



ROSTER SUBMISSION AND ADJUSTMENT GUIDE



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SUBMITTING PHIKEIA AND INITIATES

Below you will find step-by-step guide on how to submit your chapters Phikeia and Initiates. It is expected that any new Phikeia or Initiate is reported to General Headquarters within ten days of the accepting a bid or being Initiated.

1. Go to www.phideltatheta.org/myphideltatheta and log in.
2. Click on the tab that says *Vault*. Once in Vault, follow the below instructions to add Phikeia or report Initiates.

HOW TO REPORT PHIKEIAS

1. Click on *Chapter*, then *Add New Member*, and then *Add Member*.
2. The following fields are required to add a new member:
 - a. First and last name
 - b. Phikeia's email address, date of birth, cell phone, pledge date, and expected year of graduation
 - c. You may be prompted to select a member status, if so, click Phikeia
 - d. Parents/guardians first and last name, email, home phone, and address
3. Click on *save* and *continue*.
4. An additional screen will appear. This is a review screen. Hit *enter*, then click on *Add Member* to bring up a blank screen for the next Phikeia.
5. After submission each Phikeia will receive an email from MyPhiDeltaTheta asking each Phikeia to complete their account set-up. The Phikeia can update their profile and above information once registered throughout membership.

HOW TO REPORT INITIATES

1. Click on *Chapter*, then *Member Initiation Reporting*, and then click *Create Initiation Report*.
2. Enter in the term (semester/quarter), year, and date of initiation.
3. Click individually on each Phikeia and enter in the above information in the following formats:
 - a. Date initiated: 00/00/0000
 - b. Bond # (roll number): 01776 (enter as a five-digit number)
 - c. Enter Bond number's in exactly as they were assigned within the actual Bond Book.
4. Double check your records and then click *save* and *continue*.
 - d. **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.**
5. *What is 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). Releasing a Phikeia is the same as Depledging.
6. Click *save* and *continue*, this will bring up the final step where you will "save and submit to headquarters for approval". When you are ready to initiate any Phikeia that were 'held' simply re-start this process.

UPDATING OFFICERS THAT CAN ALTER THE ROSTER IN VAULT

Each chapter is to have four (4) men that have administrative abilities within Vault. These typically are the president, vice president, treasurer and Phikeia educator. To change who has access follow the below instructions.

1. Have the chapter officer sign into their desktop (Vault) and on the far right side of the screen they will see a gear symbol. Click on *gear* and select *Vault Users and Custom Member Fields*.
 - a. Click on *Vault users*, then click on "add user:"
2. From this screen, choose the "user" from the pull down menu. (If that individual has established his MYPDT account, the username and password fields should fill with asterisks). If this does not happen, then the member must establish access to his MyPhiDeltaTheta account before he can be put in as an administrator.

3. Under *user reason* choose undergraduate officer.
4. On the right side of the screen use the pull down menus of Administration, Communications, Chapter, House, and National.
 - b. Choose *manage* on each menu. This will give the specific member the ability to update officers, submit Phikeia, submit initiation reports, update rosters.
5. To remove a members administrative ability once he is no longer in office, just click on that members name and click on the trash can option to delete his access.

UPDATING YOUR CHAPTER'S OFFICERS

To update officers, login into www.phideltatheta.org/myphideltatheta and click *Vault*. On the top of the screen, click on *Chapter* and follow the below instructions:

1. Click the *Chapter* option on the drop-down and then select 'Officers'

TO ADD NEW OFFICERS

1. Click on *Edit Officers* and use the drop down menu next to the office you are updating (ex. president, treasurer, etc.) to find the member who has been elected into office and choose his name and put in a start date (the date he began/ begins his term in office).
2. DO NOT put in an end date until the end of the officer's term when you, or another member of your chapter, will be updating the officer list again.
3. Once you've made all updates, click on update officers on the bottom right of the screen to finalize the updates.

TO REMOVE EXISTING OFFICERS

1. Click on *Edit Officers* and put in the end date (last date in office) for an officer to take the member out of office.
2. Once you've made all changes click on update officers at the bottom right of the screen to finalize the updates.

MOVING MEMBERS TO ALUMNI STATUS, LEFT SCHOOL TRANSFERRED, AND STUDY ABROAD

MOVING MEMBERS TO ALUMNI STATUS

1. To change a man's member(s) status to **alumni**, go to *Vault* and follow the below instructions.
2. On the top of the screen, click on *Chapter*. A dropdown will appear, click *update member status*.
3. Vault automatically filters to have Phikeia at the top of the page. Change filter to *undergraduate status*. This will bring up all undergraduates in the chapter alphabetically.
4. Change the member status reason option to *graduated*.
5. Then click on the men's names that will coincide with that option.
6. Insert the date of graduation and then click on *update member status* (bottom right hand side).
7. Once complete, click *submit*.
 - a. If a member has not graduated or completed four years of study, or four years of membership they are not eligible for alumni status.

MOVING MEMBERS TO LEFT SCHOOL/TRANSFERRED

Any roster adjustment for an individual who has left school/transferred must be completed within the *Forms* section of MyPhiDeltaTheta for it to be properly reflected on your chapter roster. The form must be filled out completely and submitted. Once reviewed General Headquarters will update that individuals record to Left school/transferred.

MOVING MEMBERS TO STUDY ABROAD

Any roster adjustment for an individual who has left to Study Abroad must be completed within the *Forms* section of MyPhiDeltaTheta. The form must be filled out completely and submitted. General Headquarters will update the member status to Undergraduate-Abroad.

SUBMITTING A MEMBERSHIP RESIGNATION REQUEST

The individual seeking to resign his membership to Phi Delta Theta must submit a letter seeking resignation to General Headquarters to be put on the next General Council agenda to be voted on. These letters should be sent to the director of chapter services. The request must expressly state, from the individual, why they are seeking to resign their membership.

SUBMITTING MEMBERSHIP SEPARATION AND SUSPENSIONS

For the roster to accurately reflect that a member who been separated (expelled) by the chapter or suspended for a period of time not to exceed twelve months the chapter must submit the Suspension/Separation form found within the *Forms* section of MyPhiDeltaTheta.

Once submitted the form will be reviewed by General Headquarters. Chapters disciplining members need to do so in accordance with *The Code of Phi Delta Theta* for it to be upheld and reflected on the roster.

If there are any questions about the form submission a representative of your General Headquarters team will reach out to the submitting member.

SUBMITTING A SPECIAL INITIATION REQUEST

Often chapters would to initiate someone (a father, faculty advisor, an older gentleman that was a member of a local fraternity, etc.) that is not an active student of the university.

The chapter may submit a Special Initiation Request for the General Council to consider at their next meeting. This request can be submitted within the *Forms* section of MyPhiDeltaTheta. Upon review from the General Council the chapter president will receive an email confirmation of the General Council's decision and all, if any, necessary next steps.



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