

## Updating the Leadership Roster

This is this Action used to:

- Update the names of members serving in a leadership role for the chapter.

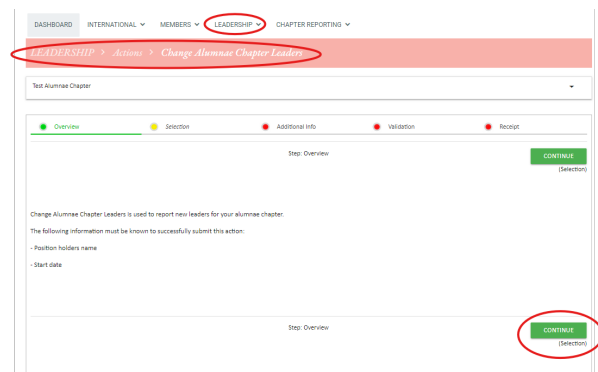
This guide illustrates how to complete this action in Beta Base using the Leadership > Actions > Change Alumnae Chapter Leadership.

### Updating the Alumnae Chapter Leadership Roster

Alumnae chapters should update their leadership roster as new officers are elected to serve. Doing so ensures they will receive appropriate communications from the Sorority. It will also give incoming officers access to Beta Base.

To do this, outgoing alumnae chapter officers must:

1. Go to Leadership > Actions > Change Alumnae Chapter Leadership. Once on the Overview page, click Continue. This will take you to the Selection page.



2. Select which position(s) you would like to update by selecting the check box next to the position(s). Select Continue.

Select	Position	Start Date	Thru Date
<input type="checkbox"/>	Alumnae Chapter Co-President	VACANT POSITION	07/14/2019
<input type="checkbox"/>	Alumnae Chapter President	Susan	01/30/2022
<input type="checkbox"/>	Alumnae Chapter Vice President	Audrey	07/14/2019
<input type="checkbox"/>	Alumnae Chapter Treasurer	Sharon	01/01/2024
<input type="checkbox"/>	Alumnae Chapter Panhellenic Delegate	Julie	08/01/2023
<input type="checkbox"/>	Collegiate Relations Chairwoman	VACANT POSITION	08/01/2023
<input type="checkbox"/>	Membership Chairwoman	VACANT POSITION	08/01/2022
<input type="checkbox"/>	Philanthropy Chairwoman		
<input type="checkbox"/>	Programming Chairwoman	VACANT POSITION	02/17/2021
<input type="checkbox"/>	Technology Chairwoman	VACANT POSITION	08/01/2022

3. Click “Find a Member” next to the position you are updating.

LEADERSHIP > Actions > Change Alumnae Chapter Leaders

Test Alumnae Chapter

● Overview
● Selection
● Additional Info
● Validation
● Receipt

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

Select the member you are appointing to the position using the contact finder. If there is more than one member with the same name, make sure to note the member's maiden name and university to ensure you are adding the correct individual. You will be asked to add the member's effective date (date she begins in that position). Note that the prior officers will be marked as ending their service one-day prior to the effective date. If you have a vacant position, select vacant from the selection list.

Position	New Officer	Additional Information
Alumnae Chapter Co-President	Find a Member	

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

4. Search for the member. Once the results pull, check the box next to the appropriate person. This will add the person's name to the Selection page. If the position will be vacant (not filled), select “Vacant Position”.

**Tip:** You can search for members by typing in the first few letters of their first and last names.

First Name

Last Name

Maiden Name

SEARCH

Vacant Position

No records to display.

5. Add the Effective Date. If you choose a future date, the member's name will not be visible on the roster until the date chosen, and they will not have access to Beta Base until that date. Select Continue.

**Tip:** You may use Apply To All if all dates should reflect the same date.

Position	New Officer	Additional Information
Alumnae Chapter Co-President	Vacant Position <input type="text"/>	* Effective Date: <input type="text"/> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">*</span> required Apply To All

PREVIOUS  
(Selection)

CONTINUE  
(Validation)

6. Verify the information entered is correct on the Validation page. Type your name and date at the bottom to confirm your actions. Select Continue.

● Overview
● Selection
● Additional Info
● Validation
● Receipt

PREVIOUS  
(Additional Info)

Step: Validation

CONTINUE  
(Receipt)

Confirm your changes. If you have made any mistakes, use the Back button at the bottom of the screen to return to the prior page.

Position	New Officer	Start Date	Additional Information
Membership Chairwoman	Natalie Pearson	11/30/2020	

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

Natalie	Pearson	11/28/2020
Natalie	Pearson	11/28/2020

7. You will then see a receipt for your actions. The green progress bar at the top of the report will extend through the Receipt step, and Receipt will have a green dot next to it. Additions may take up to 10 minutes to appear on the report.

● Overview
● Selection
● Additional info
● Validation
● Receipt

PREVIOUS  
(Additional Info)

Step: Receipt

GO TO TASK CENTER

View and print your receipt that shows your requested changes have been submitted. Officer changes will post immediately when you submit the form.

**Summary**

Batch ID	201128-000-6
Created By	PEARSON, NATALIE
Date	11/28/2020
Trans Count	1

Transaction Number	Request	New Officer	Effective Date
572088		Natalie Pearson	11/30/2020



