2016-2017 OFFICER UPDATE PROCESS

The officer update process is a quick reporting procedure that takes place **immediately** after chapter officer elections. This process, which ensures incoming officer names are properly submitted to the Fraternity, has been redesigned for the 2016-2017 academic year to be a simple, self-service reporting system conducted by the incoming chapter president. The following instructions will help you complete your chapter's officer update.

There are 5 major steps to completing the officer update process. Those steps are:
> **Step 1: Log In**
> **Step 2: Update Chapter President Mailing Address**
> **Step 3: Access Officer Management Tab**
> **Step 4: Terminate Outgoing Officers**
> **Step 5: Add Incoming Officers**

In-depth instructions for completing these 5 steps are below. For step-by-step video instructions, view the [SigEp Officer Update Process Demo](). **Please note** that while the video references the "2015-16 academic year," the process mechanics have not changed for the current year.

Step 1: Log-In

Log in to your [Membership Account](), and enter your username and password.

If you have never logged in on SigEp.org, click [Forgot Username]() under Login Assistance and enter your email address (the same one you use to read national SigEp emails). An email with account reset instructions will be sent to you. Email [officer.update@sigep.net]() if you cannot log into the portal or are receiving an error message.

Please note you **should not** click on the Register link found on the Login page. You are already a registered user on the site even if you have not previously logged in.

Step 2: Update Chapter President Mailing Address

As chapter president you will receive all membership materials for new members, including LRoBs, Balanced Man pins, membership cards and membership certificates. Therefore, you need to update your mailing address to your current **school** address.

To update your mailing address within your Membership Account, click "Edit Your Profile" on your Personal Profile. Once you update your address, click the gray "Save" button at the bottom of the page.

Step 3: Access Officer Management Tab

From the Membership Account, you will make all officer updates in the "Officer Management" tab within the Chapter Officer Portal (see link at the top of your Personal Profile).

IMPORTANT: You must connect with your [Regional Director](#) immediately after elections so he may grant you permission to the Chapter Officer Portal, which is accessed by chapter officers only.

Once you confirm access to the Chapter Officer Portal from the Regional Director, click "Chapter Officer Portal" and your chapter's portal will load momentarily. Once the portal loads, click the farthest red tab at the top of the page labeled "Officer Management." This is where you will remove/ add chapter officers.

Step 4: Terminate Outgoing Officers

First you will terminate all outgoing officers who are listed in the Current Officers section. To complete this step, do the following:

- Type an end date in the "End Date" field for all outgoing officers. This field is located to the far right of each officer's name (the date can be today's date or any date in past or future).
- Click the "Update Terminations" button at the top of the section.
    - o **NOTE:** If you pick an end date for an officer that is today's date or any date in future, the outgoing officer will not immediately disappear when you click the "Update Terminations" button- He will eventually disappear once that end date passes. If you pick an end date for an officer that is in the past, that outgoing officer WILL immediately disappear when you click the "Update Terminations" button.

You as the incoming chapter president will already have a role created in the Current Officers section by the Regional Director. DO NOT REMOVE YOURSELF.

Step 5: Add Incoming Officers

After you terminate the outgoing officers you will need to add the new, incoming officers from the Incoming Officers section below. This section contains a full chapter roster from which you can locate the brothers assuming officer positions. To complete this step, do the following:

- Locate the incoming officer(s) from the alphabetical chapter roster.
- Select his officer position from the "Position" picklist to the left of the brother's name.
- Type a start date in the "Start Date" field for all incoming officers. This field is located to the far right of each incoming officer's name (the date can be today's date or any date in past or future).
- Click the "Add Incoming" button at the top or bottom of the chapter roster.
    - o **NOTE:** When you click the "Add Incoming" button all incoming officers, regardless of their Start Date being current, past or future, will appear in the Current Officers section above.

If you add an incoming officer by mistake, look for the brother's name in the Current Officers section above, pick today's date as the "End Date," click the "Update Terminations" button and the brother will disappear from the Current Officers list in 24hrs.

If there are members missing from the chapter roster in the Incoming Officers section, it means those members were never registered. To correct this, first review the Accepted/ Pending tab of the Chapter Officer Portal to see if the member(s) are there. If so, please complete payment by selecting the members and clicking the Pay via eCheck or Pay via CC button. Please contact Chapter Services and Membership Manager Donna Jarvis at 804-286-0605 or d.jarvis@sigep.net with questions about payment.

If members do not appear on the Accepted/Pending tab, review the Candidates tab and add missing members, select the candidates who are members, and click the "Candidate Accepted" button. Finally, complete the payment for these members.

Signing SigEp's Member Safety Policies agreement

Once you and your officers are updated and finally reach the official "Start Date" of your term, each of you will receive an email to review and agree to SigEp's member safety policies with an electronic signature.