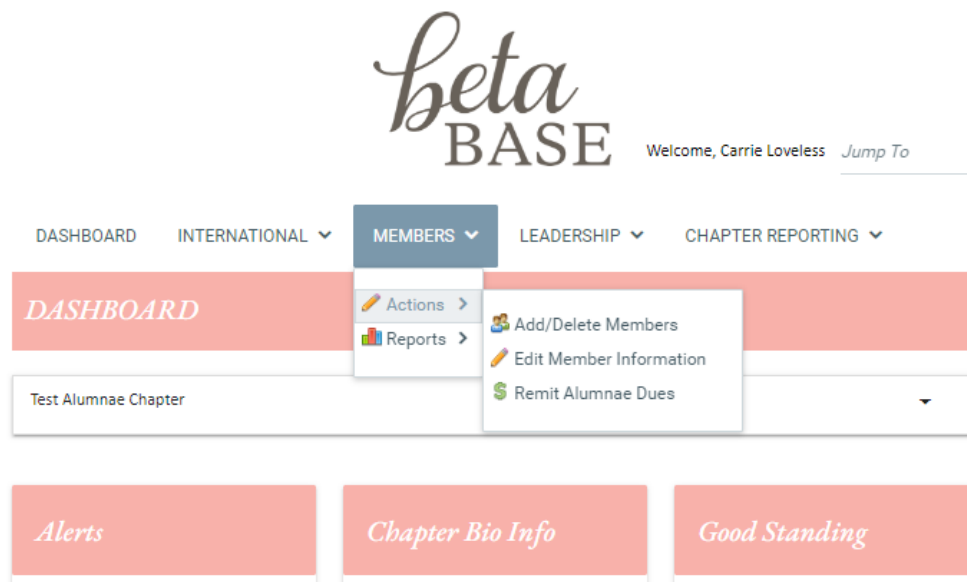
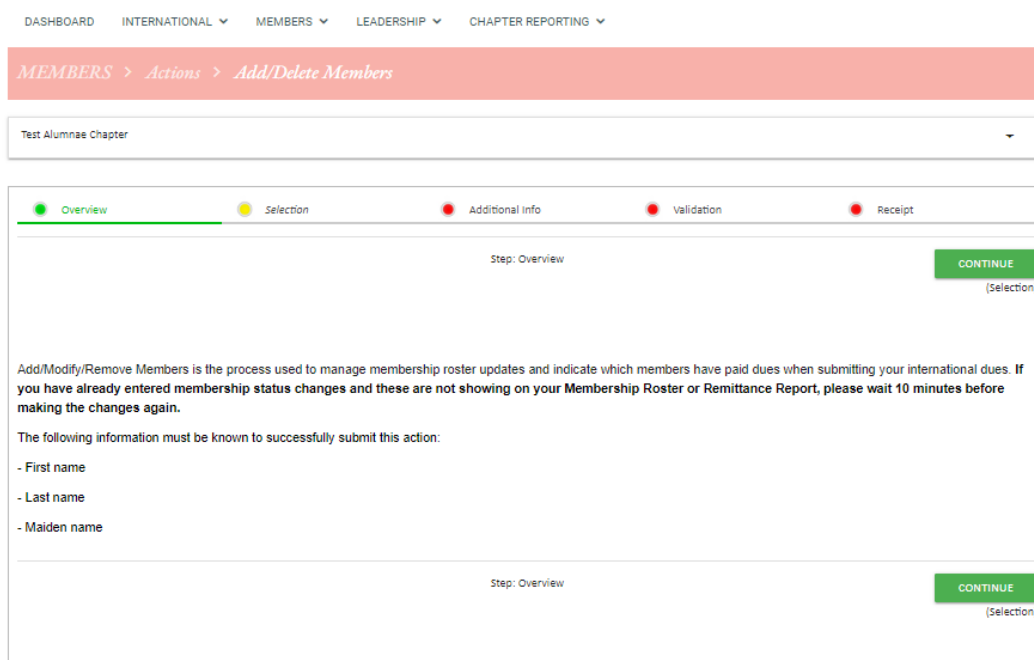


Add/Delete Alumnae Chapter Members From Roster

1. **Log in to Beta Base.**
2. Navigate to Members > Actions > Add/Delete Members.



3. Read Overview, and select Continue.



- Read the instructions carefully, as they provide steps to complete after submission of this action.

DASHBOARD INTERNATIONAL MEMBERS LEADERSHIP CHAPTER REPORTING

MEMBERS > Actions > Add/Delete Members

Test Alumnae Chapter

Overview Selection Additional info Validation Receipt

PREVIOUS (Overview) Step: Selection CONTINUE (Additional info)

Select the appropriate action for each member for whom you wish to make a membership status change. Once you have changed the status for the member, click the Continue button at the top or bottom of the screen.

- Add member:** Chapter adds alumna member to the chapter's member roster.
- Remove member:** Chapter removes alumna member from the chapter's member roster.

If you have already entered membership status changes and these are not showing on your Membership Roster or Remittance Report, please wait 10 minutes before making the changes again.

***Process 10-15 members at a time for optimal speed.

The following instructions are for adding a member to your chapter's roster. To review steps from removing a member, skip to Step 13.

- Select the blue button labeled ADD MEMBER TO LIST.

ADD MEMBER TO LIST Show Applicable Members

First Name	Last Name	Maiden Name	Affiliated University	1) Add member 2) Remove member
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Abigail	Kootillas	Kootillas	Oakland University	<input checked="" type="radio"/> No Action <input type="radio"/> 1 <input type="radio"/> 2
Anne Louise	Layton	Layton	McGill University	<input checked="" type="radio"/> No Action <input type="radio"/> 1 <input type="radio"/> 2
2 members				

PREVIOUS (Overview) Step: Selection CONTINUE (Additional info)

- Input the member's information, then click the Search button. First name, last name and maiden name fields are available. Please use legal names, as those are likely what is within the database for each member.

First Name
Brooke

Last Name
Jacobson

Maiden Name

SEARCH

- All names matching your search will populate. Select the box to the left of the alumna's name you'd like to add to your chapter's roster. If the name you are searching for does not appear, please check the spelling of the member's name.

	First Name	Middle Name	Last Name	Maiden Name	Affiliated University
<input type="checkbox"/>	Brooke	Suzanne	Jacobson	Jacobson	University of Wisconsin - Milwaukee

- You may continue to the following steps if you only have one member to add. If you have additional members to add, follow Steps 5-7 for each member.

Select 1 to indicate that you'd like to add the member to your roster. Click the green Continue button once you have made selections for all newly added members.

ADD MEMBER TO LIST Show Applicable Members

First Name	Last Name	Maiden Name	Affiliated University	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1) Add member 2) Remove member
Brooke	Jacobson	Jacobson	University of Wisconsin - Milwaukee	<input checked="" type="radio"/> No Action <input type="radio"/> 1 <input type="radio"/> 2

- Select an effective date for the member. Please note, if you select a future date, you will not see the member on your chapter's roster until that date. Click the green Continue button once you have selected a date for all available transactions.

DASHBOARD INTERNATIONAL MEMBERS LEADERSHIP CHAPTER REPORTING

MEMBERS > Actions > Add/Delete Members

Test Alumnae Chapter

Overview
 Selection
 Additional Info
 Validation
 Receipt

Step: Additional Info (validation)

Provide the requested information specific to the membership action you selected. Note that the effective date defaults to today. This membership change will be part of the membership history for this member, so please report an accurate date. **If you have already entered membership status changes and these are not showing on your Membership Roster or Remittance Report, please wait 10 minutes before making the changes again.**

First Name	Last Name	Maiden Name	Affiliated University	Action	Additional Information
Brooke	Jacobson	Jacobson	University of Wisconsin - Milwaukee	Add member	* Effective Date: 4/16/2023 <input type="text"/> <input type="button" value="Apply To All"/>

Step: Additional Info (validation)



10. Validate all changes by typing your first name, last name and date in the pre-fill fields. Click the green Continue button to proceed.

DASHBOARD INTERNATIONAL MEMBERS LEADERSHIP CHAPTER REPORTING

MEMBERS > Actions > Add/Delete Members

Test Alumnae Chapter

Overview Selection **Additional info** Validation Receipt

PREVIOUS Step: Validation CONTINUE
(Additional info) (Receipt)

Please verify that all of the information below is correct and then enter your electronic signature and date at the bottom of the page. **If you have already entered membership status changes and these are not showing on your Membership Roster or Remittance Report, please wait 10 minutes before making the changes again.**

First Name	Last Name	Maiden Name	Affiliated University	Action	Additional Information	Amount
Brooke	Jacobson	Jacobson	University of Wisconsin - Milwaukee	Add member	Effective Date: 4/16/2023	\$0.00
Total Amount: \$0.00						

I affirm that the actions I completed are correct and abide by Gamma Phi Beta policies and procedures.

Carrie Loveless 4/18/2023
Carrie Loveless 4/18/2023

PREVIOUS Step: Validation CONTINUE
(Additional info) (Receipt)

11. A successful submission will result in the receipt summary being visible.

DASHBOARD INTERNATIONAL MEMBERS LEADERSHIP CHAPTER REPORTING

MEMBERS > Actions > Add/Delete Members

Test Alumnae Chapter

Overview Selection Additional info Validation **Receipt**

Step: Receipt GO TO DASHBOARD

Thank you for submitting the following information. Your submission has been received. To complete your submission of international alumnae dues, you must print the Remittance Report for International Dues Payment under Members>Reports to mail in with your check. It is recommended that you print this page for your chapter records. The dollar amount on this receipt does not reflect the amount of alumnae dues reported. **If you have already entered membership status changes and these are not showing on your Membership Roster or Remittance Report, please wait 10 minutes before making the changes again.**

PRINT

Summary

Batch ID	230418I-000-57
Created By	LOVELESS, CARRIE
Date	4/18/2023
Trans Count	1
Total Amount	\$0.00

Transaction Number	Request	Affected Member	Attachment Count	Effective Date	Amount
689653	Add member	Brooke Suzanne Jacobson	0	4/16/2023	\$0.00
Total Amount: \$0.00					

Step: Receipt GO TO DASHBOARD



- Allow 10-15 minutes for the database to process the update. To confirm the member has been added to the chapter's roster, navigate to MEMBERS > Reports > Member Roster.

Member Roster
Test Alumnae Chapter

Printed: 4/18/2023

Member Type	Address Status	Member Number	First Name	Informal	Maiden Name	Last Name	Current Year Dues Paid	Paid through chapter or individually to IH	Address 1	Address 2	City	State	Z
ALUM		075-0477	Brooke	Brooke	Jacobson	Jacobson	7/31/2099	Life Loyal	730 Stinson Blvd Unit 503		Minneapolis	MN	5
ALUM		120-1384	Abigaile	Abbey	Kootsillas	Kootsillas		Has not paid dues	14965 Overbrook Dr	Apt 203	Southgate	MI	4
ALUM		043-0409	Anne Louise	Anne	Layton	Layton	7/31/2099	Life Loyal	88 Gothic Ave		Toronto	ON	lv

The following instructions are for removing a member from your chapter's roster. To review steps for adding a member to your chapter's roster, see Step 5.

- Select the 2 option for any member on your roster you would like to remove. After all members who need to be removed have the 2 option selected by their name, click the green Continue button.

ADD MEMBER TO LIST Show Applicable Members

First Name	Last Name	Maiden Name	Affiliated University	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1) Add member 2) Remove member
Brooke	Jacobson	Jacobson	University of Wisconsin - Milwaukee	<input type="radio"/> No Action <input type="radio"/> 1 <input checked="" type="radio"/> 2
Abigaile	Kootsillas	Kootsillas	Oakland University	<input checked="" type="radio"/> No Action <input type="radio"/> 1 <input type="radio"/> 2
Anne Louise	Layton	Layton	McGill University	<input checked="" type="radio"/> No Action <input type="radio"/> 1 <input type="radio"/> 2
3 members				

PREVIOUS
(Overview)
Step: Selection
CONTINUE
(Additional info)



14. Select the date that should be listed for the end of the membership. Click the green Continue button to proceed.

DASHBOARD INTERNATIONAL MEMBERS LEADERSHIP CHAPTER REPORTING

MEMBERS > Actions > Add/Delete Members

Test Alumnae Chapter

Overview Selection **Additional info** Validation Receipt

PREVIOUS (Selection) Step: Additional info CONTINUE (Validation)

Provide the requested information specific to the membership action you selected. Note that the effective date defaults to today. This membership change will be part of the membership history for this member, so please report an accurate date. **If you have already entered membership status changes and these are not showing on your Membership Roster or Remittance Report, please wait 10 minutes before making the changes again.**

First Name	Last Name	Maiden Name	Affiliated University	Action	Additional Information
Brooke	Jacobson	Jacobson	University of Wisconsin - Milwaukee	Remove member	* Effective Date: 4/16/2023 <input type="text"/> <input type="button" value="Apply To All"/>

PREVIOUS (Selection) Step: Additional info CONTINUE (Validation)

15. Validate all changes by typing your first name, last name and date in the pre-fill fields. Click the green Continue button to proceed.

DASHBOARD INTERNATIONAL MEMBERS LEADERSHIP CHAPTER REPORTING

MEMBERS > Actions > Add/Delete Members

Test Alumnae Chapter

Overview Selection Additional info **Validation** Receipt

PREVIOUS (Additional Info) Step: Validation CONTINUE (Receipt)

Please verify that all of the information below is correct and then enter your electronic signature and date at the bottom of the page. **If you have already entered membership status changes and these are not showing on your Membership Roster or Remittance Report, please wait 10 minutes before making the changes again.**

First Name	Last Name	Maiden Name	Affiliated University	Action	Additional Information	Amount
Brooke	Jacobson	Jacobson	University of Wisconsin - Milwaukee	Remove member	Effective Date: 4/16/2023	\$0.00
Total Amount: \$0.00						

I affirm that the actions I completed are correct and abide by Gamma Phi Beta policies and procedures.

Carrie Loveless 4/18/2023
 Carrie Loveless 4/18/2023

PREVIOUS (Additional Info) Step: Validation CONTINUE (Receipt)



16. A successful submission will result in the receipt summary being visible.

DASHBOARD INTERNATIONAL MEMBERS LEADERSHIP CHAPTER REPORTING

MEMBERS > Actions > Add/Delete Members

Test Alumnae Chapter

Overview Selection Additional info Validation Receipt

Step: Receipt [GO TO DASHBOARD](#)

Thank you for submitting the following information. Your submission has been received. To complete your submission of international alumnae dues, you must print the Remittance Report for International Dues Payment under Members>Reports to mail in with your check. It is recommended that you print this page for your chapter records. The dollar amount on this receipt does not reflect the amount of alumnae dues reported. **If you have already entered membership status changes and these are not showing on your Membership Roster or Remittance Report, please wait 10 minutes before making the changes again.**

[PRINT](#)

Summary

Batch ID	230418I-000-01
Created By	LOVELESS, CARRIE
Date	4/18/2023
Trans Count	1
Total Amount	\$0.00

Transaction Number	Request	Affected Member	Attachment Count	Effective Date	Amount
689656	Remove member	Brooke Suzanne Jacobson	0	4/16/2023	\$0.00
					Total Amount: \$0.00

Step: Receipt [GO TO DASHBOARD](#)

17. Allow 10-15 minutes for the database to process the update. To confirm the member has been remove from the chapter's roster, navigate to MEMBERS > Reports > Member Roster.

Member Roster

Test Alumnae Chapter

Printed: 4/18/2023

Member Type	Address Status	Member Number	First Name	Informal	Maiden Name	Last Name	Current Year Dues Paid	Paid through chapter or individually to IH	Address 1	Address 2	City	State	Z
ALUM		120-1384	Abigaille	Abbey	Kootsillas	Kootsillas		Has not paid dues	14965 Overbrook Dr	Apt 203	Southgate	MI	4
ALUM		043-0409	Anne Louise	Anne	Layton	Layton	7/31/2099	Life Loyal	88 Gothic Ave		Toronto	ON	IV

