



2018-2019 Officer Transition Process

The officer update process is a quick reporting procedure that takes place immediately after chapter officer elections. This process ensures incoming officer names are properly submitted for the sake of proper and effective communication from the Fraternity and Headquarters staff. The following instructions will help you complete your chapter's officer update.

There are 3 major steps to completing the officer update process. Those steps are:

- Step 1: Log In
- Step 2: Terminate Outgoing Officers
- Step 3: Add Incoming Officers

In-depth instructions for completing these 3 steps are below.

Step 1: Log-In

Before you can log onto the Chapter Officer Portal, you must connect with your regional director immediately after elections so he may grant you permission to log-in.

Once your regional director has confirmed your permission, you can log onto the Chapter Officer Portal from the [SigEp website](#).

If you have never logged in on SigEp.org or the Balanced Man Program app, click "Forgot Username" and enter your username (your email plus .sigep). An email with account reset instructions will be sent to you.

Step 2: Terminate Outgoing Officers

From the Officer Portal, you will make all officer updates in the "Officer Management" tab.

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.
 - **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 3: 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.
 - **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 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 Revenue Manager Donna Jarvis at 804- 286-0605 or d.jarvis@sigep.net with questions about payment. If members do not appear on the Accepted 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.