨ & ΤΒΣ
National Headquarters

Online Membership & Reporting





Guidebook

for Kappa Kappa Psi *&* Tau Beta Sigma
2013-2015 Edition

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Background

At the 2009 National Convention, Kappa Kappa Psi National Vice President for Colonization & Membership Derrick Mills introduced his idea for an online membership database to replace the limited system that had been in use at National Headquarters since 1997. This new database would not only perform the functions of the old system, but would also allow chapters to submit the vast majority of their paperwork online. The National Chapters of Kappa Kappa Psi and Tau Beta Sigma voted to move forward with the proposed membership database and reporting system, and a contract was signed the following month with the IT company selected to design and host the system.. Once the contract was signed, work began on the design and testing of this new system. It has been a challenging and complex project, but the Online Membership & Reporting System (OMRS) successfully launched on November 1, 2012 to Chapter, District and National Officers. Login information began going out to the rest of our members on November 12, 2012. Within a few days, all initiated members of Kappa Kappa Psi and Tau Beta Sigma that had valid e-mail addresses on file with HQ received login information for the Online Membership & Reporting System. The 2012 Fall Activity Report was the first major test of the OMRS, and several bugs were identified in the system. By January 2013, all of the identified bugs were corrected and Phases 1 & 2 of the OMRS development were concluded. Following the 2013 Winter Council Meeting, several items of the Phase 3 plan for development were begun, with completion by the District Convention season. The remainder of Phase 3 has been planned and will begin development and gradual rollout in June 2013.

Beginning November 1, 2012, Chapters may no longer submit paper forms for the following: Chapter Personnel Report, Chapter Personnel Update, Initiate Registration Form, Honorary Initiation Form, Fall Activity Report, and Chapter Summary Report. Chapter Officers will now complete these forms through the OMRS which is available at https://online.kkytbs.org

National Headquarters will provide regular updates to this document as new forms are added or process changes are implemented.

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Member Profiles

Every initiated member of Kappa Kappa Psi & Tau Beta Sigma has his or her own profile in the Online Membership & Reporting System. Since this is your own record of Fraternity/Sorority involvement, it should not be passed down to other members. The basic member profile consists of the following components: contact information, membership information (current & past), initiation dates & chapter member number, and a record of any donations that you may have made to Kappa Kappa Psi and/or Tau Beta Sigma. Chapter, District, and National Officers have additional components on their profiles which will be discusses in more detail later.

Many of you will notice in your past memberships that not every year of your membership is listed. This is due to limitations of the legacy database that was used from 1997-2012. That system only recorded current membership status and your date of initiation . The OMRS now tracks membership on an annual basis, but only had the information that was in the legacy system to start with. Over time, membership records will be updated in the OMRS based on the paper Chapter Personnel Reports and Officer Updates submitted by chapters.

Others may notice a discrepancy between their membership number on their profile, and the number maintained in chapter records. The member number (also known as an initiation number or scroll number) listed in the OMRS matches that on the Master Roster maintained at HQ, and is considered your official membership number. Discrepancies in numbering are often due to initiates and honoraries not being reported, or not being reported in a timely manner. Still other chapters do not assign honoraries a member number on the roster that they maintain.

On the following pages you will find examples of a member profile and the options available on the site for an individual who has been involved in the organization for a number of years and is now a Life Member, and a profile for an Active member with only a couple years of involvement:

Basic Parts of the Member Profile:

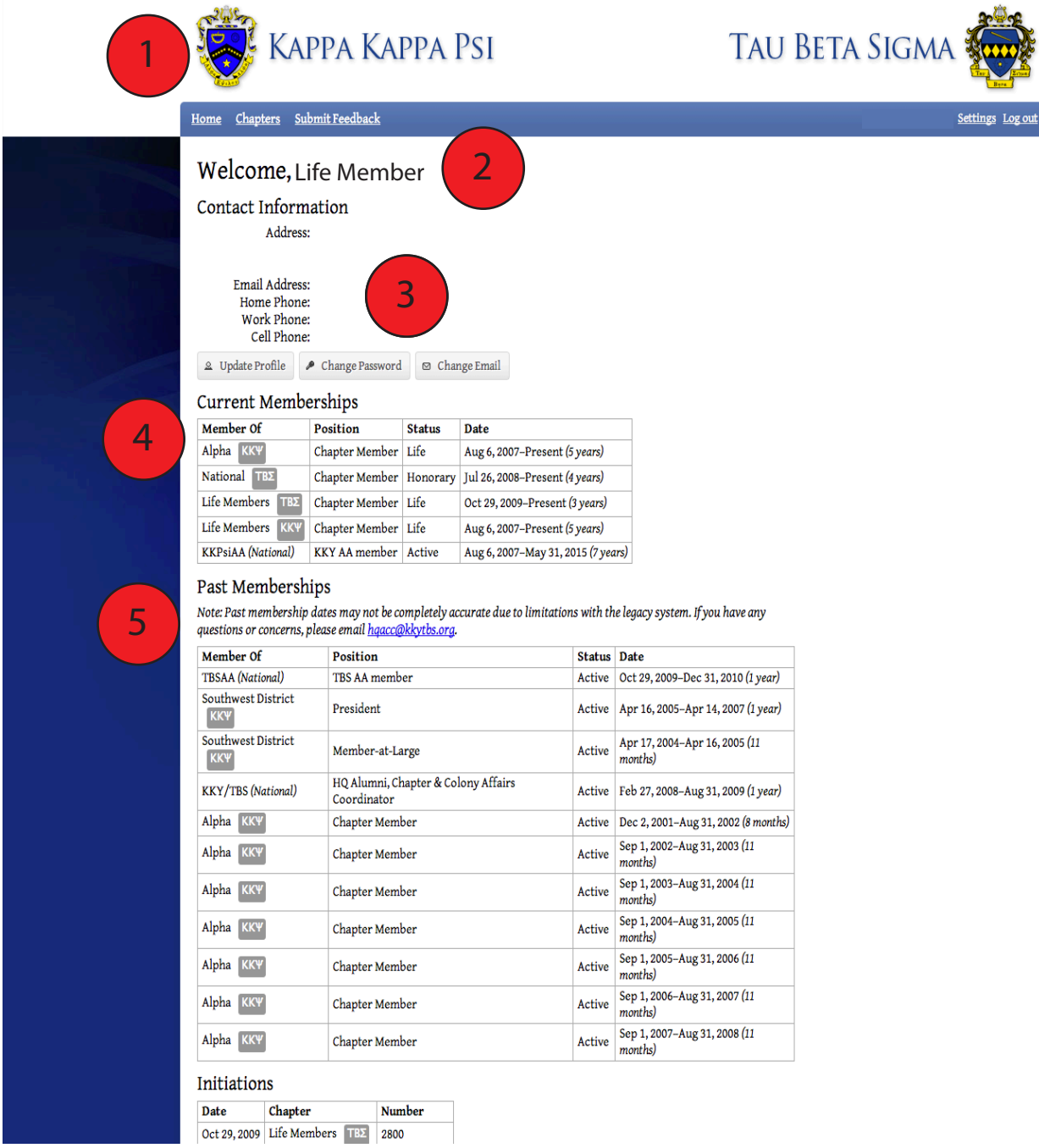
1. Whichever organization you belong to will be displayed at the top. This particular Life Member was initiated in Kappa Kappa Psi and is an honorary member of Tau Beta Sigma, so both crests are displayed.

2. This will list your full name.

3. Contact information including E-mail address, phone numbers, and mailing address.

4. Memberships fall into either the Current or Past Memberships; Current Memberships are those that are valid during the current membership term and those that have no ending date:
   - Active, Conditional, & Associate: Sept 1 - Aug 31
   - Inactive, Alumni & Life: starts with the date the status was reported and has no end date
   - TBSAA: starts with the date the application was processed, and ends on December 31
   - KKPsiAA: starts with the date the application was processed, and ends on May 31

5. Past Memberships are those membership terms that have expired. In this example, you will see a completed record for someone who was Active for 7 school years, and served several terms as a District Officer.



Member Of	Position	Status	Date
Alpha ΚΚΨ	Chapter Member	Life	Aug 6, 2007–Present *(5 years)*
National ΤΒΣ	Chapter Member	Honorary	Jul 26, 2008–Present *(4 years)*
Life Members ΤΒΣ	Chapter Member	Life	Oct 29, 2009–Present *(3 years)*
Life Members ΚΚΨ	Chapter Member	Life	Aug 6, 2007–Present *(5 years)*
KKPsiAA *(National)*	KKY AA member	Active	Aug 6, 2007–May 31, 2015 *(7 years)*

Note: Past membership dates may not be completely accurate due to limitations with the legacy system. If you have any questions or concerns, please email hqacc@kkytbs.org.

Member Of	Position	Status	Date
TBSAA *(National)*	TBS AA member	Active	Oct 29, 2009–Dec 31, 2010 *(1 year)*
Southwest District ΚΚΨ	President	Active	Apr 16, 2005–Apr 14, 2007 *(1 year)*
Southwest District ΚΚΨ	Member-at-Large	Active	Apr 17, 2004–Apr 16, 2005 *(11 months)*
KKY/TBS *(National)*	HQ Alumni, Chapter & Colony Affairs Coordinator	Active	Feb 27, 2008–Aug 31, 2009 *(1 year)*
Alpha ΚΚΨ	Chapter Member	Active	Dec 2, 2001–Aug 31, 2002 *(8 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2002–Aug 31, 2003 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2003–Aug 31, 2004 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2004–Aug 31, 2005 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2005–Aug 31, 2006 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2006–Aug 31, 2007 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2007–Aug 31, 2008 *(11 months)*

Date	Chapter	Number
Oct 29, 2009	Life Members ΤΒΣ	2800

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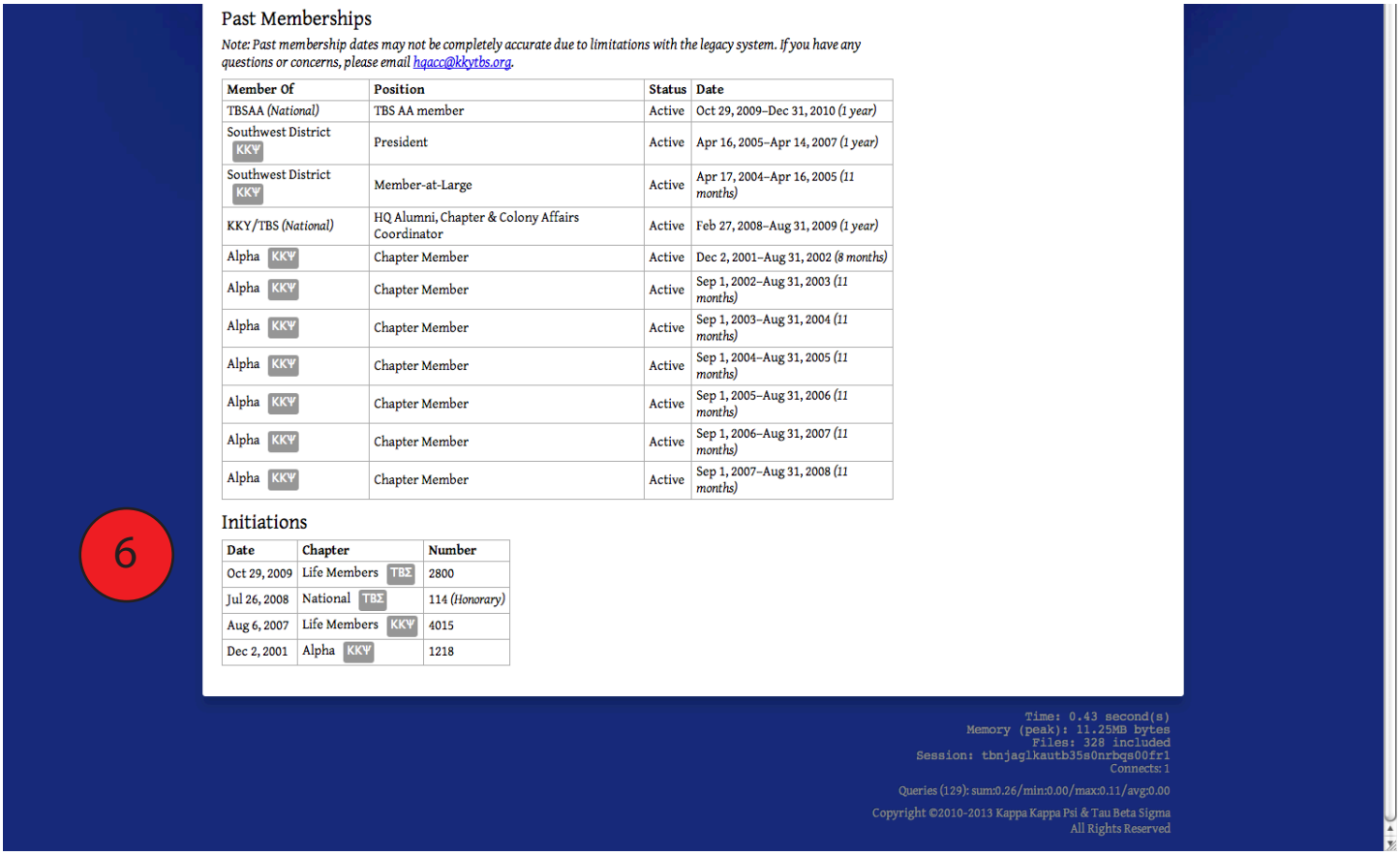

Past Memberships

Note: Past membership dates may not be completely accurate due to limitations with the legacy system. If you have any questions or concerns, please email hqacc@kkytbs.org.

Member Of	Position	Status	Date
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Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2003–Aug 31, 2004 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2004–Aug 31, 2005 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2005–Aug 31, 2006 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2006–Aug 31, 2007 *(11 months)*
Alpha ΚΚΨ	Chapter Member	Active	Sep 1, 2007–Aug 31, 2008 *(11 months)*

Initiations

Date	Chapter	Number
Oct 29, 2009	Life Members ΤΒΣ	2800
Jul 26, 2008	National ΤΒΣ	114 *(Honorary)*
Aug 6, 2007	Life Members ΚΚΨ	4015
Dec 2, 2001	Alpha ΚΚΨ	1218

Time: 0.43 second(s)
Memory (peak): 11.25MB bytes
Files: 328 included
Session: tbnjaglkautb35s0nrbqs00fr1
Connects: 1

Queries (129): sum:0.26/min:0.00/max:0.11/avg:0.00

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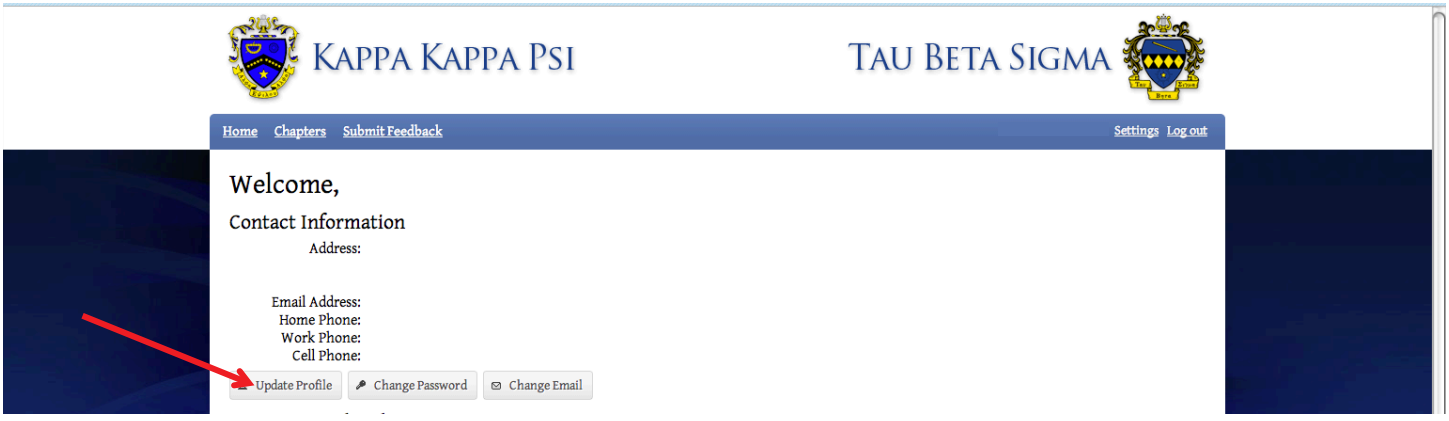
6 This section shows your dates of initiation and your official Initiation Number (also known as a Member Number, Roster Number, and Scroll Number) on the Master Roster.

Editing your Membership Profile

The profile contains a great deal of information about your involvement in Kappa Kappa Psi and Tau Beta Sigma, but can it be updated? The answer is yes, certain information is always editable to the member while other information can only be updated by National Headquarters.

You can edit your information by clicking on the Update Profile button on your home page, which is located just below your contact information. There are additional options to update your e-mail address and password as well.



The Update Profile Page has five sections that you can edit information in. You will notice that it does not include Current Memberships, Previous Memberships, and Initiation information; those fields are maintained strictly by National Headquarters.

1. The Personal Information section will have your name as it was reported when you were initiated (and any updates made since). The Goes By/Nickname field should be used to specify if you prefer to be addressed by something other than your first name, however, it is not for chapter nicknames.

2. The Contact Information provides National Headquarters and National Officers with phone numbers and an additional e-mail address if necessary.

3. The Current Mailing Address section should be used to show where you currently reside. For students, this is likely different than your permanent address

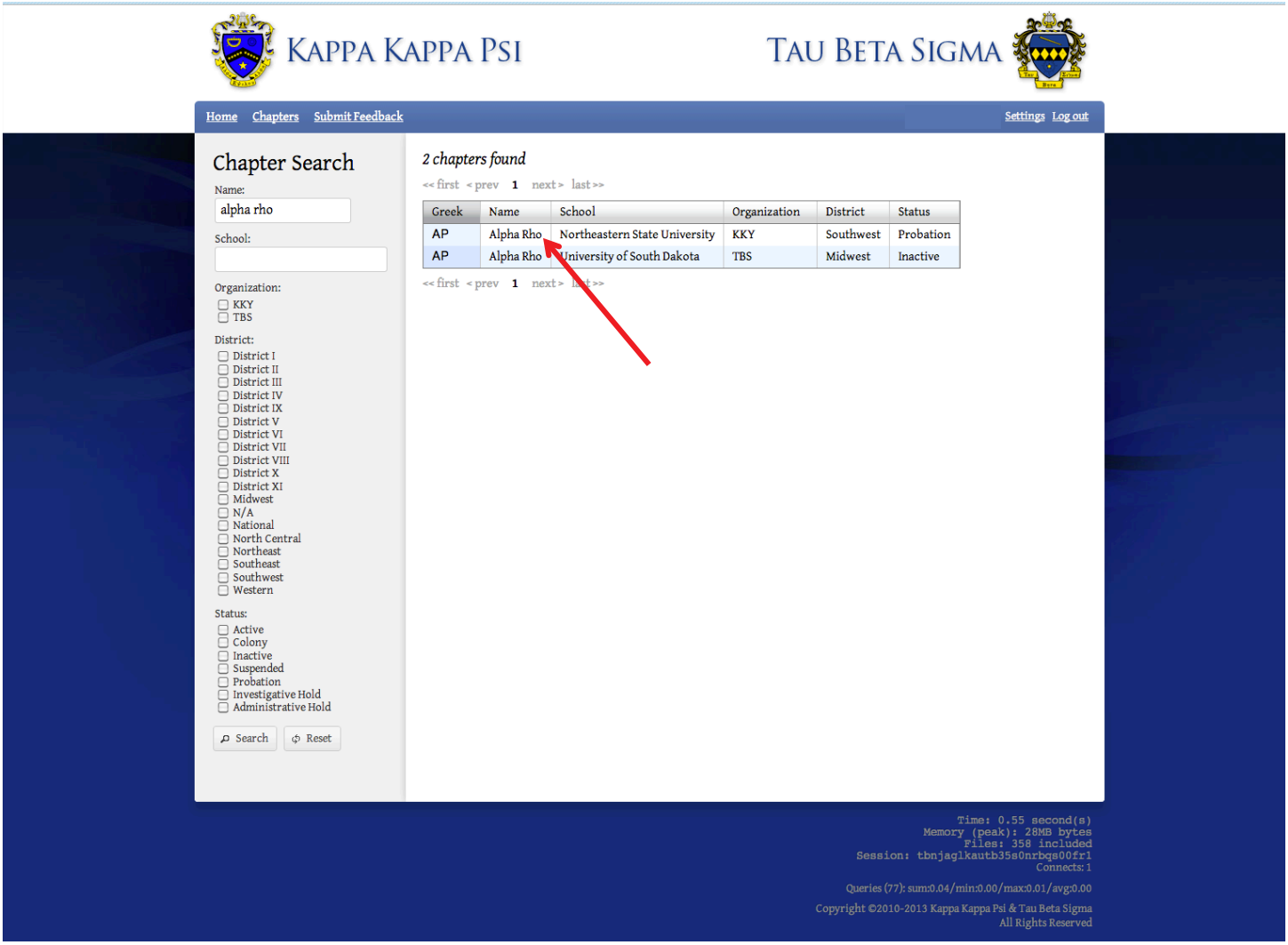
4. Permanent Address is where you should receive official correspondence and documents. For students, this should most likely be your parent or guardian's address.

5. The only part of membership information that you can adjust is your Graduation Date and Instrument. For those who graduated prior to 2000, it is likely that HQ has no graduation date on file for you.

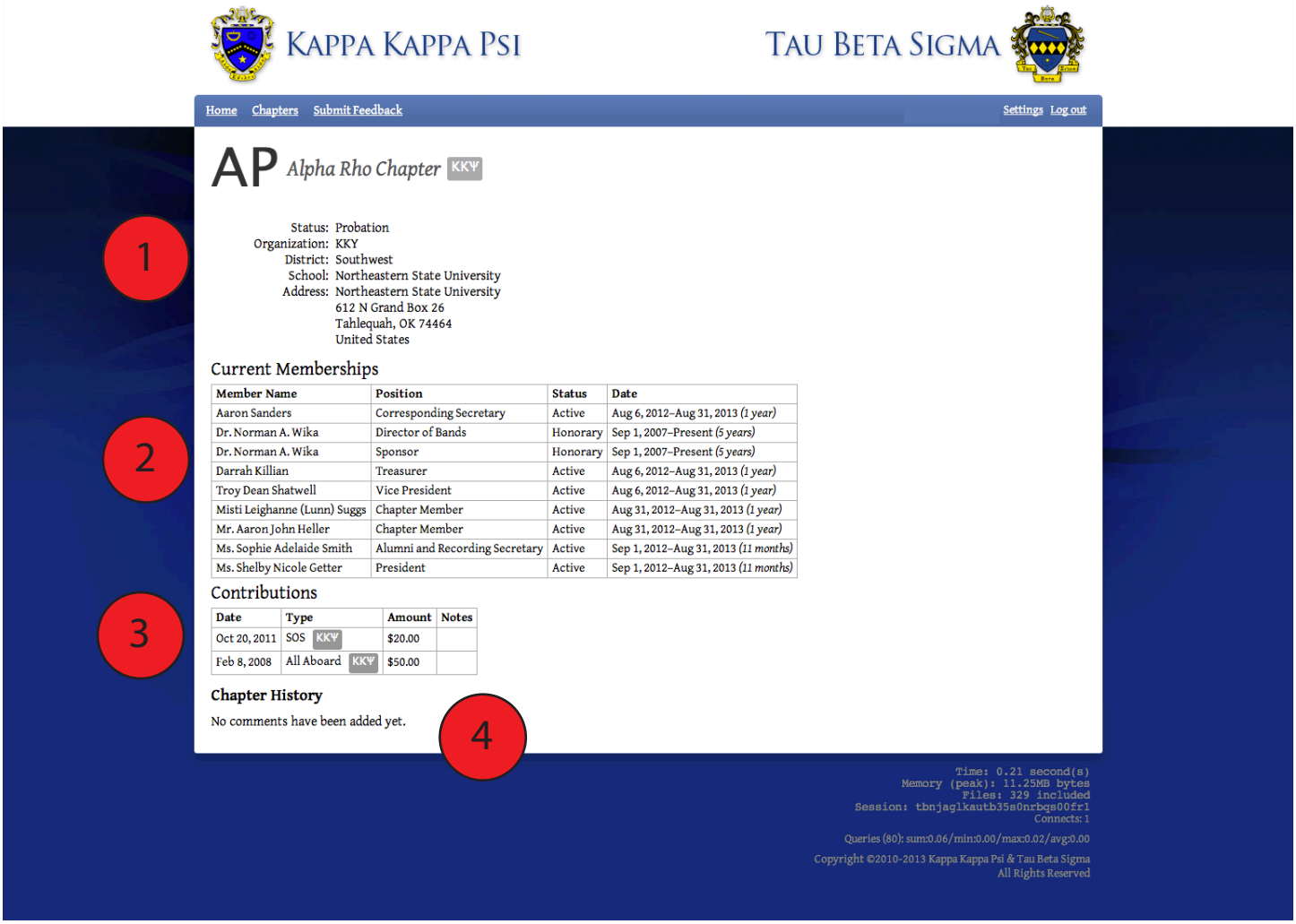
Now that we have examined your personal profile, ww will look at what else is available to every member of Kappa Kappa Psi and Tau Beta Sigma as part of the OMRS. You will notice three menu items in the blue stripe below the crest(s) at the top of the screen: Home, Chapter Search and Submit Feedback. Home takes you to your personal profile, so we will look at the other two items now.

Chapter Search

The Chapter Search option provides a similar function to the chapter directory that was tied to the legacy database system. However, the information returned from the Chapter Search in the OMRS provides much greater detail than what is available to non-members. To use the chapter search click the link, and you should see the following:



The Chapter Search page provides a number of options to narrow your search including chapter name, school, organization, district, and chapter status. In the above example, we entered only a chapter name and received the results for the Alpha Rho Chapter of Kappa Kappa Psi and the Alpha Rho Chapter of Tau Beta Sigma. You will see that is returns only a basic result with the Chapter Name, School, Organization, District, and Chapter Status. To view more information about the chapter, click on the chapter name and you should see the following:



Similar to your own Member Profile, each Chapter has its own profile that contains similar information.

1. This provides basic contact information for the chapter including the mailing address. Also included is the District the chapter belongs to and the current chapter status.

2. Similar to your member profile, the Current Memberships section lists all members of the chapter with a current membership status of Active, Conditional, or Associate. The Director of Bands and Sponsor will also be listed if they are an initiated member of the chapter. If you notice that your Sponsor or DOB is not listed on your chapter's profile, it is likely that they have never been initiated (active or honorary) in your chapter; or if they have, it was never reported to National Headquarters.

3. A feature that is not currently available on the member profile, but is viewable at the chapter level is the Contributions History. Any donations made by the chapter are logged in the OMRS and show the date, amount donated, and what the money was donated for.

4. The Chapter History section, which remains blank in the example above, details the status history of the Chapter. For example, when a chapter is placed on Administrative/Investigative Hold, Probation, is Suspended, or is dropped a notification of that status change, the date, and a reason will be displayed here.

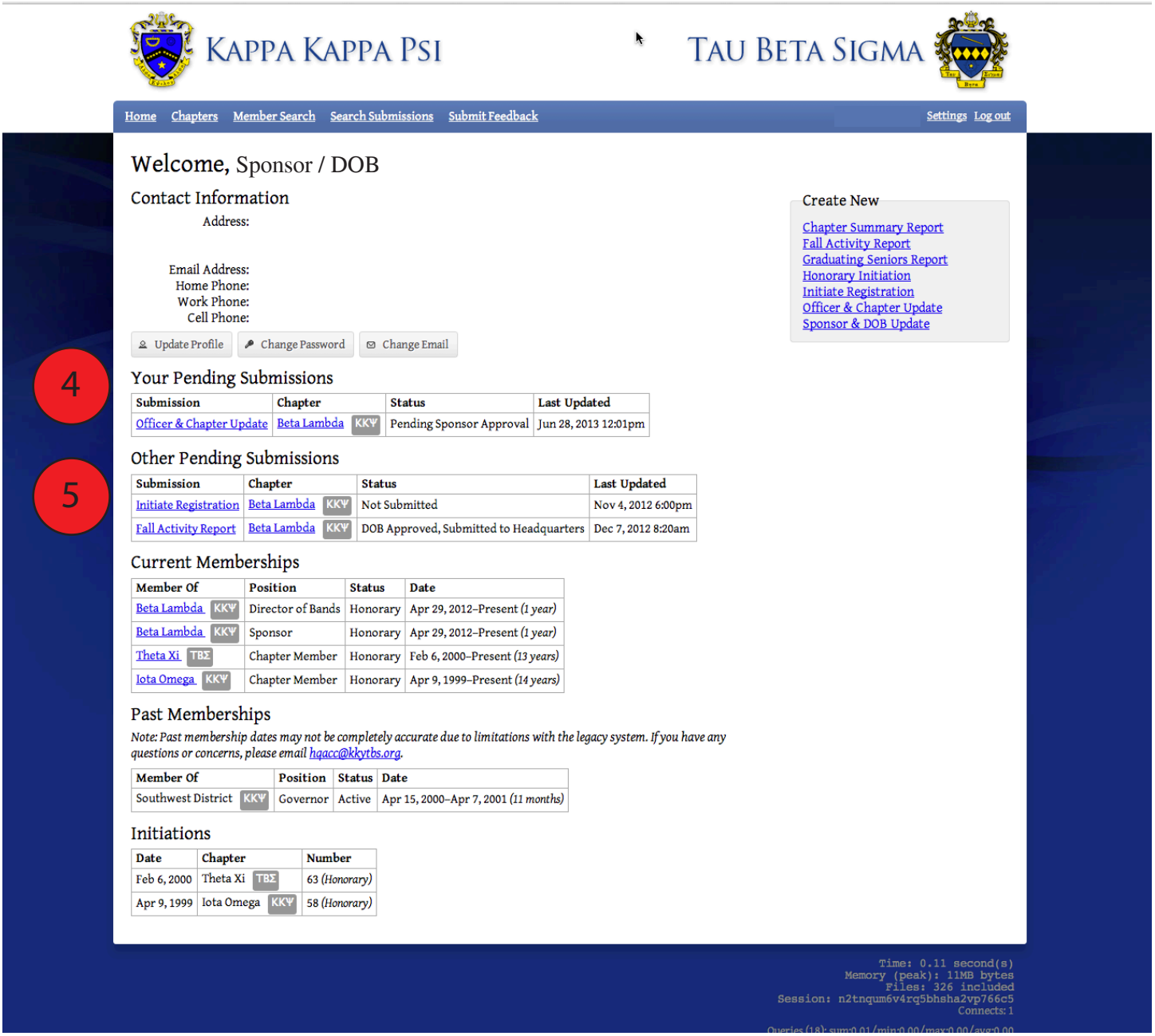
Chapter Officer Profiles

Chapter Officers (including Sponsor and Director of Bands) have the same profile components as other members, but add a few extra features. You will notice a new menu on the right hand side of the profile page that will allow chapter officers to create new forms for submission. Along with the Create New Forms menu, several additional options have been added to the horizontal menu at the top of the profile.

1. You can see by the crest at the top that this individual is a member of Kappa Kappa Psi.

2. The Chapter Officer Menu has added Member Search and Search Submissions options to the horizontal menu in addition to other options available to Chapter Members. We will look at these options on the following pages.

3. The Create New Form Menu on the right allows Chapter Officers to begin working on forms/reports to submit to National Headquarters. These include: Chapter Personnel Report, Chapter Personnel Update, Chapter Summary Report, Fall Activity Report, Graduating Senior Report, Honorary Initiation, Initiate Registration, Officer & Chapter Update, and Sponsor & DOB Update. The Chapter Personnel Report and Chapter Personnel Update are only available for part of the year and do no show in the list above.



4 The Your Pending Submissions section of the profile will show any forms that are still in process that were created by the individual who is logged in. To edit a form or change the submission status, click on the form in the section.

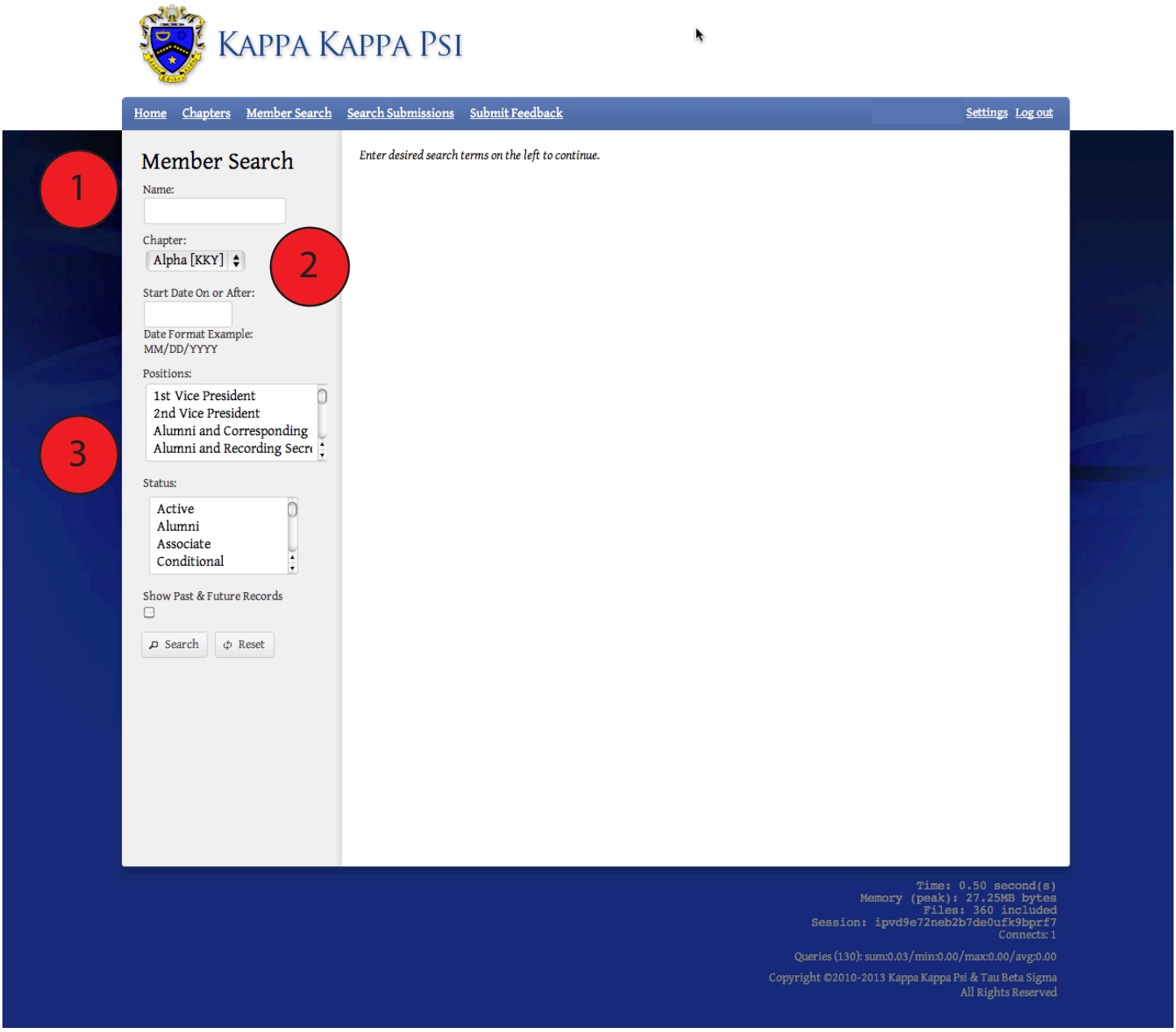
5 The Other Pending Submissions section of the profile will show any forms started by another member of your chapter that are still in progress. The form links in the section will allow the Sponsor and Director of Bands to access reports that are awaiting his or her review and approval. Items in this section will also be viewable by other chapter officers, however they will not be able to edit the form.

Note that the Pending Submissions sections only appear on the profile if the chapter has forms in the submission process.

The Chapter Search tool available to Chapter Officers is the same as what was previously described on the Member Profile, so instead we will look at the other menu options that are available.

Member Search

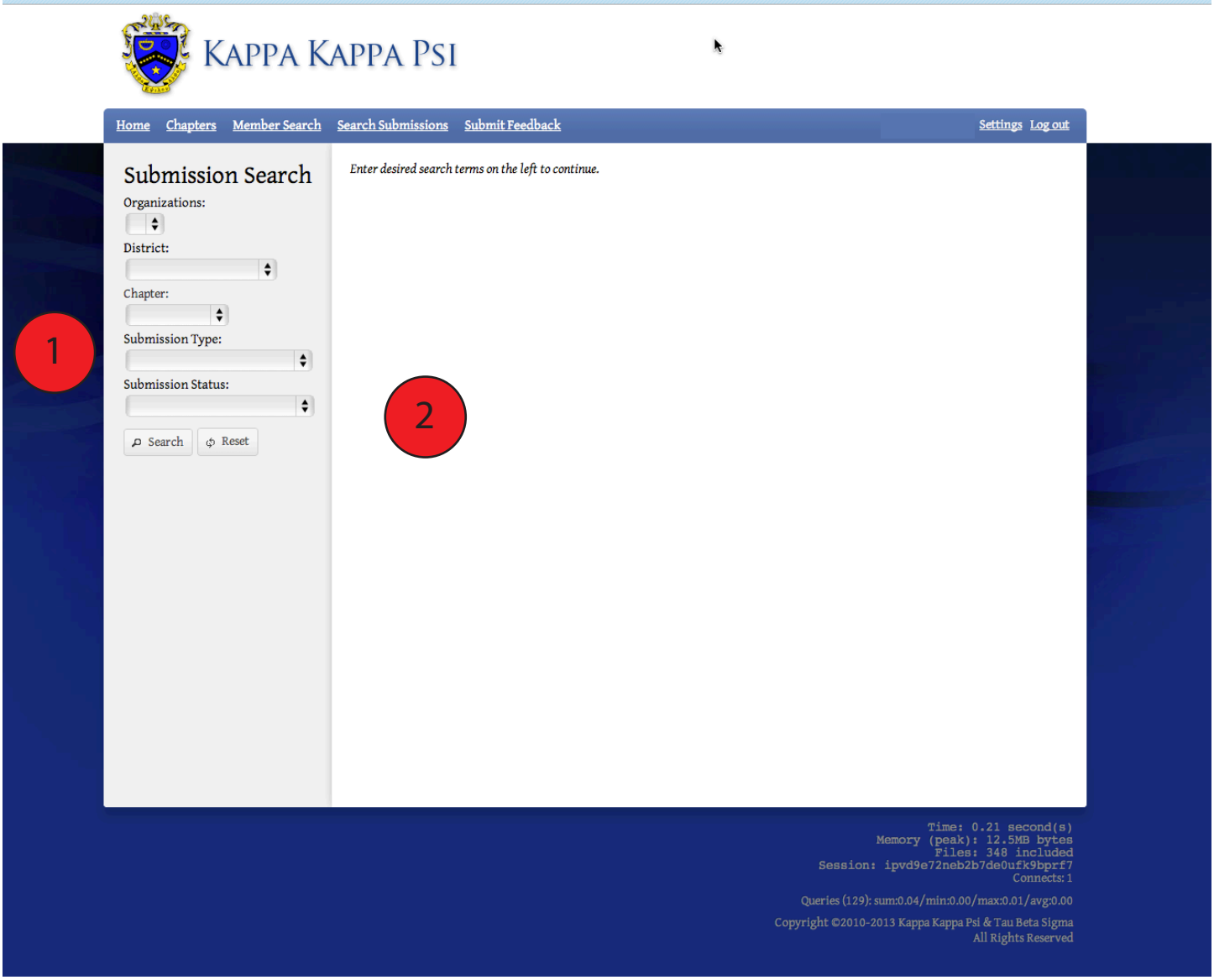
Chapter Officers have the ability to view the profile of any member of his or her chapter. This is a great tool for contacting chapter alumni, or checking to see if a member left in good standing. As you can see in the example below, the Chapter field is locked to the specific chapter that the officer is from.



1. The name field allows you to search for a specific individual, or it may be left blank to return multiple results.
2. As previously mentioned, chapter officers may only search within his or her own chapter, and the Chapter dropdown menu is locked.
3. If you want to further limit the results returned, you can also search by membership date, positions held, and/or membership status.

Search Submissions

Did your previous officers submit all the forms they were supposed to? You can check by using the Search Submissions menu. Once on the search page, you will have the option to search by Submission Type (what form/report) and/or Submission Status. Like with the Member Search, officers are limited to viewing only results from his or her own chapter.



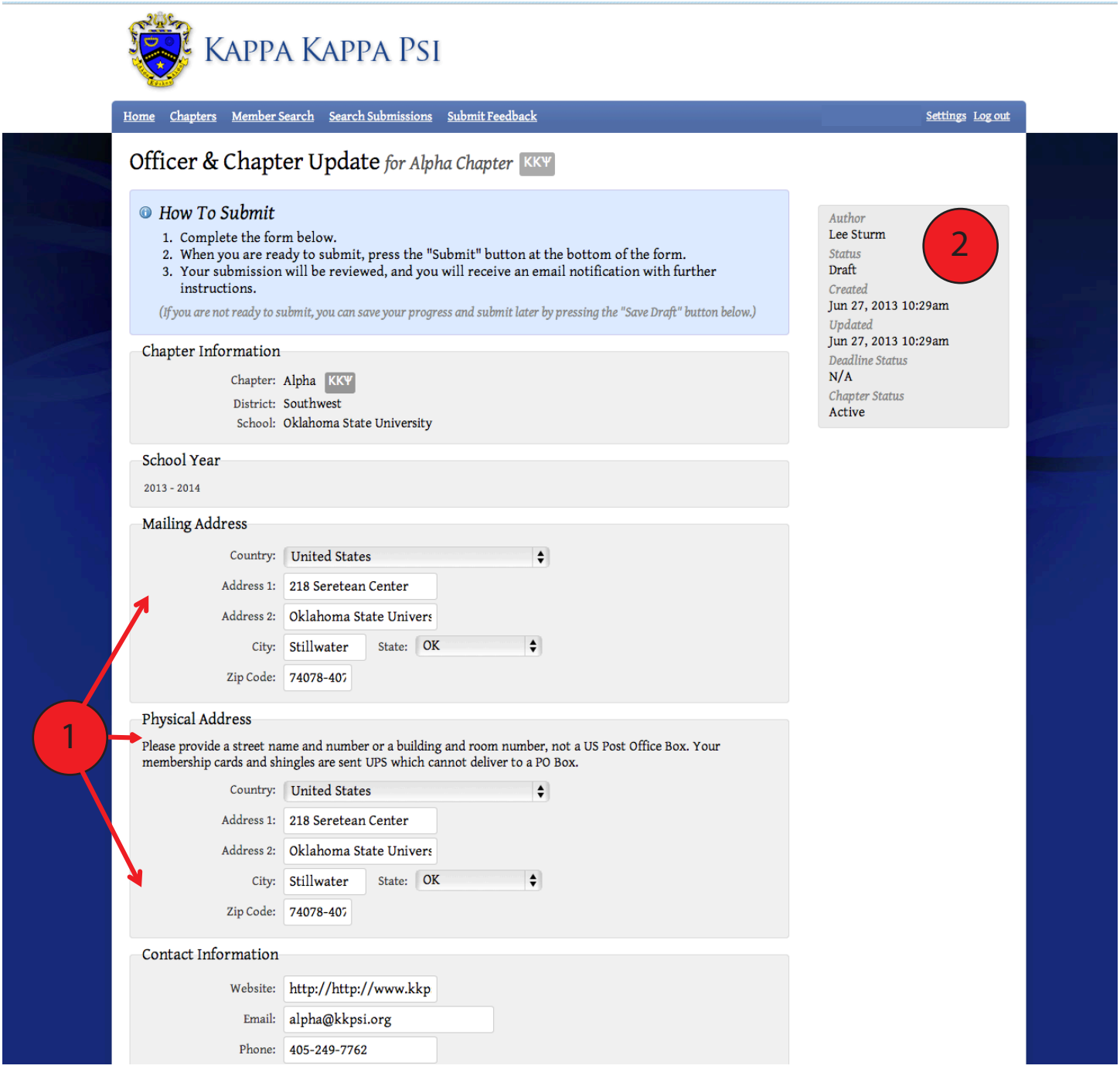
1. Select a Submission Type of Officer & Chapter Update, Chapter Personnel Report, Chapter Personnel Update, Chapter Summary Report, Fall Activity Report, Graduating Senior Report, Honorary Initiation, Initiate Registration, or Sponsor & DOB Update. You can leave the field blank and your search will return all form types.

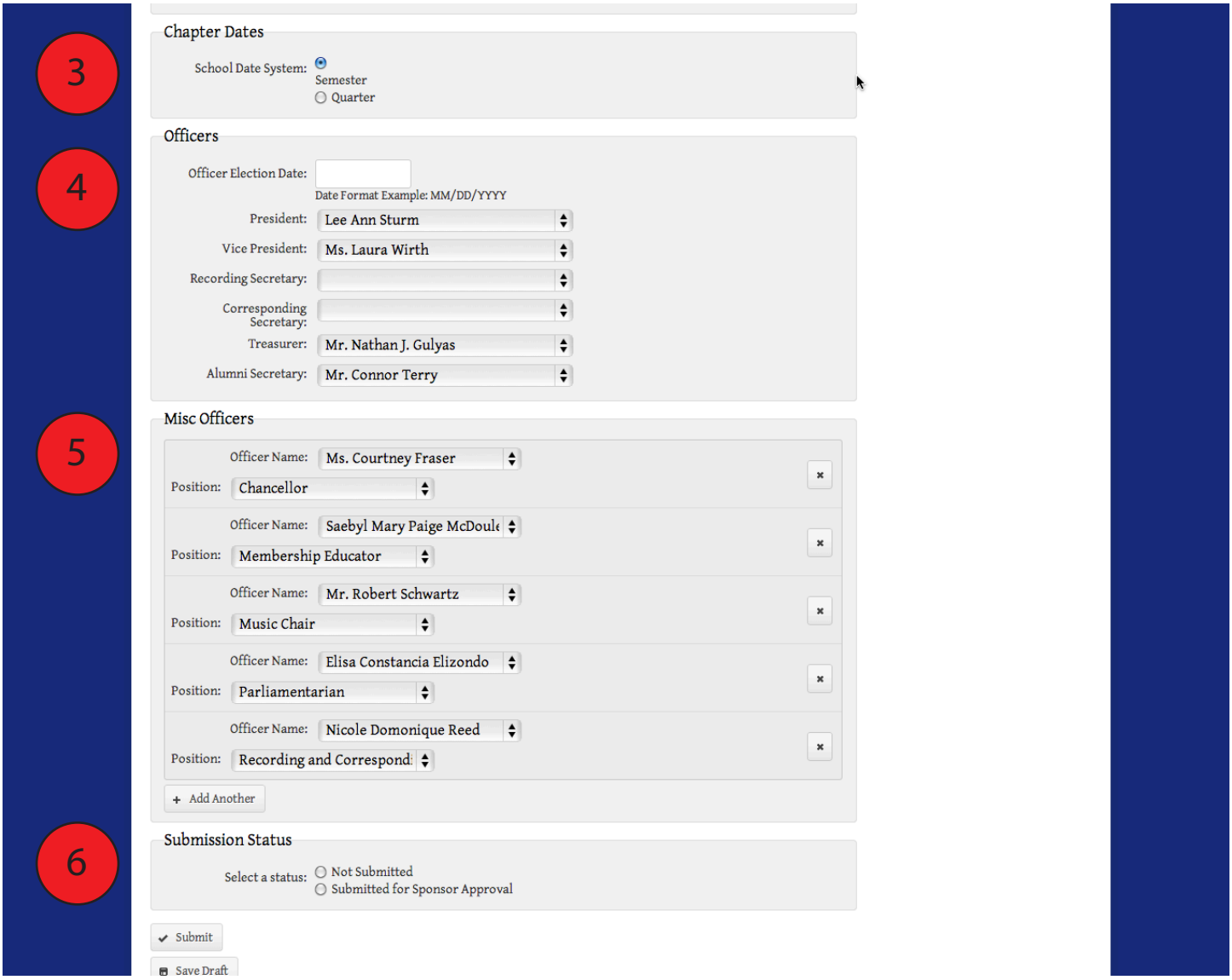
2. You can also limit your search by choosing one of the following options on the Submission Status dropdown: DOB Approved, Pending Collection of Fees; DOB Approved, Submitted to Headquarters; DOB Approved, Transaction Completed; Draft, Form & Payment Sent to National Headquarters; Not Submitted; Requires Corrections; Sponsor Approved, Pending Collection of Fees; Sponsor Approved, Pending DOB Approval; Submitted for Sponsor Approval; Submitted to Headquarters; Transaction Completed; or Transaction Confirmed. You can leave the field blank and your search will return all status types.

Now that we are familiar with the Chapter Officer's Profile, we should look at the various reports/forms that are available to officers and the submission process for each.

Officer & Chapter Update

The Officer and Chapter Update should be submitted anytime you hold officer elections or change the contact information for your chapter. It is important that each time this form is submitted, all current officers are listed, as it updates the Current & Past Memberships sections of each incoming and outgoing officer. You will also be limited to an election date during the current school year, so make sure you get this updated as soon as you hold elections. But also be aware that if an outgoing officer has created a form/report in the OMRS, he or she will no longer have the ability to edit that submission once they are no longer listed as a current officer. At this time, only the officer that creates a form has the ability to edit it; keep this in mind as you submit the Officer & Chapter Update. Notice the instructions at the top of the form; they will update with each change in Submission Status.





1. Each time this form is submitted, double-check all three areas of contact information to ensure everything is correct.

2. This section shows the current status of your form and when it was last updated. On forms that have specific deadlines, you can also see if it is On-Time or Late.

3. Is your school on a Semester or Quarter System? This will affect the due dates for the Chapter Personnel Report and Chapter Personnel Update.

4. The Officers Section includes the most common officers, which were also the only ones that were collected prior to the launch of the OMRS. You can only select Chapter Members who have a status of Active or Associate to serve as an officer. If an officer serves in multiple offices, see if there is a combined listing in the Misc Officers Section. This is most common with the Secretary positions. If a member holds all secretary positions, please select Secretary in the Misc Officers and leave the other Secretary fields blank.

5. The Misc Officers section allows the chapter to list all of their officers, not only those with the most common titles. If your chapter has an officer that is not listed, please contact HQ at kkytbs@kkytbs.org to see if it can be added.

6. To submit a form for approval (or the next phase of the approval process), select the appropriate status and then click submit. You may also save your work without submitting by clicking the Save Draft Button.

Each form / report in the OMRS follow a specific workflow, or submission process that begins with the creation of the report and ends with its approval. At any point in the process, a status of "Requires Corrections" can be submitted if there are errors in the form that need to be updated.

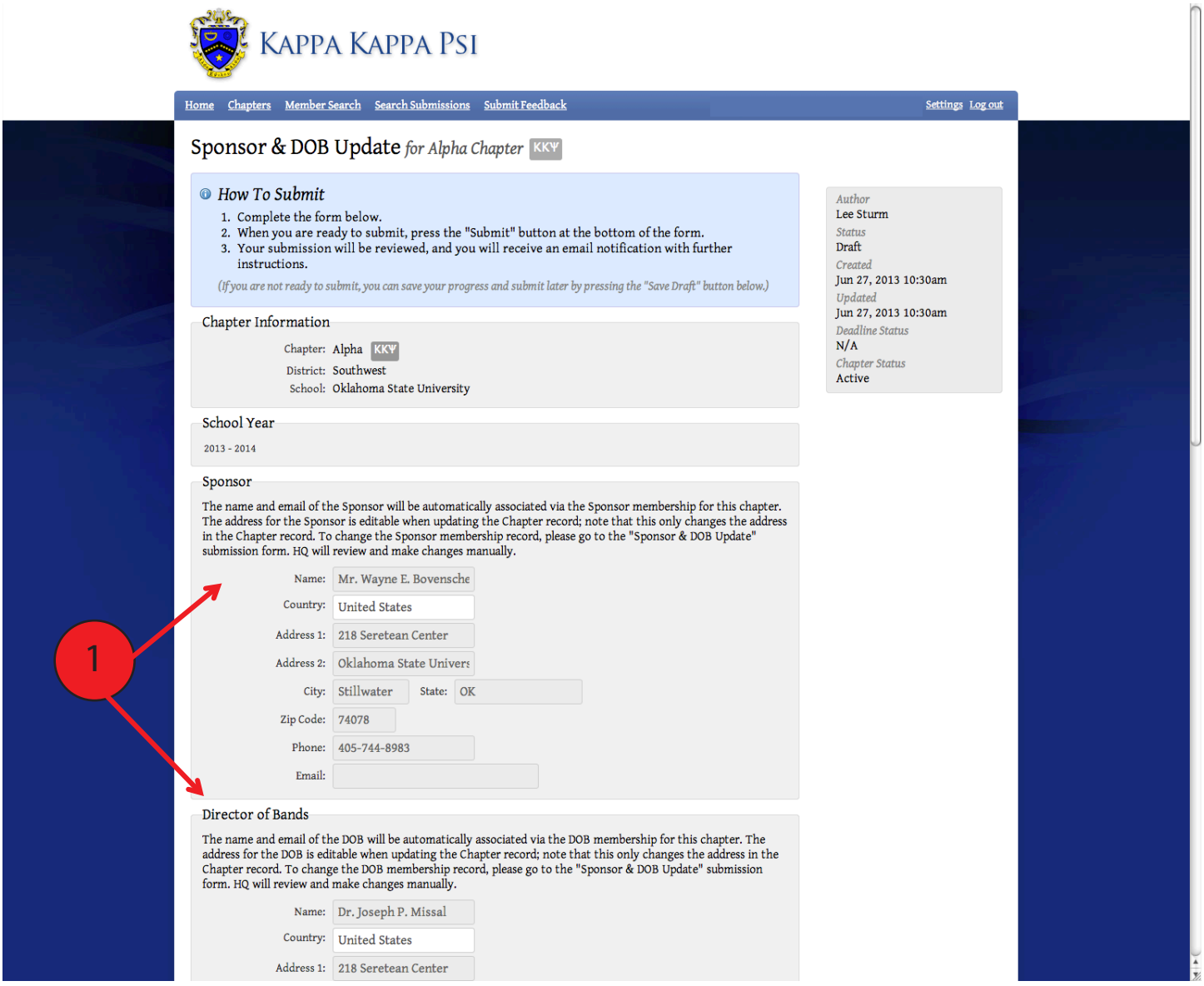
Submission Process: Officer & Chapter Update

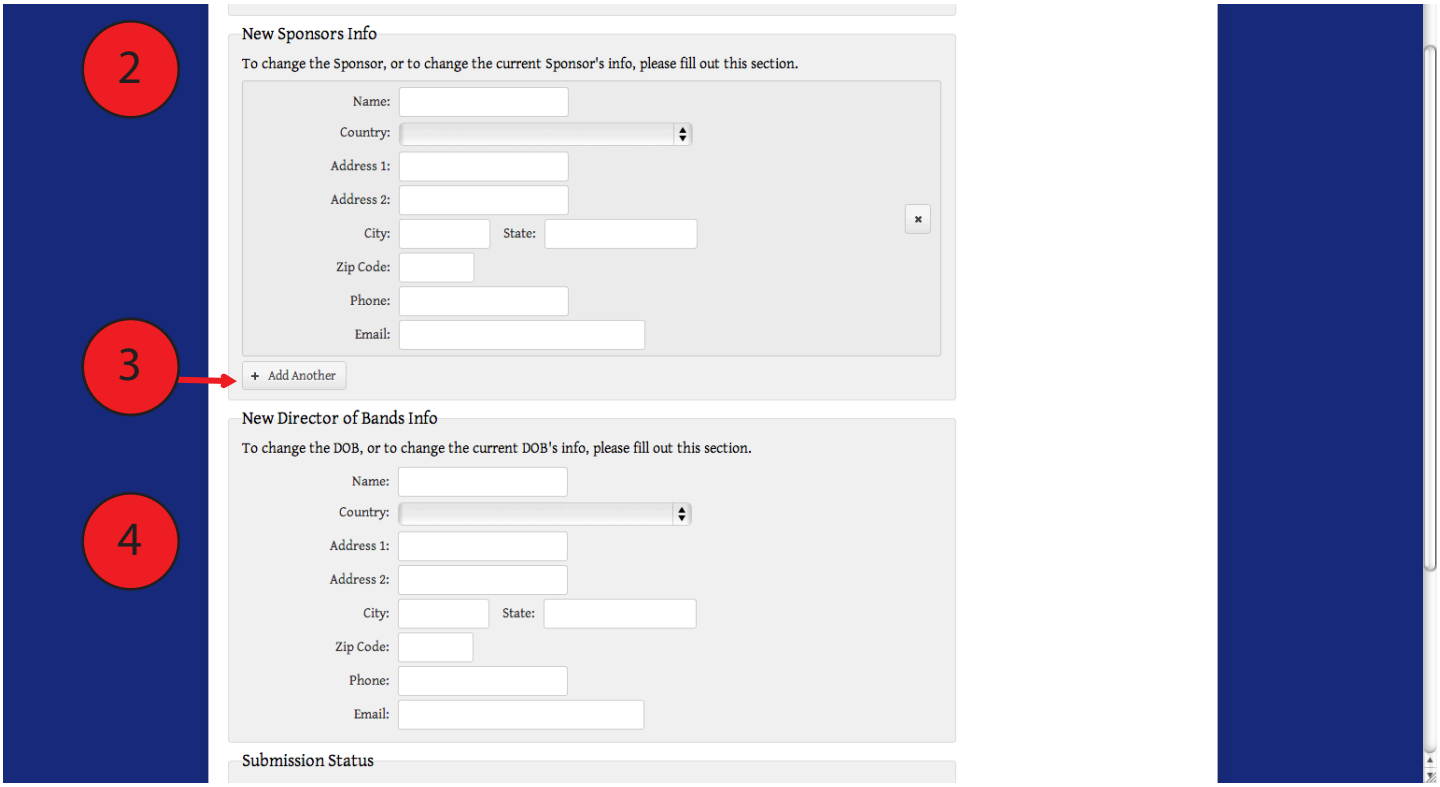
1. Outgoing Officer Creates New Officer & Chapter Update
2. The form creator sets status to "Submitted for Sponsor Approval"
3. Sponsor approves the form by submitting a status of "Sponsor Approved, Pending DOB Approval"
4. The Submission is completed and member profiles are updated when the DOB approves the form by submitting a status of "DOB Approved, Transaction Completed"

If your DOB is also your Sponsor, he or she will only have to approve the form once.

Sponsor & DOB Update

This form will most likely be submitted the least often of any of those available to Chapter Officers. It will only need to be submitted if your school has had a change of Director of Bands, if the DOB appoints a new Chapter Sponsor, or if the contact information for the Sponsor or DOB has changed. Remember that the Sponsor serves at the discretion of the Director of Bands and may not be appointed by the Chapter.





1. The first part of the Sponsor & DOB Update page shows your current Sponsor & DOB and the associated contact information. You will notice in the example that the e-mail address field appears blank. This is normal because the e-mail address is tied to the individual's personal profile. Before submitting an update for this information, double check with your Sponsor & DOB to see if they are able to login to the OMRS.

2. This section allows you to change your Sponsor, or to update his or her contact information.

3. Many Chapters have two or more Sponsors. In this case, you can click the "Add Another" button which will provide another New Sponsors Info box for you to complete. At the present time, only one Sponsor will display on the Chapter Profile, but each of them will have access to the OMRS as a Chapter Sponsor.

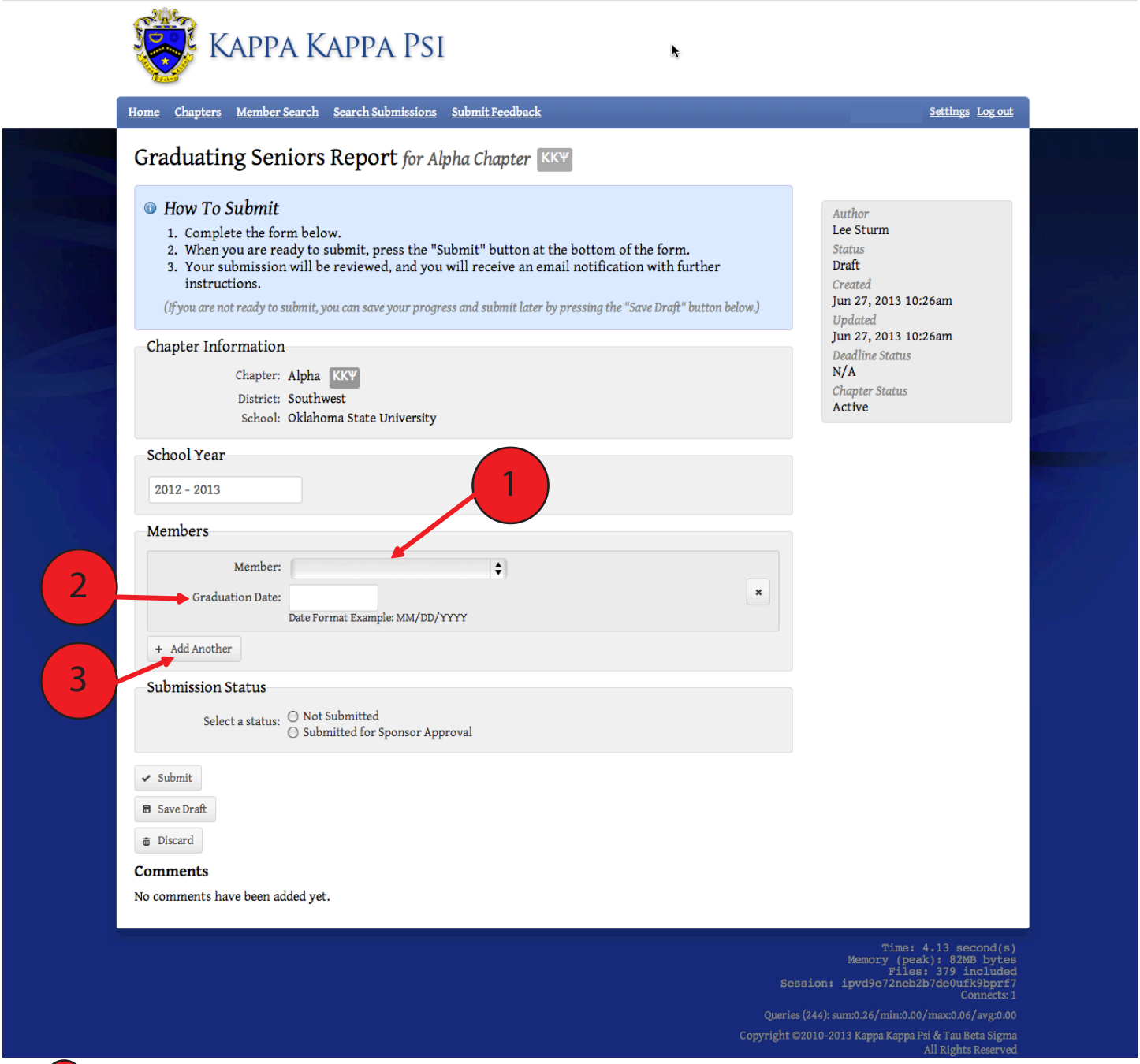
4. This section allows you to change your Director of Bands, or to update his or her contact information.

Submission Process: Sponsor & DOB Update

1. Chapter Officer (or Sponsor /DOB) creates Sponsor & DOB Update
2. The form creator sets status to "Submitted to Headquarters"
3. National Headquarters Staff Member manually updates the member and chapter profiles
4. Form is completed when HQ Staff Member sets status to "Transaction Completed"

Graduating Senior Report

The Graduating Senior Report (GSR) can be submitted at any time during the school year, but it is recommended that you submit a copy for Fall graduates at the same time you are completing the Fall Activity Report and a copy for Spring graduates while completing the Chapter Summary Report. The GSR can only be submitted for individuals who have a current membership status of Active, Conditional, or Associate, so it is important that this form is submitted during the correct school year. Kappa Kappa Psi members have an additional reason to make sure that this form is submitted properly; recent graduates receive one free year membership in the Kappa Kappa Psi Alumni Association.



1. The Member dropdown box will allow you to select from all chapter members with a current membership status of Active, Conditional, or Associate.

2. The date entered in the Graduation Date box will update that portion of the member profile, and will be used for the start date of the graduate's Alumni status.

3. Click on the Add Another button to add additional members to the Graduating Senior Report.

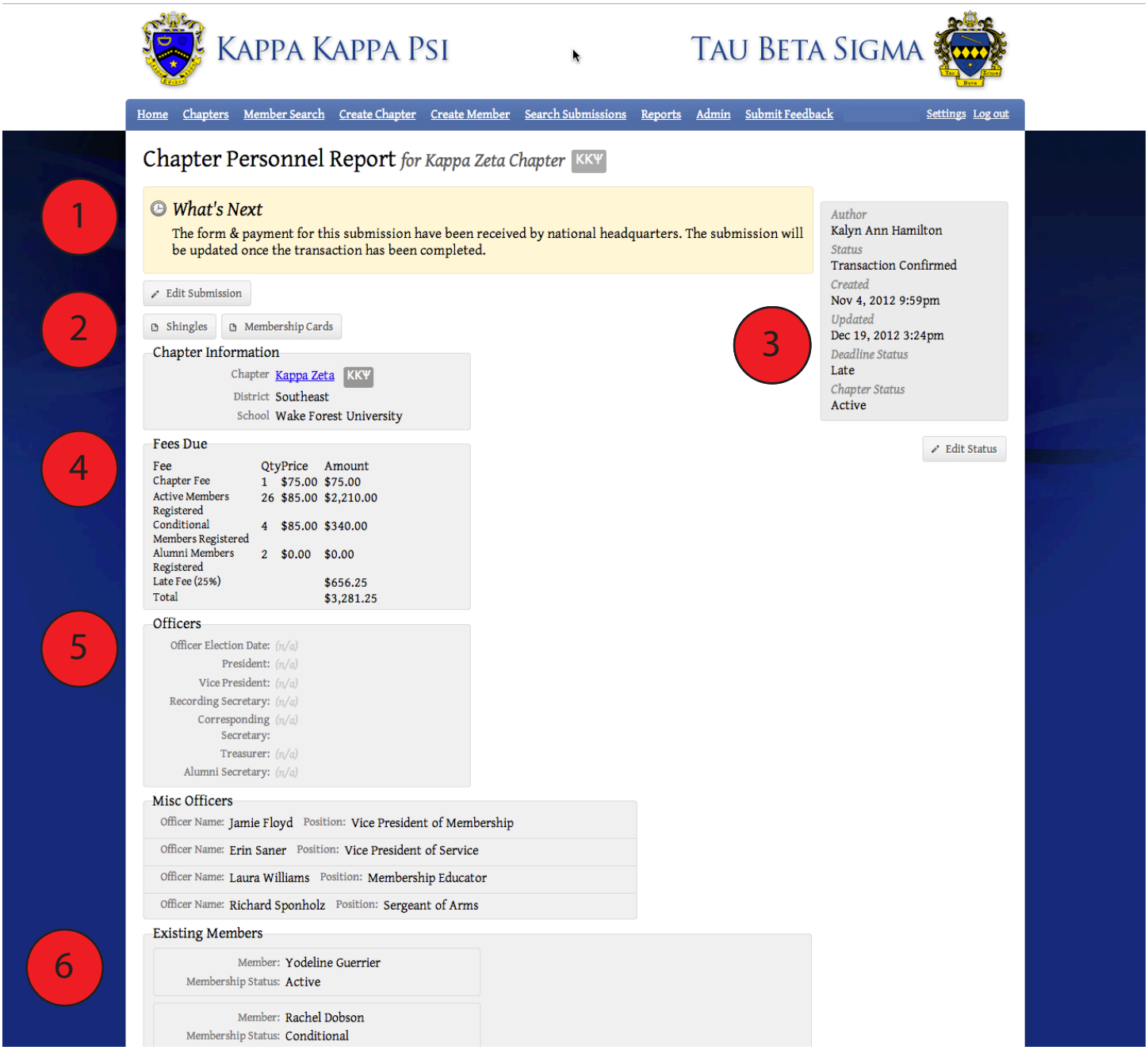
Submission Process: Graduating Senior Report

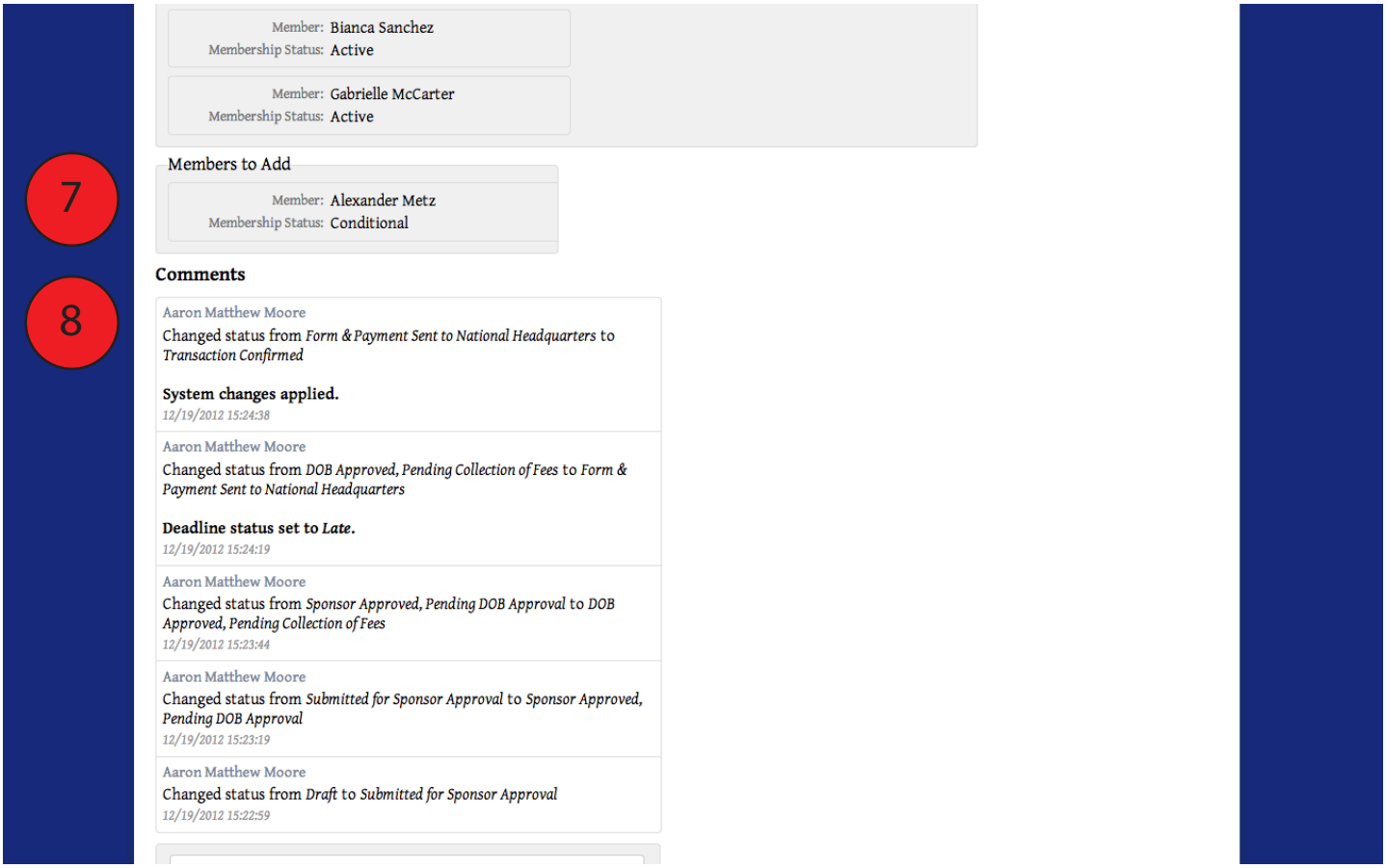
1. Chapter Officer Creates New Graduating Senior Report
2. The form creator sets status to "Submitted for Sponsor Approval"
3. Sponsor approves the form by submitting a status of "Sponsor Approved, Pending DOB Approval"
4. DOB approves the form by submitting a status of "DOB Approved, Transaction Completed" *If your DOB is also your Sponsor, he or she will only have to approve the form once.*

5. Profile changes are made when HQ changes the form status to "Transaction Confirmed" and is completed when HQ sets a status of "Transaction Completed."

Chapter Personnel Report

The Chapter Personnel Report (CPR) is how the chapter notifies National Headquarters who is going to be active for the current school year. This report is due on September 15 for semester schools, and October 1 for quarter schools. To be considered submitted, the CPR must have received Sponsor & DOB approval in the OMRS, have a status of "Form & Payment Sent to Headquarters", the summary page must be signed by all Active, Conditional, and Associate Members, and the summary page & payment mailed to HQ. Each of the above conditions must be met prior to September 30 (October 15 for quarter schools) to avoid late fees. After that date, a 25% late fee will be added to the chapter fee and member dues. National Headquarters reserves the right to change the status of any form that has been set to a status of "Form & Payment Sent to Headquarters" prior to the deadline if the payment is not postmarked by the deadline as well.





1. As with all forms, you should see a colored box at the top with instructions for the next required step. This particular form is seen from an HQ vantage point after it has been "Transaction Confirmed."

2. At the "Transaction Confirmed" and "Transaction Completed" stages, National Headquarters has the ability to print membership cards for members.

3. The box on the right shows the current status of the form, the original author, and the date the form was created and last edited.

4. The Fees Due section will automatically update to show how much money is owed with this form. If the form is completed after the deadline, the OMRS will automatically add in the late fees.

5. The Officers and Misc Officers Sections will be pre-populated with the current chapter officers and cannot be updated in this form. They are listed for record keeping purposes.

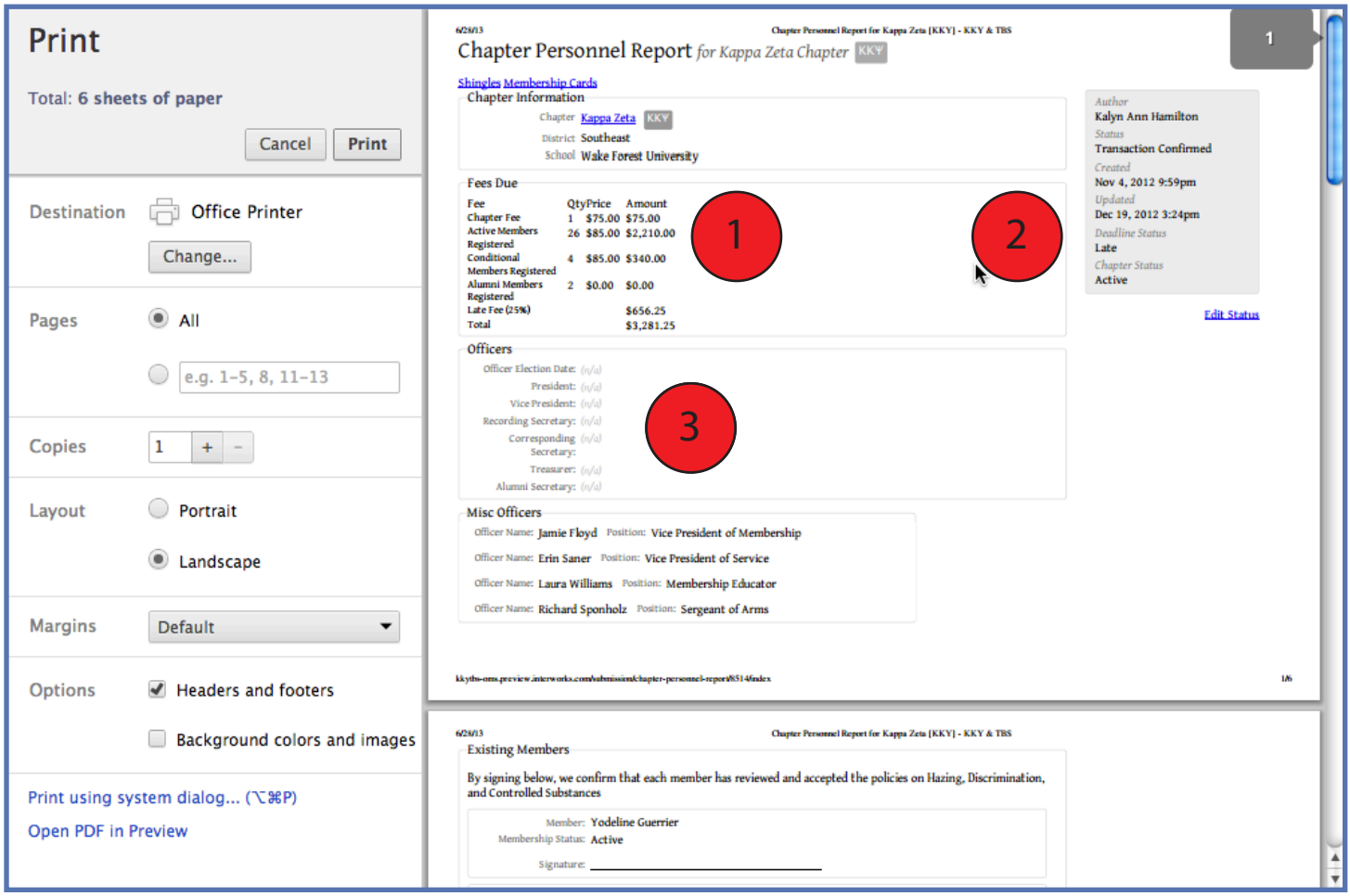
6. The Existing Members section will list all chapter members that have an Active, Conditional, or Associate membership at the August 31st of the previous year's membership. An updated status is required for each of these members.

7. The Members to Add section works much like the Graduating Senior Report. It will allow you to select members from the chapter roster that did not pre-populate into the Existing Members section if they are returning to an Active, Conditional, or Associate Status. This section will also be used for any new transfer members. However, if you have a transfer member you will need to contact HQ at hqacc@kkytbs.org with the member's name, previous chapter, and chapter transferring to prior to completing the CPR. National HQ Staff will manually add the transfer member to your roster so that you may submit their dues.

8. The Comments section of the form shows when each status change to the form occurred and who made the change. Additional comments can be made if there are corrections needed on the form.

To successfully complete a Chapter Personnel Report, a summary page and payment must be submitted to National Headquarters in addition to receiving the required approvals in the OMRS. Many people have asked why they still have to mail anything in since we are doing our reporting online. The answer is actually pretty simple, and has two parts. The first is submitting the paperwork by mail lets National Headquarters know which chapter the payment is for. The second reason is part of our insurance liability; by signing the form, each Active, Conditional, And Associate Members signifies that they have read, understand, and agree to abide by the policies of Kappa Kappa Psi and Tau Beta Sigma.

The Summary Page is generated simply by printing the form. When it is printed, you should notice that the formatting has changed and signature lines have appeared for each member.

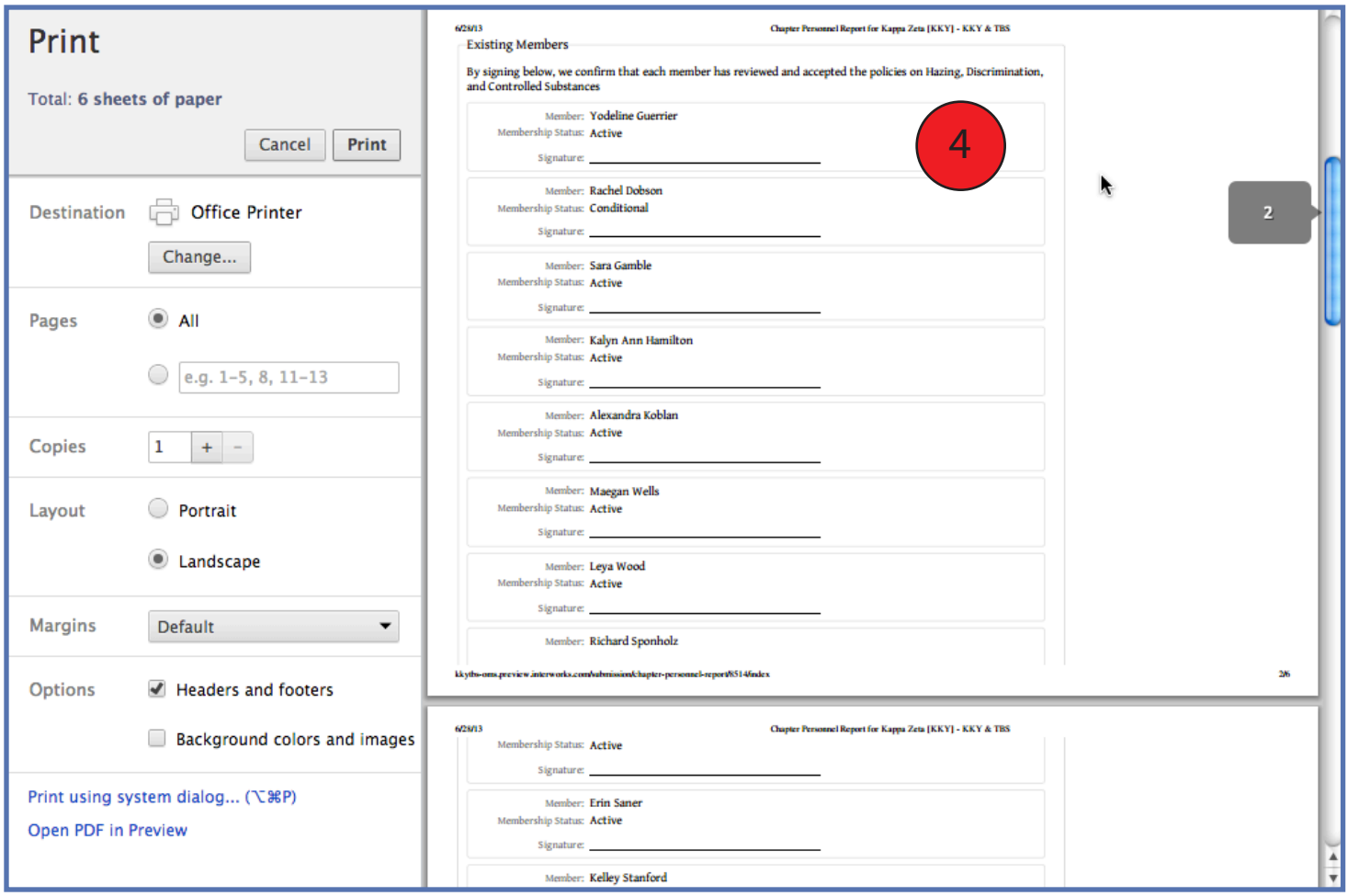


1. The Fees Due section should match what you saw before printing, and will automatically update to show how much money is owed with this form. If the form is completed after the deadline, the OMRS will automatically add in the late fees.

2. The box on the right shows the current status of the form, the original author, and the date the form was created and last edited.

3. The Officers and Misc Officers Sections will display the pre-populated Chapter Officers.

4. The Existing Members & Members to Add sections have been reformatted to include a signature line for each member. You must gather signatures from all Active, Conditional, and Associate Members before mailing this form. Signatures are not required for Inactive and Alumni members.



Submission Process: Chapter Personnel Report

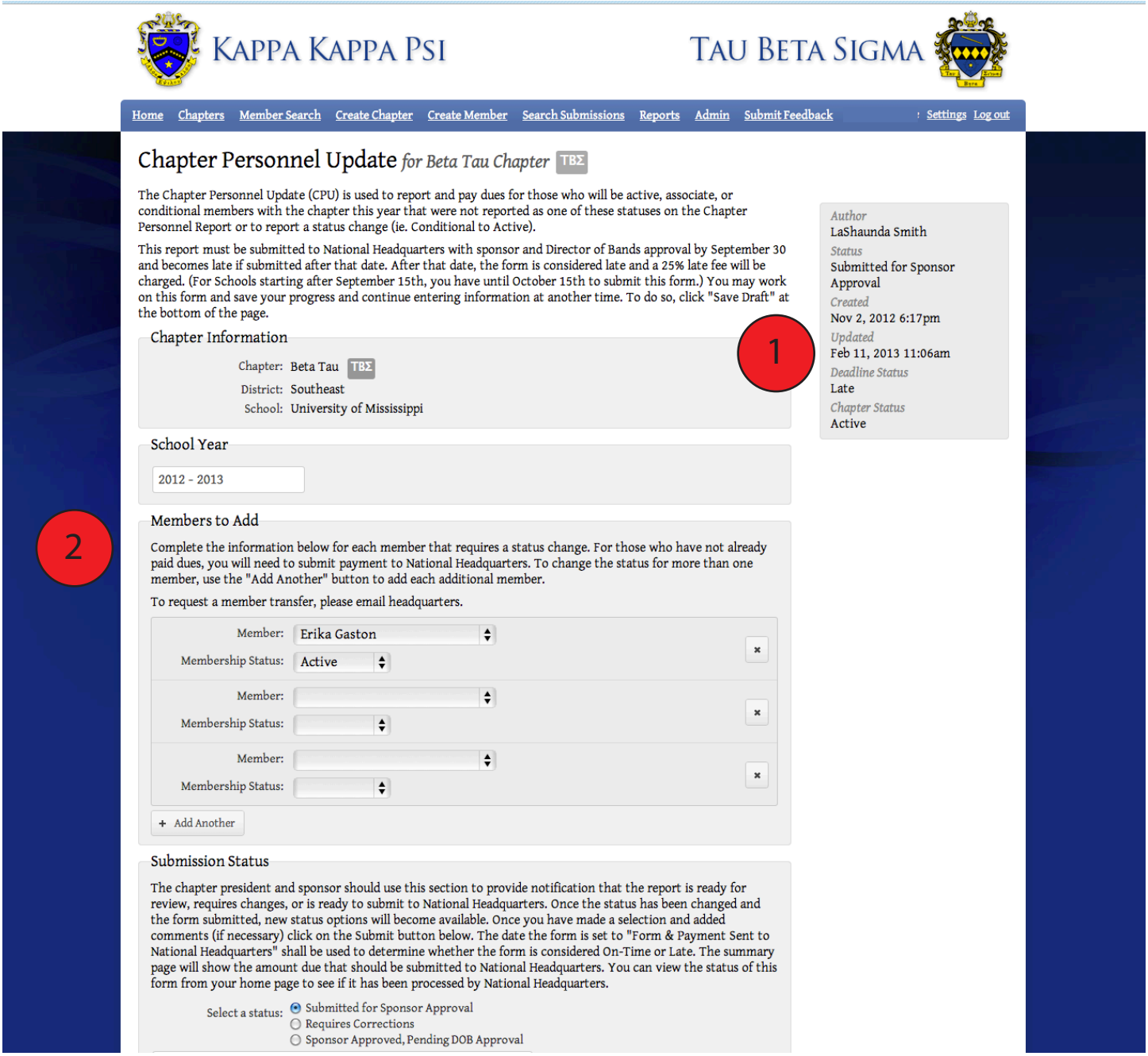
1. Chapter Officer creates new Chapter Personnel Report (only one CPR may be submitted per year).
2. Once completed, the author submits the form with a status of "Submitted for Sponsor Approval."
3. Sponsor approves the form by submitting a status of "Sponsor Approved, Pending DOB Approval."
4. DOB approves the form by submitting a status of "DOB Approved, Pending Collection of Fees" *If your DOB is also your Sponsor, he or she will only have to approve the form once.*
5. The author collects required fees and changes the status to "Form & Payment Sent to National Headquarters."
6. Author prints the summary page and gathers signatures from all Active, Conditional, & Associate Members.
7. Author mails the summary page and payment to National Headquarters.
8. National Headquarters processes the payment and changes the form status to "Transaction Confirmed."
9. Membership cards are printed and form status updated to "Transaction Completed."
10. Membership cards are mailed to the chapter.

Chapter Personnel Update

The Chapter Personnel Update (CPU) is how the chapter notifies National Headquarters of any mid-year status changes including reporting any additional dues paying members after the Chapter Personnel Report has been submitted. The CPU has the same due date of September 15 for semester schools, and October 1 for quarter schools. Any submissions after September 30 (October 15 for quarter schools) will incur a 25% late fee. National Headquarters reserves the right to change the status of any form that has been set to a status of "Form & Payment Sent to Headquarters" prior to the deadline if the payment is not postmarked by

the deadline as well.

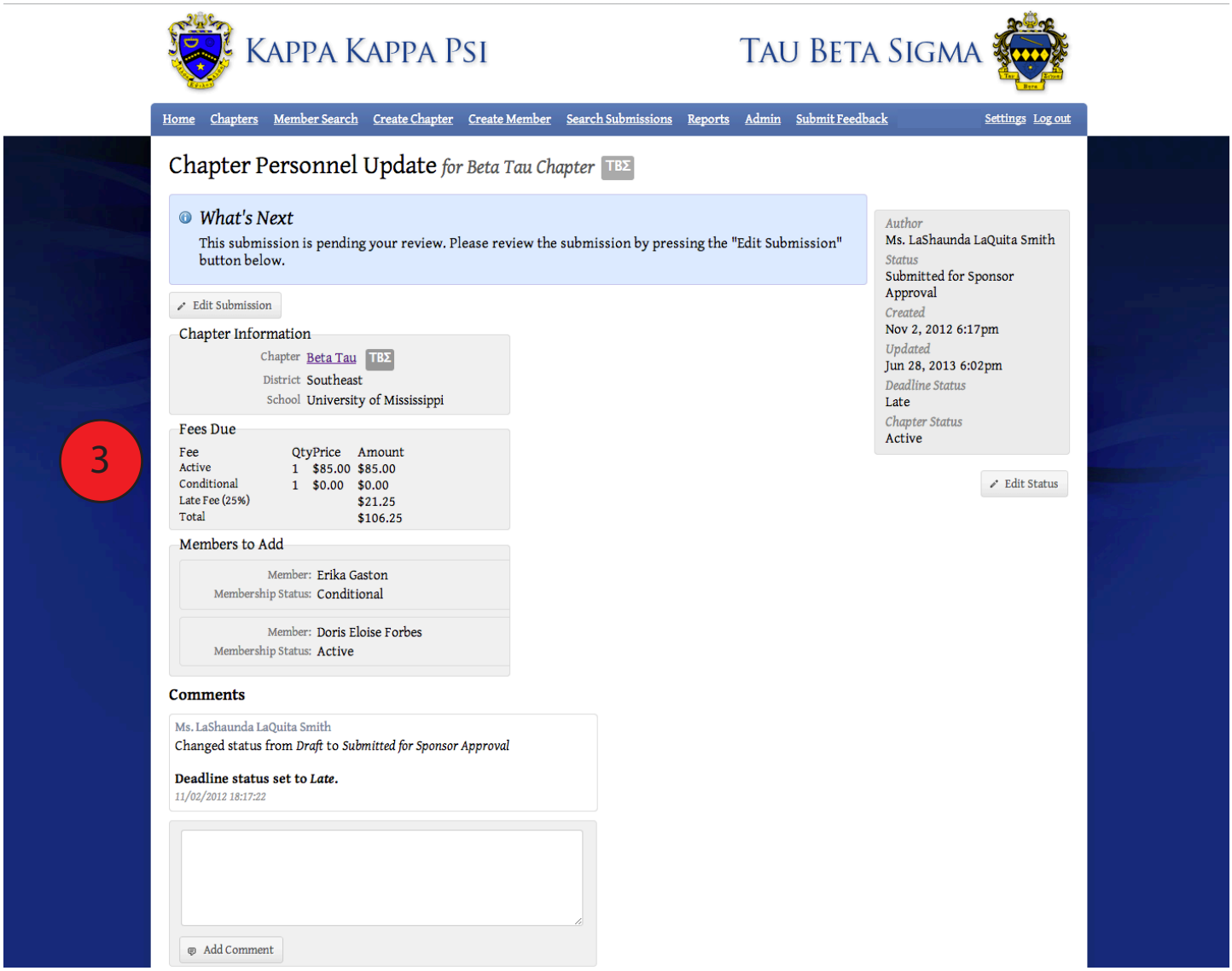
The CPU functions the same as the Chapter Personnel Report, but lacks the Existing Members section. You only need to report members that have a change in membership status when submitting a CPU.



1. The box on the right shows the current status of the form, the original author, and the date the form was created and last edited.

2. The Members to Add section allows you to choose members from the chapter roster and select a membership status.

3. The Fees Due section will automatically update to show how much money is owed with this form. If the form is completed after the deadline, the OMRS will automatically add in the late fees. The Total due will only reflect any members who have not previously paid dues for the current school year.

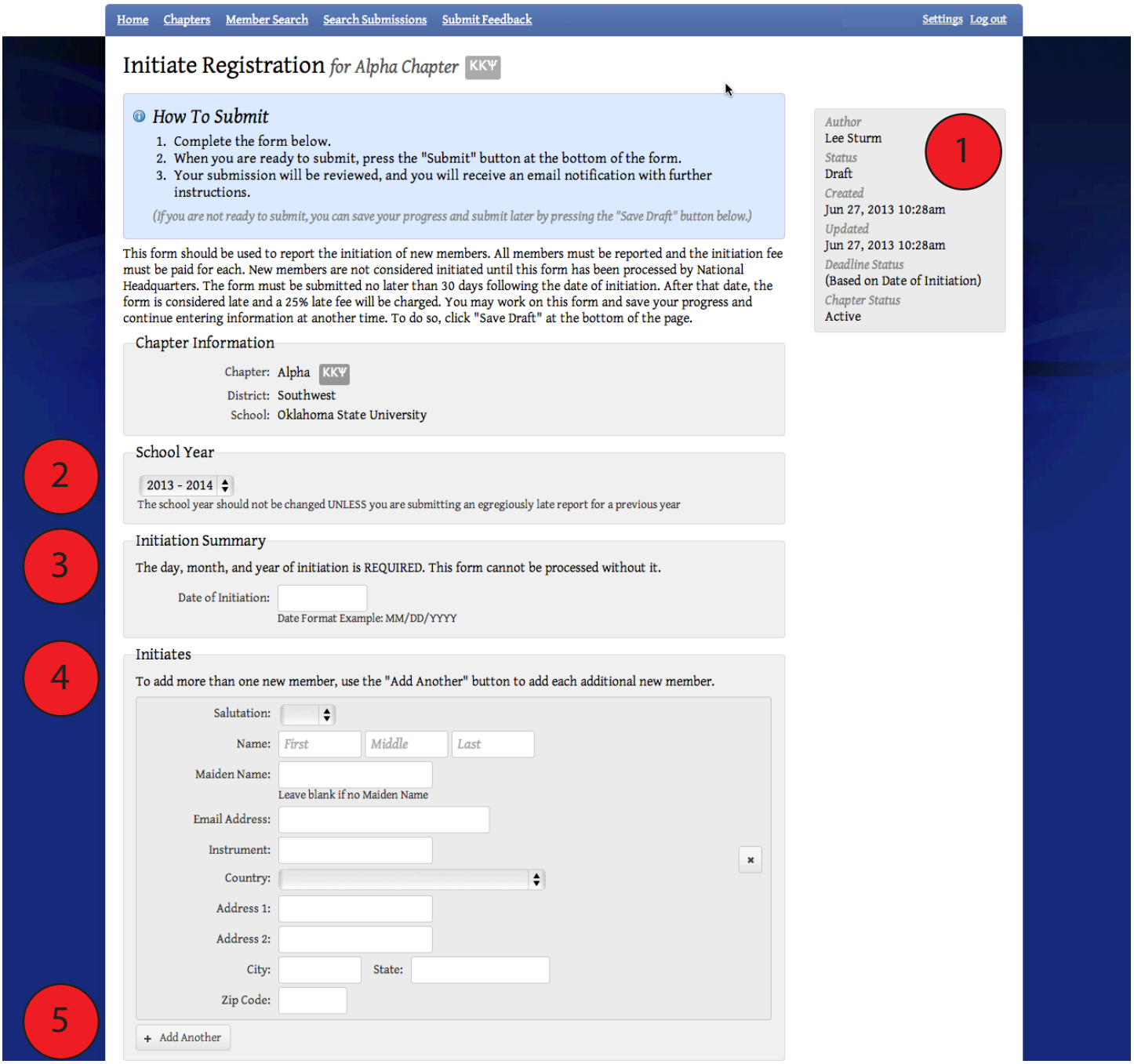


Submission Process: Chapter Personnel Update

1. Chapter Officer creates new Chapter Personnel Update.
2. Once completed, the author submits the form with a status of "Submitted for Sponsor Approval."
3. Sponsor approves the form by submitting a status of "Sponsor Approved, Pending DOB Approval."
4. DOB approves the form by submitting a status of "DOB Approved, Pending Collection of Fees" *If your DOB is also your Sponsor, he or she will only have to approve the form once.*
5. The author collects required fees and changes the status to "Form & Payment Sent to National Headquarters."
6. Author prints the summary page and gathers signatures from all Active, Conditional, & Associate Members.
7. Author mails the summary page and payment to National Headquarters. The summary page must be mailed to National Headquarters even if the form shows a balance due of $0.00. HQ Staff will not know that the form is ready to be processed until the signed summary page has been received at Headquarters.
8. National Headquarters processes the payment and changes the form status to "Transaction Confirmed."
9. Membership cards are printed for anyone who had not previously received one, and form status updated to "Transaction Completed."
10. Membership cards are mailed to the chapter.

Initiate Registration

The Initiate Registration Form (IRF) is used to report new members of the chapter to National Headquarters. Once this form is completed, recently initiated members will receive an e-mail welcoming them to the organizations and proving a link to set up his or her account in the OMRS. When this form reaches the "Transaction Completed" status, new membership records are created for the individuals listed on the IRF and include his or her initiation date and master roster number. To be considered on-time, this form must receive Sponsor & DOB Approval, have a status of "Form & Payment Sent to National Headquarters", and the signed summary page and payment mailed to Headquarters within 30 days following 3rd Degree.



1. The box on the right shows the current status of the form, the original author, and the date the form was created and last edited. On the deadline status, you can see that it has not been determined because the initiation date has not been entered on the form.

2. Select the appropriate school year for when the initiation was held. This field will automatically default to the current school year, and will not need to be changed unless you are reporting initiates from a previous school year.

3. A complete initiation date is required in order to process this form. You must submit a separate IRF for each initiation date.

4. Complete all information for your initiates. Remember that the order that they are listed on this form is the order they will be assigned member numbers on your chapter roster. Each initiate listed must have a valid and unique e-mail address for the form to be processed.

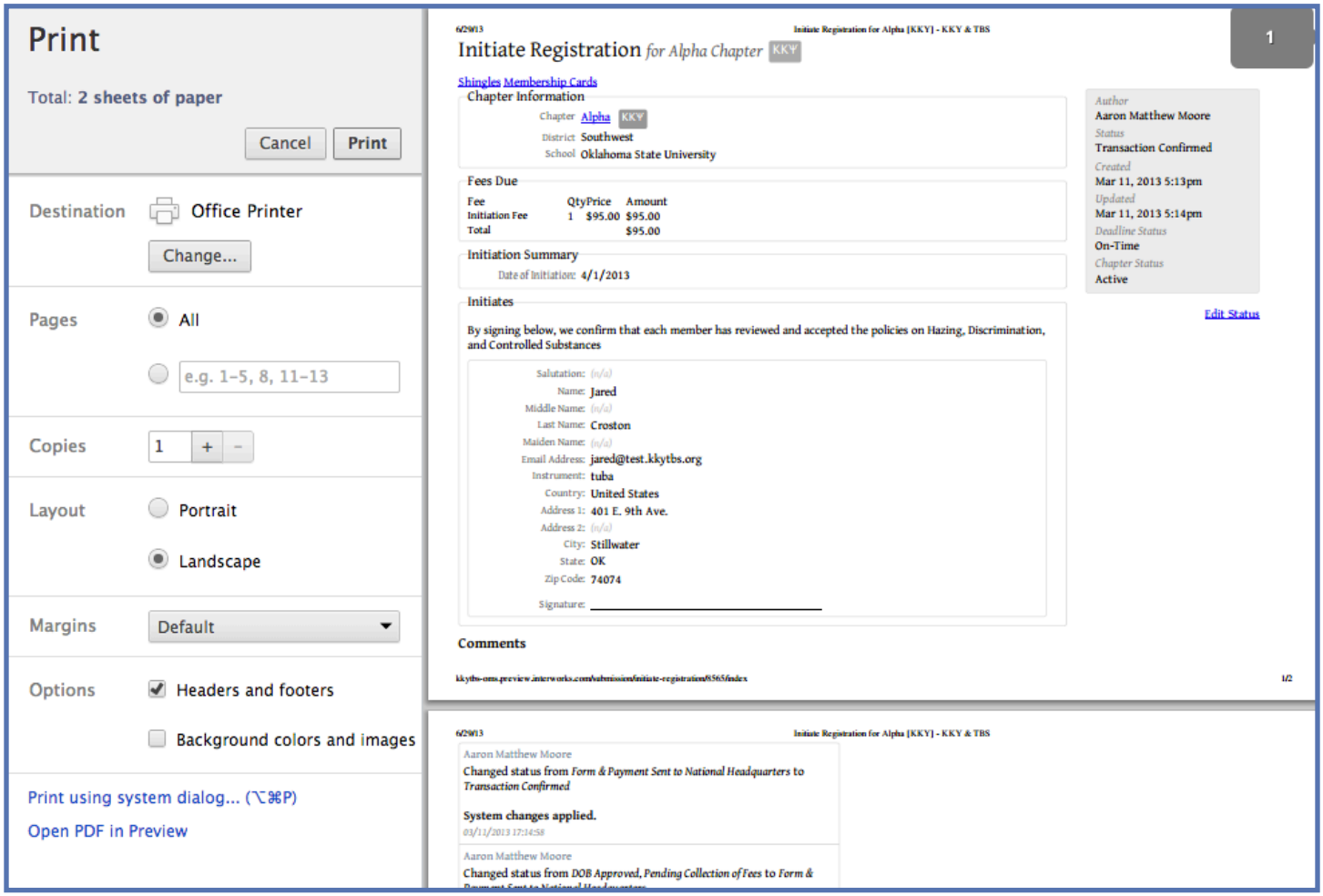
5. You can use the Add another button to add as many initiates to the form as needed.

6. Once the IRF has a status of "Transaction Confirmed", National HQ Staff has the ability to print cards and shingles for the new members.

7. You can see that the form page shows the total amount due once it has been submitted for approval. If the form has not been set to a status of "Form & Payment Sent to National Headquarters" within 30 days of the initiation date listed, the OMRS will automatically charge late fees.

To successfully complete an Initiate Registration Form, a summary page and payment must be submitted to National Headquarters in addition to receiving the required approvals in the OMRS. Many people have asked why they still have to mail anything in since we are doing our reporting online. The answer is actually pretty simple, and has two parts. The first is submitting the paperwork by mail lets National Headquarters know which chapter the payment is for. The second reason is part of our insurance liability; by signing the form, each newly initiated member signifies that they have read, understand, and agree to abide by the policies of Kappa Kappa Psi and Tau Beta Sigma.

The Summary Page is generated simply by printing the form. When it is printed, you should notice that the formatting has changed and signature lines have appeared for each new member.



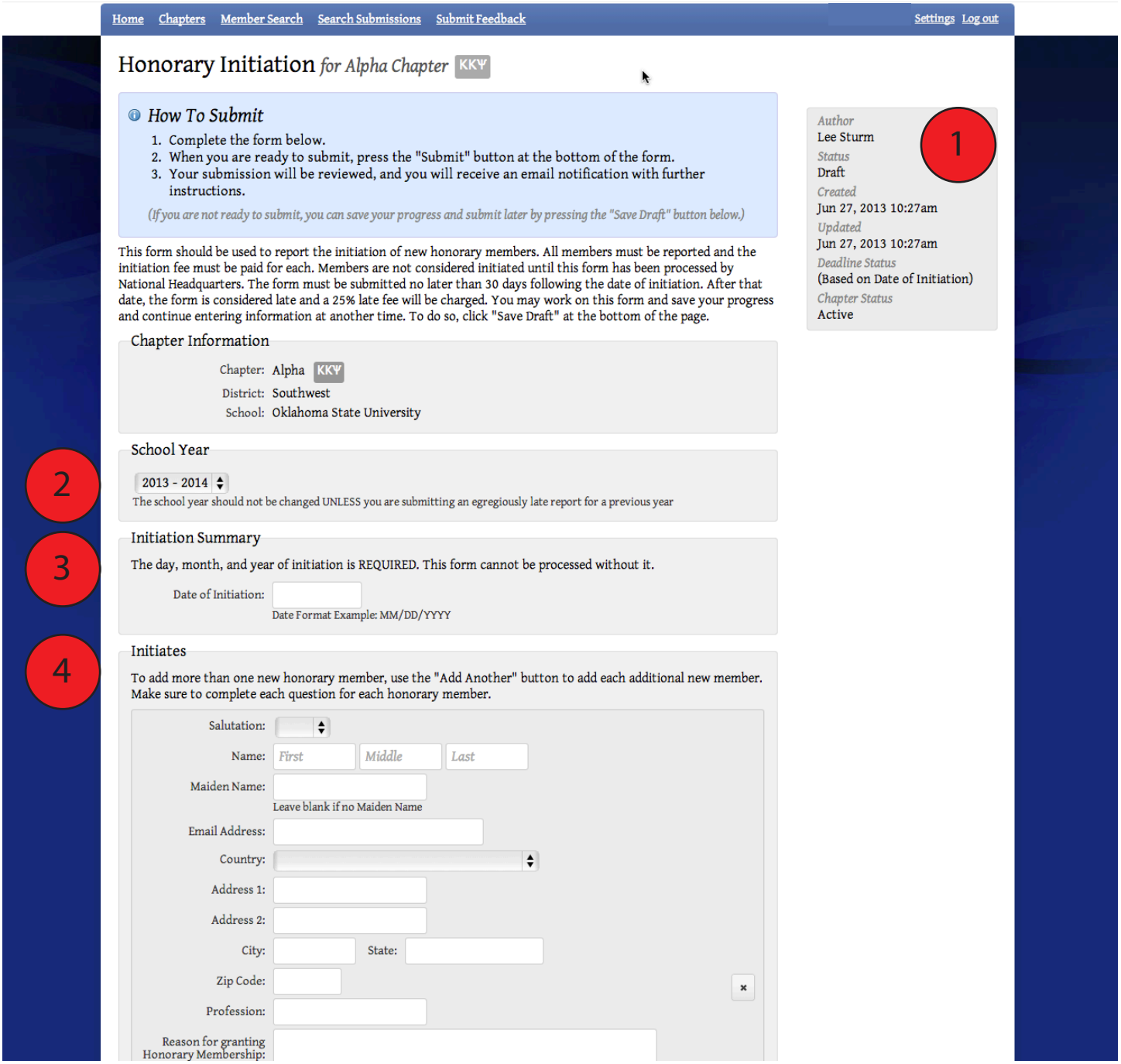
Submission Process: Initiate Registration Form

1. Chapter Officer creates new Initiate Registration Form.
2. Once completed, the author submits the form with a status of "Submitted for Sponsor Approval."
3. Sponsor approves the form by submitting a status of "Sponsor Approved, Pending DOB Approval."
4. DOB approves the form by submitting a status of "DOB Approved, Pending Collection of Fees."
   If your DOB is also your Sponsor, he or she will only have to approve the form once.
5. The author collects required fees and changes the status to "Form & Payment Sent to National Headquarters."
6. Author prints the summary page and gathers signatures from all new members
7. Author mails the summary page and payment to National Headquarters. HQ Staff will not know that the form is ready to be processed until the signed summary page has been received at Headquarters.
8. National Headquarters processes the payment and changes the form status to "Transaction Confirmed."

9. Membership cards and shingles are printed, and form status updated to "Transaction Completed."
10. Membership cards and shingles are mailed to the chapter.

Honorary Initiate Registration

The Honorary Initiate Registration is used to report new honorary members of the chapter to National Headquarters. Once this form is completed, recently initiated members will receive an e-mail welcoming them to the organizations and proving a link to set up his or her account in the OMRS. When this form reaches the "Transaction Completed" status, new membership records are created for the individuals listed on the Honorary Registration and include his or her initiation date and master roster number. To be considered on-time, this form must receive Sponsor & DOB Approval, have a status of "Form & Payment Sent to National Headquarters", and the summary page and payment mailed to Headquarters within 30 days of the initiation date listed on the form. Like on other money-based forms, the amount due will be shown once the form has been submitted for Sponsor approval.



1. The box on the right shows the current status of the form, the original author, and the date the form was created and last edited. On the deadline status, you can see that it has not been determined because the initiation date has not been entered on the form.

2. Select the appropriate school year for when the initiation was held. This field will automatically default to the current school year, and will not need to be changed unless you are reporting honorary initiates from a previous school year.

3. A complete initiation date is required in order to process this form. You must submit a separate Honorary Initiation Form for each initiation date.

4. Complete all information for your honoraries. Remember that the order that they are listed on this form is the order they will be assigned member numbers on your chapter roster. Each member listed must have a valid and unique e-mail address, a brief biography, and the reason they are being granted honorary status in order for the form to be processed. It is also important to specify if the honorary has previous been initiated into either Kappa Kappa Psi or Tau Beta Sigma (or if they may have a Never Initiated entry for serving as a Chapter Sponsor or DOB). Like on previous forms, you can use the Add another button to add as many honoraries to the form as needed.

Submission Process: Honorary Initiation Form

1. Chapter Officer creates new Honorary Initiation Form.
2. Once completed, the author submits the form with a status of "Submitted for Sponsor Approval."
3. Sponsor approves the form by submitting a status of "Sponsor Approved, Pending DOB Approval."
4. DOB approves the form by submitting a status of "DOB Approved, Pending Collection of Fees."
   If your DOB is also your Sponsor, he or she will only have to approve the form once.
5. The author collects required fees and changes the status to "Form & Payment Sent to National Headquarters."
6. Author prints the summary page mails it and payment to National Headquarters. HQ Staff will not know that the form is ready to be processed until the summary page has been received at Headquarters.
7. National Headquarters processes the payment and changes the form status to "Transaction Confirmed."
8. Membership cards and shingles are printed, and form status updated to "Transaction Completed."
9. Membership cards and shingles are mailed to the chapter.

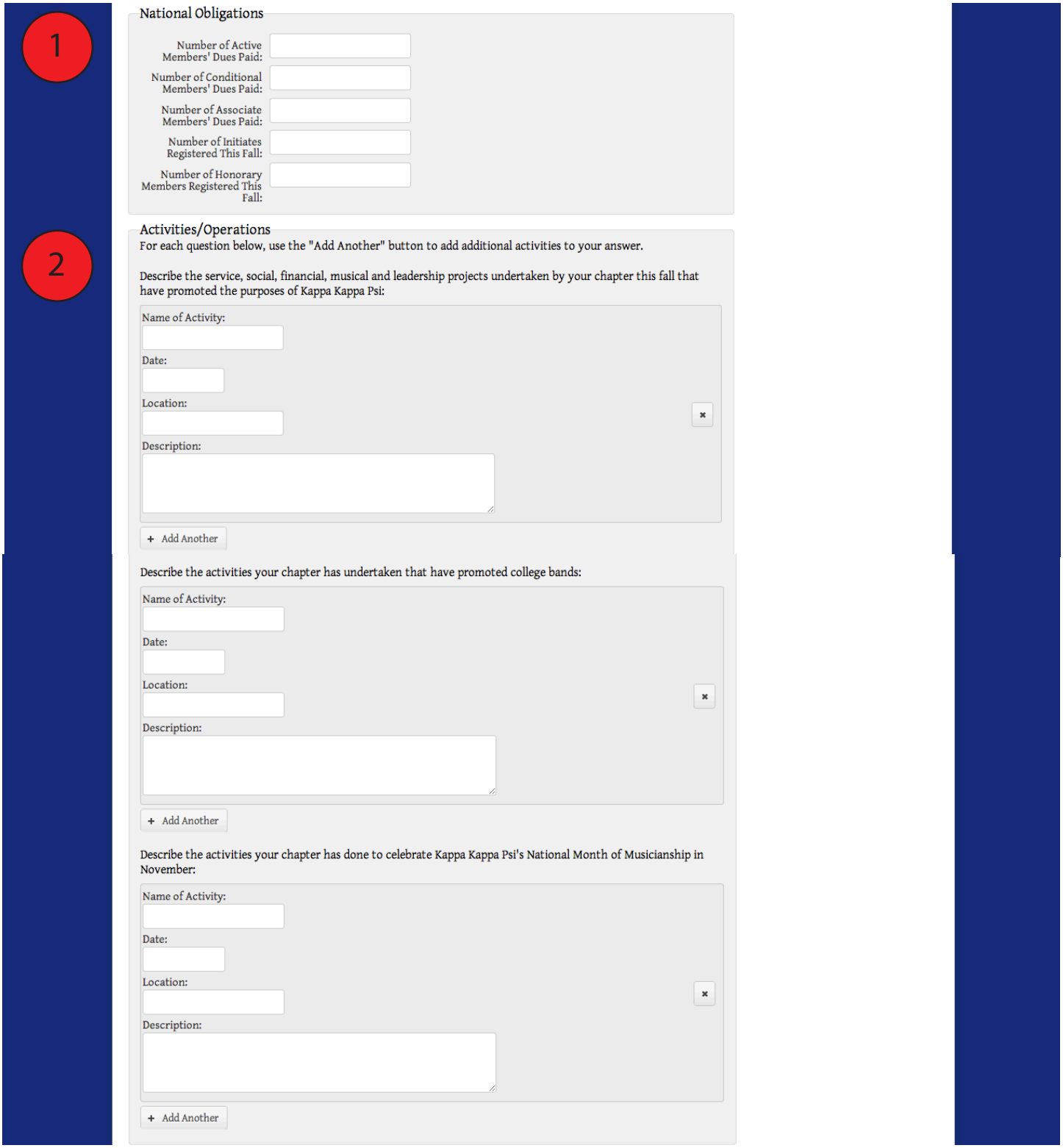
Fall Activity Report

The Fall Activity Report (FAR) is one of two required reports that details the activities of your chapter throughout the school year. This form deals with the time period of June 1- December 1, and is due no later than December 1 each year. Failure to submit consecutive Fall Activity Reports and Chapter Summary Reports will cause your chapter to be automatically placed on Probation. The first several sections of this report will be pre-populated based on information previously submitted on the Officer & Chapter Update and the Sponsor & DOB Update. In the remainder of the report, make sure that a complete and accurate answer is provided in each text box.

1 The box on the right shows the current status of the form, the original author, and the date the form was created and last edited. On the deadline status, you can see that in this example as an Error(out of range) message. If you see this error on your form, it is because you are attempting to submit the FAR too early in the specified school year.

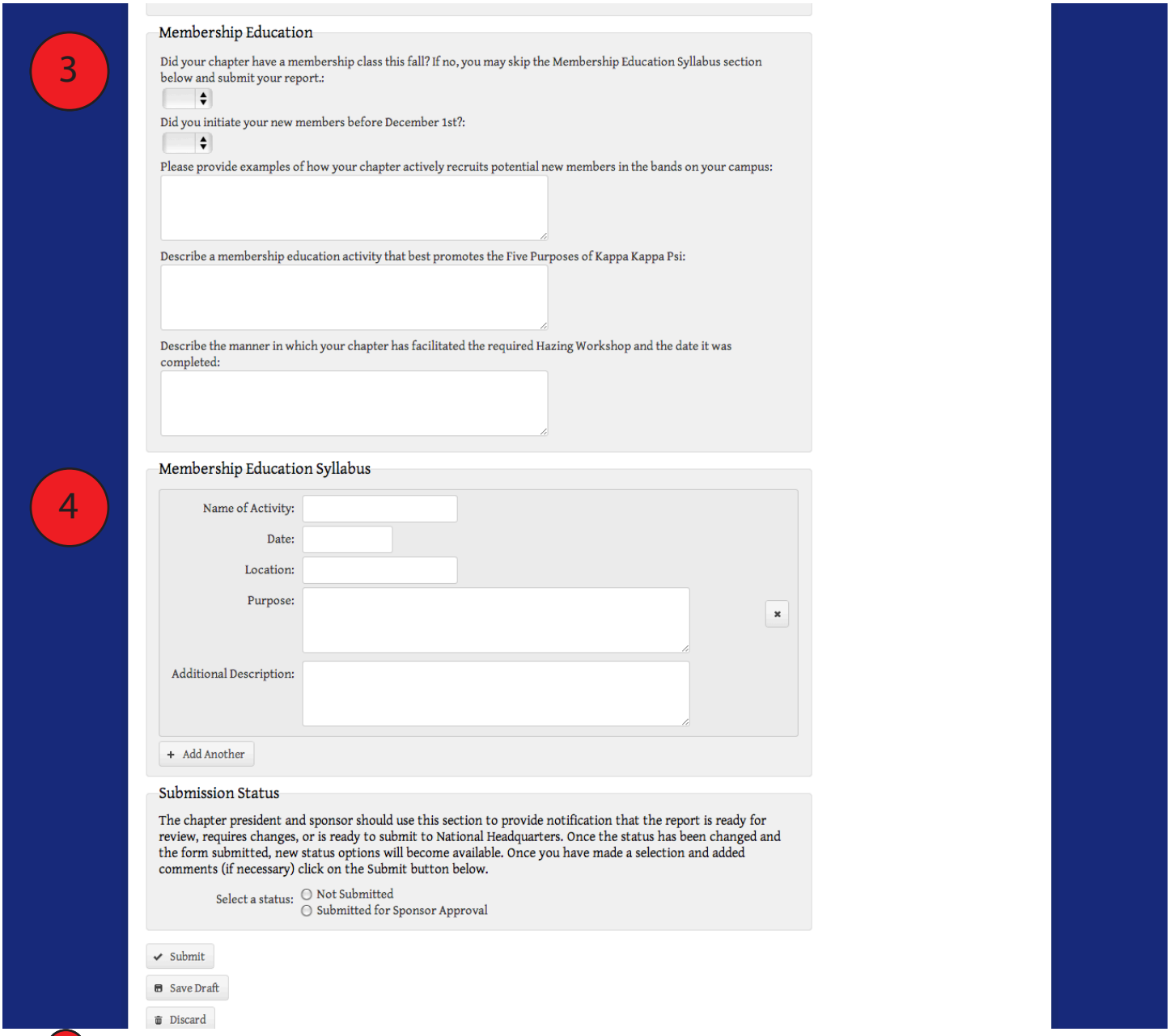
2 Select the appropriate school year for the FAR. It should automatically select the current school year, but may be set to previous years if the chapter did not submit an FAR for another school year.

3 The Chapter contact information and Chapter Officers listings will be pre-populated based on the information that is current in the chapter profile at the time the report is started. If you change officers before submitting the FAR, this information will not update.



1 Complete the National Obligations section with information for any fees paid during the fall semester. You can verify this information by accessing any Chapter Personnel Reports, Chapter Personnel Updates, Initiate Registration Forms, and Honorary Registration Forms submitted prior to December 1.

2 The second section of the form will have a selection of questions that vary depending on whether you are in Kappa Kappa Psi or Tau Beta Sigma. For each question, you can add additional activities by clicking the Add Another button.



3 The Membership Education section must also be completed entirely in order to submit your report, and will consist of different questions depending on your organization. Please provide detailed answers for each of the questions in the section.

4 The Membership Education Syllabus section only has to be completed if you begin your membership education process during the Fall Semester. Use the Add Another button to create an entry for each activity held during your membership education process. Every field in this section must be completed for each activity listed.

Submission Process: Fall Activity Report

1. Chapter Officer creates new Fall Activity Report.
2. Once completed, the author submits the form with a status of "Submitted for Sponsor Approval."
3. Sponsor approves the form by submitting a status of "Sponsor Approved, Pending DOB Approval."
4. DOB approves the form by submitting a status of "DOB Approved, Submitted to Headquarters."
   If your DOB is also your Sponsor, he or she will only have to approve the form once.
5. National Headquarters reviews the submission and changes the form status to "Transaction Confirmed."

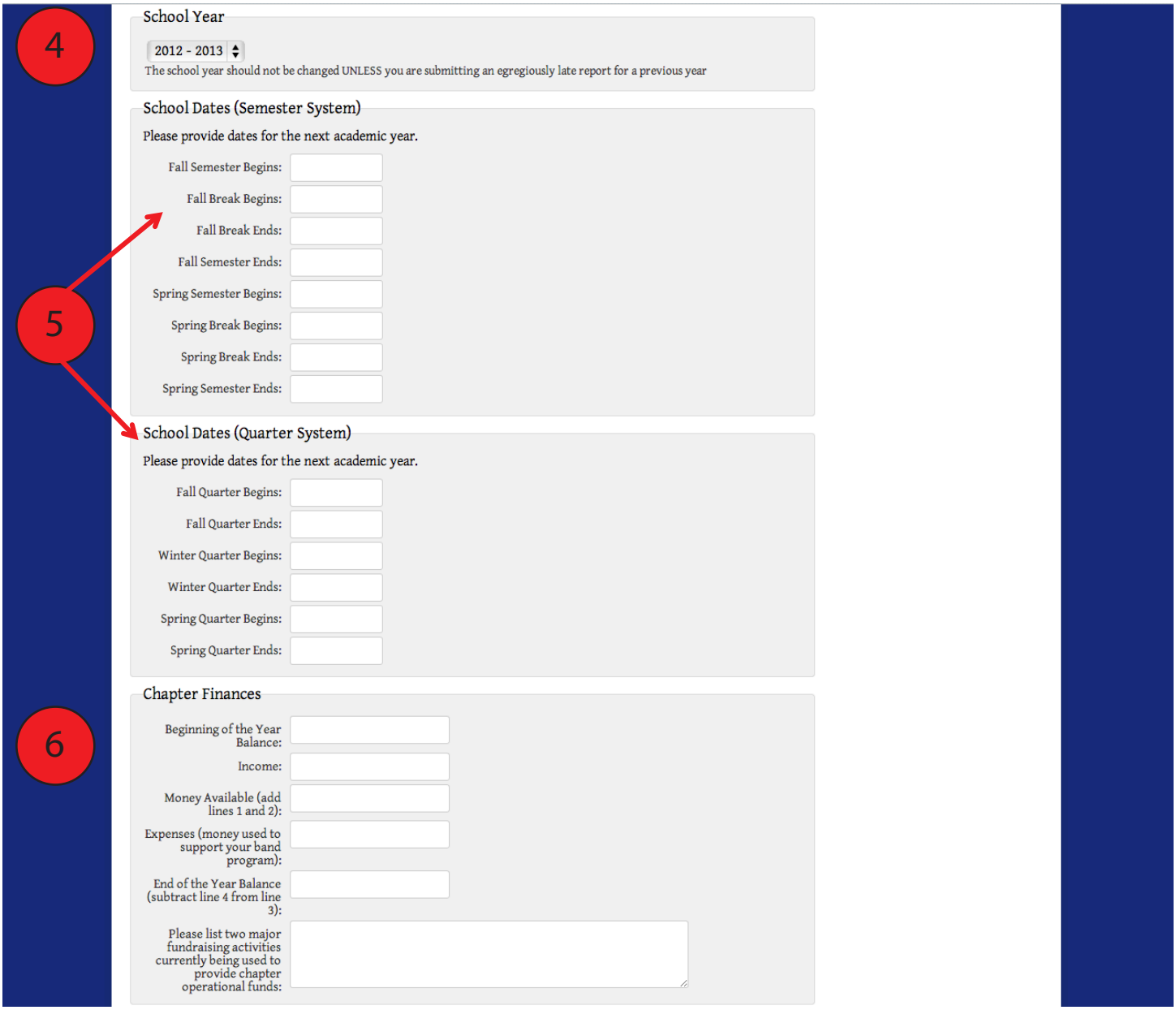
Chapter Summary Report

The Chapter Summary Report (CSR) is one of two required reports that details the activities of your chapter throughout the school year. Unlike the FAR, this form deals with the entire school year, and is due no later than June 1 each year. Failure to submit consecutive Fall Activity Reports and Chapter Summary Reports will cause your chapter to be automatically placed on Probation. The first several sections of this report will be pre-populated based on information previously submitted on the Officer & Chapter Update and the Sponsor & DOB Update. In the remainder of the report, make sure that a complete and accurate answer is provided in each text box.

1. The box on the right shows the current status of the form, the original author, and the date the form was created and last edited. On the deadline status, you can see that in this example as an Error(out of range) message. If you see this error on your form, it is because you are attempting to submit the FAR too early in the specified school year.

2. Select the appropriate school year for the FAR. It should automatically select the current school year, but may be set to previous years if the chapter did not submit an FAR for another school year.

3 The Chapter contact information and Chapter Officers listings will be pre-populated based on the information that is current in the chapter profile at the time the report is started. If you change officers before submitting the FAR, this information will not update.

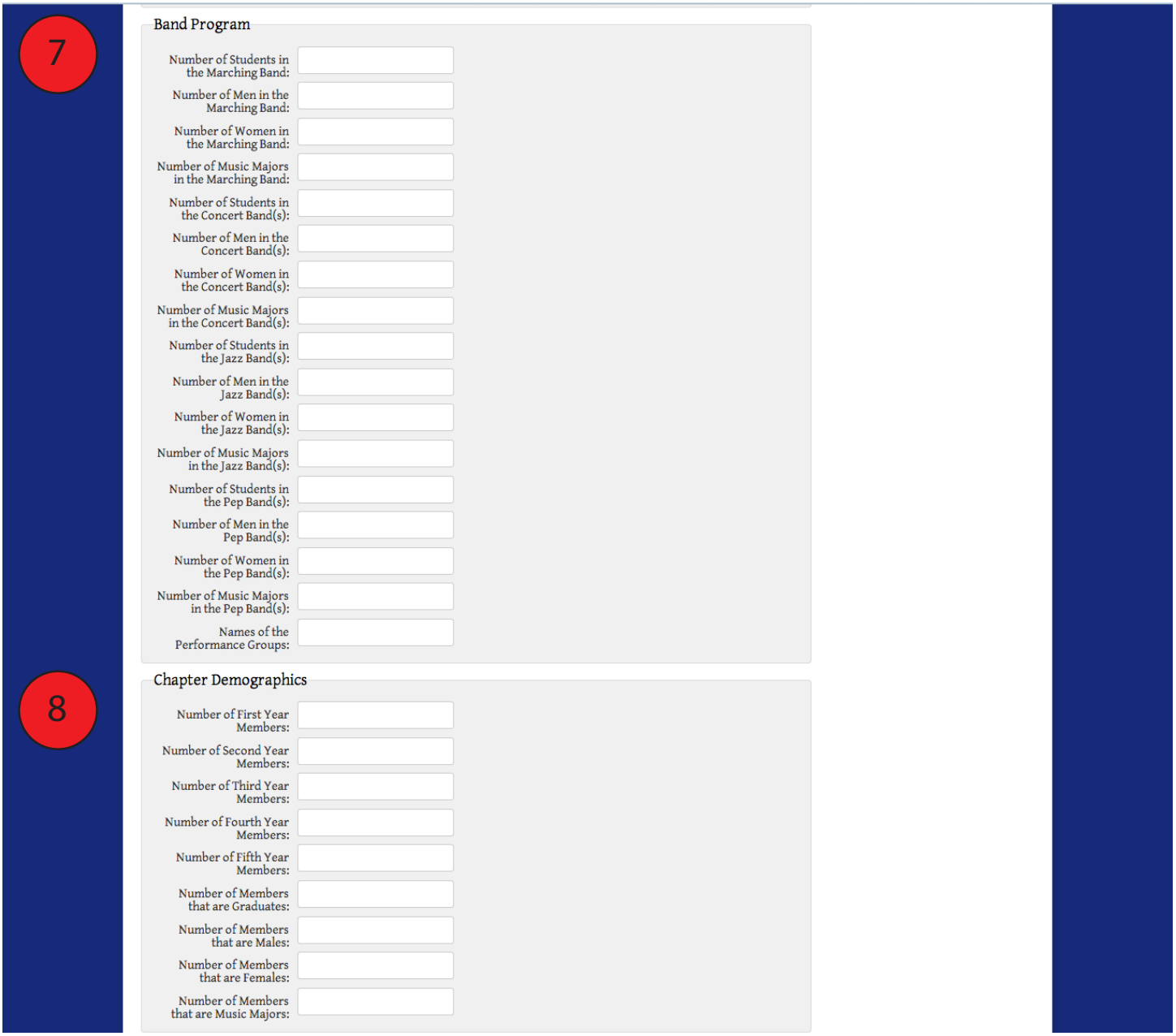


4 The School Year option will automatically set to the current school year, but may be changed if you are submitting a Chapter Summary Report for a previous school year.

5 The School Dates (Semester System) and School Dates (Quarter System) should list dates for the next school year. This allows the National Councils and Chapter Field Representatives to work on programming and prepare for chapter visits. You only need to complete either the Semester or the Quarter sections based on what system is used by your school.

6 Make sure your Chapter Treasurer is aware early in the year what questions are asked in the Chapter Finances section of the CSR to allow them to collect that information throughout the year. By tracking these items, he or she can have the required information ready as you begin work on the CSR.

7 Most of the information in the Band Program section can be gathered from your band secretary or someone else in the music/band office. Make sure you don't wait until the end of the semester, or they might not be in the office.



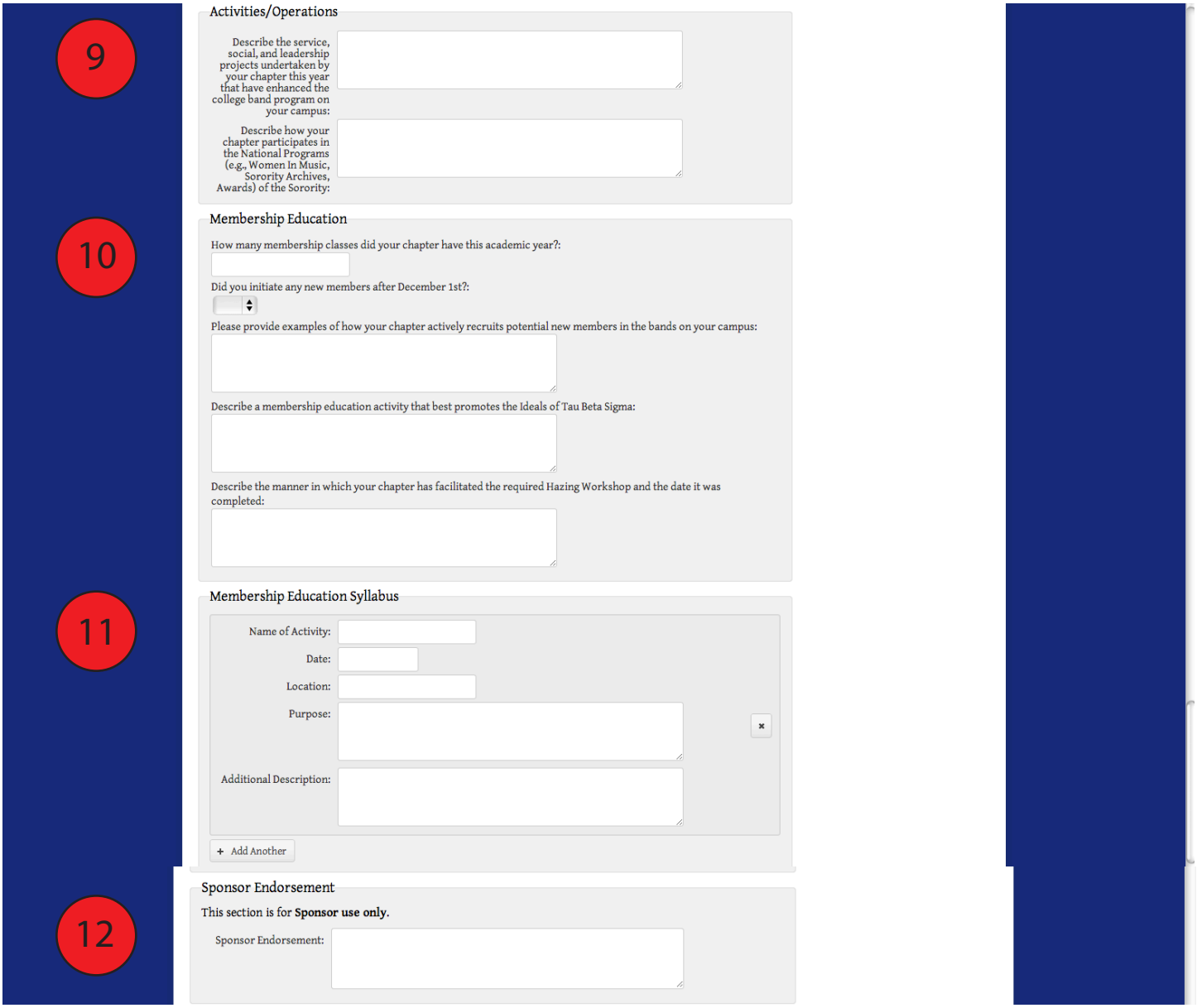
8 The Chapter Demographics section should report what year in school each member is rather than their year in the organization.

9 Like the Fall Activity Report, there are specific questions to answer based on your organization. This example shows the questions on a TBΣ Chapter Summary Report.

10 The Membership Education section must also be completed entirely in order to submit your report, and will consist of different questions depending on your organization. Please provide detailed answers for each of the questions in the section; these may be the same questions that were asked on the FAR.

11 The Membership Education Syllabus section should account for every activity related to your membership education process that took place after December 1, and should include any Continuing Membership Education Program activities. Use the Add Another button to create an entry for each activity held during your membership education process. Every field in this section must be completed for each activity listed.

12 Before approving the CSR, the Chapter Sponsor should complete the Sponsor Endorsement section. Their comments should reflect his or her opinion of the work done by the chapter during the school year.

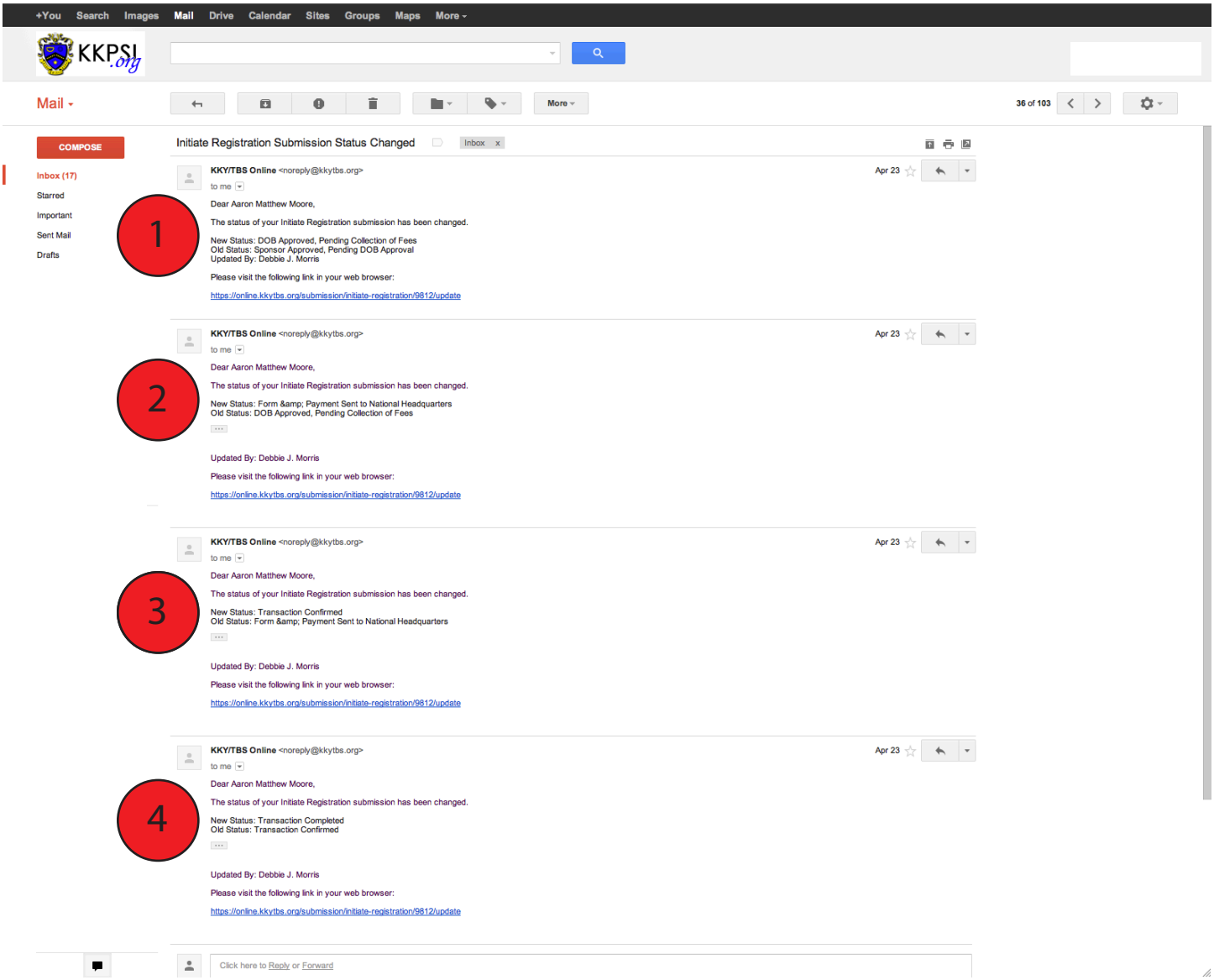


Submission Process: Chapter Summary Report

1. Chapter Officer creates new Chapter Summary Report.
2. Once completed, the author submits the form with a status of "Submitted for Sponsor Approval."
3. Sponsor approves the form by submitting a status of "Sponsor Approved, Pending DOB Approval."
4. DOB approves the form by submitting a status of "DOB Approved, Submitted to Headquarters."
   If your DOB is also your Sponsor, he or she will only have to approve the form once.
5. National Headquarters reviews the submission and changes the form status to "Transaction Confirmed."

Notifications

Now that you have started a new form submission and selected a status of "Submitted for Sponsor Approval" how do you and the other people involved in the approval process know that there is a form that requires action on your part? Each time the submission status is updated, a notification e-mail is sent to the author of the form and the person who needs to take action on the form.



The example above shows the notification history for a completed Initiate Registration Form beginning with the notification sent once the form has been approved by the Director of Bands. *Please note that for the links to take you directly to the form, you must already be logged in to the OMRS.*

1. In each notification e-mail, the body of the e-mail will show the current status of the submission, the previous status, and who made the update. In this case, the Director of Bands has approved the Initiate Registration Form by changing the Status from "Sponsor Approved, Pending DOB Approval" to "DOB Approved, Pending Collection of Fees".

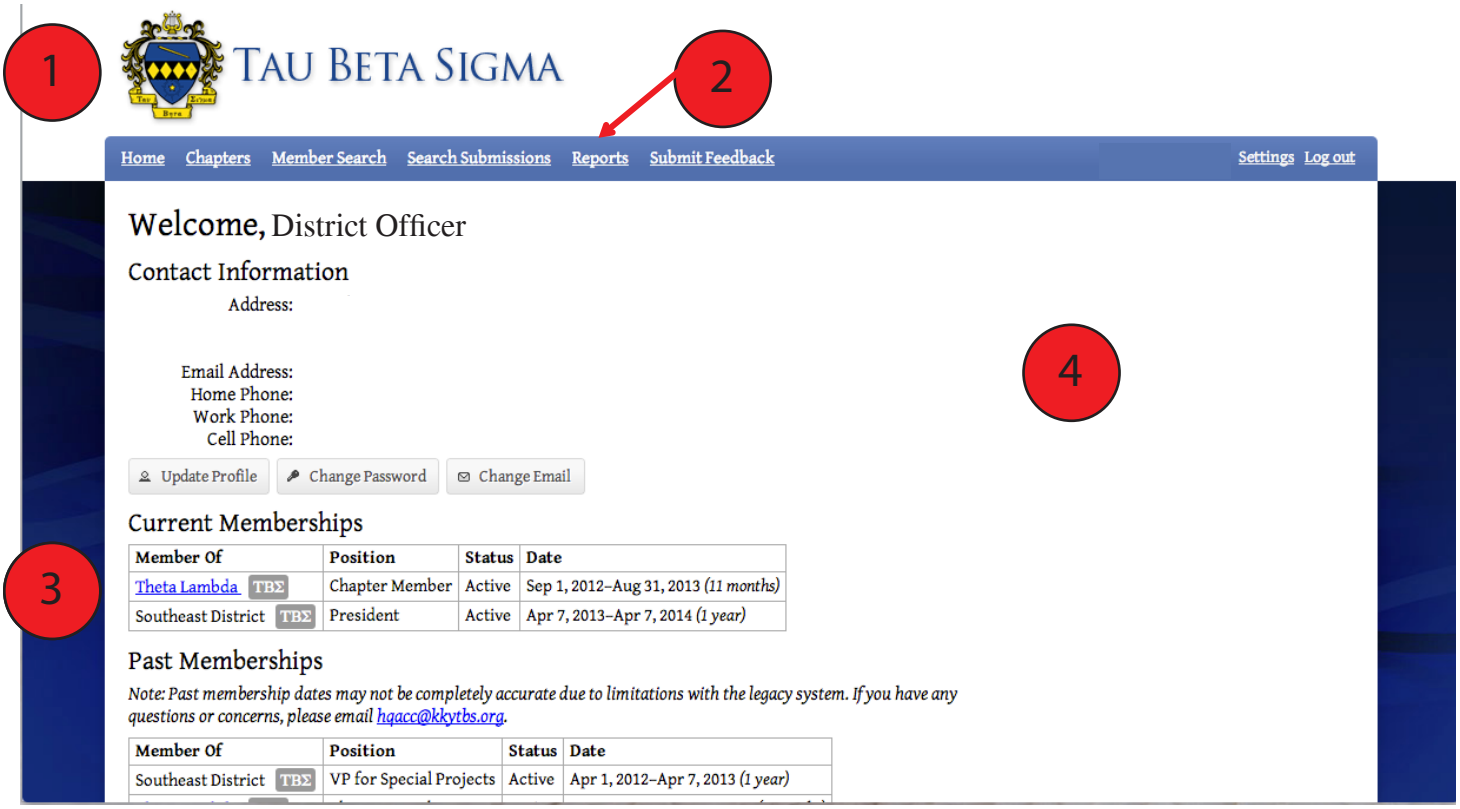
2. In this notification, the chapter officer has collected the fees and signatures on the summary page and mailed those to HQ, and updates the submission status to "Form and Payment Sent to National Headquarters".

3. In this notification, the payment has been received and verified by National Headquarters and the submission status updated to "Transaction Confirmed"

4. The final notification received is when the submission status is set to "Transaction Completed" by National Headquarters. This notification lets you know that any card, shingles, and/or membership pins have been shipped to the chapter's physical address.

District Officer Profiles

District officer have a different set of tools available to them than Chapter Member and Chapter Officers. Just like with Chapter Officers, District Officer profiles have all of the features included on the Member Profile. Whether a District officer has access to submit chapter forms/reports depends on whether they are a Chapter Officer as well, if not they may only have additional items in the horizontal menu at the top of the profile. If the individual serves as an officer on both the chapter and district levels, they will also have access to the Create New Form menu on the right hand side of the profile page. This level of access is available to District Officers, Governors, and Counselors.

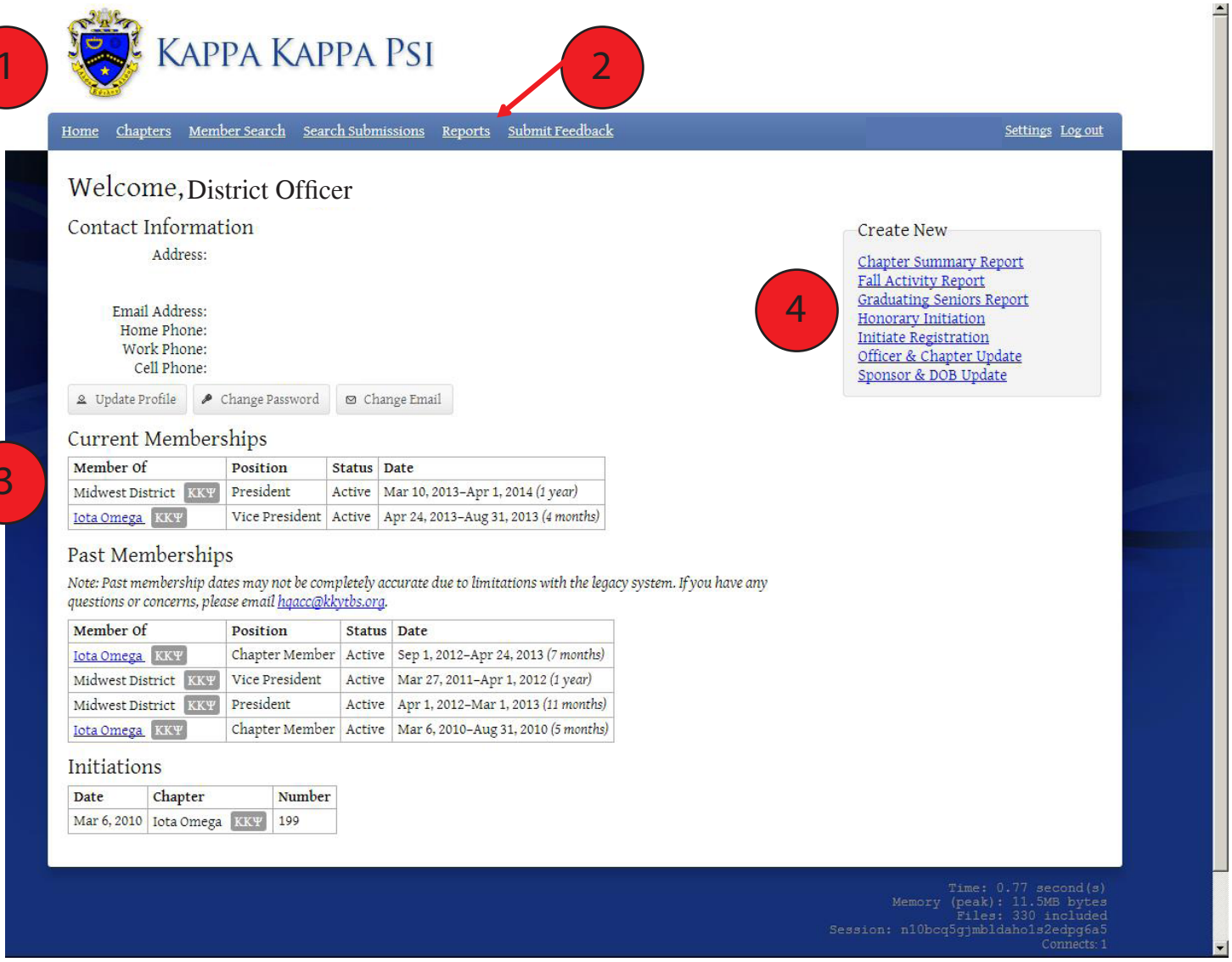


1. You can see by the crest at the top that this individual is a member of Tau Beta Sigma.

2. The District Officer Menu has added a Reports menu to the other options available to Chapter Officers. We will look at the available reports on the following pages.

3. The entry in the Current Memberships shows an entry for Southeast District TBΣ as the District President. You will note that the dates do not conform to the membership dates that were discussed in the Member Profile section. District Officers terms run from District Convention to District Convention.

4. In the example above, the District Officer does not also serve as a Chapter Officer, so the Create New Reports menu is not available.



1 You can see by the crest at the top that this individual is a member of Kappa Kappa Psi.

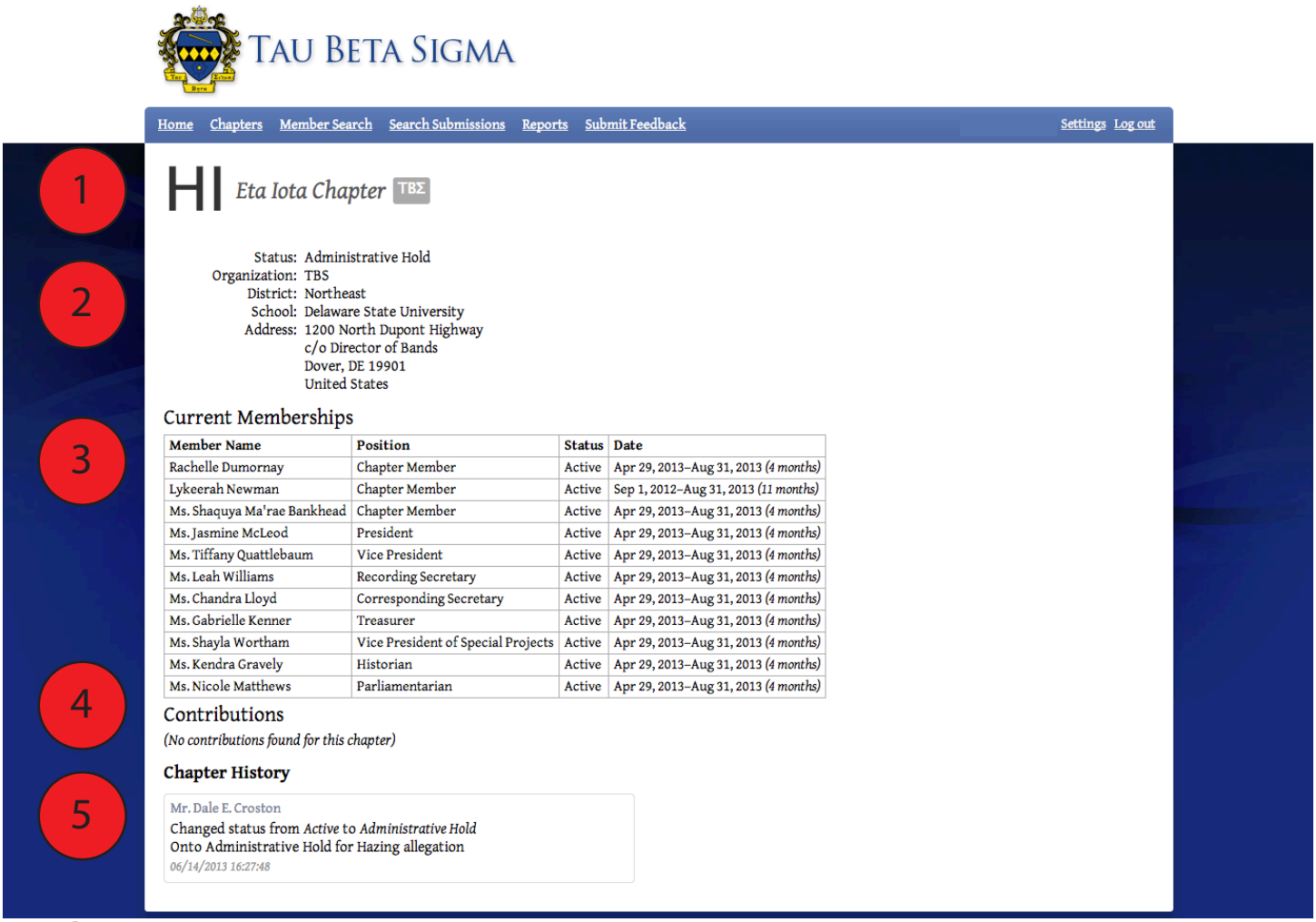
2 The District Officer Menu has added a Reports menu to the other options available to Chapter Officers. We will look at the available reports on the following pages.

3 The entry in the Current Memberships shows an entry for Midwest District KKΨ as the District President. You will note that the dates do not conform to the membership dates that were discussed in the Member Profile section, and are different than the dates in the previous example since the conventions were held on different dates.

4 In the example above, the District Officer also serves as a Chapter Officer, so the Create New Reports menu is available on the right side of their profile.

Chapter Search

The Chapter Search feature allows District Officers to look up the Chapter Officers for chapters in his or her district, and also provides basic contact information for the chapter.



1. The Chapter name that was selected on the Chapter Search option will be displayed, the page header will show the chapter name in both Greek letters and in English.

2. This provides basic contact information for the chapter including the mailing address. Also included is the District the chapter belongs to and the current chapter status. In this example, the chapter is on Administrative Hold.

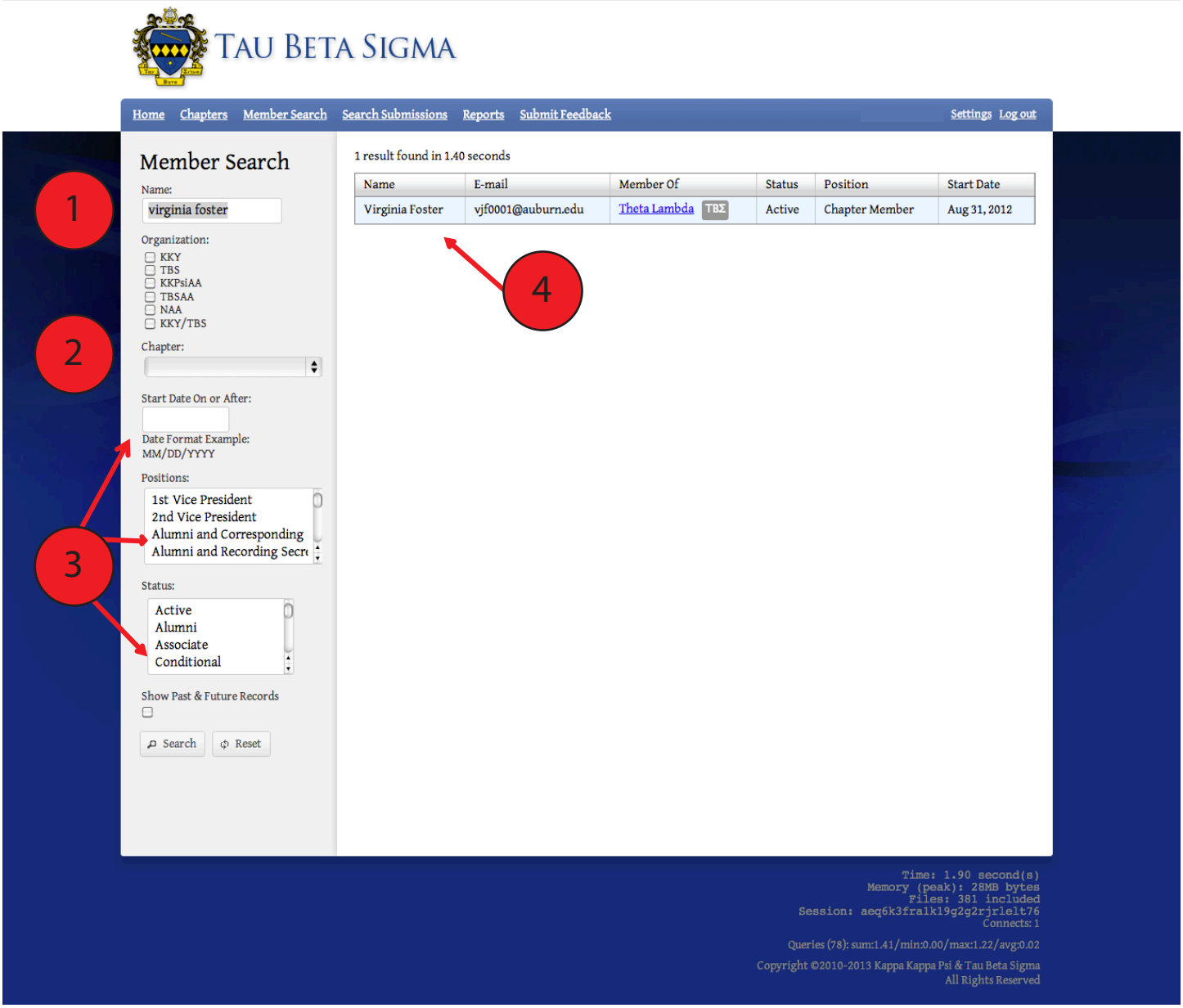
3. Similar to your member profile, the Current Memberships section lists all members of the chapter with a current membership status of Active, Conditional, or Associate. In this example, neither the Director of Bands nor Sponsor are listed, so it is likely that they have never been initiated (active or honorary) in this chapter; or if they have, it was never reported to National Headquarters. Though not available at this time, District Officers will soon be able to click on members' names and access their contact information.

4. A feature that is not currently available on the member profile, but is viewable at the chapter level is the Contributions History. Any donations made by the chapter are logged in the OMRS and show the date, amount donated, and what the money was donated for.

5. The Chapter History section provides a status history of the chapter. Each notification of a status change will include the previous status, the new status, the reason for the status change, and the date.

Member Search

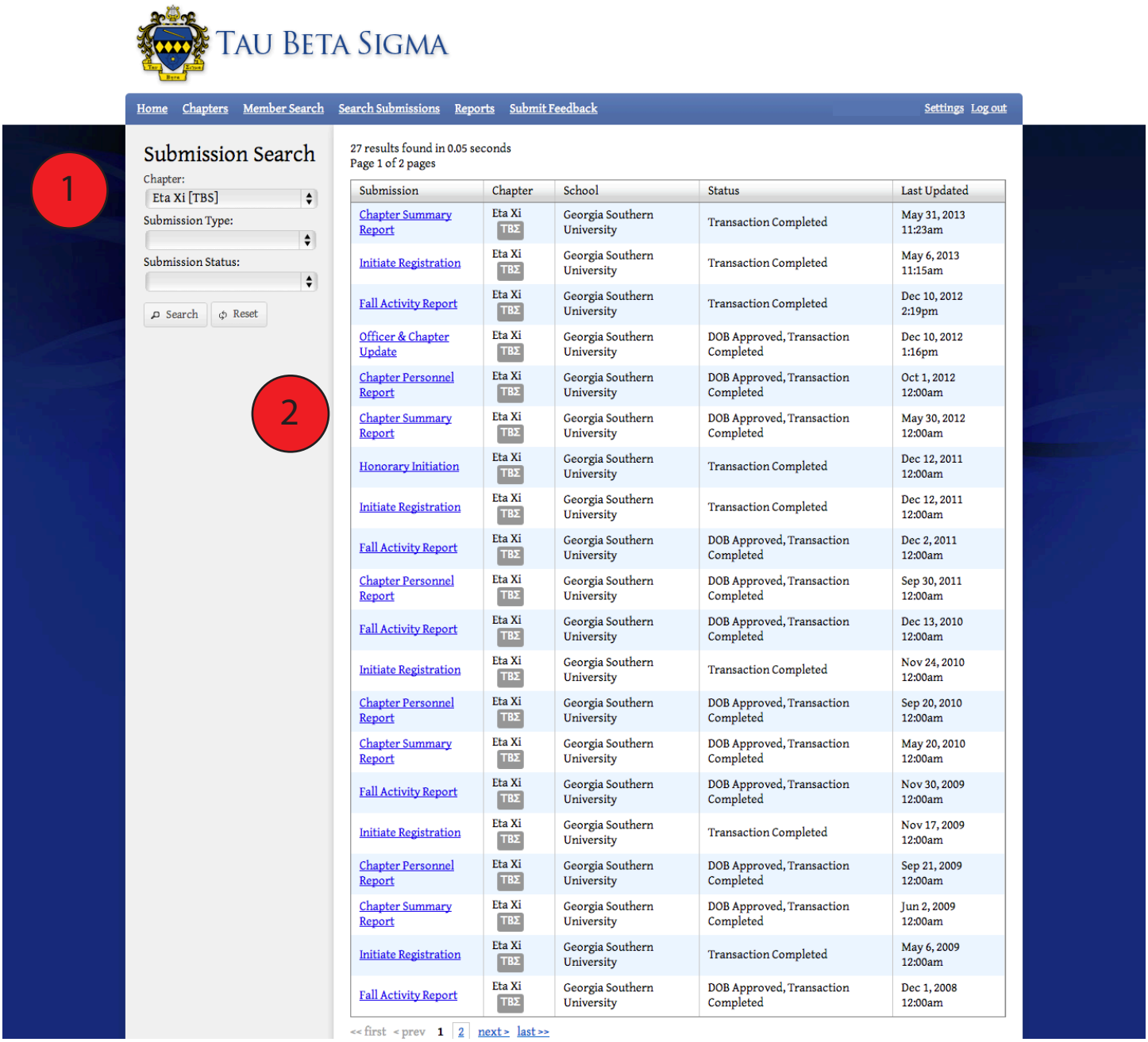
The Member Search feature allows District Officers to look up the current membership status of any member, and also provides an e-mail address for each individual. This tool can also be used by District Convention Host Chapter Coordinators to verify membership status at convention registration. To set up this access, District Convention Coordinators will need to contact National Headquarters at kkytbs@kkytbs.org prior to the start of their convention.



1. The name field allows you to search for a specific individual, or it may be left blank to return multiple results.
2. Unlike Chapter Officers, District Officers may search for members from any chapter.
3. If you want to further limit the results returned, you can also search by membership date, positions held, and/or membership status.
4. The search results will return the Member Name, E-mail Address, Chapter, Current Membership Status, and the starting date for the Current Membership Status.

Submission Search

Since the OMRS launched, the submission search tool has become a favorite of District Officers. This search page allows District & National Officers to search by a large number of options: Organization, Chapter, or District; Submission Type (Form/Report), and/or Submission Status. The availability of the this search form has allowed National & District Officers to see who has completed or is working on forms in real time. Prior to the OMRS, this information was only available once a form had been completed and processed by National Headquarters; now it is available to review as soon as a draft is saved or submitted for approval.



1 In this example, a specific chapter has been selected, with no other filters applied. When a chapter is selected, the options to filter by Organization or District disappear.

2 By only filtering results by chapter, all reports started or submitted by a chapter are displayed.

3 In the second example, the search is filters by Southeast District (TBΣ), and is further filtered by Chapter Summary Report. With a District selected as the first filter, the options of Organization and Chapter search have disappeared.

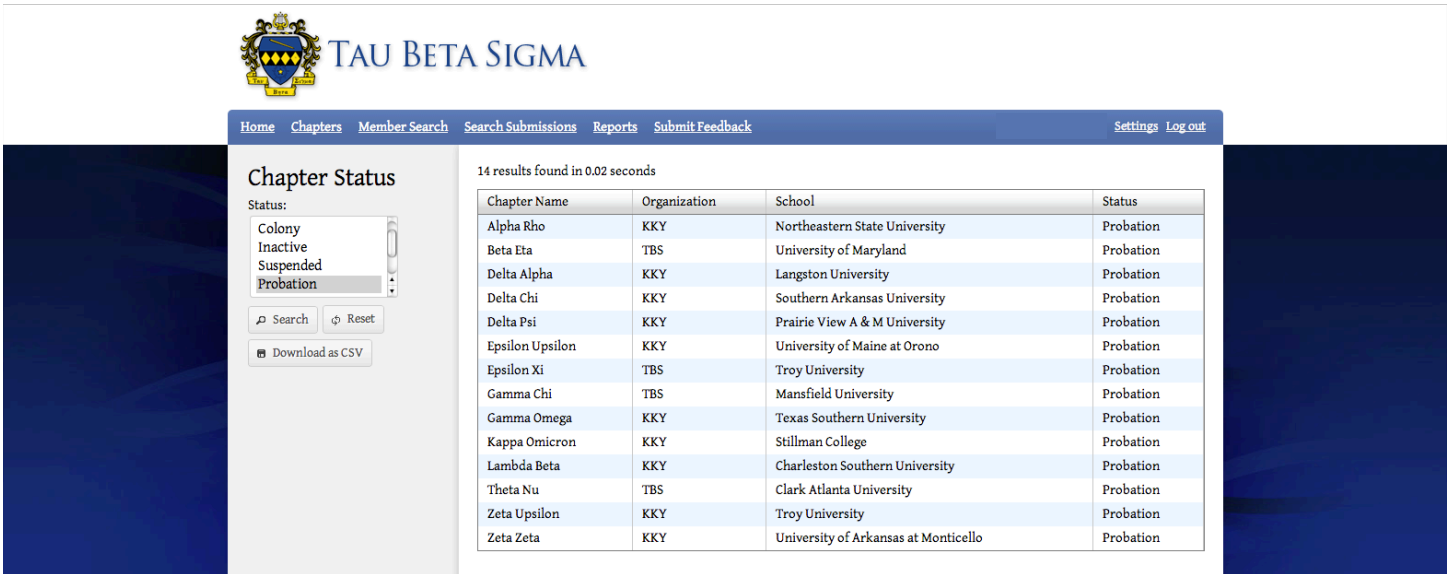
4 By filtering the search by District and a specific Submission Type, the results return a listing of every Chapter Summary report on record in the OMRS for only chapters in the Southeast District of Tau Beta Sigma.

Reports

The reports menu provides additional tools for District Officers, National Council & Board of Trustees, and National Headquarters. Different reports are available based upon the level of access. District officers currently have access to the following: Chapter Mailing List, Chapter Status Report, District Convention Eligibility List, Status & Membership Report, and a Sponsor & DOB List. We will look closer at the two most used of these reports.

Chapter Status Report

The Chapter Status Report is a quick way to check which chapters are on a specific chapter discipline status. The available choices are: Active, Colony, Inactive, Suspended, Probation, Investigative Hold and Administrative Hold. The example below shows a search for all chapter currently on Probation. You may also select multiple filter options, for example, all chapters currently on Probation, Suspended, or one of the Hold statuses.



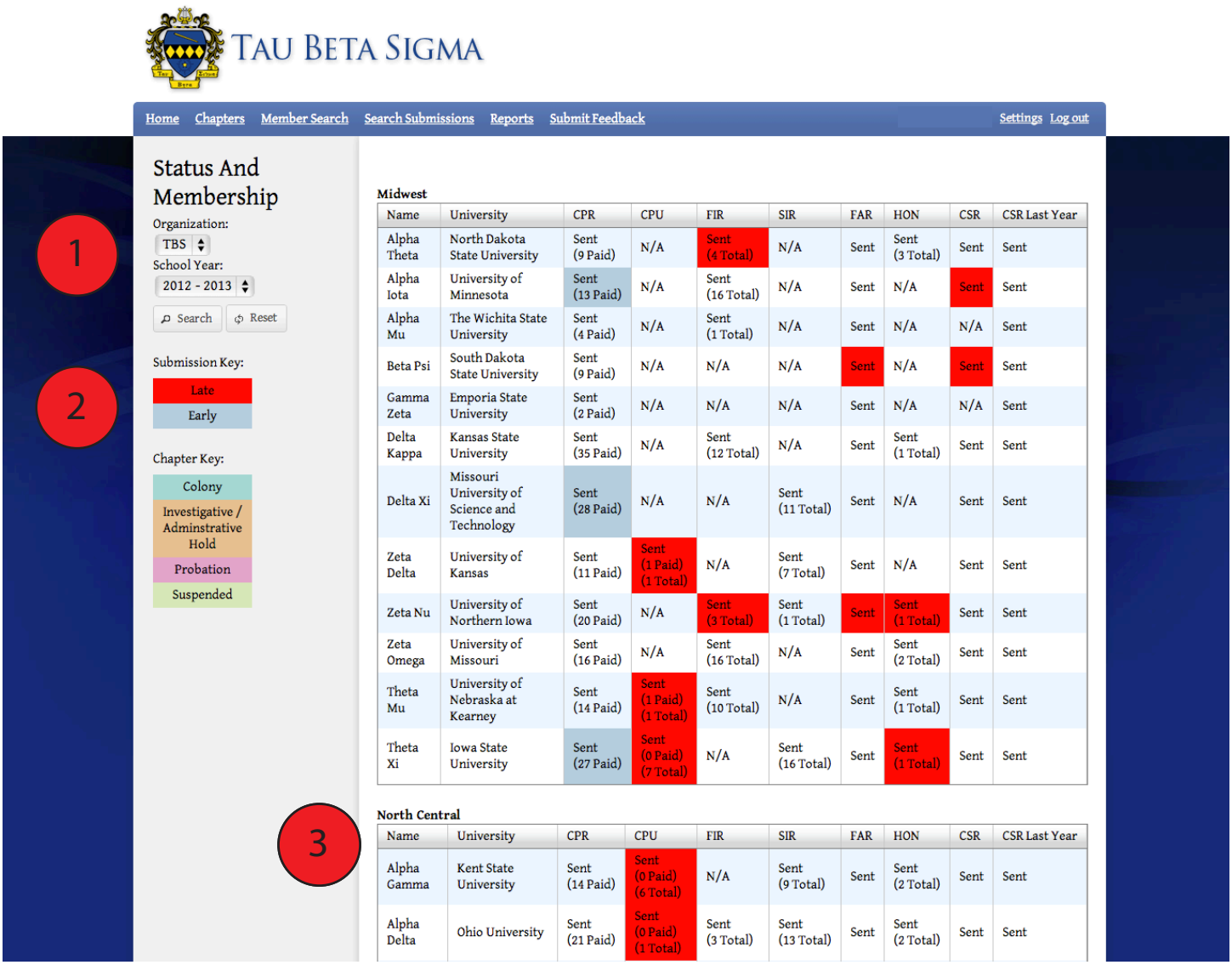
Chapter Name	Organization	School	Status
Alpha Rho	KKY	Northeastern State University	Probation
Beta Eta	TBS	University of Maryland	Probation
Delta Alpha	KKY	Langston University	Probation
Delta Chi	KKY	Southern Arkansas University	Probation
Delta Psi	KKY	Prairie View A & M University	Probation
Epsilon Upsilon	KKY	University of Maine at Orono	Probation
Epsilon Xi	TBS	Troy University	Probation
Gamma Chi	TBS	Mansfield University	Probation
Gamma Omega	KKY	Texas Southern University	Probation
Kappa Omicron	KKY	Stillman College	Probation
Lambda Beta	KKY	Charleston Southern University	Probation
Theta Nu	TBS	Clark Atlanta University	Probation
Zeta Upsilon	KKY	Troy University	Probation
Zeta Zeta	KKY	University of Arkansas at Monticello	Probation

1. The Status box on the left will allow you to select a single chapter status or multiple statuses.

2. Currently, results are returned for all chapters meeting the specified criteria for both organizations. Future development will allow a search by organization and/or district.

Status and Membership Report

Before the launch of the OMRS, the Status & Membership (S&M) was only available to the National Council, Governors, and Counselors, and only upon request. The S&M is now available in real time, and access includes District Officers. For a District Officer, this tool allows him or her the ability to see who has submitted reports this year, and whether they were late or on-time. Please note that this report only reflects submissions that have been completed. Chapters may have forms in progress that are not listed here because they have not yet been approved.



Midwest

Name	University	CPR	CPU	FIR	SIR	FAR	HON	CSR	CSR Last Year
Alpha Theta	North Dakota State University	Sent (9 Paid)	N/A	Sent (4 Total)	N/A	Sent	Sent (3 Total)	Sent	Sent
Alpha Iota	University of Minnesota	Sent (13 Paid)	N/A	Sent (16 Total)	N/A	Sent	N/A	Sent	Sent
Alpha Mu	The Wichita State University	Sent (4 Paid)	N/A	Sent (1 Total)	N/A	Sent	N/A	N/A	Sent
Beta Psi	South Dakota State University	Sent (9 Paid)	N/A	N/A	N/A	Sent	N/A	Sent	Sent
Gamma Zeta	Emporia State University	Sent (2 Paid)	N/A	N/A	N/A	Sent	N/A	N/A	Sent
Delta Kappa	Kansas State University	Sent (35 Paid)	N/A	Sent (12 Total)	N/A	Sent	Sent (1 Total)	Sent	Sent
Delta Xi	Missouri University of Science and Technology	Sent (28 Paid)	N/A	N/A	Sent (11 Total)	Sent	N/A	Sent	Sent
Zeta Delta	University of Kansas	Sent (11 Paid)	Sent (1 Paid) (1 Total)	N/A	Sent (7 Total)	Sent	N/A	Sent	Sent
Zeta Nu	University of Northern Iowa	Sent (20 Paid)	N/A	Sent (3 Total)	Sent (1 Total)	Sent	Sent (1 Total)	Sent	Sent
Zeta Omega	University of Missouri	Sent (16 Paid)	N/A	Sent (16 Total)	N/A	Sent	Sent (2 Total)	Sent	Sent
Theta Mu	University of Nebraska at Kearney	Sent (14 Paid)	Sent (1 Paid) (1 Total)	Sent (10 Total)	N/A	Sent	Sent (1 Total)	Sent	Sent
Theta Xi	Iowa State University	Sent (27 Paid)	Sent (0 Paid) (7 Total)	N/A	Sent (16 Total)	Sent	Sent (1 Total)	Sent	Sent

North Central

Name	University	CPR	CPU	FIR	SIR	FAR	HON	CSR	CSR Last Year
Alpha Gamma	Kent State University	Sent (14 Paid)	Sent (0 Paid) (6 Total)	N/A	Sent (9 Total)	Sent	Sent (2 Total)	Sent	Sent
Alpha Delta	Ohio University	Sent (21 Paid)	Sent (0 Paid) (1 Total)	Sent (3 Total)	Sent (13 Total)	Sent	Sent (2 Total)	Sent	Sent

1. To generate the Status & Membership Report, you must first select an organization and school year in the dropdown boxes on the left.

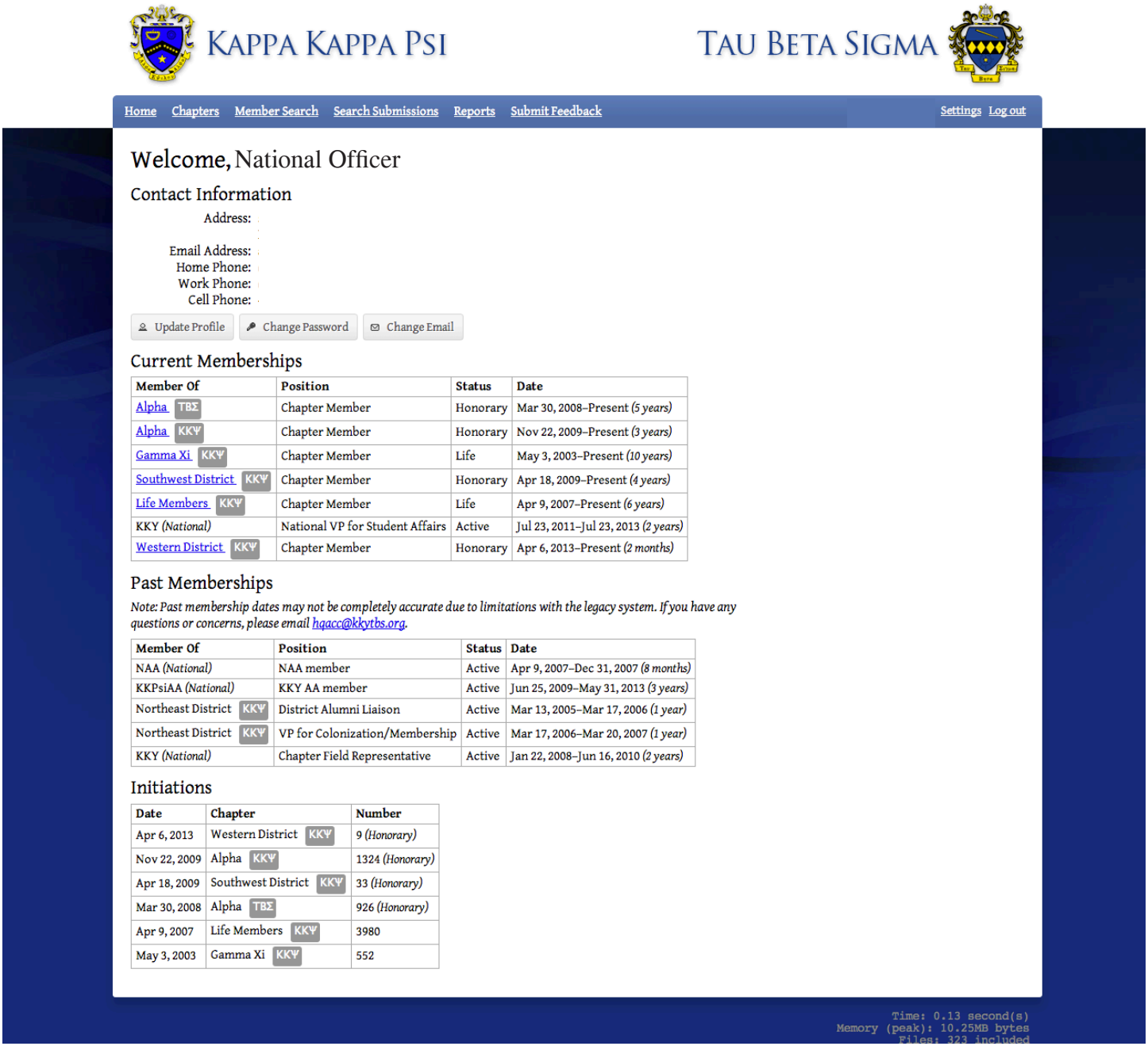
2. Beneath the dropdown boxes, you will notice a Submission Key and a Chapter Key that will identify the color coding on the report. The items in the Submission Key reference specific forms/reports and the Chapter Key highlights the Chapter Discipline Status of a chapter at the time the most recent report of the selected school year was completed.

3. Results are sorted by District, and provide information on the Chapter Personnel Report, and Chapter Personnel Updates, Fall & Spring Initiates, Fall Activity Report, and Honorary Members reported, the Chapter Summary Report, and the previous year's Chapter Summary Report.

National Officer Profiles

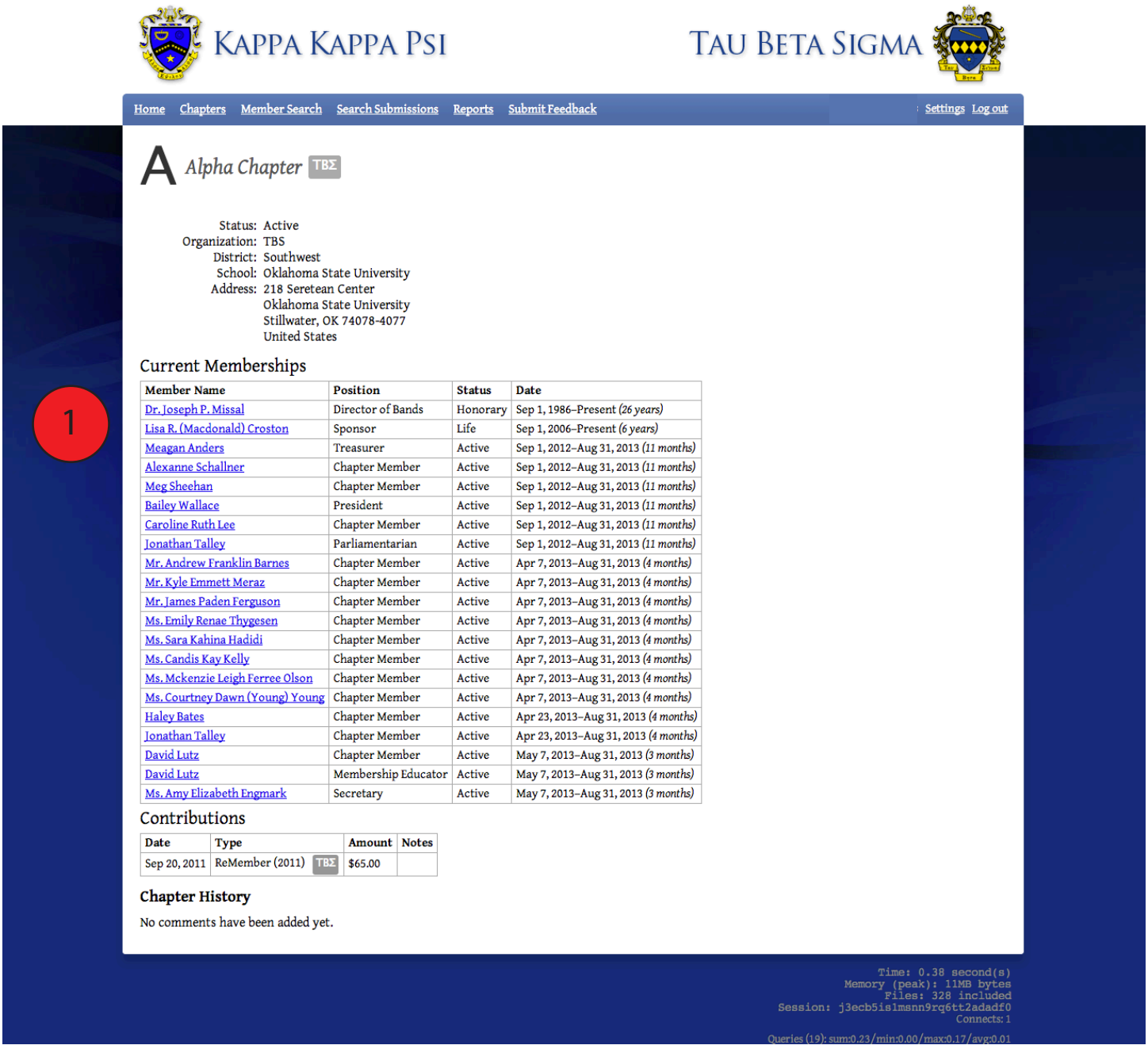
National Officer (both National Council and Board of Trustees) profiles build upon the access granted to District Officers, but allow greater access to forms, reports, and member profiles. You will notice in the example below that the member profile looks the same as it does for other levels of membership. Menu items for National Officers also appear the same as at the District Officer level.

Since a large part of the features available to National Officers has already been discussed in previous sections, we will only look at those that are different. Also, like at the District Officer level, the Create New Reports menu box is only available if the individual is also serving as a Chapter Officer, Sponsor, and/or Director of Bands.



Chapter Search

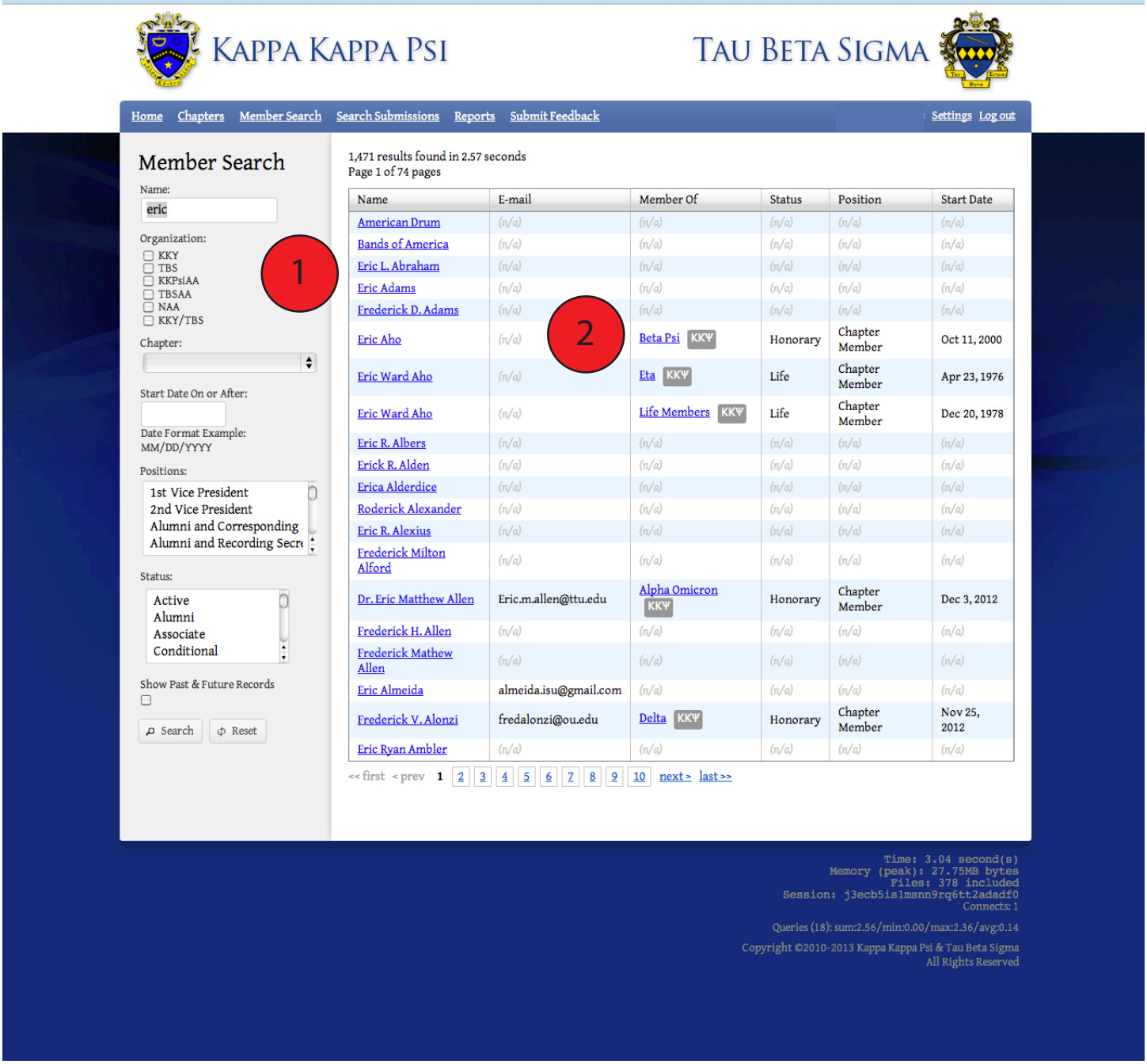
The Chapter Search feature allows National Officers to look up the current active membership of a chapter, as well as the contact information for that chapter. National Officers also have direct access from this form to the profile for each chapter member.



1 The Chapter profile appears the same to National Officers as it did to District Officers, with one exception. Each member's name is a hyperlink on this level of access. Clicking on the name will take the officer to the member profile for that individual.

Member Search

The Member Search feature allows National Officers to look up the current membership of an individual, as well as the contact information for that individual. National Officers also have direct access from this form to the profile for any member returned in the search.



1. The Member Search results appear the same to National Officers as they did to District Officers, with one exception. Each member's name is a hyperlink on this level of access. Clicking on the name will take the officer to the member profile for that individual.

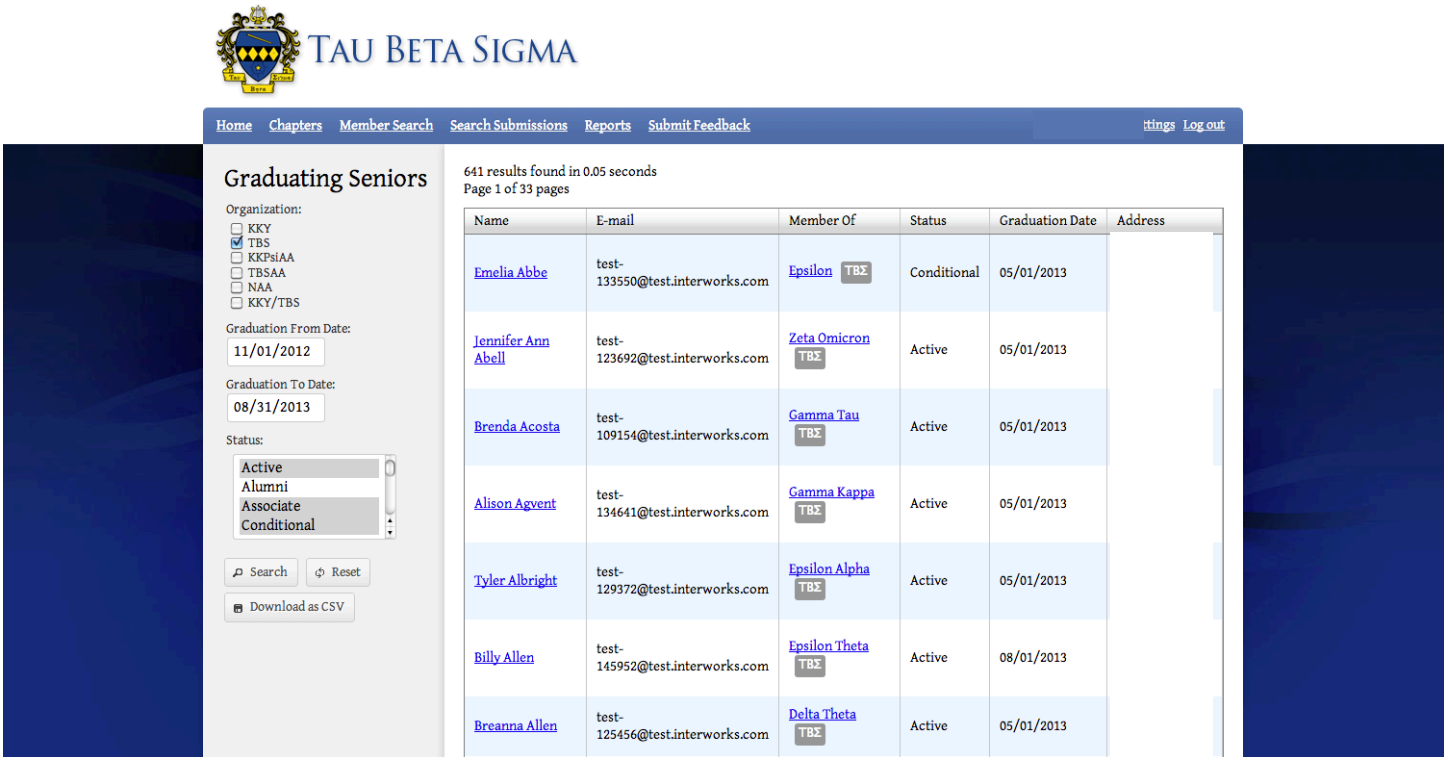
2. Members that do not have a current membership status in the OMRS are listed with an n/a response generated in the Member Of, Status, Position, and Start Date columns.

Reports

Each report available to District Officers is also available to National Officers. At this time, National Officers also have access to one additional report titled Graduating Seniors.

Graduating Senior Search

Though available to National Officers, the Graduating Senior Search feature is most commonly used by National Headquarters. This search feature generates a report of all graduating seniors within a specified date range. The results can also be filtered by organization and membership status. The results display the member's name, e-mail address, chapter, member status, graduation date, and mailing address.



HQ Staff Profiles

Members of the National Headquarters Staff have access to all items that are available to Chapter Members and Chapter, District & National Officers, as well as having edit abilities on all forms and profiles. Like Chapter Officers, National HQ Staff also has a role to play in the approval of many of the forms/reports submitted by chapters.

1. The horizontal menu for HQ Staff members add additional menu options that are not available to other membership levels. The two new menu items are Create Chapter and Create Member.

2. The Create New Form/Report menu always appears on the HQ Staff profile, however, unlike chapter officers, HQ Staff members have the ability to create a new report for any chapter.

3. The Other Pending Submissions section is also greatly expanded on the HQ Staff profile. Instead of only being able to view the specific chapter(s) that an individual is an officer of, HQ Staff members are able to see all pending submissions in the OMRS.

Create New Chapter

This tool is used by National Headquarters to add new colonies to the OMRS to allow chapter and member tracking to begin. HQ Staff members also see the following view when editing the profile for other members. You will notice additional reference fields that are available to National Headquarters that are not available at other membership levels.

Sponsor

The name and email of the Sponsor will be automatically associated via the Sponsor membership for this chapter. The address for the Sponsor is editable when updating the Chapter record; note that this only changes the address in the Chapter record. To change the Sponsor membership record, please go to the "Sponsor & DOB Update" submission form. HQ will review and make changes manually.

Name:
Country:
Address 1:
Address 2:
City: State:
Zip Code:
Phone:
Email:

Director of Bands

The name and email of the DOB will be automatically associated via the DOB membership for this chapter. The address for the DOB is editable when updating the Chapter record; note that this only changes the address in the Chapter record. To change the DOB membership record, please go to the "Sponsor & DOB Update" submission form. HQ will review and make changes manually.

Name:
Country:
Address 1:
Address 2:
City: State:
Zip Code:
Phone:
Email:

Colony

Colony Date:
Colony Advising Person Name:
Colony Advising Person Email:
Colony Advising Chapter:
Installation Date:
Installation Officer:
+ Add Another
Colony Notes:
Notes are placed in chapter history.

Chapter Dates

School Date System:
Semester
Quarter
Founding Date:
Drop Date:
Re-Colonization Date:

+ Create Chapter
× Cancel

Time: 0.70 second(s)
Memory (peak): 29MB bytes
Files: 376 included
Session: kif80d5ap0d011mpihco3cb9a2
Connects: 1
Queries (14): sum:0.01/min:0.00/max:0.00/avg:0.00
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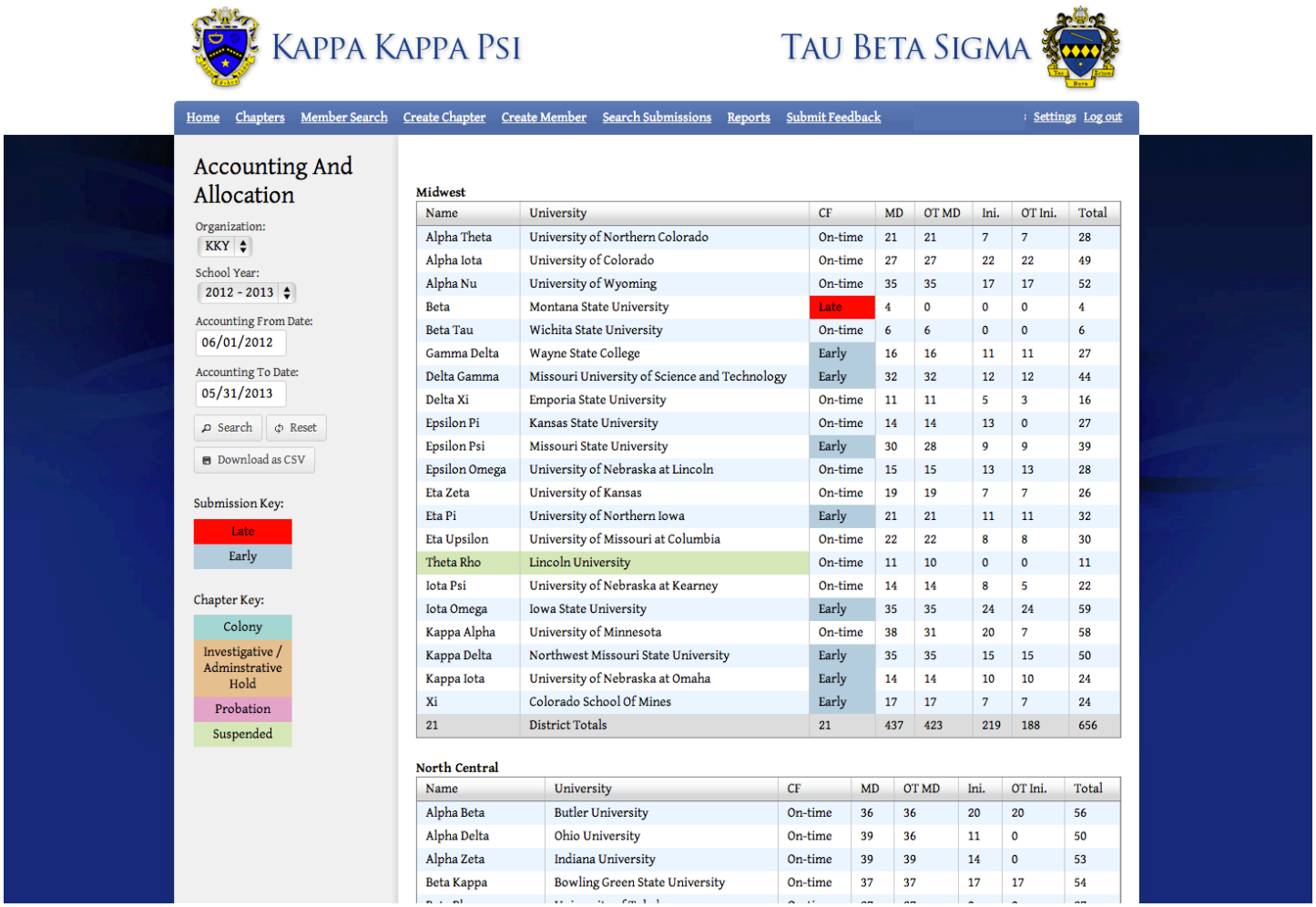
Create New Member

New members are typically added to the OMRS through the Initiate Registration and Honorary Initiation Forms, but this tool allows National Headquarters to add create new members in the OMRS if needed. Creating a member from this form requires the same information that is collected on the Initiate Registration Form. HQ Staff members also see the following view when editing the profile for other members. You will notice additional reference fields that are available to National Headquarters that are not available at other membership levels.

National Headquarters currently has access to two additional reports that are not available to other membership levels: Accounting & Allocation and Podium Subscription.

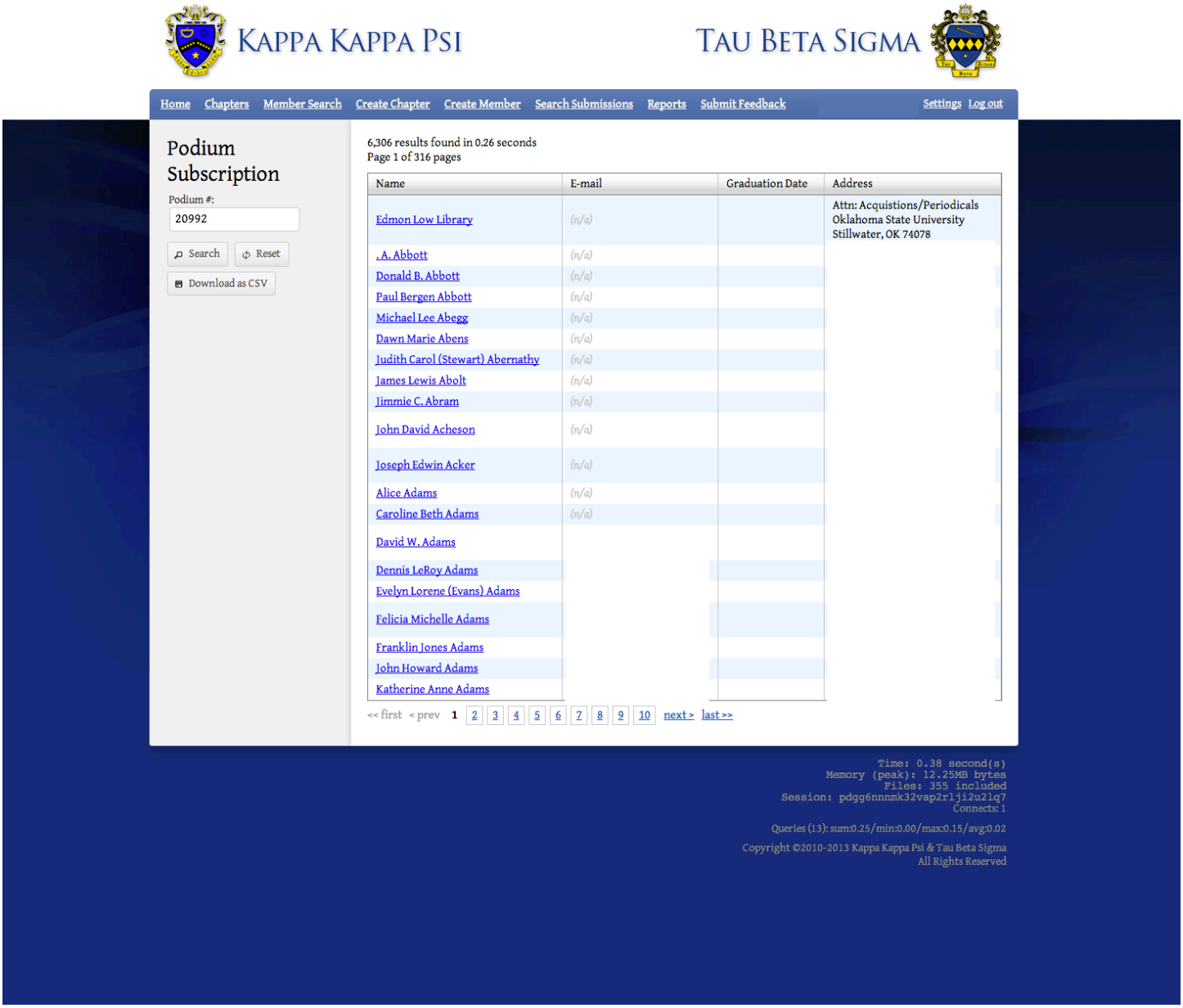
Accounting and Allocation Report

This report is used to determine the total number of member dues and initiate fees paid during a set period of time. The National Accountant uses information from this report to determine totals for the fall and spring District Allotments.



Podium Subscription Report

Podiums are printed and mailed twice per year, this report is used by National Headquarters to generate the mailing list that is sent to the printing company who ships the Podium to chapters and subscribers.

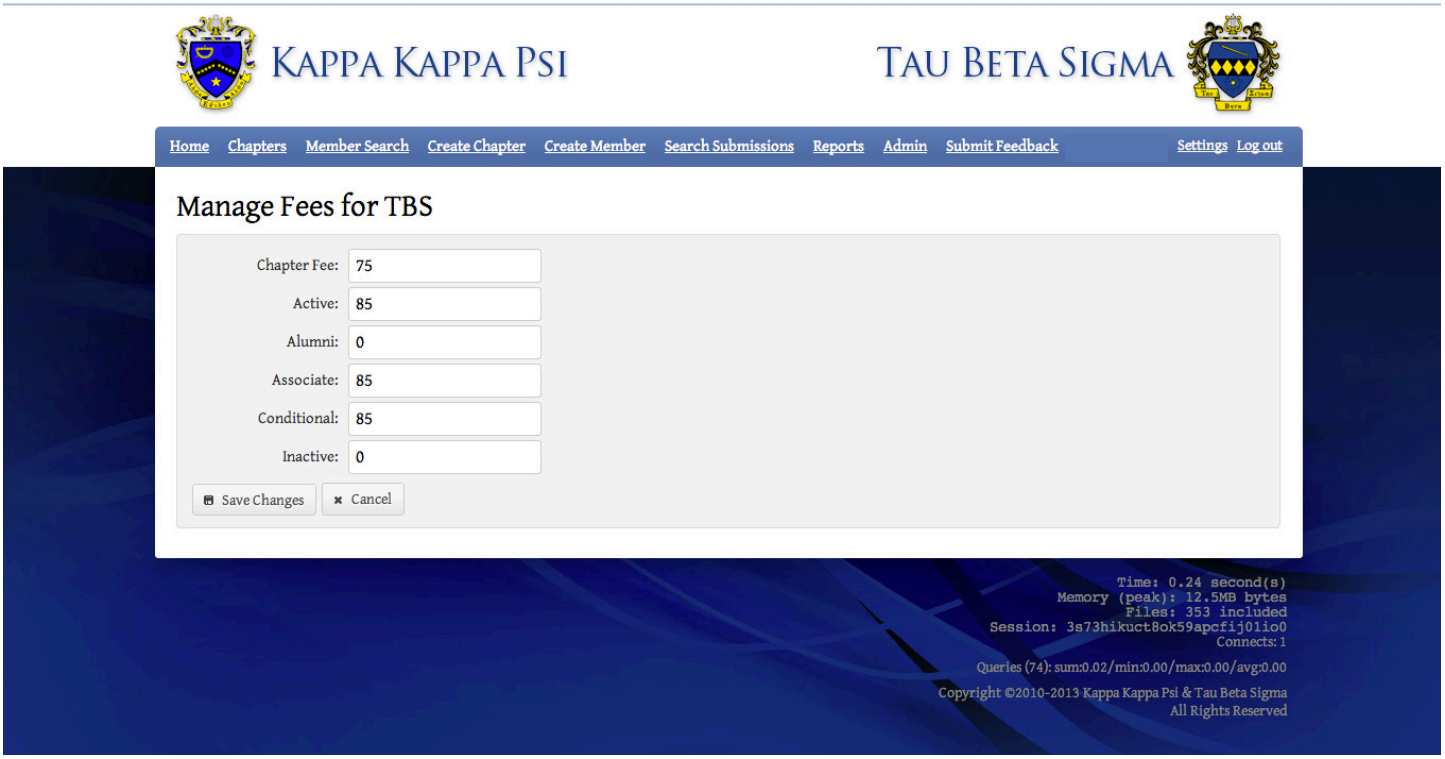


Admin Profiles

Admin profiles are similar to the National HQ Staff Profiles, but have an additional menu item labeled Admin. This menu provides details on site status and allows the Admin to update membership fees for each organization.

Manage Fees

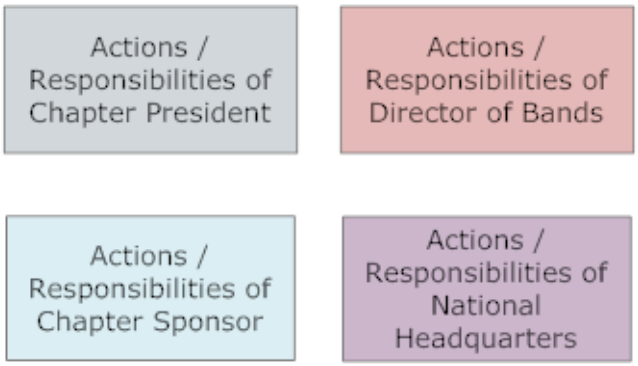
Kappa Kappa Psi, Tau Beta Sigma, and the related Alumni Associations each have their own fee structure for annual dues and other fees. This menu allows an Admin user to update the prices anytime the National Chapter or Alumni Associations vote to change their dues and fees.



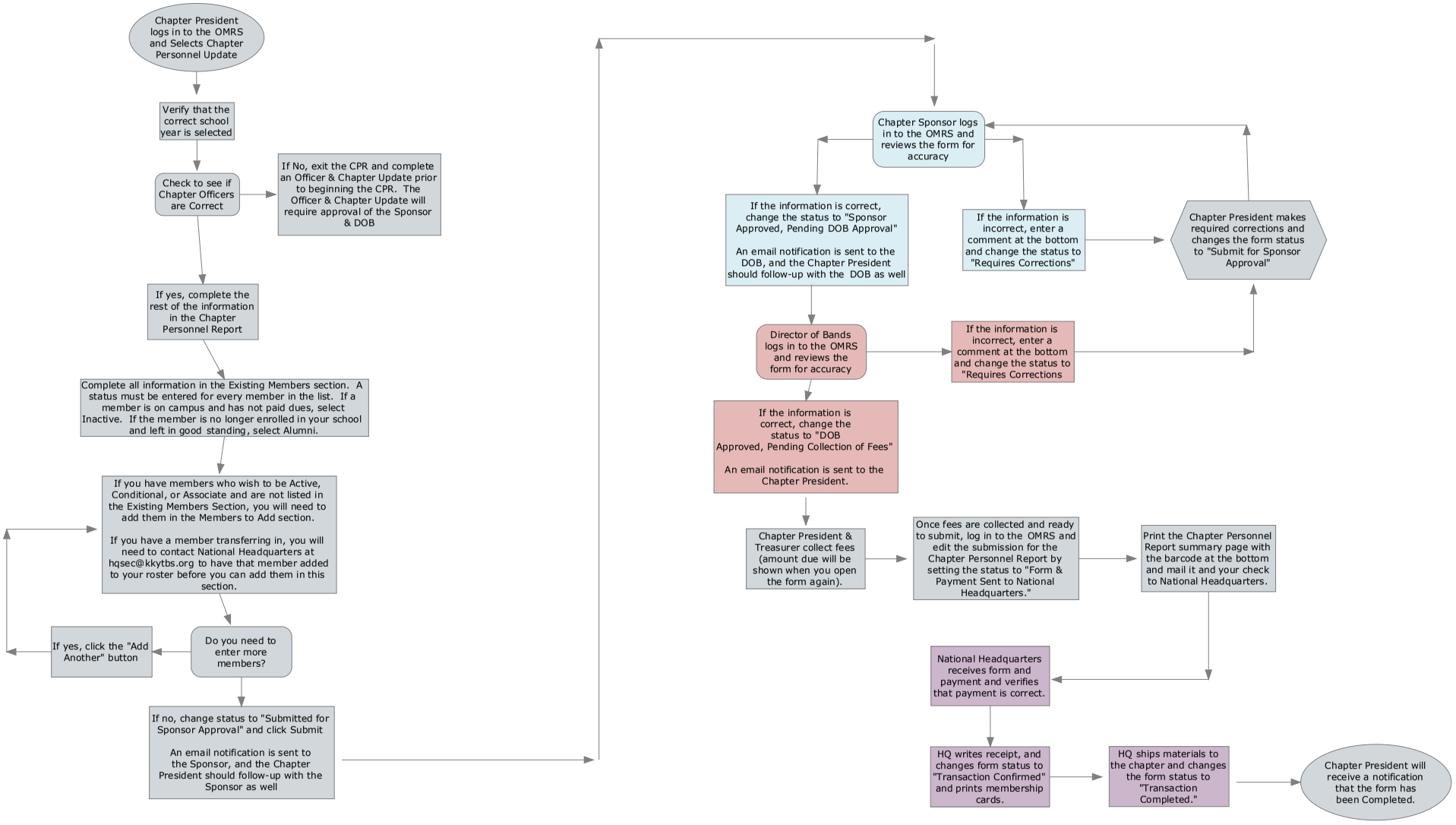
Flow Charts for Form Processes

The following pages provide a graphical example of the process involved with each of the forms discussed in the Chapter Officers Profile section.

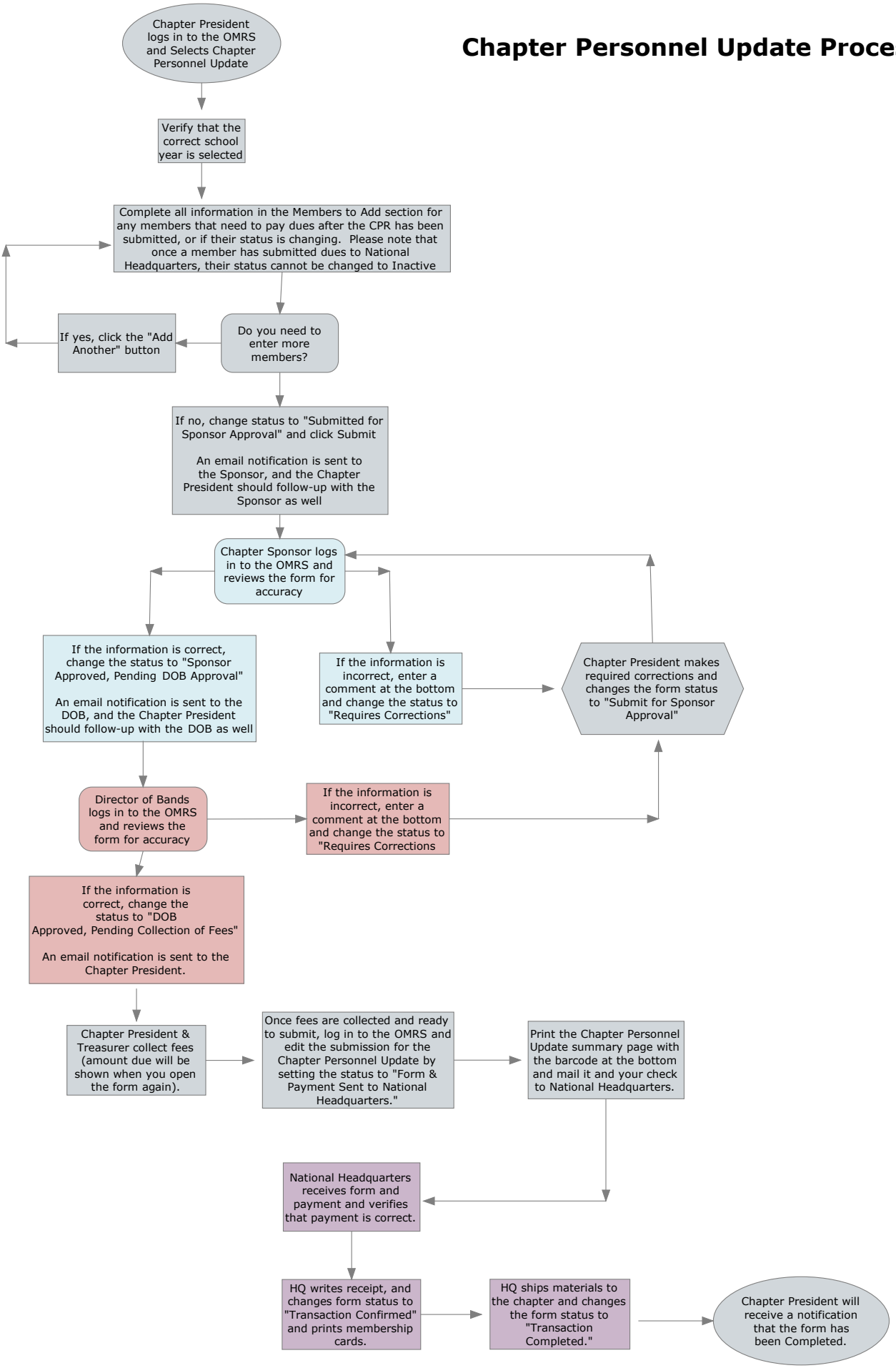
Each color on the flowchart represents the responsibility of a different person:



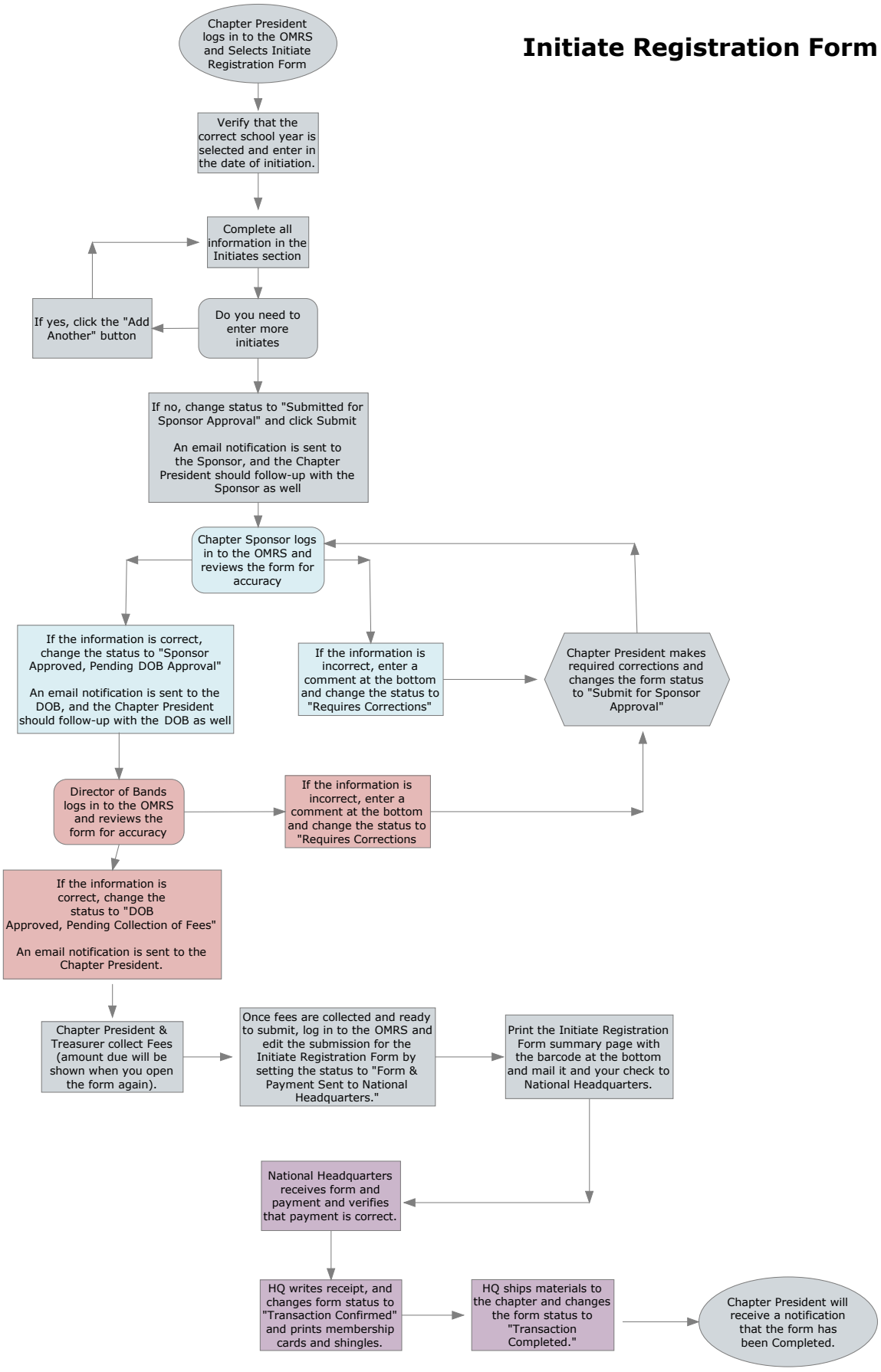
Chapter Personnel Report Process Guide



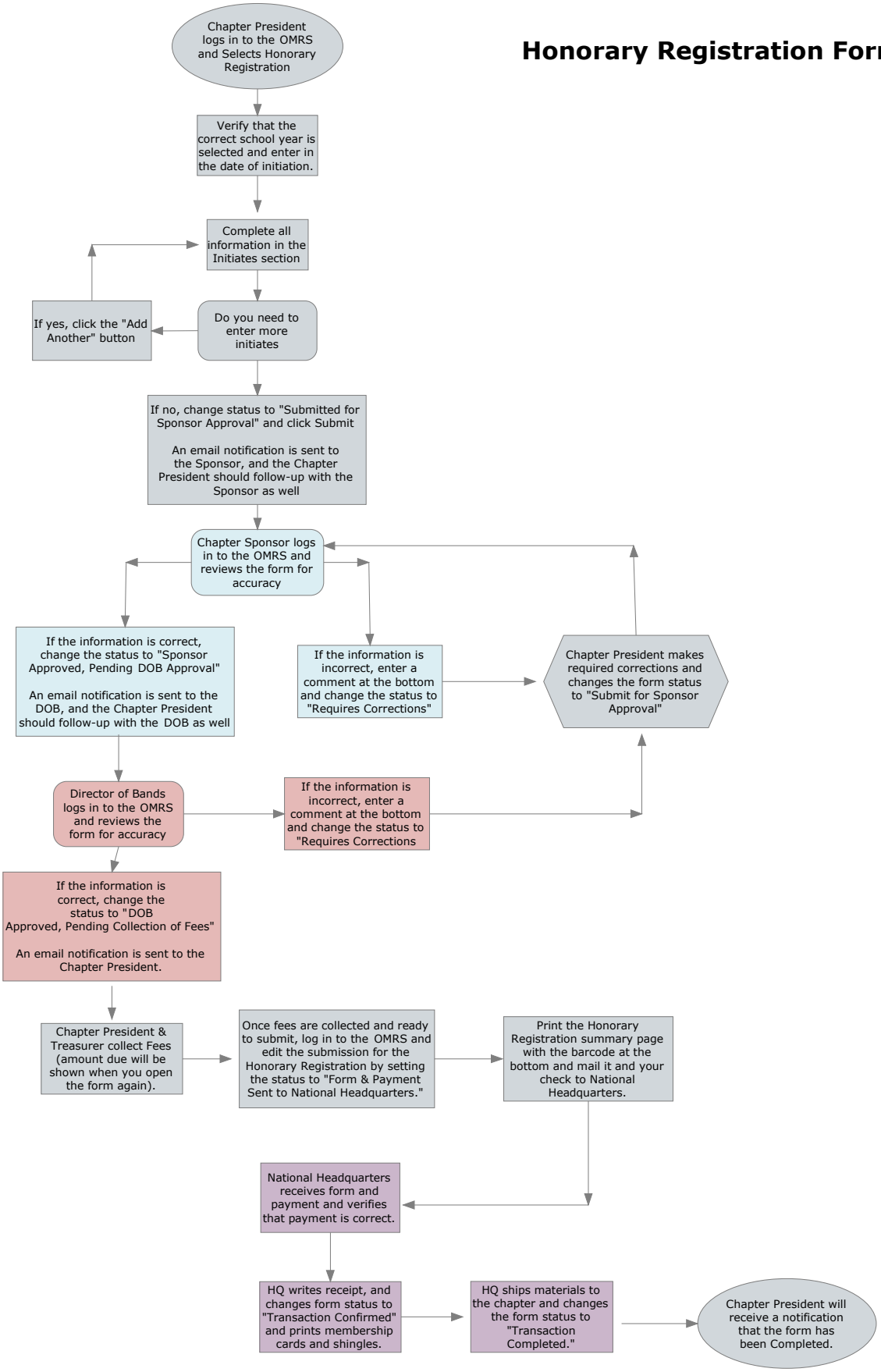
Chapter Personnel Update Process Guide



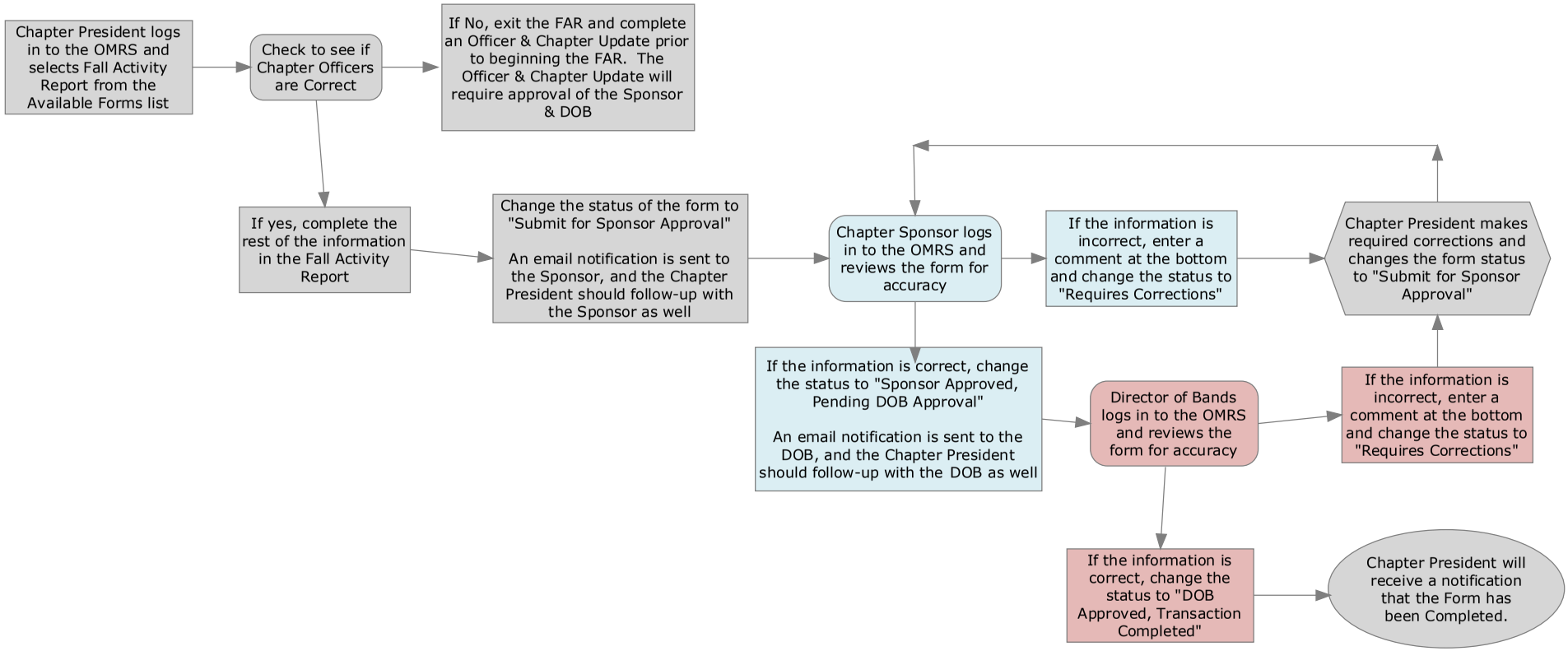
Initiate Registration Form Process Guide



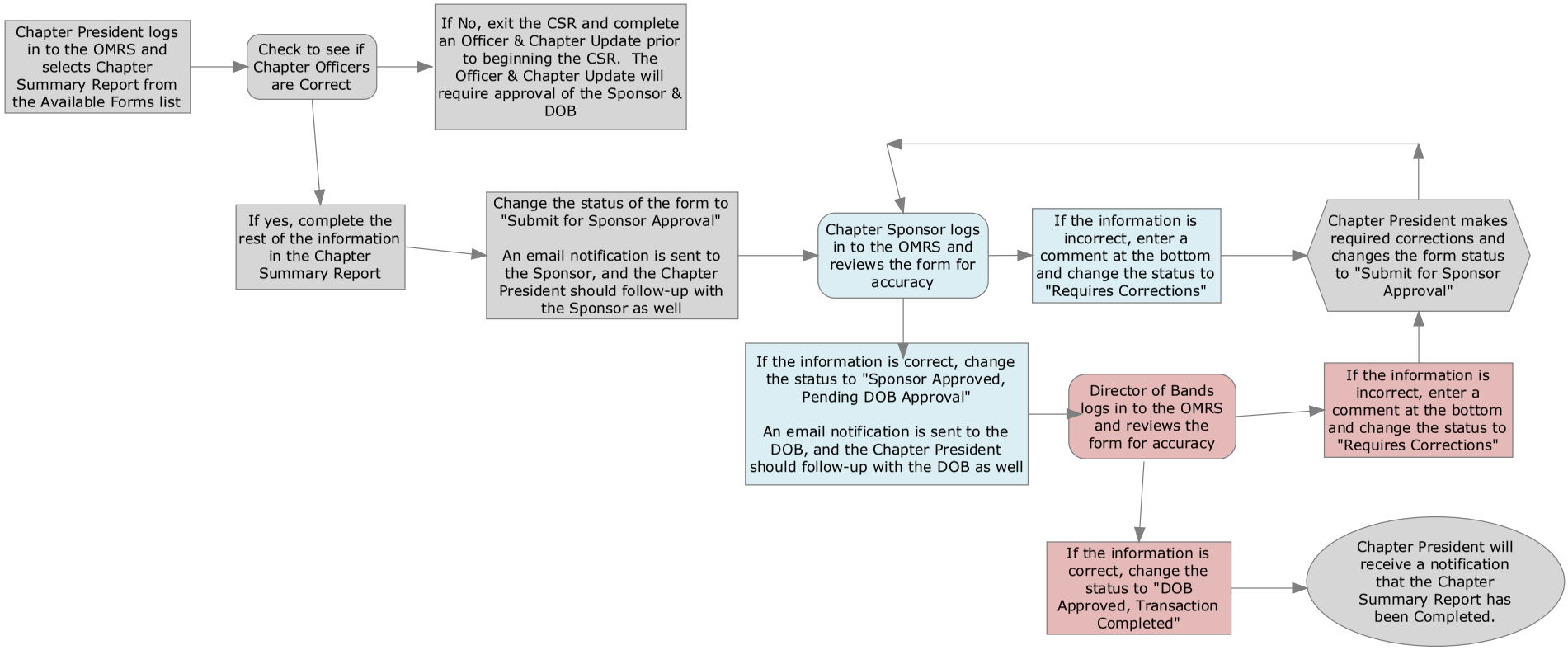
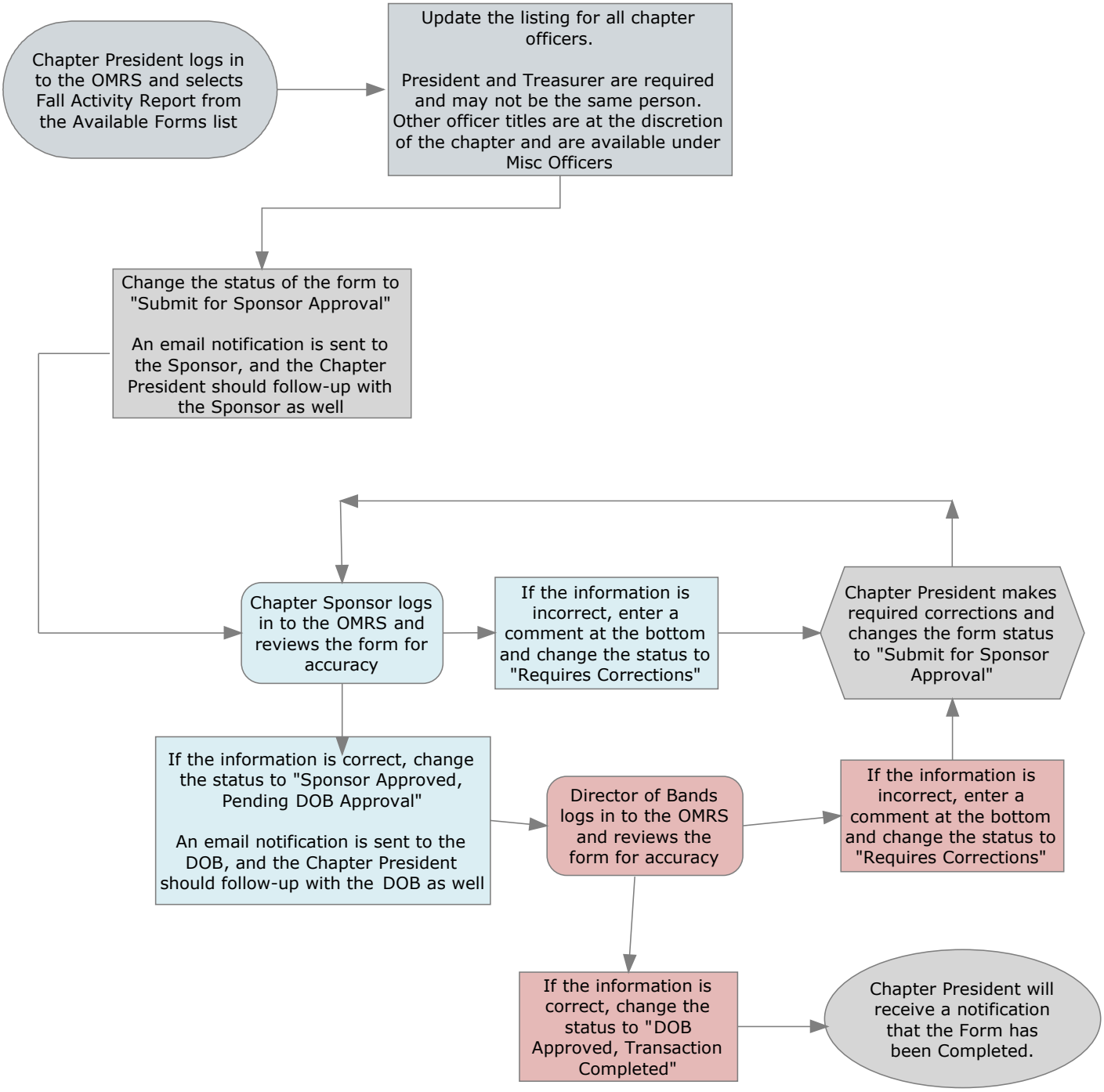
Honorary Registration Form Process Guide



Fall Activity Report Process Guide



Chapter Summary Report Process Guide



Officer & Chapter Update Process Guide