Alpha Phi Omega

Officer Portal Manual for Extension Groups

Preparing campus and community leaders through service since 1925.

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Access Requirements

ONLINE MEMBERSHIP MANAGEMENT SYSTEM

The Officer Portal is an online membership management system, designed to allow extension group/chapter officers the ability to provide real time ongoing maintenance to the extension/chapter membership roster, officers and other extension/chapter reporting requirements, eliminating the use of paper!

ACCESS REQUIREMENTS

To access the Officer Portal you will need the following:

- Computer/laptop/tablet, etc.
- Internet connection
- Web browser *(such as Internet Explorer, Firefox, Safari, Chrome)*

WHO HAS ACCESS TO THE OFFICER PORTAL

The OP is available to all recorded officers of Alpha Phi Omega. The user must be on record as an officer with the National Office before establishing an account or the user will not be able to gain access. If you are unsure if the correct officers are listed you may contact your sectional chair or e-mail opsupport@apo.org

Only active officers of APO have access to the Officer Portal. All privileges within the OP are dependent upon office title but the primary users are the following officer titles:

- **Regional Chairs** – can view all chapters and extension groups within the region
- **Regional Information Officer** – can view all chapters and extension group within the region
- **Regional Extension Officer** – can view all extension groups within the region
- **Sectional Chairs** – can view all chapters and extension groups within the section
- **Chapter Officers** – Chapter advisors, president, vice president of membership, vice president of service, pledge trainer, secretary, and treasurer positions will be able to view their chapter's members, forms/documents, and information
- **Extension Officers** – Advisors, extension president, sponsor, extension vice president of membership, extension vice president of service, extension secretary, and extension treasurer positions will be able to view their extension group's members, forms/documents, and information

Establishing an Account

After verifying that <u>you are listed</u> as an officer on record with the National Office you are ready to establish your account.

1. Browse to the Officer Portal via the following link: https://op.apo.org.
2. Click the link titled — "Click here to establish your officer portal account"
3. Select your extension group/school name, click next.
4. Enter the following…
   - Your <u>last name</u> at the time of petitioning
   - Your <u>first name</u> at the time of petitioning
   - Leave the <u>chapter roll number</u> field blank
   - Enter your <u>petitioning year, click next</u>

Please verify the e-mail address on file. If it is incorrect please contact the National Office at 816-373-8667 or via e-mail at opsupport@apo.org as soon as possible. If e-mail is valid, please wait until the e-mail is received as it provides further instructions to finalize the account setup.

LOGGING IN
1. Enter username and password that you received via e-mail. Click —Login.
2. If you hold more than one office, select the title that best fits the job you're performing at the time. You can only work from one office at a time.

Officer Portal Tour

After logging in, you'll arrive at the Home screen. This screen displays a vertical menu depicted with small images. The following pages describe each major section.

PROFILE

Once you are logged in, there are several links across the top as well as a menu bar with icons on the left hand side. The following can be found on the top right hand side of your screen: Change Office Role   I Need Help   Logout

- **Change Office Role** – If you hold more than one office, you can toggle between them (if you do not hold more than one office, this button is not visible to you).
- **I Need Help** – Sends an e-mail to opsupport@apo.org
- **Logout** – Logs you out of Officer Portal.

MESSAGES

☑ Recent Portal Messages (0 messages)   Messages can be found at the top of the screen under the Profile links. Make sure you have read the messages *before* you delete them because you cannot retrieve them after deleted. E-mails and OP messages are sent to officers as the forms that they are responsible for are coming due. Reminders are also sent when they become overdue.

E-mails are also sent to officers (who have permission) to view the forms when they are completed, meaning that they have been submitted and approved.

CALENDAR
The calendar contains due dates for forms as well as dates for chapter events.
- Public Calendar entries may be viewed by all officers, while
- Private Calendar entries may be viewed only by entry creator.

Information on how to add, edit, and remove events can be found in the calendar section of this manual.

FORMS
Click on the Forms icon on the left-hand side of the page. For each office, you may see different forms listed here. More information on how to complete forms can be found in the Forms section of this manual.

MEMBERS
This area contains the current student petitioners from a particular extension group. We will reduce data entry errors as well as the workload of extension officers by having them enter only basic information. It is our belief that the members will always have the best information on their contact information, so we ask that they are the ones to update their data rather than asking an officer to do so.

OFFICERS
The Officers area provides a listing of current officers within the extension group. The screen only tracks the pertinent officer roles the National Office tracks and allows in the officer portal. This listing should be updated within 10 days of elections and reviewed at the end of each semester to ensure accuracy. If you need additional officer placeholders you can e-mail opsupport@apo.org.

ORDERS

The Orders area allows officers to order and pay for petitioning pins. Once chartered, officers will be able to order service and pledge pins,

DASHBOARD

The dashboard is essentially a snapshot that includes a synopsis of the general information on the extension group, as well as a link to their website.

You can also see invoices and make payments from this tab.

LIBRARY

The library is a repository for all Alpha Phi Omega manuals, forms and other documents.

Application for Interest Group Status

Sponsors, regional chairs, sectional chairs, and region extension coordinators can complete the online interest group application on behalf of a prospective group to obtain interest group status.

WHAT YOU WILL NEED:
- Name, address, e-mail, and phone number for the interested student or faculty/staff member
- Roster for all interested students and advisors including name, e-mail address, and phone number
- Signed Authorization to Conduct Activities on Campus form, if not already on file at the National Office
- Dates of Fraternity and Extension Process orientations
- Signed Affirmation of Compliance including all signatures from students and advisors listed on roster

TO COMPLETE THE APPLICATION FOR INTEREST GROUP STATUS:
1. Open Officer Portal via Web address (https://op.apo.org).
2. Log in with your username & password.
3. Click the **'Forms'** icon on left column
4. Locate the form titled **'Application for Interest Group Status'** under **'Forms that May be Completed at Any Time.'**
5. Complete the required fields and upload all necessary documents. Please ensure that all submitted information is accurate and up to date.
6. When the form is complete, select [Save this Form and Submit] to submit the application. The application will be reviewed by National Office staff and the regional chairs and the submitter will receive an e-mail notification when final approval is obtained. Interest group status will be conferred upon the group once all approvals have been submitted.

Petitioner Entry Instructions

If petitioners need to be entered for an Interest Group to complete the Application for Petitioning Status, the sponsor should enter all students who have paid Petitioning Fees and for 'Petitioning Ceremony Date' will need to enter a future date. Petitioners must be entered and paid for prior to the first petitioning ceremony.
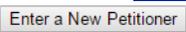
For all future ceremonies after the group has been established as a petitioning group, petitioners must be entered and paid for within 10 days of the petitioning ceremony, preferably by an extension officer.

1. Open Officer Portal (https://op.apo.org)
2. Log in with your username & password
3. Click the '**Members**' icon on left column

NOTE: ALWAYS review the new names against the Membership Roster before entering to eliminate any duplication of petitioner entries.
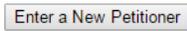
4. Click the '**Submit New Petitioning Members**' link. **Submit New Petitioning Members**
5. Click the '**Enter a New Petitioner**' button. `Enter a New Petitioner`
6. Enter the following fields are required for entry
   - first name
   - last name
   - individual e-mail address

NOTE: you can enter more information such as the members address, phone numbers, etc. The Expected Graduation date field must be a present and/or future date, otherwise omit entering this date.

7. Click the '**Save**' button. `Save`
8. You will repeat steps above for the each member within the petitioning class by pressing '**Enter a New Petitioner**' button. `Enter a New Petitioner`
9. When everyone within the petitioning class has been entered, click the button called '**Complete Petitioning Class Entry**'. `Complete Petitioning Class Entry`
10. Enter the '**Petitioning Ceremony Date**' in the blank field

Note: the group you just entered should all be within the same petitioning class or they will have the <u>wrong</u> petitioning date.

If you entered multiple petitioning ceremony dates together you will have to click the trash can icon next to each individual and re-enter them within the correct petitioning class date. `Delete`

11. When the entire petitioning class and date have been entered, click the '**Submit Petitioning Class to National Office**' button. | Submit Petitioning Class to National Office |
12. Next you'll print your invoice by clicking the '**Print/View Invoice**' button. | View/Print Invoice |
13. Your petitioning class submission is now complete.

Note: If petitioners are being added in the interest group stage to prepare for the completion of the petitioning group application, a different submission confirmation will appear (below)

*Note: Petitioning fees and a complete Application for Petitioning Status (see Application for Petitioning Status section) **must be submitted prior to holding the first petitioning ceremony**. After petitioning status has been conferred upon the group, petitioners will need to be submitted and paid for within 10 business days of the ceremony for all future ceremonies.*

We accept Checks/Money orders, ACH and Credit Cards. We do accept cash; however it is not recommended to send cash through the mail!

Required Petitioner Validation Process

Every petitioner must validate their membership before they can charter. It is imperative that the e-mail entered under each petitioner's record is input using the individual member's e-mail address – NOT the petitioning group officer's e-mail! If you find a petitioning member that never received the validation e-mail for any reason, you can edit the e-mail under the member's listing if necessary and resend the validation so that they can be included in the chartering class.

1. Open Officer Portal via Web address (https://op.apo.org)
2. Log in with your username & password.
3. Click the '**Members**' icon in the left column.
4. Click the '**Chartering Roster Submission**' link.　　🖥 Chartering Roster Submission
5. Locate the member's name in the list that needs an e-mail update or have the validation e-mail resent.
6. Click the **'Update E-mail Address'** link to correct the e-mail address.
7. Click 💾 to save your changes OR click 🔒 to cancel the editing.
8. Once a petitioning member's e-mail address has been updated, you must resend the validation e-mail so that the petitioner can validate their membership with Alpha Phi Omega. **Click 'Resend Validation E-mail'**.
9. Repeat steps 5-8 to repeat the process for all other e-mail updates/validation e-mails.

Note: Petitioners who have not yet been paid for will appear as Petitioner (Pending) and will not appear in the Chartering Roster Submission area. If the validation e-mail needs to be resent for a pending petitioner, please e-mail **opsupport@apo.org**.

How to View Invoices

1. Open Officer Portal (https://op.apo.org)
2. Log in with your username & password.
3. Click the '**Dashboard**' icon on the left column.
4. Click the link in the center of the screen titled 'Click here for a current statement for this chapter'
5. This will open a .pdf document that includes all unpaid or open invoices that Chapter owes. The report can be printed for further review. Each invoice is separated by an alternating grey shaded area.

OR

1. Open Officer Portal via Web address (https://op.apo.org)
2. Log in with your username & password.
3. Click the '**Members**' icon on the left column.
4. Under the 'Membership Changes' heading area find the membership batch type you are ready to pay.

   - To pay Petitioning Members for 8/6/2015 created on 8/6/2015 – click on the '*select class*' icon (as shown in the image below):

Membership Changes

Submit New Petitioning Members | Chartering Roster Submission | Roster Changes | Transfer a Member

☑ Only show classes from the current year

Batch Name	Type	Submitted on Date	# in Batch	Status	Select
Roster Change for 9/22/2014	Report Members Studying Abroad/Interning (removes from active to associate status)	9/22/2014	1	Roster Changes Processed	
Roster Change for 9/22/2014	Return Members Studying Abroad/Interning (return to active roster)	9/22/2014	1	Roster Changes Processed	
Roster Change for 10/6/2014	Move Associate Members to Alumni Status (in-active associate to alumni)	10/6/2014	1	Roster Changes Processed	
Roster Change for 10/6/2014	Move Associate Members to Alumni Status (in-active associate to alumni)	10/6/2014	1	Roster Changes Processed	
Roster Change for 10/9/2014	RePledge (one who attended & paid fee at pledge ceremony, dropped out and is now pledging again)	10/9/2014	1	Roster Changes Processed	
Roster Change for 11/12/2014	Report Graduates (removes from student to alumni)	11/12/2014	2	Roster Changes Processed	
Roster Change for 5/4/2015	Report Graduates (removes from student to alumni)	5/4/2015	1	Roster Changes Processed	
Roster Change for 5/21/2015	Return Alumni/Graduate Member to active roster (*This will charge Active Member Reinstatement Fee $30/ea)	5/21/2015	2	Roster Changes Processed	
Roster Change for 5/21/2015	Return Associate Members (*This will charge Active Annual Membership Dues $30/ea)	5/21/2015	1	Roster Changes Processed	
Roster Change for 6/19/2015	Return Alumni/Graduate Member to active roster (*This will charge Active Member Reinstatement Fee $30/ea)	6/19/2015	1	Roster Changes Processed	
Petitioners for 8/6/2015 created 8/6/2015	Petitioning Members	8/6/2015	1	Petitioning Group Submitted	

5. Choose View/Print Invoice (**hint: this is another option to locate a specific invoice to pay**).
6. You can now print or save the invoice (or pay if selected) from the batch of members you selected.
7. You can access this invoice to submit to school for payments.

New petitioner entry is complete

This petitioner class entry is now completed and has been submitted to National Office. You may now click the "View/Print Invoice" button below to obtain a list of names submitted and the amount due.
Payment must be remitted to the National Office prior to completing the Petitioning Group application.
To make a payment using credit card/electronic check, click view/print Invoice to pay online.
OR
Call our office at 816-373-8667. OR
Print and mail the invoice and amount due to:
1441 E 104th Street
Kansas City MO 64131-4635

View/Print Invoice | Pay My Chapter Balance

How to Make a Payment

1. Open Officer Portal (https://op.apo.org)
2. Log in with your username & password.
3. Click the '**Dashboard**' icon on the left column.
4. Click the link in the center of the screen titled 'Click here to make a payment for this chapter'
5. This screen provides all open invoices that match to the summary report.
6. To make a payment, select your form of payment.
   - Acceptable forms of payments: credit card & electronic checks.
7. Then simply click on the check box next to the invoice line item that you wish to pay. The total amount due is automatically calculated for you.
8. After selecting the invoices ready to be paid, click the next button. Next >>
9. If paying by **Credit Card**: enter the card type, card number, verification code, expiration date

Chapter Payment

Step 2 - Enter Credit Card Information

Payment Amount:	**$165.00**
Card type:	[▼]
Card number:	[ ]
Card 3 or 4 digit verification code:	[ ]
Card expiration date:	[Month ▼] - [Year ▼]

[<< Back] [Next >>]

10. If paying by **electronic check**: enter the routing transit number, checking account number and check number.
11. After entering the required payment fields, click the next button to complete the transaction via our secured (https) site.
12. Payment is now complete. You should receive an e-mail verifying that the payment has been submitted. Please allow 1-2 business days for any membership payments to reflect on the roster.

If you have any further questions, please contact the National Office at 816-373-8667.
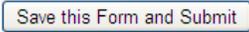
Application for Petitioning Group Status

Sponsors or other designated members may complete the online petitioning group application on behalf of an interest group to obtain petitioning group status. For more information on requirements for obtaining petitioning group status, please refer to the application or the Building a New Chapter (BANC) Guide.

<u>WHAT YOU WILL NEED:</u>
1. Date, presenter, and number of attendees for the Fraternity and Extension Process Orientations
2. All petitioners must have been entered and paid for and they must also have electronically validated their membership. See self-validation section for more information.

<u>TO COMPLETE THE APPLICATION FOR PETITIONING GROUP STATUS:</u>
1. Open Officer Portal via web address (https://op.apo.org).
2. Log in with your username and password.
3. Click the **'Forms'** icon on left column
4. Locate the form titled **'Application for Petitioning Group Status'** under **'Forms that May be Completed at Any Time.'**
5. Complete the required fields and upload all necessary documents. Please ensure that all submitted information is accurate and up to date.
    - Certain sections such as **'Petitioning Members', Policy Signatures,** and **'Petitioning Group Fees'** will either display 'Requirement Met' or a message describing what is missing. If there are missing items, you will need to exit out of the application and complete those prior to submission.
6. When the form is complete, select [Save this Form and Submit] to submit the application. If the button is greyed out, not all requirements have been met. You will need to submit any missing items prior to submission.
7. The application will be reviewed by National Office staff and the regional chair and the submitter will receive an e-mail notification when final approval is obtained. Petitioning group status will be conferred upon the group once all approvals have been submitted and a ceremony has been conducted. Please contact your sectional chair or regional chair for more information on holding a petitioning ceremony.

Application for Charter

The extension president should submit the Application for Charter on behalf of the petitioning group once the group has completed all of the required items outlined in Category V, Sub-Category 3, Policy II of the Fraternity Operations and Policy Manual.

All of the required items will be reported through the Officer Portal. For more information on the extension requirements of the Fraternity and the Four Phases of Extension, visit the Building a New Chapter Guide in the Library of the Officer Portal.

To complete the Application for Charter:
1.   Open Officer Portal via web address (https://op.apo.org).
2.   Log in with your username and password.
3.   Click the 'Forms' icon on left column
4.   Locate the form titled 'Application for Charter' under 'Forms that May be Completed at Any Time.'
5.   Complete the required fields and upload all necessary documents. Please ensure that all submitted information is accurate and up to date.
    - Certain sections such as the 'Service Program Summary' will either display 'Requirement Met' or 'Requirement Not Met, please refer to requirements'. If there are missing items, you will need to exit out of the application and complete those missing items prior to submission.
6.   When the form is complete, select 'Submit Application'. If the button is greyed out, not all requirements have been met. You will need to submit any missing items prior to submission.
7.   The application will then be reviewed by the Manager of Chapter Administration at the National Office for completion, and then by sectional chair and regional chair. If the application is approved by all three parties, the application will be sent to the National Extension Committee for review.
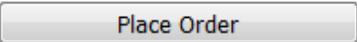
    The Extension Committee will review the application. If the application is approved by the Extension Committee, it will then be sent to the Alpha Phi Omega Board of Directors for the last and final approval.

Online Pin Orders

Petitioning groups may order petitioning pins by visiting the APO shop at https://shop.apo.org, ordering on the Officer Portal, or calling the National Office at 816-373-8667 ext. 16.

TO ORDER PINS VIA THE OFFICER PORTAL:
1. Open Officer Portal via web address (https://op.apo.org).
2. Log in with your username and password.
3. Click the **'Orders'** icon on left column
4. Review the shipping information at the top of the screen to ensure all information is accurate.
5. Enter the quantity of petitioning pins you would like to order. There is a flat shipping rate for all orders that will be fulfilled via USPS. If you need an order to arrive more quickly, please contact 816-373-8667 ext. 16.
6. Enter your billing information in the boxes provided.

7. Once you have verified that all information is correct, select the [Place Order] button to finalize your order.

Extension Officer Listing

It is important that the extension group update chapter officers within 10 business days of their election to office. With the Officer Portal, officers can be updated time and changes show immediately.

This set of instructions is to replace active officers who are already members of Alpha Phi Omega ONLY. If you need to update an advisory officer who is NOT already a member and will be a new member of Alpha Phi Omega you must submit the **'Chapter Advisor Form for NEW APO MEMBERS ONLY'** via the Forms icon.

TYPES OF OFFICERS NEEDED
Each petitioning group is required to recruit and maintain a minimum of 4 advisors, but you can have more. Advisors are alumni members or non-students who are elected into office.
- 2 - Faculty Advisors
- 1 - Community Advisor
- 1 - Scouting Advisor
- 1- Advisory Chair (should be one of the above advisors)

It is also suggested that each group has the following student led offices filled:
- Ext President
- Ext Membership VP
- Ext Service VP
- Ext Treasurer
- Ext Secretary

UPDATING EXTENSION OFFICER LISTING
1. Open Officer Portal (https://op.apo.org)
2. Log in with your username & password.
3. Click on the '**Officers**' icon from the menu to your left. You will find your current list of the active officers.
4. To **edit an officer's personal information** (address, e-mail and phone numbers) click the **Select** button next to the appropriate officer name.
5. To **swap out officers** please click **Edit** button next to the appropriate officers name.
    - **Replace this officer and allow me to select a new one**: click this to transition officers if you have a replacement officer ready to be put into the office.
    - **Remove this person from office, but no replacement at this time:** click this when you haven't replaced an officer or had elections just yet; this option will leave the office open by using a placeholder titled '**Officer Needed**' in the office name.
    - **Cancel and return – no changes are necessary at this time:** click this if you need to return to the officer listing without making changes.
6. Repeat steps #4 and #6 above for each officer needing to be updated and/or replaced.
7. Current extension officers must swap out the incoming officers before the election period ends or the new officer will not be able to access the OP. Once the transition occurs and the officer is updated, the previous officer will no longer have access to log in. For example: if you're the outgoing Extension President and you are entering the new Extension President, as soon as you log out your access will be removed. Make sure you perform all your duties prior to updating!
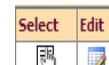
How to Submit Transfer Members

Extension groups may add initiated brothers to the roster who have transferred into the extension group by transferring them in the Officer Portal. Transfer members do not have to pay petitioning or chartering fees.

1. Open Officer Portal (https://op.apo.org).
2. Log in with your username & password.
3. Click the **'Members'** icon on the left column.
4. Click the [Transfer a Member] link.
5. Enter the name, e-mail address, and initiating chapter of the individual transferring into the petitioning group and then click **'Search for Person'.** Please note that this e-mail address is what is on file at the National Office, so it may be a previous school e-mail address.

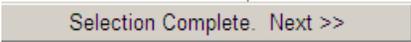| Membership Affiliation	
To affiliate a member in your chapter, the member must first be in a status that is considered eligible for affiliation.	
Use the fields below to locate the member you wish to attempt to affiliate:	
First Name:	Kathleen
Last Name:	Arnold
Email Address:	test@apo.org
Previous Chapter:	TEST:Alpha Phi Omega (APO University) ▼
	Search for Person Cancel

6. The member's eligibility for transfer will appear at the bottom of the screen.
   - If the member is eligible for transfer, the message will say: Member's status: This member is eligible to transfer. Continue to step 7.
   - If the member is still listed as an active initiate within their old chapter the message will say: Member's status: This member is eligible to transfer once the former chapter removes them from their roster. Please contact 'Chapter President's name' at 'example@apo.org' then resubmit after the former chapter has removed this member.
   - If the member you are trying to transfer has a pending membership the message will say: Member's status: This member is not eligible to be transferred. Please contact the National Office at 816-373-8667 to obtain further assitance.
   - If your search did not match any member, the message will say: No undergraduate member found that matches your criteria. Update your search results, or contact the National Office for more assistance.
7. If the member you retrieved is correct then you are ready to transfer the member. Fill in the date for the transfer (today's date auto populates). Click the [Complete Transfer] button when you are ready to finalize the transfer.

8. You should see a congratulatory message indicating that the transfer was completed and has been submitted for approval at the National Office. Repeat steps for each member requiring a transfer.

Roster Changes

1. Open Officer Portal (https://op.apo.org)
2. Log in with your username & password
3. Click the '**Members**' icon on left column
4. Click the '**Roster Changes'** link 🖳Roster Changes . This link will allow you to submit changes to the extension group roster such as DePetition members and Return Petitioning members.
5. Each change class must be grouped by the type of change needing to be made. To submit a change you must first:
   a. Specify the semester for the group (fall, winter, spring, summer).
   b. Specify the annual year for this group.
   c. Select the type of changes needing to be made (ie: DePetition or return petitioning member).
   d. Enter the effective date for the change (can be the date you submit the change or if known you can create the change for whatever date this changes occurred).
6. Once the required fields are entered, click the button titled. [Create this Group]
7. A list of members who are available for this change type will appear in the list. To select a member to apply to this type of change, click the check box ☐ next to each member.
8. After selecting all members that apply to this type of change, click the button titled: '**Selection Complete. Next'** [Selection Complete. Next >>]
9. The group is then submitted for processing and the appropriate membership status is updated.

Note: Once the class has been submitted you will receive an approval after the changes have been processed in the National Office.

Online Forms Submission

This demonstrates how to submit the required forms necessary to keep the extension group on track for chartering. For example: (service reporting, new advisors, honorary members, etc.) For a complete list of chartering requirements, download the Building a New Chapter Guide in the OP Library.
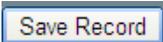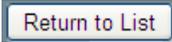
1.   Open Officer Portal (https://op.apo.org)
2.   Log in with your username & password
3.   Click the **'Forms'** icon on left column
4.   Choose the form that you're looking to complete
    - Tasks That Are Due or Coming Due- These are forms that have a specific due date. If you do not see a form that you think should be here, please e-mail opsupport@apo.org.
    - Tasks That May Be Completed at Any Time- These are forms that do not have a specific due date; however, most of the forms in this area are required forms that need to be completed before completing the Application for Chartering.
5.   After opening the form, complete all fields within the form. All fields indicated by an * are required to be completed before submitting the form.
6.   Once all required fields are entered you can:
    - Save this Form and Complete Later   [Save this Form and Complete Later]   : this selection allows you to begin entry into the form and return at a later time if you need to collect additional information before submission.
    - Save this Form and Submit   [Save this Form and Submit] : this selection should be used when all fields within the form are completed and is ready to submit to the National Office.
7.   Congratulations! Your form has been completed and has been submitted for approval, if applicable.
8.   Repeat steps 4-7 for each form needing to be completed.

Member Information Update

This section demonstrates how to update a member's information (name, address, phone number, e-mail, grad date, etc.). NOTE: If the petitioning date for a member is incorrect, please e-mail opsupport@apo.org.

1.   Open Officer Portal (https://op.apo.org)
2.   Log in with your username & password.
3.   Click the **'Members'** icon on left column
4.   Scroll down to Membership list.
5.   Locate the member name needing to be updated.
6.   Click the edit button [icon] to the right of the member's name.
7.   Update any personal information in yellow. Only particular officers may change/update member information.
8.   When complete click **'Save Record'** [Save Record button]
9.   Return to the member list by clicking **'Return to List'** [Return to List button]
10.   Repeat steps 4-8 for each additional member as needed.

Managing Calendar Events

How to Manage Events in the Officer Portal Calendar

ADD EVENT
1. Open Officer Portal (https://op.apo.org)
2. Log in with your username & password.
3. Once logged in, your default view shows the extension groups calendar.

4. Click on the "Add an entry to your calendar" button"

5. Select the type of event using the calendar entry type.
6. Enter the date of the event
7. Ask yourself who should view the event? To allow others to view the event please select the check box indicating you want all officers within the extension group to view the event. Otherwise if it's for your use only, do not select the check box.
8. Finally, add a short description or title of the event.
9. Click Save to add the event to the calendar.

EDIT EVENT

1. Locate the event you want to edit, click on it to open the Calendar Entry Maintenance screen.

2. Update the details using the drop down menu (ie: to update the type of event, make the changes) and click save.

REMOVE EVENT

1. Locate the calendar event you need to remove and click to open editing.

2. Press the delete button. Once pressed, you will be prompted to confirm the deletion.

NOTE: some events are entered and maintained by the National Office and may not be removed from the calendar. If you find an event is listed incorrectly, please e-mail opsupport@apo.org
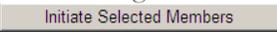
3. At this point you will press either Ok to continue with the deletion or press cancel to stop the deletion.

Chartering Roster Entry

These steps demonstrate how submit the final chartering roster for the petitioning group. Prior to this submission all petitioners must have been entered, paid for, and processed. This should be completed prior to final submission of the chartering application to the National Office.

1. Open Officer Portal (https://op.apo.org)
2. Log in with your username & password.
3. Click the '**Members**' icon on left column.
4. Click the '**Chartering Roster Submission**' link. Chartering Roster Submission
5. You will see an alphabetical list of active petitioners that are ready for chartering. If you do not see the member listed:
   - The member might not have been submitted to National Office. Please follow the '**Petitioner Entry Instructions**' before advancing to the next step. Each chartering member must be an active petitioner.
   - The member could be a transfer student (if the member was moving from one school to another, you must submit the member though the link via the Members icon)
   - The member could be an honorary member. Extension members that have graduated or other persons meeting requirements of the National Bylaws (Article III, Section 2) and voted on by the extension group should be entered using the Honorary Membership Application form.
6. Are members in the list ready to be chartered? First make sure each member has been validated. An automatic e-mail was sent to each petitioner upon entry. Every petitioning member who will be chartering will be required to sign off on the APO Pledging Standards, Risk Management Policy and to confirm/update their personal information before the member can be included on the charter. This can be done by clicking on the link within the welcome e-mail. To verify which members are and are not validated you'll see the following:
   - **Validated**
     If the petitioning member says Validated, they have completed the self-validation. This appears in green with a 'Validated on' date. Once all members are ready to be chartered they will appear in green, you may continue with chartering and progress to step 8.

   - **Outstanding Validation:**
     If the member appears in the list with 'Outstanding Validation'. This occurs when the member didn't validate their petitioning membership or digitally sign the policies. The petitioning members who have not done the self-validation appear in red indicating 'Outstanding Validation' and are not able to be included until completed.
       - If a petitioning member requires validation: contact the member and confirm the e-mail address; update as needed and/or resend the validation e-mail (see instructions on how to edit & resend e-mail validation) informing the member that you need it validated as soon as possible to proceed with initiation process. After validation is complete you may progress to step 7.
4. Enter the 'Chartering Ceremony date' in the field provided. If the ceremony date has not yet been determined, you may enter an estimated date. The Manager of Chapter Administration (chapter.admin@apo.org) will be confirming the date with the extension president prior to ordering membership cards/certificates and the charter.
5. To select a member for chartering find the column titled **Include in Initiation**. Use your mouse to click the check box ( ) to the right of each member's name to be included.
6. After each chartering member and ceremony date has been entered, click the 'Initiate Selected Members' button.
7. Your chartering class is now complete.

8. You may pay or print your invoice by clicking the 'Print Invoice' button. [View/Print Invoice]
   - For assistance on paying an invoice locate the "How to make a payment" section.

Initiation has been completed for this class.

If you find you need to add additional members after submitting the chartering roster, it must be done by the
national office. Please email chapter.admin@apo.org if additional names must be added post submission.

You may now click the "View/Print Invoice" button below to obtain a list of names submitted and the amount due.
Payment must be remitted to the National Office within 10 business days of the ritual date.
To make a payment, you may call 816-373-8667 with a credit card
OR
Print and mail the invoice and amount due to:
1441 E 104th Street
Kansas City MO 64131-4635

[View/Print Invoice] [Pay My Chapter Balance]

Note: All chartering fees must be submitted for the group's application for charter to be considered complete. The 10 weeks required between submitting the application and the chartering date will not begin until the application is complete.

We accept Checks/Money orders, ACH and Credit Cards. We do accept cash; however it is not recommended to send cash through the mail!