



GUIDE TO MYPHIDELT PORTAL



PHI DELTA THETA
Become the greatest version of yourself

MYPHIDELT LAUNCHPAD BREAKDOWN



Roster: view membership roster, update member statuses, view Risk Management Affidavit completion for each member, update member contact information, send myPhiDelt invitations

Roles: view listed chapter officers, remove/add officer roles, set beginning and end dates for various chapter officer positions

Recruitment: organize potential new member contact information, report new accepted Phikeia(s)

Statement: view chapter's bills, make payments to General Headquarters

Chapter Profile: view information about the chapter including status, discipline information, founding date, reorganization date, province, tax ID, website and associated social media accounts

Send Emails: access to a mass-mailer tool

Officer Forms: complete various forms for General Headquarters, including awards packet, chapter greatness checklist, event planning form, chapter incident report

Website Editor: edit your chapter's website provided by myPhiDelt



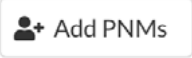
greekbill: if your chapter utilizes greekbill, you will be able to access it from this link, charge members, track dues payments

Chapter Support Team: access province president contact information

FREQUENTLY COMPLETED TASKS

ADDING PHIKEIA


In order to add a new Phikeia to your Roster on MyPhiDelt, you will take the following steps:

1. From your **MyPhiDelt Homepage**, click on your *chapter's name* in the top right hand corner of the screen
2. On the **Chapter Tools** page, click the **Recruitment** icon 
3. From the **Recruitment** tab, click the  icon to add members who you intend to report
4. Fill out all required information on the **Add PNM Page** and click create at the bottom of the screen
5. Repeat steps 3 and 4 for all PNMs you wish to add to submit as Phikeia 
6. You are also *able to copy and paste from an existing spreadsheet* into the MyPhiDelt tab
7. Once all PNMs you wish to report as Phikeia are listed under the **Accepted** tab, select **Report** and PNMs will be reported to General Headquarters as Phikeia

CHECKING RISK MANAGEMENT AFFIDAVIT STATUS

1. From your **MyPhiDelt Homepage**, click on your *chapter's name* in the top right-hand corner of the screen.
2. On the **Chapter Tools** page, click the **Roster** icon 
3. If a member has completed the Risk Management Affidavit, the date of completion will be listed on the **RM Affidavit** column of the roster, if not, the section will be blank
4. To have members complete the Risk Management Affidavit, instruct them to log into MyPhiDelt, it should prompt members to complete the affidavit as soon as they sign in

CHANGING OFFICER ROLES


1. From your **MyPhiDelt Homepage**, click on your chapter's name in the top right-hand corner of the screen
2. On the **Chapter Tools** page, click the **Roles** icon 
3. If someone currently holds that role, click the **three dots** next to their name and select **End Role Assignment**
4. To add a role, select the **Add Role** option in the upper right-hand corner of the page and input all required information
5. Click **Assign Role** to finalize this new role

CHANGING MEMBER STATUS

1. From your **MyPhiDelt Homepage**, click on your *chapter's name* in the top right-hand corner of the screen
2. On the **Chapter Tools** page, click the **Roster** icon 
3. Either *search* or *scroll* to find the member whose status you would like to update
4. Click the three dots  next to that member's name on the roster and select **Update Contact's Status**
5. From the drop-down list, select the **New Status** for that member from the list of available options

6. Click on the box that has now appeared underneath the drop-down list to fill out any required information for the status change
7. Once complete, click the **Change Status** button at the bottom of your screen to submit the roster update
8. For clarification on member statuses, see the [linked document](#)


VIEWING AND PAYING INVOICES

1. From your **MyPhiDelt Homepage**, click on your *chapter's name* in the top right-hand corner of the screen
2. On the **Chapter Tools** page, click the **Statement** icon 
3. From the **Statement** page, you should be able to see any outstanding balances and their associated line items
4. In order to make a payment, you will input your desired payment amount in the open space underneath the **Payment Account** column of your statement
5. Once your desired payment amount has been typed in, click the **Make Payment** button at the bottom of the screen

HOW TO ACCESS PDT U

On your **MyPhiDelt Homepage**, click the **PDT U** tab on the top of your page



ACCESSING OFFICER FORMS

1. From your **MyPhiDelt Homepage**, click on your *chapter's name* in the top right-hand corner of the screen
2. On the **Chapter Tools** page, click the **Officer Forms** icon 
3. From the **Officer Forms** page, select your desired form, this could include:
 - Chapter Greatness Checklist
 - Event Planning Form
 - Chapter Incident Report
 - Awards Packet

HOW TO ACCESS YOUR CHAPTER WEBSITE

1. From your **MyPhiDelt Homepage**, click on your *chapter's name* in the top right-hand corner of the screen
2. On the **Chapter Tools** page, click the **Website Editor** icon  to access the **Website Editor**

SENDING MYPHIDELT INVITATION

1. From your **MyPhiDelt Homepage**, click on your *chapter's name* in the top right-hand corner of the screen
2. On the **Chapter Tools** page, click the **Roster** icon 
3. Either *search* or *scroll* to find the member who you would like to send a myPhiDelt invite
4. Click the three dots  next to that member's name on the roster and select **Send myPhiDelt Invite**

ADDITIONAL RESOURCES

SPECIAL INITIATION REQUEST

To request a vote from the General Council for a member to be initiated that is not currently an undergraduate student/in a special circumstance, you can fill out a form. This form will be available on your myPhiDelt portal under **Officer Forms**. For now, chapter presidents can fill out the following form after acquiring an approval through a chapter vote:

SPECIAL INITIATION REQUEST FORM

Download [here](#). Upon completion, submit to Director of Chapter Support Todd Simmons at tsimmons@phideltatheta.org

RITUAL ORDER FORM

Contact Director of Chapter Support Todd Simmons at tsimmons@phideltatheta.org.