



## A GUIDE TO MASTERING CHAPTER GATEWAY

### GETTING STARTED

1. Visit [gateway.pikapp.org](http://gateway.pikapp.org) and log in. If you haven't set up account, follow the link to **Create an Account**.
2. If you have issues logging in or receive an error, e-mail [support@pikapp.org](mailto:support@pikapp.org) or call (704) 504-0888.
3. Once you log in, your homepage will look like the image below:

### TASK CENTER

Opening page in Chapter Gateway; gives a quick snapshot of where your chapter stands.

Welcome, Jolyn McGriff

Chapter Gateway PI KAPPA PHI

Task Center | Membership Management | Conferences & Workshops | Administrative Items | Seven Objectives | Service & Philanthropy | Scholarship | Volunteers & Advisors

Task Center

THETA ETA  
American University

**Announcements**

As a reminder, your chapter's Pi Kapp College for Chapter Officers 2015 registration must be completed by **December 15, 2014** to avoid late fees. Your Secretary must update your chapter officers and key committee chairmen following elections before completing the registration process.

**Approvals & Alerts**

Pending Membership Transactions: 0

**Membership**

- Current Chapter Size (including associate members): 28
- End of Term Chapter Size Goal (including associate members): 31

**Leadership**

Your chapter currently has:

- 11 officers and key committee chairmen
- 7 advisors
- 8 alumni chapter officers
- 0 housing corporation officers

**Recruitment**

- Last Pre-Initiation: Sep 09, 2014
- Number of Current Associate Members: 5

**Finances**

Your chapter currently owes \$1800.00 to headquarters.

**Philanthropy**

- Your chapter fundraising total is \$1353.77 as of 07/03/2014
- Your chapter volunteer hours per man average is 0 as of 07/03/2014

**Scholarship**

Your chapter's most recent grade report was submitted during the Spring 2014 term:

- Number of NIC Fraternities on Campus: 15
- All-Fraternity GPA: 3.16
- Chapter GPA: 3.2
- Rank on Campus: 7

PI KAPPA PHI


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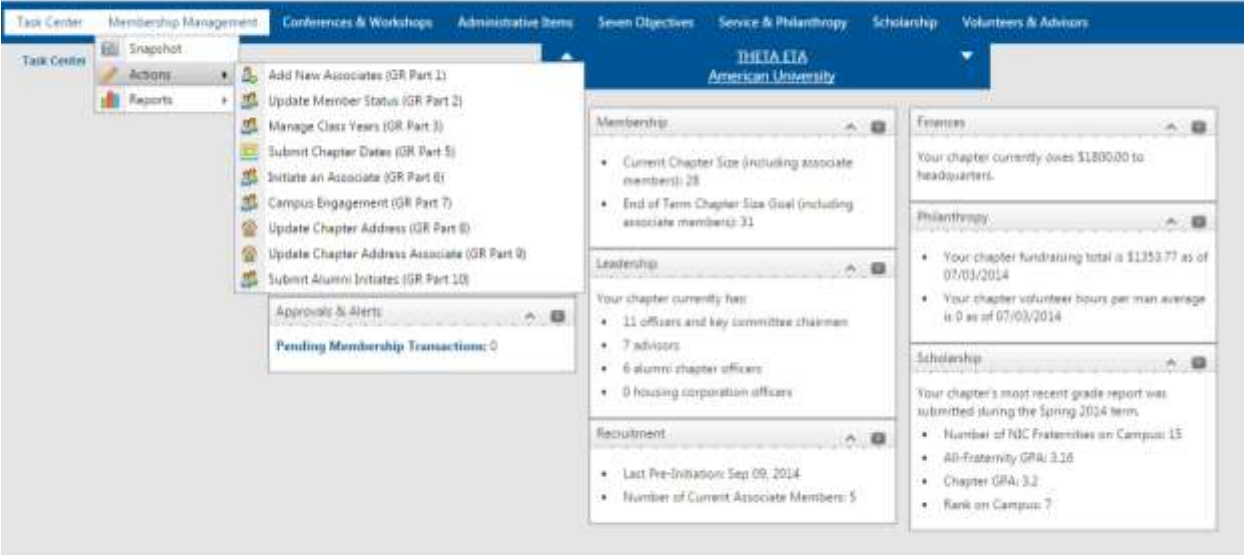
## MEMBERSHIP MANAGEMENT OVERVIEW

Go the **Membership Management > Actions** to complete the Green Report. The 10 sections of the Green Report to complete include:

- Add New Associates (GR Part 1)
- Update Member Status (GR Part 2)
- Manage Class Years (GR Part 3)
- Update Officer Information (GR Part 4)
- Submit Chapter Dates (GR Part 5)
- Initiate an Associate (GR Part 6)
- Campus Engagement (GR Part 7)
- Update Chapter Address (GR Part 8)
- Update Chapter Address Associate (GR Part 9)
- Submit Alumni Initiates (GR Part 10)

Welcome, *Julien McGill*

Chapter Gateway  PI KAPPA PHI



The screenshot displays the Chapter Gateway interface for Theta Eta at American University. The top navigation bar includes sections for Task Center, Membership Management, Conferences & Workshops, Administrative Items, Seven Objectives, Service & Philanthropy, Scholarship, and Volunteers & Advisors. The Membership Management section is active, showing a dropdown menu with 10 actions: Add New Associates (GR Part 1), Update Member Status (GR Part 2), Manage Class Years (GR Part 3), Submit Chapter Dates (GR Part 5), Initiate an Associate (GR Part 6), Campus Engagement (GR Part 7), Update Chapter Address (GR Part 8), Update Chapter Address Associate (GR Part 9), and Submit Alumni Initiates (GR Part 10). Below the menu is a 'Pending Membership Transactions: 0' section. The main content area features several data panels: Membership (Current Chapter Size: 28, End of Term Chapter Size Goal: 31), Leadership (11 officers and key committee chairmen, 7 advisors, 6 alumni chapter officers, 0 housing corporation officers), Recruitment (Last Pre-Initiation: Sep 09, 2014, Number of Current Associate Members: 5), Finances (Current dues: \$1800.00), Philanthropy (Fundraising total: \$1353.77, Volunteer hours average: 0), and Scholarship (Most recent grade report submitted during Spring 2014 term, NCC Fraternities on Campus: 15, All-Fraternity GPA: 3.16, Chapter GPA: 3.2, Rank on Campus: 7).

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## UPDATING THE GREEN REPORT: PART 1 - ADDING NEW ASSOCIATE MEMBERS

[Membership Management > Actions > Add New Associates]

The user will need the following information from the associate member: Full name, preferred name, cell phone, e-mail, and class year.

Press “Add Person” and Continue:

- Enter associate member’s information
- Choose the correct pre-initiation date for each associate member and hit Continue
- Electronically sign and receive receipt

**REMINDER:** All Pre-Initiates must complete the “Welcome Registration” task that is sent to them via e-mail, as well as pay the \$90 pre-initiation fee that must be submitted to the National Headquarters. This includes the price of their *White Diamond* (\$10) and associate member pin (\$10).

## UPDATING THE GREEN REPORT: PART 2 - UPDATING MEMBER STATUS

[Membership Management > Actions > Update Member Status]

The following are brief descriptions of the different membership options that you are able to select.

- **Graduated** // Member has graduated from university.
- **Left School** // Member has left school for reasons other than study abroad, graduation, sickness, etc.
- **Suspended (Financial)** // This process will require a dollar amount owed to the chapter. This feature also automatically begins the national financial suspension/expulsions process (i.e. “30-60-90 process”). It is the Treasurer’s responsibility to work with you to initiate this process.
- **Suspended or Conditional Alumni Status (Standards)** // This will require the chapter to indicate the date on which the member was suspended by the Standards Board or the date the member was placed on conditional alumni status by the Standards Board for failing to meet the Fraternity’s minimum academic standards. Additionally, the Standards Board Chairman will be required to submit the charge letter, Standards Board meeting minutes, and decision letter to the National Headquarters.
- **Transferred** // Member has transferred to another institution. The function requires the user to list the school transferred to.
- **Depledged** // This option is only available for associate members. In the unfortunate event that an associate member does not get initiated, it must be indicated here.
- **Studying Abroad** // Member is studying abroad. The Secretary should include the city and country where the member is studying.
- **Left School (Internship, Co-op, Military Service)** // Member has left for one of the reasons listed.
- **Requested Personal Leave (Sickness of Family)** // Member has requested a brief leave from his obligations to the chapter due to family or personal health issues. The National Headquarters staff will solicit additional details from the Secretary prior to approving the request.
- **Returned from Temporary Leave (Abroad, Internship, etc.)** // When a member has temporarily left the chapter for one of the reasons above, this function allows you to move them back to “active” status on the chapter’s roster

## **UPDATING THE GREEN REPORT: PART 3 - MANAGING CLASS YEARS**

**[Membership Management > Actions > Manage Class Years]**

- Select the new class year of each member by clicking the bubble that corresponds with the member's class year.
- Make sure that every member on your roster has the correct class year
  - Ensure that members who are graduating this semester are marked as "Senior graduating this semester"

## **UPDATING THE GREEN REPORT: PART 4 - UPDATE OFFICER INFORMATION**

**[Membership Management > Actions > Update Officer Information]**

In Step Two you will need to select the checkbox for each officer position that has changed and then click Continue.

The following step will require you to click the magnifying glass that says "Find a Member" and search for the new officer's name. Once you have selected the member you will need to enter the effective date for the officer's term and click Continue.

## **UPDATING THE GREEN REPORT: PART 5 - SUBMIT CHAPTER DATES**

**[Membership Management > Actions > Submit Chapter Dates]**

On Step Three, you will need to enter the following information and then click Continue:

- Last Pre-Initiation Date
- Last Initiation Date
- Next Pre-Initiation Date
- Next Initiation Date
- Fiscal Year End (e.g. June 30, December 31, etc.)
- Chapter Meeting Day
- Term System (Semester or Quarter)
- Click the checkbox if your campus has deferred recruitment

## **UPDATING THE GREEN REPORT: PART 6 - INITIATE AN ASSOCIATE MEMBER**

**[Membership Management > Actions > Initiate an Associate]**

- Review Overview page and hit Continue
- Fill in the appropriate bubble next to the associate member's name (only associate members will be visible on this page) and hit continue
- Provide and confirm the date of initiation. Also, provide a roll (initiation) number in correct field. (Check out the "apply to all" button to speed up the process.)
- Review the updates and electronically sign to finally submit. Hit Continue to go to the final step.
- Review and print your receipt

## UPDATING THE GREEN REPORT: PART 6 - INITIATE AN ASSOCIATE MEMBER (CONTINUED)

Reminders for initiating associate members:

- You should make this update and send the white initiation cards directly to the national office within 3 days of the ceremony. Make sure that initiates sign both the front and back of the card. This is how the Fraternity keeps records of all initiated members, both undergraduate and alumni. Every single member, including the Founders, has signed these cards and they are on file with the National Headquarters.
- Initiation fee is \$210 per initiate (included member badge)
- All initiates should fill out the cards PRIOR TO initiation, as well as submit the fees. Do NOT initiate anyone who cannot pay the fee at the time of initiation; your chapter will be held responsible for the amount of that initiation via your account statement.
- Remember that Chapter Gateway is NOT an online store. This technology cannot yet accept payments for necessary fees. All payments need to be called or mailed in to the national office.

## UPDATING THE GREEN REPORT: PART 7 - CAMPUS ENGAGEMENT

[Membership Management > Actions > Campus Engagement]

- Select the bubble that best matches each member's involvement on campus
- In Step Three you will need to enter a position name, organization name, or short description of each member's involvement.

## UPDATING THE GREEN REPORT: PART 8 OR 9 - UPDATE CHAPTER ADDRESS

[Membership Management > Actions > Update Chapter Address] OR  
[Membership Management > Actions > Update Chapter Address Associate]

- Enter the chapter address in the fields provided and then click save.

## UPDATING THE GREEN REPORT: PART 10 - SUBMIT ALUMNI INITIATES

[Membership Management > Actions > Submit Alumni Initiates]

- In Step Three you will need to add the following information for the alumni initiate:
  - First Name
  - Last Name
  - Middle Name
  - E-mail Address
  - Initiation Date
  - Informal Name (i.e. Preferred Name)
  - Initiation Number (in the format of #####)
  - Mobile Phone
  - Submission Date
- Enter the required information and then click Continue
- Sign electronically and receive receipt

## SUBMITTING VOLUNTEER HOURS

[Service & Philanthropy > Actions > Submit Volunteer Hours by Event]

- In Step Two, simply click the checkbox and then click Continue to move on to Step Three.
- Next you will need to enter the following information:
  - Event Details
    - Name of Event
    - Date of Event
    - Description
  - Volunteer Organization
    - Volunteer Organization
    - Contact at Volunteer Organization
    - Contact E-mail Address
    - Contact Phone Number
  - Chapter Participation
    - Number of Chapter Members in Attendance
    - Number of Volunteer Hours
    - Number of People with Disabilities in Attendance
  - Most Memorable Moment
  - Additional Information
    - Local Partners or Sponsors (e.g. sororities, student organizations, local businesses, etc.)