# **Alumni Advisor Instructions**

Need help? Email alumni@ptk.org

## **Viewing Alumni Association Member Roster**

- Log into Your Account at www.ptk.org
- Go to Advisors > Your Chapter > Rosters > Members



	Chapter Info	Eligible Students	Rosters
*	<b>Q</b> Profile	View	Members
Your Chapter	Contact Info	Upload	Alumni
	\$ Financials	Induction & Orientation Date	25
	Report Chapter Officers		

• Select All Association Members (Note: To View Past Association Members UNCHECK Both "Current" and "Future" Boxes)

Las	it Name:		First Name:		Email:			
City	/:		State/Province:	•	Country:		•	
Pos	sition:		Status:	-	Voting:		-	
Rep	presents:		• (V	rent Euture				
ctions	5: Export to File	Go				1	Add Committee	Me
Displa	Export to File	Go					Add Committee	Me
Displa	Export to File	Go	Membership	Location	From/To	Contact Information	Add Committee Voting Status	Me
Displa	Export to File	Go Position ADVISOR	Membership Advisor Membership Product	Location 123 Advisor Avenue Suite 188 Jackson, MS 39211	From/To 06/08/2016	Contact Information societyadvisor@test.com (601)555-3476	Add Committee Voting Status Non Voting Member	Me S
Displa	Export to File Last/First Name Advisor (TEST), Society Society	<b>Position</b> ADVISOR ADVISOR	Membership Advisor Membership Product Advisor Membership Product	Location 123 Advisor Avenue Suite 188 Jackson, MS 39211 123 Advisor Avenue Suite 188 Jackson, MS 39211	From/To 06/08/2016 06/08/2016	Contact Information societyadvisor@test.com (601)555-3476 societyadvisor@test.com (601)555-3476	Add Committee Voting Status Non Voting Member Non Voting Member	Me S A
	Export to File LattFirst Name Advisor (TEST), Society Advisor (TEST), Society Advisor (TEST), Society	Position ADVISOR ADVISOR ADVISOR	Membership Advisor Membership Product Advisor Membership Product Advisor Membership Product	Location 123 Advisor Avenue Suite 188 Jackson, MS 39211 123 Advisor Avenue Suite 188 Jackson, MS 39211 123 Advisor Avenue Suite 188 Jackson, MS 39211	From/To 06/08/2016 06/08/2016 06/08/2016	Contact Information society/advisor@test.com (601)555-3476 society/advisor@test.com (601)555-3476 society/advisor@test.com (601)555-3476	Add Committee	Ме 9 4 4
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• Or Select Individual Association Members

Last Name:		First Name:		Email:			
City:		State/Province:	•	Country:		•	
Position:	-	· Status:	-	Voting:		•	
Represents:	•	·					
Name:		Curr	ent Future				
ctions: Export to File	▼ Go				A	Add Committee	M
ctions: Export to File	▼ Go			5 (T	[	Add Committee	M
Ctions: Export to File Displaying 1-13 of 13 Last/First Name	Go Position	Membership Adving Manharship Deduct	Location	From/To	Contact Information	Add Committee	M
ctions: Export to File Displaying 1-13 of 13 Last/First Name Advisor (TEST), Society	Go Position ADVISOR	Membership Advisor Membership Product	Location 123 Advisor Avenue Suite 188 Jackson, MS 39211	From/To 06/08/2016	Contact Information societyadvisor@test.com (601)555-3476	Add Committee Voting Status Non Voting Member	M
tions: Export to File Displaying 1-13 of 13 Last/First Name Advisor (TEST), Society Advisor (TEST)	Go Position ADVISOR SOR	Membership Advisor Membership Product Advisor Membership Product	Location 123 Advisor Avenue Suite 189 Jackson, NS 39211 123 Advisor Avenue Suite 188 Jackson, NS 39211	From/To 06/08/2016 06/08/2016	Contact Information societyadvisor@test.com (601)555-3476 societyadvisor@test.com (601)555-3476	Add Committee	M S A
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• Select Action to Perform: Export to File, Print Roster, or Send Email

PHI THETA KAPPA	FUTURE MEMBERS	MEMBERS	ADVISORS	BLOG	SCHOLARSHIPS	EVENTS	GIVING	ABOUT US	STORI
	_			_					
Last Name:	First Name				Email:				
City:	State/Prov	ince:		·	Country:			•	
Position:	<ul> <li>Status:</li> </ul>		•	•	Voting:			•	
Represents:	•								
Name:	5	Current	Future						
Close									
Search Clear									
Ci - Export to File -							Ac	dd Committee	Membe
Display Export to File Print Roster					1	2 3 4	5 View Al	< <	> >
N: Send Email	nbership	Location			From/To	Contact Info	rmation	Voting	Status

# Adding Alumni Members to Association Member Roster

- Log into Your Account at www.ptk.org
- Go to Advisors > Your Chapter > Rosters > Members

FUTURE MEMBERS	MEMBERS	ADVISORS	BLOG	SCHOLARSHIPS	EVENTS	GIVING	ABOUT US	STORE	
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	Chapter Info	Eligible Students	Rosters
*	Q Profile	View	Members
Your Chapter	Contact Info	Upload	Alumni
	\$ Financials	Induction & Orientation Date	s
	Report Chapter Officers		

• Click "Add Committee Member"

Last Name:		First Name:		Email:	
City:		State/Province:	•	Country:	•
Position:	•	Status:	•	Voting:	•
Represents:	•				
Name:		Current	Future		
Search Clear					

- Enter the Email Address on File with Phi Theta Kappa for the Member
- Click "Check"

Enter the email address of the	e person you would like to add.	We will check our records to see i	f this person is already in the system.
★ Email Address:	danya.stuart@ptk.org	Check	

- Verify the Name of the Member
- Click "Continue"

Email Address:	danya.stuart@	ptk.org Check	
earch Results for danya	a.stuart@ptk.org		
Select	Name	Company	Location
۲	Stuart, Danya	Headquarters Staff, Phi Theta Kappa Honor Society	1625 Eastover Dr Jackson, MS 39211-6461

- **Position:** Alumni (Auto-selects)
- Sub-Position: Association Member
- Begin Date: Date Member Joined Alumni Association
- End Date: Can be left blank, for lifetime membership
- Click "Save"

★ Required	
Name:	Stuart, Danya
* Position:	Alumni 🗸
* Sub-Position:	Select 🔹
* Begin Date:	
* End Date:	
Save Carcel	

# Adding Alumni Association Officers (also add as member, if not already)

- Log into Your Account at www.ptk.org
- Go to Advisors > Your Chapter > Rosters > Members



	Chapter Info	Eligible Students	Rosters
*	Q Profile	View	Members
Your Chapter	Contact Info	Upload	Alumni
	\$ Financials	Induction & Orientation Dates	
	Report Chapter Officers		

• Click "Add Committee Member"

Last Name:		First Name:		Email:	
City:		State/Province:	-	Country:	•
Position:	•	Status:	-	Voting:	•
Represents:	•				
Name:		Current	Future		
Search Clear					

- Enter the Email Address on File with Phi Theta Kappa for the Member
- Click "Check"



- Verify the Name of the Member
- Click "Continue"

Email Address:	danya.stuart@	ptk.org Check	
earch Results for danya	a.stuart@ptk.org		
Select	Name	Company	Location
۲	Stuart, Danya	Headquarters Staff, Phi Theta Kappa Honor Society	1625 Eastover Dr Jackson, MS 39211-6461

- Position: Alumni (Auto-selects)
- **Sub-Position:** Select Alumni Association President, Alumni Association Vice President, Alumni Association Secretary, Alumni Association Treasurer
- Begin Date: First Day of Term
- End Date: Last Day of Term
- Click "Save"

* Required	Stuart Danva	
* Position:	Alumni	•
* Sub-Position:	Select	•
* Begin Date:		1
* End Date:		1

# **Updating Current Association Member/Officer Information**

- Log into Your Account at www.ptk.org
- Go to Advisors > Rosters > Members

FUTURE MEMBERS	MEMBERS	ADVISORS	BLOG	SCHOLARSHIPS	EVENTS	GIVING	ABOUT US	STORE	

	Chapter Info	Eligible Students	Rosters
*	<b>Q</b> Profile	View	Members
Your Chapter	Contact Info	Upload	Alumni
	\$ Financials	Induction & Orientation Dates	
	Report Chapter Officers		

#### • Click on Member Name

Rej	presents: Name arch Clear		ji C	<b>₽</b> Eurrent	E Future				
ction	s: Export to File	✓ Go					-	Add Committee	Membe
Displ	laying 1-13 of 13								
	Last/First Name	Position	Membership	Locatio	n	From/To	Contact Information	Voting Status	Status
	Advisor (TEST), Society	ADVISOR	Advisor Membership Product	t 123 Adv MS 3921	isor Avenue Suite 18B Jackson, I1	06/08/2016	societyadvisor@test.com (601)555-3476	Non Voting Member	Active
	Advisor (TEST), Society	ADVISOR	Advisor Membership Product	t 123 Adv MS 3921	isor Avenue Suite 18B Jackson, 1	06/08/2016	societyadvisor@test.com (601)555-3476	Non Voting Member	Active
	Advisor (TEST), Society	ADVISOR	Advisor Membership Product	t 123 Adv MS 3921	isor Avenue Suite 18B Jackson, I1	06/08/2016	societyadvisor@test.com (601)555-3476	Non Voting Member	Active
	Advisor (TEST), Society	ADVISOR	Advisor Membership Product	t 123 Adv MS 3921	isor Avenue Suite 18B Jackson, I1	06/08/2016	societyadvisor@test.com (601)555-3476	Non Voting Member	Active
	Advisor (TEST), Society	ADVISOR		123 Adv MS 3921	isor Avenue Suite 18B Jackson, I1	06/08/2016	societyadvisor@test.com (601)555-3476	Non Voting Member	Active
	Advisor (TEST), Society	ADVISOR	Advisor Membership Product	t 123 Adv MS 3921	isor Avenue Suite 18B Jackson, I1	06/08/2016	societyadvisor@test.com (601)555-3476	Non Voting Member	Active
	Advisor (TEST), Society	ADVISOR		123 Adv MS 3921	isor Avenue Suite 18B Jackson, I1	06/08/2016	societyadvisor@test.com (601)555-3476	Non Voting Member	Active
	Causey, Alan	Alumni Alumni Association President		1625 Ea 39211-6	stover Dr Jackson, MS 431	03/01/2016	alan.Causey@ptk.org (601) 984-5652	Non Voting Member	Active

• Under "Actions" in "Current Committee Positions," Click "Edit"



- Make Necessary Changes
- Click "Save"

★ Required	
Name:	Stuart, Danya
* Position:	Alumni 🗸
* Sub-Position:	Select 🔹
* Begin Date:	
* End Date:	
Save Cincel	

# Adding/Updating/Removing Alumni Association Advisors

- Go to ptk.org
- Scroll to Bottom of Page
- Click "Report New Advisor"

PHI THE TA KAPPA	FUTURE MEMBERS	MEMBERS	ADVISORS	BLOG	SCHOLARSHIPS	EVENTS	GIVING	ABOUT US	STORE
Contact Us <b>800.946.9995</b> ☑ Send a message ☑ Staff Directory	Stay Connecte	d M	Hel Q Fir B Rep	Dful Lin d Your Adv	iks visor dvisor				
1625 Eastover Drive, Jackson, MS 39211 M – F, 8:30 am – 5:00 pm CST	Give Online Nov	N			Violation	1			

• Complete the Advisor Update Form

PHITHETA KAPPA										
FUTURE M	EMBERS	MEMBERS	ADVISORS	BLOG	SCHOLARSHIPS	EVENTS	GIVING	ABOUT US	STORE	
Advisor Information Update Form Advisor Inform	atior	n Upd	ate Fo	rm			Con and and and and and and and and and an		J	

• Click "Submit" at the Bottom of the Form

PHITHETA KAPPA	FUTURE MEMBERS	MEMBERS	ADVISORS	BLOG	SCHOLARSHIPS	EVENTS	GIVING	ABOUT US	STORE
Information Submitted By								Su	bmit

### **Alumni Certificates**

Individual alumni members are able to purchase Alumni Certificates at <u>www.ptk.org/store</u> for \$10 per certificate.

Alumni Advisors may purchase certificates on behalf of their alumni chapters. Please contact *mia.ramos@ptk.org.*