

# ONLINE REPORTING

Member reporting is completed online at <https://my.delts.org>.

Each chapter/colony president, treasurer and new member educator should create a username and password to make updates specific to each officer's duties via the Officer Portal.

**Note: To make updates, you must be the president, treasurer or new member educator the Central Office currently has on file.** If you have transitioned officers, but the officers have not been updated, you may contact Lesa Purcell for assistance at 317-284-0203 or [lesa.purcell@delts.net](mailto:lesa.purcell@delts.net).

Remaining undergraduate officers and alumni volunteers may create a username and password to view chapter rosters and chapter officers. However, they cannot make any changes.

## CREATING A USER ACCOUNT

- Go to <https://my.delts.org> and the Officer Portal login screen will appear.
- For first time users, click on the link "[If you are an officer and don't have an account, click here to get your account](#)" and complete a short informational interview.
- Confirm that your email address is correct and select "Finish" (If your email address needs updated, please contact the Central Office at 317-284-0203.)
- Upon completing the interviews, you will receive an email for setting up a username and password.

## REPORTING OFFICERS

If leaving office, remove yourself after completing all other officer changes. **\*Once removed from office, you will no longer be able to update the Officer Portal.**

- Log into the Officer Portal, select the "**Officers**" link located to the left of page.
- To change the officer in the position, click the far right option "Edit" for that officer.
- Select "**Replace this office holder with a new officer holder.**"
- You may select to replace the officer with a new officer or cancel activity and return to previous screen.
- To replace officer, enter the beginning date for the new officer.
- Select the new person to hold this office by clicking the radio button to the right of the member name.
- Click on "**Complete Officer Replacement**" to finalize the new officer.
- Review and make any necessary updates to the new officer's information.
- Select "**Save Officer Information**" to install the new officer.

## REPORTING NEW MEMBERS

(It is helpful to collect new member information in advance or have new members complete.) To assist in gathering the required information, template cards are available online in the Treasurer Resources section at <http://www.delts.org/media/ReportofNewMemberTemplate.pdf> to print and have members complete. The cards can be used to enter the information via online reporting. **Please do not submit the completed paper versions of the Report of New Members to the Central Office.**

- Login at <https://my.delts.org>, click on "**Members**," located on the left side of the Officer Portal home page.
- Next, click on "**Report New Members.**"
- Select the "**Enter a New Member**" button. A New Member Information screen will appear.  
**All information with red arrows is required.**
- After entering all personal and payment information, click "**Save.**" Repeat for each new member.
- Once all new members have been entered, select "**Submit this list of new members to headquarters.**"
- Enter the pledge date and click the button "**Submit this new member class to headquarters.**"
- **Your new members will NOT be reported to the Central Office without selecting this.**
- Finally, you will be directed to a statement summarizing the new members and amount owed by the chapter.

## **NEW MEMBER VALIDATION**

Every new member is sent an email after his information is entered into the system. This message will have him verify and/or update his information and accept the policies and procedures of Delta Tau Delta including the binding arbitration provision. This is very important! The process takes less than 5 minutes.

**YOUR NEW MEMBERS WILL NOT BE ABLE TO INITIATE UNTIL THEY HAVE COMPLETED THIS VALIDATION PROCESS.** You may, at any point, send a reminder email with the validation link from the system by following the steps below.

## **RESENDING MEMBER VALIDATION LINK**

- Log in to <https://my.delts.org> and click on "**Members**."
- Select "**Report Initiates**."
- You will see a list of the new members in your chapter. Anyone with an "**Outstanding Validation**" has not completed the validation process.
- Click the "**Resend Validation Email**" link located in the Email Address column. This will send an email for verifying membership. (Please confirm the email address is correct).
- To update an email address, select the "**Update Email Address**" link located in the Email Address column. Upon revising the email, you will need to resend the validation email as instructed in previous step.
- Instruct new members to use the most recently received email link. *The links in previous emails are no longer valid.*

## **REPORTING INITIATES**

To assist in gathering the required information, Report of Initiation template cards are available online in the Treasurer Resources section at <http://www.delts.org/media/ReportofInitiationTemplate.pdf> to print and have members complete. **Please do not submit the completed paper versions of the Report of Initiation to the Central Office.**

- Log into the Officer Portal and select the "**Members**" link.
- Click on "**Report Initiates**" enter the **date of initiation**.
- Select "**Specify Payment Info**" in the right column to enter the method of payment for each initiated member.
- Next, select the box in the "**Include in Initiation**" column.
- After selecting each member to be initiated, click the "**Initiate the Selected Men**" button.

**Finally, you will need to assign the roll numbers in the correct order the men went through initiation.** Select the member's name and click the "**Assign Roll**" button. The name and assigned roll number will appear on the right side of screen. **(It is your responsibility to put these men in the correct order.)**

After each member has been assigned a roll number, confirm the roll number order is correct and click on "**Submit Initiates**." The report will then be sent to the Central Office for processing. You will be directed to an invoice. To retrieve your invoice, click on "**Get the report for this class**". The invoice will summarize the initiated members and the amount due by the chapter.

At this point the report of initiation is complete. The new initiates should receive their badges within 2 weeks and certificates in 4-6 weeks. **Please be sure to submit payment to the Central Office within 48 hours of formal initiation.**

## **UPDATING MEMBER INFORMATION**

- Log into the Officer Portal and select the "**Members**" link.
- Scroll down to your Membership List.
- Click the "**Select**" button to the right of the member's name.
- The yellow information fields can be updated, i.e., preferred first name, address, email, etc.
- After making necessary updates, select **Save Record**.
- If information that is not accessible needs to be changed, please contact the Central Office at 317-284-0203.

## **REPORTING MEMBER STATUS CHANGES**

- To update an individual's status; click on **Members**, select **Report Member Status Changes** and choose the appropriate new status from the drop down menu.

Member Status Change options and descriptions are as follows:

- **Alumnus** – Initiates In Good Standing or Suspended who have graduated.  
Initiates currently not enrolled and not expected to return to the university.
- **Colony Grad** – New Members of a **colony** who have graduated.
- **Depledge** – New Members of a chapter/colony who quit prior to being initiated.
- **Suspended Members Returning to Good Standing.**

**For members remaining in good standing, no action is necessary.**

- Upon selecting the status, click on the **"Create this Group."** Select the members to be changed to the new status and click on **"Selection Complete. Next."**
- If there are no members to be changed, click the **"Cancel"** button, located on the upper right of page.
- Repeat steps for each status change option group being reported.
- Upon completing status updates, allow 10 days for the reported changes to be processed and reflected on the chapter/colony membership list.

**Suspensions, Expulsions and Withdrawals are reported by completing and submitting the appropriate form to the Central Office via fax, mail or email.**

**\*These forms are accessible via the Document Library link on the left side of the Officer Portal home page.**