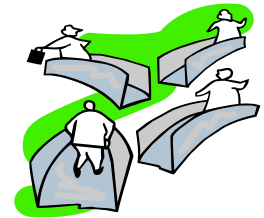


PATHWAYS – News from the Records Department



The Phi Eta Sigma national office constantly strives to provide the best, most efficient service possible in order to ensure speed and accuracy in the preparation of chapter orders for memberships and supplies.

Since the national office began accepting membership records electronically in 2003, the number of chapters using this system has increased each year. Approximately two-thirds of our chapters now submit their membership orders electronically, resulting in faster turnaround time. If the data file is formatted perfectly and all required information is included in the e-mail order summary, our staff can usually process and ship the requested materials within two days of receiving the e-mail (except during our extreme rush periods in October and April).

By following the steps below, you will assist the national office staff in processing your electronic order correctly and on time:

PREPARE for your induction by inviting students

who are eligible to be recognized with Phi Eta Sigma membership. Be sure to include in the invitation the date and location of the induction ceremony and invite their parents and loved ones to attend. Set a reasonable deadline for students to respond, allow time for organizing your membership records for submission to the national office, and estimate approximately two weeks for certificate preparation and shipping.

ARRANGE the membership information in an Excel spreadsheet for submission to the national office.

A new file must be created for each new membership order submitted. Student membership records should be alphabetized, first by last name and secondly by first name. (This helps to prevent duplications and blank records.) Each membership record must contain the following fields in the order listed:

- A) Last Name (including Jr., Sr., or Roman Numerals following the name)
- B) First Name or Initial
- C) Middle Name or Initial
- D) Street Address (must be recorded entirely in one field or cell)
- E) City
- F) State (use postal service 2-letter state abbreviation, ALL CAPS)
- G) Zip Code (format cells in this field as text rather than numbers so leading zeros appear)

**A text file may be used for data submission if Excel is not available. All fields listed here must be included in the text file in the exact order specified. Use commas to separate the data fields, & return at the end of each record except the last one.*

Please note these special instructions for preparing your Excel spreadsheet: (see example below)

	A	B	C	D	E	F	G
1	Smith II	John	Wesley	201 Main Street	San Antonio	TX	40059
2	Jones	Jenny	Maria	577 Liberty Court	Columbus	OH	45858
3	Wilson, Jr.	Wayne		421 Maple Ave.	Nashville	TN	37212
4							

- Enter each student or honorary membership record on a separate row of the spreadsheet.
- Each column should contain only one of the seven specified fields in the exact order listed (columns A-G).
- If honorary members are included in the file, column H of the spreadsheet may be used to designate honorary members by entering the word “Honorary” for the appropriate membership records. The number of honorary members should also be indicated in the e-mail order summary.
- Use only one cell for each required field of data. Do not skip a cell unless there is no information for that field (such as a middle name).

- Please include periods with initials and abbreviations in the names and addresses listed.
- Please do not include any international character in the names and addresses (normal accent marks are acceptable), and do not enter addresses outside the U.S.
- Please do not add extra spaces before or after the data in each cell.
- Be sure there are no blank records entered in the file. After entering all data, sort the records alphabetically, first by last name and secondly by first name, to locate and eliminate any blank records or duplications.
- Save the finished Excel file and attach it to an e-mail order summary (see next item for details). The data file **must** be in one of the specified formats (Excel file or text document) in order to be used by the national office. If the file cannot be opened or accepted by the national office, you will be notified promptly so that another method for submitting your memberships may be employed.

TELL us in an e-mail message who you are and exactly what you want in each order.

Your message must include the following information:

- ⇒ Chapter Name (name of school)
- ⇒ Chapter Code (provided to advisers by mail)
- ⇒ Adviser Name
- ⇒ Date of Induction
- ⇒ Total number of membership records submitted with this e-mail
- ⇒ Number of student memberships w/key or tie tac (specify type and quantity of jewelry)
- ⇒ Number of honorary memberships w/key or tie tac (specify type and quantity of jewelry) **You may specify in your order message which names in the membership file are for honorary members (Example: "First 3 members in file are honorary.")*

Below is a sample e-mail cover message that you may copy and customize for your chapter membership orders—

TO: Phi Eta Sigma phi.eta.sigma@wku.edu
 FROM: John Doe jdoe@indiana.edu
 DATE: January 6, 2003
 SUBJECT: Membership order—2/8/03 induction
Attachment: Indiana mem.2/8/03

Please process the attached file as new members. Order summary follows--

Chapter (School) Name: Indiana University
Chapter Code: INU123
Chapter Adviser: Professor John Doe
Induction date: February 8, 2003
Number of records in file: 520

We wish to order the following items:

- 310 Student memberships with key
- 208 Student memberships with tie tac
- 2 Honorary memberships with key (last 2 names in file)
- 700 Banquet program covers
- 30 Honor cords
- 30 Medallions
- 750 Question and Answer brochures
- 750 Overview brochures

Submitted by Jane Smith, Chapter Secretary
janesmith@indiana.edu

Attach to this e-mail the data file you created containing the names and addresses of the new inductees, both student and honorary. Be sure that only new membership records are included in the attached file and that the number of records in the file agrees with the total number of memberships requested in your e-mail message. (See last page of this packet for instructions on ordering replacement certificates.)

HURRY! Send your membership order via e-mail to the national office at least two weeks prior to the induction ceremony to allow time for certificate preparation and shipping. Attach the new member data file to your e-mail order message and send it to the national office at phi.eta.sigma@wku.edu. **You should receive an e-mail confirmation that your order was received within 24 hours. Be sure to telephone the national office if you do not receive this confirmation; otherwise, there may have been a problem with the file transmission, and your order may not be processed on time.*

WATCH for your shipment of induction materials to be delivered to the chapter adviser's campus address.

Check the enclosed invoice to ensure that all items listed are included in the package. Be aware that jewelry may be packaged in an enclosed envelope or plastic wrapper for protection. After receiving and checking your order, organize the certificates and jewelry for distribution at the induction ceremony. Each order will include a list of chapter members whose certificates are included in that shipment. Please keep this list for your chapter records.

ADDITIONAL memberships/late orders should be submitted by the same method as your initial order.

Please create a new data file for each late membership order. Format the data file like your original order, according to our specified instructions. Please check for any duplication of records that may have been submitted in a previous order. Again, materials will be shipped to the chapter adviser's campus address.

**If you anticipate having several late additions, please consider sending them in as a group rather than sending one record at a time. It is both time-consuming & costly for the chapter adviser and national office to process & mail materials for late memberships individually.*

YIKES! A damaged or incorrect certificate! Need a replacement?

Feel free to place an order for a replacement certificate by e-mail or by mailing us a brief note. Your request must include the following:

- Chapter (school) name
- Induction date (at least an approximate date)
- Member's name as it should appear on certificate
- If this is a correction or name change, please provide the incorrect spelling as it was originally recorded, in addition to the correct spelling.

Please DO NOT submit another data file or membership slip when requesting a replacement certificate.

SUPPLIES, such as membership pads and "Q&A" brochures, may be requested anytime

by mail (using an order form), by phone, by fax, by e-mail, or by using our online order form on the **For Chapter Advisers** page of our Web site www.phietasigma.org. These items are shipped to the chapter adviser, at no cost to the chapter, anytime you request them. Other merchandise for sale is listed with prices on the order form.

**When you place an on-line order for merchandise or supplies, you should receive an e-mail confirmation within 24 hours that your order was received. If you do not receive confirmation, please phone the national office right away.*

****The national office extends credit to all Phi Eta Sigma chapters.** As mentioned above, each shipment of merchandise contains an invoice showing charges for all items listed and any payment applied to that transaction. If your chapter's account had a balance prior to that transaction, we will also attach a statement of account listing previous invoices and showing the total balance due on your account. Please be sure to route these documents to the person or department responsible for issuing payment. Feel free to call the national office if you have questions about your account.

Your assistance and cooperation in following these steps will help us to meet your needs with greater speed and efficiency. Chapters that follow these steps precisely are recognized at the Society's biennial national convention with our "Pathways" awards for superior administrative performance.

***Please check the Phi Eta Sigma Web site** for many items of Society information, including national scholarship news and national convention details.

Remember—Together, we are a great team!

Phi Eta Sigma National Honor Society
Western Kentucky University
1906 College Heights Blvd. #11062
Bowling Green, KY 42101-1062

Phone: 270-745-6540
FAX: 270-745-3893
E-mail: phi.eta.sigma@wku.edu
Web Site--www.phietasigma.org

