



GUIDE TO COMPLETING THE CHAPTER GREATNESS CHECKLIST



PHI DELTA THETA
Become the greatest version of yourself

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HOW DOES THIS GUIDE HELP ME?

This guide provides a step-by-step process for completing each report and reporting item found on the [Chapter Greatness Checklist](#). If you have any questions about the items on the Chapter Greatness Checklist, either contact your leadership consultant or Director of Chapter Services Dylan Berg at dberg@phideltatheta.org.

BENEFITS OF ON-TIME REPORTING

Completing all six reports and the other listed items on time will result in the chapter being awarded the **Excellence in GHQ Reporting Award**. Winning awards can *directly reduce* the chapter's insurance bill.

Submitting event planning forms and upcoming social events will save the chapter up to five percent on its insurance bill.

Up-to-date roster information will result in members and officers receiving the right types of communication and support. Out-of-date rosters can create issues with Bond number reporting, membership billing, and insurance.

On-time accurate reporting from the chapter will help the chapter advisory board, province president, and General Headquarters better support the chapter in a timely and intentional way throughout the year.

To receive the Excellence in GHQ Reporting Award at the end of the year, the chapter must complete the following items on time: 1) all six reports, 2) conference registrations, 3) insurance bill paid, 4) \$0 GHQ balance, 5) up-to-date membership roster, 6) risk management affidavits, and 7) six event planning forms.

BEFORE GETTING STARTED

1. Obtain a copy of the [Chapter Greatness Checklist](#).
2. Conference delegates should receive a copy of this checklist at every Phi Delt conference (PLC, Kleberg), but extra copies can be found on the Fraternity's website. To find it, visit www.phideltatheta.org, go to the Members drop-down menu and select *Chapter Greatness Checklist* under *Resources*.
3. Create an account on [MyPhiDeltaTheta](#).
4. On the Phi Delt Theta website, there is a MYPDT link at the top of the page to register or sign in. Many reports require access to the VAULT application of myPhiDeltaTheta. **The outgoing officer must give you access to this area during transitions, so work with him to ensure that he completes this task before you begin.**
5. Plan ahead and leave plenty of time to complete all the reports.
6. Do not start a report due May 1 on May 1 or the day before. You should be reviewing each report before the due date and checking to see what has and has not been completed before submitting the report. Also, take note of items that need to be **postmarked** or **received by** the date on the checklist.

BEGINNING OF SCHOOL REPORT: AUGUST 31

The Beginning of School Report focuses on items that will help the chapter start the year on the right foot. Below is how you complete each item within this report.

CHAPTER STRATEGIC PLAN

You will be asked to upload your chapter's strategic plan (goals) for the upcoming school year. Uploading this will help your chapter advisory board, province president, and General Headquarters best support your chapter and its needs.

UPCOMING SOCIAL EVENTS

This portion of the report should list all upcoming chapter events including socials, brotherhood events, community service and philanthropy events, or anything else that would require the chapter to fill out an Event Planning Form.

The social calendar should list dates, activities, and locations for the coming semester. If the dates for events are not set in stone, set tentative ones and indicate that they could change on the calendar.

Remember that Event Planning Forms must be sent in thirty (30) days in advance to ensure they are reviewed. The submission of a minimum of six event planning forms is one of the requirements to receive the Excellence in GHQ Reporting Award.

RECRUITMENT GOALS

This question will ask the chapter to identify its total new member goal for the fall and to provide an update on how close the chapter is to meeting that goal. Providing this information will help your advisers and the General Headquarters provide resources and support in the chapter's recruitment efforts.

PHIKEIA AND INITIATE REPORTING

This is completed within the Vault tab on MyPhiDeltaTheta. Reporting new Phikeias and initiates in a timely manner is *extremely* important for accurate membership records and billing. Reporting new Phikeias and initiates to the General Headquarters ensures that a record of each member with his contact information exists. Without this information, it would be impossible to track members' Bond numbers, have them register for conferences, or receive support, resources, publications, and general information from the Fraternity.

Instructions for reporting Phikeias and initiates through **Vault** are as follows:

1. Log in to [MyPhiDeltaTheta](#), Click on *Vault* on the left side

HOW TO REPORT PHIKEIAS

1. Click on *Chapter*
2. Click on *Add New Member*
3. Click on *Add Member*
4. Fill out all required fields
5. Click on *Save* and *Continue*
6. An additional screen will appear. This is a review screen. Click *Enter*, then click On
 - a. **A "pop up box" will appear that asks if the chapter wants the men listed in the order they were inputted. If the chapter clicks on YES, Vault will automatically change the men to alphabetic order and assign the bond numbers as such. The chapter officer must click on Save numbers as assigned, this will keep the bond numbers in the order they were assigned.**

7. Click *Add Member* to bring up a blank screen for the next Phikeia
 - a. **All Phikeias will then receive an email from MyPhiDeltaTheta/Omegafi asking them to complete their registration and update their profile. All Phikeias will receive at least three emails from Omegafi asking them to complete their registration.**

HOW TO REPORT INITIATES

1. Click on *Chapter*
2. Click on *Member Initiation Reporting*
3. Click on *Create Initiation Report*
4. Complete report information on first line (report term, report year, initiation date)
5. Click individually on each Phikeia and fill out the information using this format:
Date initiated: 00/00/0000
Bond # (roll number): 01776 (enter as a five-digit number)
6. Once you have double-checked that all information is correct, click *Save* and *Continue*

HOLD AND RELEASE

If you submit an incomplete roster as an initiation report, the option to **Hold and Release** will pop up. Select which Phikeia you want to hold to initiate at a later time. **Remember you are NOT allowed to skip or hold Bond numbers.** If you release a Phikeia, it is the same as depledging him. Click *Save* and *Continue*. This will bring up the final step where you will *Save and Submit to Headquarters for approval* when you have double checked that all information is accurate.

MEMBERSHIP ROSTER UPDATES

It is important to know that chapter officers must make officer changes (taking an individual out of office) before changing an individual's member status. The chapter **DOES NOT** have the ability to take an individual out of office if his status has been changed to alumni, inactive (separated/suspended), or resigned. The chapter will have to contact Accounts Receivable Specialist Debbie Smith at debbie@phideltatheta.org at GHQ to take care of this.

HOW TO CHANGE GRADUATING MEMBERS TO ALUMNI STATUS

To change an individual's member status to alumni, log-in to *Vault* and click on *Chapter*. This will show a drop down of all the things that can be updated from this tab. Choose *Update Member Status*. OmegaFi automatically filters to Phikeia. Change filter to undergraduate status. This will bring up all undergraduates in the chapter alphabetically.

1. Change the member status reason *Alumnus-Graduate*. Next, click on the individuals' names that will coincide with that option.
 - a. Insert the date of graduation (or date that the individual has left school), and then click on *Update Member Status* (bottom right-hand side). Then repeat the process if necessary with another option.
2. **For individuals who have left school/transferred without graduating** they can only be listed as an alumnus through the submission of a left school/transferred form in the *Forms* section of **MyPhiDeltaTheta**. Left school/transferred can be anyone who has left the chapter's school that will return. This should only be done if the member is up-to-date on his local dues.

HOW TO CHANGE MEMBERS TO STUDY ABROAD STATUS

If a member is studying abroad, the *Study Abroad Roster Update Form* must be completed within the *Forms* section of **MyPhiDeltaTheta** for it to be properly reflected on your chapter's roster.

HOW TO REPORT A SEPARATED OR SUSPENDED MEMBER

Login into [MyPhiDeltaTheta](#) and click *Forms*—on the left side of the screen, you will be given the option to then click *Forms* or *Reports*. Choose *Forms*, then *Separation/Suspension*. Answer all questions completely and click *Submit*. The form will be sent directly to General Headquarters. If any questions arise, a member from the General Headquarters will reach out to you.

MEMBERSHIP RESIGNATIONS

The individual is resigning his membership to Phi Delta Theta. The individual must submit a letter of resignation to the General Headquarters to be voted on at the next General Council meeting. These letters should be sent to the Director of Chapter Services Dylan Berg at dberg@phideltatheta.org. No resignation is processed unless it is provided to the General Headquarters for General Council consideration.

CHAPTER MAILING ADDRESS

If you click *yes* on the report to changing the chapter's mailing address, the report will ask for the new address. This will ensure the chapter receives any materials from the General Headquarters at the correct address.

PROVINCE PRESIDENT SUPPORT

The province president's role is to support his chapters. Here you'll be asked how the chapter's province president can best assist the chapter in the coming months. General Headquarters will provide these responses to each province president.

FALL REPORT: OCTOBER 1

The Fall Report focuses on items that most chapters are working through at this time of year. Below is how you complete each item within this report.

BIGGEST SUCCESSES/CHALLENGES

Does the chapter have good news to share with the Fraternity? Here is an easy place to share that!

Does the chapter, or its leaders, have something it could use assistance or guidance on from advisers or General Headquarters? If so, place that here!

UPCOMING SOCIAL EVENTS

This portion of the report should list all upcoming chapter events including socials, brotherhood events, community service and philanthropy events, or anything else that would require the chapter to fill out an Event Planning Form.

The social calendar should list dates, activities, and locations for the coming semester. If the dates for events are not set in stone, set tentative ones and indicate that they could change on the calendar.

Remember that Event Planning Forms must be sent in thirty (30) days in advance to ensure they are reviewed. The submission of a minimum of six event planning forms is one of the requirements to receive the Excellence in GHQ Reporting Award.

PHILANTHROPY DOLLARS RAISED

This portion of the report will ask if the chapter has raised any money for a specific cause and how much it has raised. Reporting philanthropic donations will also help the General Headquarters share the impact each chapter is having in their local communities and the world.

OFFICER ELECTION DATE

This portion of the report will ask the chapter to identify what date it will hold elections. This information will help the General Headquarters know when officer changes can be expected within MyPhiDeltaTheta.

PHIKEIA AND INITIATE REPORTING

This is completed within the Vault tab on MyPhiDeltaTheta. Reporting new Phikeias and initiates in a timely manner is *extremely* important for accurate membership records and billing. Reporting new Phikeias and initiates to the General Headquarters ensures that a record of each member with his contact information exists. Without this information, it would be impossible to track members' Bond numbers, have them register for conferences, or receive support, resources, publications, and general information from the Fraternity.

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1. Click on *Chapter*
2. Click on *Add New Member*
3. Click on *Add Member*
4. Fill out all required fields
5. Click on *Save* and *Continue*
6. An additional screen will appear. This is a review screen. Click *Enter*, then click *On*

- a. A “pop up box” will appear that asks if the chapter wants the men listed in the order they were inputted. If the chapter clicks on YES, Vault will automatically change the men to alphabetic order and assign the bond numbers as such. The chapter officer must click on Save numbers as assigned, this will keep the bond numbers in the order they were assigned.
7. Click Add Member to bring up a blank screen for the next Phikeia
 - a. All Phikeias will then receive an email from MyPhiDeltaTheta/Omegafi asking them to complete their registration and update their profile. All Phikeias will receive at least three emails from Omegafi asking them to complete their registration.

HOW TO REPORT INITIATES

1. Click on Chapter
2. Click on Member Initiation Reporting
3. Click on Create Initiation Report
4. Complete report information on first line (report term, report year, initiation date)
5. Click individually on each Phikeia and fill out the information using this format:
Date initiated: 00/00/0000
Bond # (roll number): 01776 (enter as a five-digit number)
6. Once you have double-checked that all information is correct, click Save and Continue

HOLD AND RELEASE

If you submit an incomplete roster as an initiation report, the option to **Hold and Release** will pop up. Select which Phikeia you want to hold to initiate at a later time. **Remember you are NOT allowed to skip or hold Bond numbers.** If you release a Phikeia, it is the same as depledging him. Click Save and Continue. This will bring up the final step where you will Save and Submit to Headquarters for approval when you have double checked that all information is accurate.

MEMBERSHIP ROSTER UPDATES

It is important to know that chapter officers must make officer changes (taking an individual out of office) before changing an individual's member status. The chapter **DOES NOT** have the ability to take an individual out of office if his status has been changed to alumni, inactive (separated/suspended), or resigned. The chapter will have to contact Accounts Receivable Specialist Debbie Smith at debbie@phideltatheta.org at GHQ to take care of this.

HOW TO CHANGE GRADUATING MEMBERS TO ALUMNI STATUS

To change an individual's member status to alumni, log-in to Vault and click on Chapter. This will show a drop down of all the things that can be updated from this tab. Choose Update Member Status. OmegaFi automatically filters to Phikeia. Change filter to undergraduate status. This will bring up all undergraduates in the chapter alphabetically.

1. Change the member status reason *Alumnus-Graduate*. Next, click on the individuals' names that will coincide with that option.
 - a. Insert the date of graduation (or date that the individual has left school), and then click on Update Member Status (bottom right-hand side). Then repeat the process if necessary with another option.
2. **For individuals who have left school/transferred without graduating** they can only be listed as an alumnus through the submission of a left school/transferred form in the Forms section of MyPhiDeltaTheta. Left school/transferred can be anyone who has left the chapter's school that will return. This should only be done if the member is up-to-date on his local dues.

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HOW TO REPORT A SEPARATED OR SUSPENDED MEMBER

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MEMBERSHIP RESIGNATIONS

The individual is resigning his membership to Phi Delta Theta. The individual must submit a letter of resignation to the General Headquarters to be voted on at the next General Council meeting. These letters should be sent to the Director of Chapter Services Dylan Berg at dberg@phideltatheta.org. No resignation is processed unless it is provided to the General Headquarters for General Council consideration.

INSURANCE PAYMENT DUE

The chapter's annual risk management assessment insurance bill is due on October 1. Payment by October 1 of this invoice is a requirement for the GHQ Reporting Award.

Payment must be received by October 1

US Chapters: Mail directly to JRF & Co

Canadian Chapters: Mail to GHQ

Every chapter of Phi Delta Theta is provided with liability insurance from James R. Favor & Company to protect the individual members of the chapter. Provided that chapters are following the Risk Management Policies of the Fraternity and the law, any incident that happens in the chapter house or during a registered function, where a lawsuit is filed, will be covered by the policy. To learn more about risk management or liability insurance, please visit the Phi Delta theta website or contact Insurance and Safety Coordinator Melanie Clayton at melanie@phideltatheta.org.

US chapters and colonies are invoiced by James R. Favor & Co., please send the payment to:
JRF & Co.
14466 East Evans Ave.
Aurora, CO 80014-1409

Canadian chapters and colonies are invoiced by GHQ, please send the payment to:
Phi Delta Theta General Headquarters
2 S. Campus Ave
Oxford, OH 45056

Both US and Canadian chapters and colonies have the ability to pay online by following the instructions on the invoice.

If mailing: note that the insurance premium must be **received by** October 1. Please take that fact into account and send the payment earlier rather than later to ensure it arrives on time.

RISK MANAGEMENT AFFIDAVIT

The Risk Management Affidavit is the member and chapter's legal agreement that they understand the risk management policies of the Fraternity. This form must be completed every semester in the Fall and Winter Reports. **Failing to submit the report will increase the chapter's insurance bill for the next year.** The form must be signed by every member of the chapter. Chapter officers must sign in the appropriate area, including the chapter advisory board chairman.

The **Risk Management Affidavit** is available for download on the Fraternity's website in the Members tab dropdown, Resources>Chapter Officers>Risk Management/Social.

The completed form can be directly uploaded within the Fall Report when prompted or sent in beforehand via email to Insurance and Safety Coordinator Melanie Clayton at melanie@phideltatheta.org. Submission should be a photocopy of the completed document.

HOUSE CORPORATION SUPPORT

Here you'll be asked, if applicable, how the chapter's house corporation can best assist the chapter in the coming months. As follow up is requested, the General Headquarters will provide these responses to each house corporation.

MOST ENGAGED/IMPRESSIVE SENIORS

This portion of the report will ask you to reflect and share the names of your most engaged/impressive senior members. Knowing who these individuals are is important for the chapter and the general Fraternity. The General Headquarters will use these names to promote opportunities that arise for their further engagement.

HOLIDAY REPORT: DECEMBER 1

The Holiday Report focuses on items that most chapters are working through during the first semester/quarter of the school year. Below is how you complete each item within this report.

BIGGEST SUCCESSES/CHALLENGES

Does the chapter have good news to share with the Fraternity? Here is an easy place to share that!

Does the chapter, or its leaders, have something it could use assistance or guidance on from advisers or General Headquarters? If so, place that here!

UPCOMING SOCIAL EVENTS

This portion of the report should list all upcoming chapter events including socials, brotherhood events, community service and philanthropy events, or anything else that would require the chapter to fill out an Event Planning Form.

The social calendar should list dates, activities, and locations for the coming semester. If the dates for events are not set in stone, set tentative ones and indicate that they could change on the calendar.

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PHILANTHROPY DOLLARS RAISED

This portion of the report will ask if the chapter has raised any money for a specific cause since the last report and how much it has raised. Reporting philanthropic donations will also help the General Headquarters share the impact each chapter is having in their local communities and the world.

PRESIDENTS LEADERSHIP CONFERENCE REGISTRATION

This report is the due date for each chapter to have completed its delegate registration for the upcoming Presidents Leadership Conference. The timely completion of this item is a requirement of the **Excellence in GHQ Reporting Award**.

Registration is available online at www.phideltatheta.org through the MyPhiDeltaTheta portal. The conference is in January, but all attendees must register by December 1 in order for GHQ to effectively plan the conference. Try to schedule your elections before the December 1 deadline so the president-elect can attend. If your elections are later in December, please contact Database and Events Coordinator Renée Crist Lefter at renee@phideltatheta.org and ask for an extension.

PHIKEIA AND INITIATE REPORTING

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MOST ENGAGED/IMPRESSIVE SOPHOMORES

This portion of the report will ask you to reflect and share the names of your most engaged/impressive sophomore members. Knowing who these individuals are is important for the chapter and the general Fraternity. The General Headquarters will use these names to promote opportunities that arise for their further engagement.

RECRUITMENT GOALS

This question will ask the chapter to identify its total new member goal for the winter/spring and to provide an update on how close the chapter is to meeting that goal. Providing this information will help your advisers and the General Headquarters provide resources and support in the chapter's recruitment efforts.

NEW MEMBER RETENTION

Here you'll be asked to share how well your chapter retained its most recent new members. General Headquarters and volunteers are equipped to help the chapter with strategies to keep new members engaged and retained throughout membership.

CHAPTER ADVISORY BOARD SUPPORT

Here you'll be asked how the chapter's advisory board can best assist the chapter in the coming months. As follow up is requested General Headquarters will provide these responses to each chapter advisory board and province president.

WINTER REPORT: JANUARY 25

The Winter Report focuses on items that most chapters are working through as they start the second half of the school year. Below is how you complete each item within this report.

IMPORTANT MEMBERSHIP DUES INFORMATION

Every chapter of Phi Delta Theta must pay dues to the General Headquarters once per year. In order to charge the correct amount, GHQ must have an accurate number of members on the roster. Member dues are assessed on the number of members on the roster on January 31. For information on how to update your roster see the Phikeia, Initiate, and Roster Update portions of this report guide.

BIGGEST SUCCESSES/CHALLENGES:

Does the chapter have good news to share with the Fraternity? Here is an easy place to share that!

Does the chapter, or its leaders, have something it could use assistance or guidance on from advisers or General Headquarters? If so, place that here!

UPCOMING SOCIAL EVENTS

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Instructions for reporting Phikeias and initiates through **Vault** are as follows:

1. Log in to [MyPhiDeltaTheta](#), Click on *Vault* on the left side

HOW TO REPORT PHIKEIAS

1. Click on *Chapter*
2. Click on *Add New Member*
3. Click on *Add Member*
4. Fill out all required fields
5. Click on *Save and Continue*
6. An additional screen will appear. This is a review screen. Click *Enter*, then click On
 - a. **A "pop up box" will appear that asks if the chapter wants the men listed in the order they were inputted. If the chapter clicks on YES, Vault will automatically change the men to alphabetic order and assign the bond numbers as such. The chapter officer must click on Save numbers as assigned, this will keep the bond numbers in the order they were assigned.**
7. Click *Add Member* to bring up a blank screen for the next Phikeia
 - a. **All Phikeias will then receive an email from MyPhiDeltaTheta/Omegafi asking them to complete their registration and update their profile. All Phikeias will receive at least three emails from Omegafi asking them to complete their registration.**

HOW TO REPORT INITIATES

1. Click on *Chapter*
2. Click on *Member Initiation Reporting*
3. Click on *Create Initiation Report*
4. Complete report information on first line (report term, report year, initiation date)
5. Click individually on each Phikeia and fill out the information using this format:
Date initiated: 00/00/0000
Bond # (roll number): 01776 (enter as a five-digit number)
6. Once you have double-checked that all information is correct, click *Save and Continue*

HOLD AND RELEASE

If you submit an incomplete roster as an initiation report, the option to **Hold and Release** will pop up. Select which Phikeia you want to hold to initiate at a later time. **Remember you are NOT allowed to skip or hold Bond numbers.** If you release a Phikeia, it is the same as depledging him. Click *Save and Continue*. This will bring up the final step where you will *Save and Submit to Headquarters for approval* when you have double checked that all information is accurate.

MEMBERSHIP ROSTER UPDATES

It is important to know that chapter officers must make officer changes (taking an individual out of office) before changing an individual's member status. The chapter **DOES NOT** have the ability to take an individual out of office if his status has been changed to alumni, inactive (separated/suspended), or resigned. The chapter will have to contact Accounts Receivable Specialist Debbie Smith at debbie@phideltatheta.org at GHQ to take care of this.

HOW TO CHANGE GRADUATING MEMBERS TO ALUMNI STATUS

To change an individual's member status to alumni, log-in to *Vault* and click on *Chapter*. This will show a drop down of all the things that can be updated from this tab. Choose *Update Member Status*. OmegaFi automatically filters to Phikeia. Change filter to undergraduate status. This will bring up all undergraduates in the chapter alphabetically.

1. Change the member status reason *Alumnus-Graduate*. Next, click on the individuals' names that will coincide with that option.
 - a. Insert the date of graduation (or date that the individual has left school), and then click on *Update Member Status* (bottom right-hand side). Then repeat the process if necessary with another option.
2. **For individuals who have left school/transferred without graduating** they can only be listed as an alumnus through the submission of a left school/transferred form in the *Forms* section of **MyPhiDeltaTheta**. Left school/transferred can be anyone who has left the chapter's school that will return. This should only be done if the member is up-to-date on his local dues.

HOW TO CHANGE MEMBERS TO STUDY ABROAD STATUS

If a member is studying abroad, the *Study Abroad Roster Update Form* must be completed within the *Forms* section of **MyPhiDeltaTheta** for it to be properly reflected on your chapter's roster.

HOW TO REPORT A SEPARATED OR SUSPENDED MEMBER

Login into **MyPhiDeltaTheta** and click *Forms*—on the left side of the screen, you will be given the option to then click *Forms* or *Reports*. Choose *Forms*, then *Separation/Suspension*. Answer all questions completely and click *Submit*. The form will be sent directly to General Headquarters. If any questions arise, a member from the General Headquarters will reach out to you.

MEMBERSHIP RESIGNATIONS

The individual is resigning his membership to Phi Delta Theta. The individual must submit a letter of resignation to the General Headquarters to be voted on at the next General Council meeting. These letters should be sent to the Director of Chapter Services Dylan Berg at dberg@phideltatheta.org. No resignation is processed unless it is provided to the General Headquarters for General Council consideration.

CHAPTER MAILING ADDRESS

If you click yes on the report to changing the chapter's mailing address, the report will ask for the new address. This will ensure the chapter receives any materials from the General Headquarters at the correct address.

MOST ENGAGED/IMPRESSIVE JUNIORS

This portion of the report will ask you to reflect and share the names of your most engaged/impressive junior members. Knowing who these individuals are is important for the chapter and the general Fraternity. The General Headquarters will use these names to promote opportunities that arise for their further engagement. Encourage these members to apply for the Peer Mentor program at the Kleberg Emerging Leaders Institute!

LEADERSHIP CONSULTANT SUPPORT

Here you'll be asked how your designated leadership consultant can best assist the chapter in the coming months. If follow up is requested, your leadership consultant will reach out directly. They are here to help you and your chapter!

SPRING REPORT: MARCH 1

The Spring Report focuses on items that most chapters are working through as they reach the half-way point of the spring term. Below is how you complete each item within this report.

BIGGEST SUCCESSES/CHALLENGES:

Does the chapter have good news to share with the Fraternity? Here is an easy place to share that!

Does the chapter, or its leaders, have something it could use assistance or guidance on from advisers or General Headquarters? If so, place that here!

UPCOMING SOCIAL EVENTS

This portion of the report should list all upcoming chapter events including socials, brotherhood events, community service and philanthropy events, or anything else that would require the chapter to fill out an Event Planning Form.

The social calendar should list dates, activities, and locations for the coming semester. If the dates for events are not set in stone, set tentative ones and indicate that they could change on the calendar.

Remember that Event Planning Forms must be sent in thirty (30) days in advance to ensure they are reviewed. The submission of a minimum of six event planning forms is one of the requirements to receive the Excellence in GHQ Reporting Award.

PHILANTHROPY DOLLARS RAISED

This portion of the report will ask if the chapter has raised any money for a specific cause since the last report and how much it has raised. Reporting philanthropic donations will also help the General Headquarters share the impact each chapter is having in their local communities and the world.

PHIKEIA AND INITIATE REPORTING

This is completed within the Vault tab on MyPhiDeltaTheta. Reporting new Phikeias and initiates in a timely manner is **extremely** important for accurate membership records and billing. Reporting new Phikeias and initiates to the General Headquarters ensures that a record of each member with his contact information exists. Without this information, it would be impossible to track members' Bond numbers, have them register for conferences, or receive support, resources, publications, and general information from the Fraternity.

Instructions for reporting Phikeias and initiates through **Vault** are as follows:

1. Log in to [MyPhiDeltaTheta](#), Click on *Vault* on the left side

HOW TO REPORT PHIKEIAS

1. Click on *Chapter*
2. Click on *Add New Member*
3. Click on *Add Member*
4. Fill out all required fields
5. Click on *Save* and *Continue*
6. An additional screen will appear. This is a review screen. Click *Enter*, then click On
 - a. **A "pop up box" will appear that asks if the chapter wants the men listed in the order they were inputted. If the chapter clicks on YES, Vault will automatically change the men to alphabetic order and assign the bond numbers as such. The chapter officer must click on Save numbers as assigned, this will keep the bond numbers in the order they were assigned.**

7. Click *Add Member* to bring up a blank screen for the next Phikeia
 - a. **All Phikeias will then receive an email from MyPhiDeltaTheta/Omegafi asking them to complete their registration and update their profile. All Phikeias will receive at least three emails from Omegafi asking them to complete their registration.**

HOW TO REPORT INITIATES

1. Click on *Chapter*
2. Click on *Member Initiation Reporting*
3. Click on *Create Initiation Report*
4. Complete report information on first line (report term, report year, initiation date)
5. Click individually on each Phikeia and fill out the information using this format:
Date initiated: 00/00/0000
Bond # (roll number): 01776 (enter as a five-digit number)
6. Once you have double-checked that all information is correct, click *Save* and *Continue*

HOLD AND RELEASE

If you submit an incomplete roster as an initiation report, the option to **Hold and Release** will pop up. Select which Phikeia you want to hold to initiate at a later time. **Remember you are NOT allowed to skip or hold Bond numbers.** If you release a Phikeia, it is the same as depledging him. Click *Save* and *Continue*. This will bring up the final step where you will *Save and Submit to Headquarters for approval* when you have double checked that all information is accurate.

MEMBERSHIP ROSTER UPDATES

It is important to know that chapter officers must make officer changes (taking an individual out of office) before changing an individual's member status. The chapter **DOES NOT** have the ability to take an individual out of office if his status has been changed to alumni, inactive (separated/suspended), or resigned. The chapter will have to Accounts Receivable Specialist Debbie Smith at debbie@phideltatheta.org at GHQ to take care of this.

HOW TO CHANGE GRADUATING MEMBERS TO ALUMNI STATUS

To change an individual's member status to alumni, log-in to *Vault* and click on *Chapter*. This will show a drop down of all the things that can be updated from this tab. Choose *Update Member Status*. OmegaFi automatically filters to Phikeia. Change filter to undergraduate status. This will bring up all undergraduates in the chapter alphabetically.

1. Change the member status reason *Alumnus-Graduate*. Next, click on the individuals' names that will coincide with that option.
 - a. Insert the date of graduation (or date that the individual has left school), and then click on *Update Member Status* (bottom right-hand side). Then repeat the process if necessary with another option.
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HOW TO CHANGE MEMBERS TO STUDY ABROAD STATUS

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MEMBERSHIP RESIGNATIONS

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MOST ENGAGED/IMPRESSIVE FRESHMEN

This portion of the report will ask you to reflect and share the names of your most engaged/impressive freshman members. Knowing who these individuals are is important for the chapter and the general Fraternity. The General Headquarters will use these names to promote opportunities that arise for their further engagement. Encourage these members to attend the Kleberg Emerging Leaders Institute!

SUMMER REPORT: APRIL 30

The Summer Report focuses on items that most chapters are working through as they end the second half of the school year. Below is how you complete each item within this report.

BIGGEST SUCCESSES/CHALLENGES:

Does the chapter have good news to share with the Fraternity? Here is an easy place to share that!

Does the chapter, or its leaders, have something it could use assistance or guidance on from advisers or General Headquarters? If so, place that here!

UPCOMING SOCIAL EVENTS

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PHIKEIA AND INITIATE REPORTING

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2. Click on *Add New Member*
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MEMBERSHIP ROSTER UPDATES

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HOW TO CHANGE GRADUATING MEMBERS TO ALUMNI STATUS

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MEMBERSHIP RESIGNATIONS

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ZERO BALANCE WITH GHQ

Each chapter is required to have a zero-dollar balance with General Headquarters by April 30 of each year.

Completion of this item is required to receive the Excellence in GHQ Reporting Award. Chapters with past due balances are communicated with on a periodic basis throughout the school year.

AWARDS PACKET SUBMISSION

Award packets must be submitted by April 30 for the chapter's packet to be graded and considered for awards by General Headquarters. No late packets, i.e. packets submitted after 3:00 a.m. EST on May 1 will be considered.

KLEBERG REGISTRATION DUE

This report is the due date for each chapter to have completed its delegate registration for the upcoming Kleberg Emerging Leaders Institute. The timely completion of this item is a requirement of the Excellence in GHQ Reporting Award.

Kleberg occurs late every summer, but registration must be completed before the end of the spring term. The deadline is May 1 to register your delegates. The costs for the Institute are covered for three (3) delegates and one (1) Phikeia educator, and more may attend for a nominal fee. **Kleberg is mandatory** for all chapters of Phi Delta Theta. **Failure to attend will result in a fine up to \$2,000.00 and other consequences for the chapter.** Registration is available online at www.phideltatheta.org through the [MyPhiDeltaTheta](#) portal. Questions regarding Kleberg registration should be directed to Database and Events Coordinator Renée Crist Lefter Lefter at renee@phideltatheta.org.

Be mindful that Whole Man Scholars participating in the Honors College and Peer Mentor program do not count toward the chapter's mandated four (4) participants.

NEW MEMBER RETENTION

Here you'll be asked to share how well your chapter retained its most recent new members. General Headquarters and volunteers are equipped to help the chapter with strategies to keep new members engaged and retained throughout membership.

GENERAL CONVENTION REGISTRATION

The General Convention of Phi Delta Theta is a celebration of the Fraternity and is the supreme governing body of the organization. General Convention is hosted in a different location during the summer every two years.

Phi Delta Theta is a democratic Fraternity; as such, each chapter has equal representation at the General Convention. Before the General Convention, each chapter must elect one (1) voting delegate to represent their chapter. Registration for the General Convention opens in mid-spring and must be completed by April 1. Each chapter must register a minimum of one delegate. **Failure to attend the General Convention will result in a fine up to \$1000.00 and other consequences for the chapter.** Registration is available online at

www.phideltatheta.org through the [MyPhiDeltaTheta](#) portal. Additional chapter members may attend General Convention for no additional cost, but they are responsible for their own arrangements. Questions regarding General Convention registration should be directed to Database and Events Coordinator Renée Crist Lefter Lefter at renee@phideltatheta.org.

General Convention happens biennially (every two years), registration is not included in the Chapter Greatness Checklist during off years.

OTHER IMPORTANT DATES AND ITEMS

ADDITIONAL PAYMENTS TO GHQ

CONVENTION AND LEADERSHIP FUND (OCTOBER 15 AND APRIL 15): \$350

Twice a year, every chapter must submit a payment of \$350 to the General Headquarters for the Convention and Leadership Fund. This payment can be mailed to GHQ or can be accepted over the phone by contacting Accounts Receivable Specialist Debbie Smith.

MEMBERSHIP DUES (FEBRUARY 28): \$145/MEMBER

Once a year, every chapter must submit membership dues per member to the General Headquarters. This amount is voted on at the General Convention every two years. **Updating rosters on a regular basis will keep chapters from getting overcharged.** This payment can be mailed to GHQ or can be accepted over the phone by contacting Accounts Receivable Specialist Debbie Smith.

Treasurers will receive an invoice based on the Winter Report's Chapter Roster Update on MyPhiDeltaTheta.

PHIKEIA DUES (WITHIN 10 DAYS AFTER BID ACCEPTANCE): \$85/PHIKEIA

Each Phikeia that accepts a bid is required to pay Phikeia dues to the General Headquarters. Within the first 10 days of accepting a bid, dues should be collected and a payment should be made to the General Headquarters. This payment can be mailed to GHQ or can be accepted over the phone by contacting Debbie Smith, Accounts Receivable.

Treasurers will receive an invoice after inputting data on MyPhiDeltaTheta.

INITIATION DUES (WITHIN 10 DAYS AFTER INITIATION): \$255/INITIATE

After the Phikeia process, each Phikeia that is initiated must pay initiation dues to the General Headquarters. These dues should be collected during the Phikeia process, and a payment must be made within 10 days after initiation. This payment can be mailed to GHQ or can be accepted over the phone by contacting Accounts Receivable Specialist Debbie Smith.

Treasurers will receive an invoice after inputting data on MyPhiDeltaTheta.



PHI DELTA THETA
Become the greatest version of yourself