

Chi Eta Phi Sorority, Incorporated®

National Secretary Service Booklet



Spring 2020 Edition

Introduction

The National Secretary of Chi Eta Phi Sorority, Incorporated works closely with the Supreme Basileus, National Tamias, and the Office Manager. The 2020 edition of the National Secretary Service Booklet provides vital information to ensure compliance with guidelines, procedures and the submission of reports. References for this document are found in the National Operations Manual and the National Bylaws (2019). Chapter Basilei are required to ensure that reports are submitted by the appropriate Chapter Officers. A few of the key forms are located on the website in the “**Members Only**” section. Adherence to guidelines and the use of current forms is critical for the submission of reports.



Logo

Reports

As you prepared to submit reports remember to **postal mail all money payable to the National Tamiochus**; address below. Do not send any money to the National Secretary or Headquarters.

**Erica Underdown Palmer
12903 Walkers Lane, Bowie, MD 20721**

Members-at-large

Members-at-large, are to use the same forms used by graduate members. Indicate “Member-At-Large” and follow instructions on the forms.

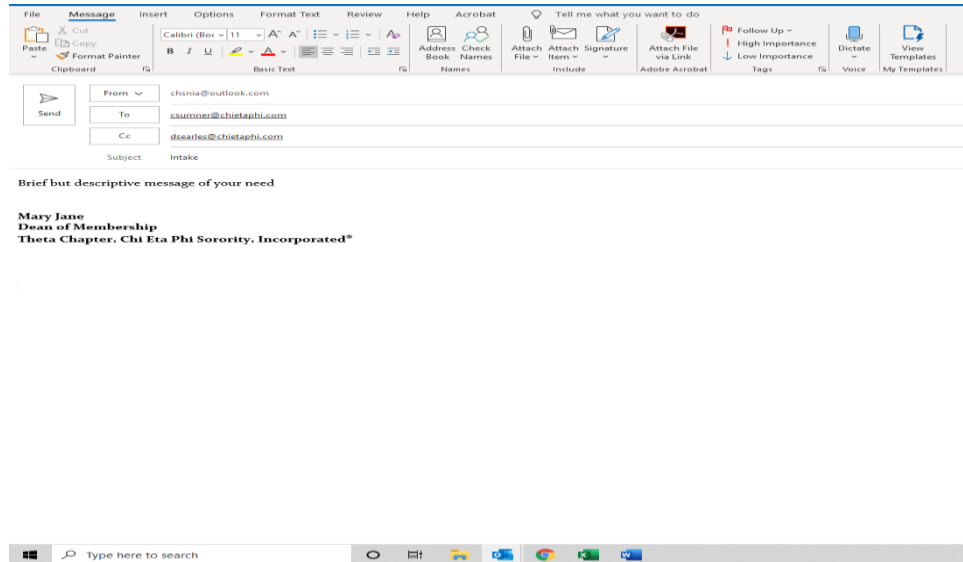
Beta/Undergraduate Chapters

Beta Sponsors are to submit the same reports as Graduate Chapters except the Futurama Report! The Beta Sponsor(s) of the Undergraduate Chapter **shall submit reports**.

Formatting

Reports shall be TYPED. Standardized font for the organization is “**Times New Roman,” size **11 or 12****. Handwritten reports are not acceptable. Typed reports decrease the possibility of errors and improves receipt of materials in a timely manner. ALL correspondence submitted via email shall contain your **name, chapter, and your title within the chapter**. When this information is not included, replies to your question(s) are delayed. Clear and concise communication is critical. In an article by Entrepreneur.com (2019), the following **dos** and **don'ts** are paraphrased below and are essential to email etiquette.

- Do have a clear **subject line**. ...
- Do use your **full name & chapter**. ...
- Do insert your **title/office held within the chapter**....
- Do **proofread** your message. ...
- **Don't assume** the recipient knows what you are referring ...*(use forwards and/or reply to the original message)*. See sample below regarding email etiquette.



Annual Chapter Boulé Report

This report is due **every year** (odd & even) by **May 30th**. Please follow the format as outlined in the Operations Manual. **Email** this report **directly to Headquarters**.

Programs & Projects Outcomes:

- A. Health Promotion & Disease Prevention
- B. Leadership Development
- C. Educational Scholarship
- D. Recruitment & Retention
- E. Programs for Youth & Young Adults
- F. Programs for the Elderly
- G. Community Health Outreach
- H. Visibility

NOTE: This report must be sent to Headquarters as a **Word document**. The office manager needs to **number the pages**. **Pdfs or cloud documents will NOT be opened or accepted.**

Boulé Credentials Report

Boulé occurs on the “**odd**” year; therefore, the due date for this report will be in the corresponding monthly Service Letter as we begin to approach Boulé.

Chapter Officer’s Report

If the Basileus is going out of office, the report should be submitted by the outgoing Basileus prior to or during the orientation of the new Basileus; due date is **May 30th**. Compose a list of each elected officer including the Immediate Past Basileus. Email report to:

- National Secretary & Headquarters (simultaneously)
- Regional Director
- First Supreme Anti-Basileus
- National Dean of Membership

Chapter Roster/Excel Spreadsheet

The **deadline** for all roster submissions is **June 30th of each year**. Chapter rosters not received by the deadline will result in Chapters not being included in the national directory. In addition, members may not receive the Glowing Lamp or JOCEPS, and will not have access to the “Members Only” section of the website. Emailing this form allows for easier transport to the webmaster and the technology team. Submit completed spreadsheet information as outlined on the form.

Email the **actual Roster/Excel Spreadsheet** to three (3) entities:

- National **Secretary** csumner@chietaphi.com & National **Headquarters** desearles@chietaphi.com (simultaneously)
- Regional Director or whomever the Director designates

NOTE: Postal mailed rosters will be NOT be accepted. **Word or pdf copies of the spreadsheet are also NOT acceptable.**

Important reminder: **Chapter Rosters must be updated by the Chapter Grammateus OR Epistoleus and emailed to National Secretary, Headquarters, and the Regional Director each time there is a change**, i.e. Intake, Transfers, Reactivations, or an individual’s contact information changes. The update needs to be inserted in the original spreadsheet where all the chapter member’s name appears. Following the guidelines and template ensures the membership receives publications and gain access to the website. Please note when inserting email addresses, **work emails are not acceptable**. In addition, it is ok to use “**normal case letters**.”

Instructions: **Type in Font, “Times New Roman,” size 11 or 12.** Type normally e.g., Upper for the first letter only (Jane Doe).

FIRST NAME	LAST NAME	CHAPTER	Region	Address	City	State	Zip	Email	Mobile Phone
Jane	Doe	Zeta	Northeast	123 ABC Street	Nirvana	TX	17222	Jane@gmail.com	267-343-3434

Telephone calls to report changes to a member’s name, address, email or phone are NOT accepted over the phone or via email. An updated excel roster must be sent.

Chapter Statements

Step 1. Postal mail dues using the Chapter Statement form and enclose a **chapter check, except if you are a member-at-large**, to the National Tamiochus. Include the “Chapter Statement” form in the envelope. Postmarked before the **June 1st deadline**. The Chapter Epistoleus and Tamias should collaborate before mailing. Chapter statements postmarked after June 1st are assessed late fees per each member; **this does not apply to life members**.

Step 2. Next, **email** a copy of the Chapter Statement and check to the **National Secretary and Headquarters (simultaneously)**. National dues, for new members (Intake), shall be postal mailed with the entire chapter membership. Use the Chapter Statement and select membership category. If you send an amended Chapter Statement and payment to the National Tamiochus,

you must also submit an updated Chapter Roster using the original Excel Roster via email to National Secretary and Headquarters.

Futurama

This report is due **May 1st** of every year.



Membership Intake

Refer to the “Membership Selection Intake Manual” for current practice. Per the **Membership Intake Policy and Procedure Manual**, allow fourteen (**14**) days for return and approval of the Application for Membership from the National Dean of Membership.

The same time frame is also applicable to Headquarters and the National Secretary. If the required forms are not received, orders will be officially placed on **HOLD** until the required documents are received.

“In order to have successful Intakes, we remind you of the following steps after you have received approval from the **National Dean of Membership**. The **National Tamiochus, National Secretary, and Headquarters are part of the Intake Process.**”

Step 1. Postal mail the most current purchase order (PO) and check to the **National Tamiochus. Obtain purchase order form Headquarters.**

Step 2. Email copies of PO and forms to the National Secretary and Headquarters; allowing **7-14 days** from the time the emails are received for your order to be processed. It is **imperative** that you **email both the Secretary and Headquarters the same information at the same time.** When emailing a copy of your chapter’s check its **vital** that you **hide or crop out** your checking account “**routing and account numbers.**”

Summary

	Nat’l Tamiochus	Nat’l Secretary	Headquarters
Check(s)	Postal mail	Email	Email
Financial Summary form	Postal mail	Email	Email
Membership Certificate Form	Postal mail	Email	Email
Membership Card Roster (excel)	N/A	Email	Email
Purchase Order (PO) form	Postal mail	Email	Email

Step 3. Chapter Grammateus and Epistoleus shall update the Chapter Roster to include the new members. Updating the Chapter Roster is **not the Dean’s responsibility.** The “Membership Card Roster” is the only excel spreadsheet composed and sent by the Dean, as it is only for the purpose of new members receiving **membership cards.**

NOTE: Please do not send JPEGs. All attachments must be a **Word or PDF document, except the Chapter Roster and the Membership Card Roster; they each must be an actual Excel spreadsheet.**

NOTE: The National Secretary postal mails the membership certificates and sorority pins. Headquarters sends all the other items. Orders that include sorority pins are **insured and required a signature for delivery**

National Officers' Report & National Committee Report

National and Appointed Officers, National Committee Chairs, and Regional Directors are to submit these reports annually on **May 15th** and upon the request of the Supreme Basileus. Email the report to the National Secretary to ensure uniform formatting. The National Secretary will forward to Headquarters.

New Membership Cards OR Replacement Cards

For **member card(s)**, type the name(s) of the new member (s) as they are to appear on the card into Excel. Use the PO form to request membership card(s). **Postal mail the PO and chapter check to National Tamiochus.** The names for membership cards are taken from the new **“Membership Card Roster.”** **Email this type of request to Headquarters and the National Secretary. DO NOT ALTER** the format on the excel spreadsheet. Use all **CAPITAL** letters for first and last name and write the word **CHAPTER** after each chapter name on each line. See example below.

	A	B	C	D
1	FIRST NAME	LAST NAME	CHAPTER	ID RECORD
2	NICOLE	SMITH	ZETA CHAPTER	
3				
4				
5				

Reactivation

When a member reactivates, the member must pay national, regional and local dues directly to the Chapter Tamiochus. To reactivate, a “Reactivation Form” must be completed in full. **Postal mail** the reactivation form, purchase order, and payment to the **National Tamiochus.** Next, email copies of the same to the **National Secretary and Headquarters.**

Reactivations are the responsibility of the Chapter Basileus, not the Dean of Membership. Also, indicate whether the reactivation is effective for the current sorority year, in which case dues must be paid. Otherwise, the member will not be considered as financially active.

Transfers

The National Secretary approves all “Transfer” requests. Note several points when completing a transfer request:

- Please make sure the form is completed prior to emailing to National Secretary (verify on the form, the financial status of the member).
- Obtain required signatures.
- **Email** to the National Secretary.
- Ensure financial obligations are met.
- Update the Chapter Roster (Excel Spreadsheet.)

If unable to obtain verification from the previous chapter in which the member was active; first seek to verify membership by obtaining various sorts of proof from the member. For example, does the member have a membership card. If still unable to ascertain membership contact the National Secretary. Once approved, makes payment directly to the National Tamiochus. The management of “transfer are the responsibility of the Chapter Basileus, **not the Dean of Membership**.

If a member is transferring from a chapter to “**Member-at-Large**” status, the form needs to be completed to verify membership. **The Regional Director must first approve**, followed by the National Secretary.

Ordering Supplies

The Office Manager at National Headquarters distributes purchase order (PO) forms and Membership Applications. Email a “non-chargeable order” form to Headquarters.

Internal Revenue

Each chapter must file with the IRS (990 or 900EZ) and submit proof to the Regional Director and the National Secretary by September 30th of every year. The information may be postal mail or emailed.

Emblem

Emblems, seals and banners are no longer ordered through National Headquarters.

Banners

Chapters are responsible for ordering their Chapter or Regional banner directly from manufacturer and **must pay in advance**. Ensure that the **Chapter or Region’s names appears first or above the name Chi Eta Phi Sorority, Incorporated**.

Hoosier Badge Company
567 North Highland Avenue, Indianapolis, IN 46202
1-317-257-4441 1-317-257-4447 (fax)
Email: orders@hoosierbadge.com or website is www.hoosierbadge.com

STEPS TO ENSURING ORGANIZATIONAL EFFECTIVENESS

DO ensure that you have an Antivirus Program installed on your computer
DO use current form, discard old outdated forms.
DO follow the requested procedures and timelines!
DO not be late: missing deadlines can cost the Chapter late fees!
DO type all reports
DO read the National Service Letters
DO follow our sorority's guidelines for writing reports using Times New Roman 12 pt. font.
DO use the Reports Checklist included in this service booklet

DO NOT use outdated purchase order forms. Complete all the requested information in the upper right-hand corner of the purchase order form. This information will assist in contacting the individual submitting the request if any inquiries are necessary to complete the order.
DO NOT create your own documents/forms.
Do NOT hesitate to seek clarification.

Express/Overnight Mail: There should not be a need to send anything to the National Secretary or Headquarters via Express Mail. However, should you decide to do so, you **MUST** sign “waiver of signature.” **Certified mail will not be accepted!**

Carefully pursue your email noting the **email address before replying**. For example: You know my email address is CHSNia@outlook.com; however, you receive an email supposedly from me with my name **associated with an erroneous email address**, that's a **HACK!** According to the Radicati 2015 Email Statistics Report, the number of worldwide email users is set to reach almost 3 billion by 2019. What's more, the report predicts that users will receive 96 messages a day, up from an average of 88 in 2014” (Kaspersky, 2019). For more information visit links below.

Create a strong password for your account; change often.

Use the Microsoft Authenticator phone app to sign in without a password

Make your account easier to recover

Make sure your operating system has the latest updates

Never reply to email asking for your password

Check your recent activity

Manage your trusted devices (Microsoft, 2019).

<https://support.microsoft.com/en-us/help/12410/microsoft-account-how-to-help-keep-your-account-safe-and-secure>

<https://usa.kaspersky.com/resource-center/threats/what-to-do-if-your-email-account-has-been-hacked>

Ensure that you have an Antivirus Program installed on your Computer

Resources

1. Membership Selection: Policy & Procedure. Washington, DC: Chi Eta Phi Sorority, Inc.
2. National Bylaws of Chi Eta Phi Sorority Incorporated. (2019). Washington, DC: Chi Eta Phi Sorority, Inc.
3. Operations Manual. (2019). Washington, DC: Chi Eta Phi Sorority, Inc.

**Chi Eta Phi Sorority, Incorporated®
National Reports Checklist**

Reports Title	Due Date	Signature	Seal
Chapter Statements & chapter check (Postal mail to National Tamiochus & email copies to National Secretary & Headquarters)	June 1st	Epistoleus & Tamias	No
Futurama Report & chapter check (Postal mail to National Tamiochus. <u>Email</u> to 1 st Supreme Anti-Basileus & National Secretary)	May 1st	Basileus/Chairman	No
National Officers Reports (Email to National Secretary)	May 15th	National Officer	No
National Committee Reports (Email to National Secretary)	May 15th	National Committee Chairman	No
Regional Directors Report (Email to National Secretary)	May 15th	Regional Director	No
Chapter Officers' Report (Email to National Secretary, Headquarters, Regional Directors, DOM & 1 st Supreme Anti-Basileus)	May 30th	Basileus/Epistoleus	No
Annual Chapter/Boulé Report (Email to Headquarters & Regional Director)	May 30th	Basileus/Epistoleus	No
Boulé Credentials Report (Email to National Secretary)	June 10th (or 30 days prior to Boulé')	Basileus/Epistoleus	No
Chapter Roster/Directory (Email Excel format National Secretary & Headquarters)	June 30th	Epistoleus	No
IRS 990E Tax Document (Email or postal mail to Regional Director & National Secretary)	Sep 30th	Basileus/Tamias	No