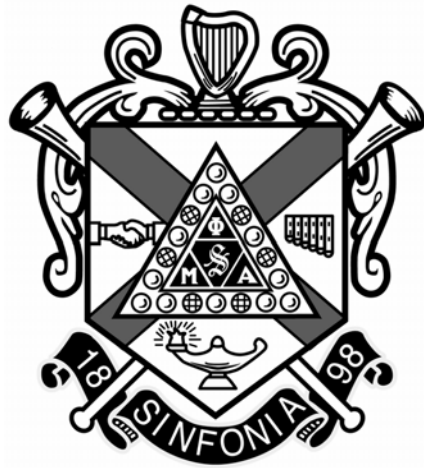


Phi Mu Alpha Sinfonia



Instructions For Probationary Member Registration and Initiation Reporting

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Introduction

In May 2004, the National Executive Committee ratified a plan to require all chapters to register their probationary members (PMs) with the National Headquarters at the beginning of the probationary membership period. Beginning with all probationary member classes in Fall 2004, every chapter must provide their Probationary Members' information (name, address, etc) through an online registration system.

This document is designed to provide step-by-step instructions as to how to complete this process. Using it, you will learn how to register your probationary members with the Fraternity, and how to complete the new online initiation report process. Use this guide as you register your probationary members for the first time, and refer to it as you have questions. Remember: you must use this process in order to complete accurate initiations. Traditional paper initiation reports will no longer be accepted at the headquarters. Please also be reminded that your initiation reports must be postmarked to the National Headquarters **no later than** two weeks prior to your initiation date. While the National Headquarters strives to ensure that all chapters receive their initiation packages in time for their initiations, on-time delivery of initiation packages for reports that are filed late cannot be guaranteed. Also, overnight shipping is not available and will not be provided, even if the chapter offers to pay for it.

This new system will make the process quicker and easier for everyone. Be sure to contact the National Headquarters with any questions.

Probationary Member Registration

Once your new probationary members have gone through the *Ceremony for Pledging*, it is important that you register them right away. The registration process is done exclusively online and can be done easily in one sitting, either on the day of the Pledging Ceremony or at the first meeting of the probationary class. Only chapter officers that are listed in the Fraternity's database have access to the online registration and initiation reporting tools.

Accessing the Online Registration Tool

- Go to www.sinfonia.org



- Log in to *MyDesktop* using the left toolbar.

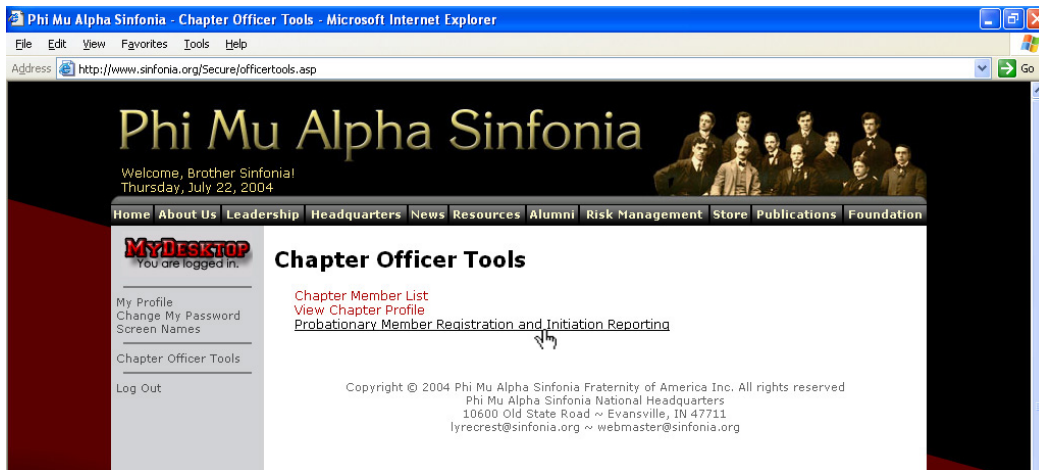


Problems? Questions? Call the National Headquarters at (800) 473-2649

- Click “Chapter Officer Tools” in the left toolbar.



- Click “Probationary Member Registration and Initiation Reporting” in the main window. This will take you to the main Probationary Member Registration and Initiation Reporting page (referred to as the Registry Manager).

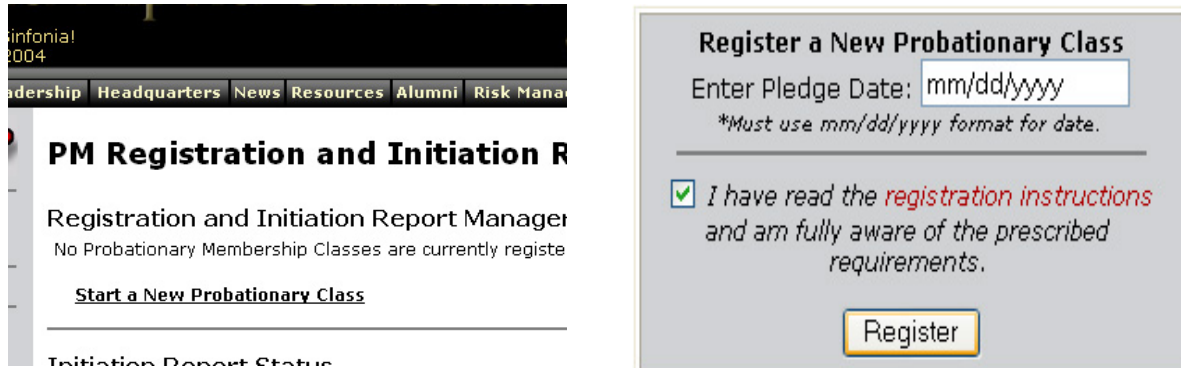


Registering the Probationary Class

There are four simple steps in registering your new probationary class.

Step One: Start Registration and Enter Pledge Date

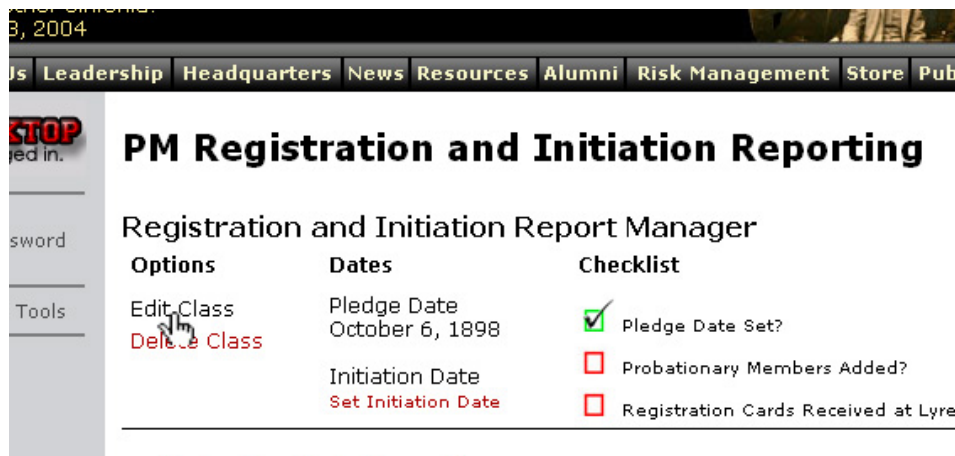
- From the Registry Manager, click “Start a New Probationary Class.” Enter the pledge date in the gray box labeled “Register New Probationary Class” (mm/dd/yyyy format means that May 8, 1983 would be entered as 05/08/1983), check the box above the “Register” button to verify you have read these instructions, and then click the “Register” button.



The screenshot shows the 'PM Registration and Initiation Report Manager' interface. On the left, there is a navigation menu with 'Leadership', 'Headquarters', 'News', 'Resources', 'Alumni', and 'Risk Management'. The main content area has a heading 'PM Registration and Initiation Report Manager' and a sub-heading 'Registration and Initiation Report Manager'. Below this, it states 'No Probationary Membership Classes are currently registered'. A button labeled 'Start a New Probationary Class' is visible. To the right, a modal window titled 'Register a New Probationary Class' is shown. It contains a text input field for 'Enter Pledge Date:' with a placeholder 'mm/dd/yyyy' and a note: '*Must use mm/dd/yyyy format for date.' Below the input field is a checked checkbox with the text 'I have read the registration instructions and am fully aware of the prescribed requirements.' At the bottom of the modal is a 'Register' button.

Step Two: Enter Individual Probationary Member Information

- From the Registry Manager, click “Edit Class” in the **Options** column.



The screenshot shows the 'PM Registration and Initiation Reporting' interface. The navigation menu includes 'Leadership', 'Headquarters', 'News', 'Resources', 'Alumni', 'Risk Management', 'Store', and 'Publications'. The main content area has a heading 'PM Registration and Initiation Reporting' and a sub-heading 'Registration and Initiation Report Manager'. Below this, there is a table with three columns: 'Options', 'Dates', and 'Checklist'.

Options	Dates	Checklist
Edit Class	Pledge Date	<input checked="" type="checkbox"/> Pledge Date Set?
Delete Class	October 6, 1898	<input type="checkbox"/> Probationary Members Added?
	Initiation Date	<input type="checkbox"/> Registration Cards Received at Lyre
	Set Initiation Date	

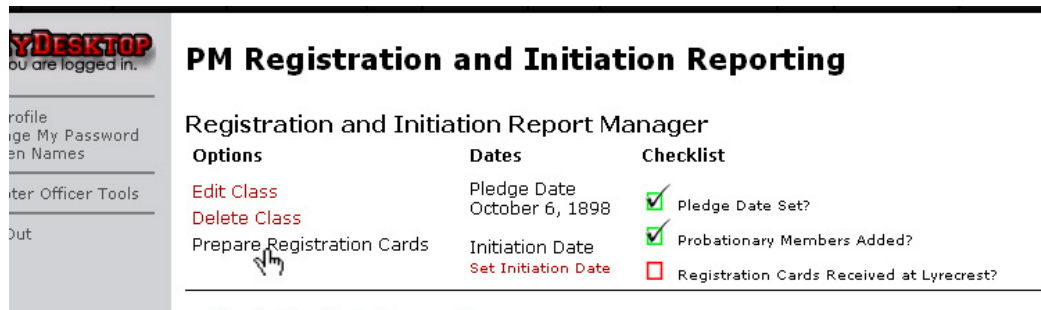
- Under **Roster Management**, click “Add a Probationary Member”.



- Enter the probationary member’s information, paying careful attention to any special formatting, such as dates.
- Repeat this process for all probationary members.

Step Three: Prepare Registration Cards

- From the Registry Manager, click “Prepare Registration Cards” in the **Options** column.



- To access the probationary member’s Registration Card, click on the probationary member's name. This will open a new browser window, so you will need to temporarily disable any pop-up blockers you may have running.
- Print this page (Please clear the page header and footer if possible – IE and Netscape users can do this in *Page Setup*).

Step Four: Mail Signature Cards to Lyrecrest

- After you have obtained all required signatures, insert all the cards into one envelope and mail it to:

Phi Mu Alpha Sinfonia
10600 Old State Road
Evansville, Indiana 47711

Problems? Questions? Call the National Headquarters at (800) 473-2649

Initiation Reporting

As covered in the introduction to this document, initiation reports cannot be filed until the registration cards for all the probationary members have been properly prepared and received at the National Headquarters. Once your registration cards have been received, you will be able to continue on to the Initiation Reporting section of the online tool.

Accessing the Online Initiation Report Tool

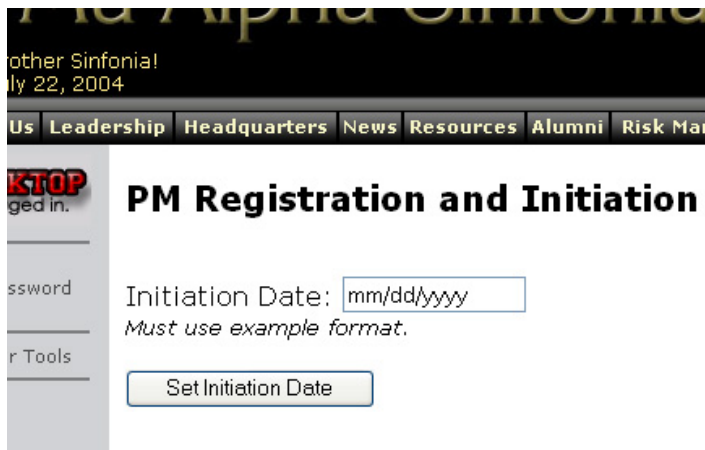
- Go to www.sinfonia.org
- Log in to *MyDesktop* using the left toolbar.
- Click “Chapter Officer Tools” in the left toolbar.
- Click “Probationary Member Registration and Initiation Reporting” in the main window. This will take you to the main Probationary Member Registration and Initiation Reporting page (referred to as the Registry Manager). At this point new options will be made available to you.

Preparing the Initiation Report

There are nine simple steps in preparing your initiation report.

Step One: Set the Initiation Date

- From the Registry Manager, click “Set Initiation Date” in the **Dates** column. Enter the scheduled initiation date (mm/dd/yyyy format) and click the “Set Initiation Date” button.



The screenshot shows a web interface for "PM Registration and Initiation". At the top, there is a navigation menu with links: Us, Leadership, Headquarters, News, Resources, Alumni, Risk Man. Below the menu, the page title is "PM Registration and Initiation". On the left side, there is a sidebar with a logo that says "KTOP" and "ged in." Below the logo, there are labels for "password" and "r Tools". The main content area contains the text "Initiation Date:" followed by a text input field with the placeholder "mm/dd/yyyy". Below the input field, there is a note: "Must use example format." At the bottom of the form, there is a button labeled "Set Initiation Date".

Step Two: Prepare Initiation Report

- From the Registry Manager, click “Prepare Initiation Report” in the **Options** column.

PM Registration and Initiation Reporting

Registration and Initiation Report Manager

Options	Dates	Checklist
Edit Class	Pledge Date October 6, 1898	<input checked="" type="checkbox"/> Registration Cards Received at Ly
Delete Class		<input checked="" type="checkbox"/> Initiation Date Set?
Prepare Initiation Report	Initiation Date October 8, 1898	<input type="checkbox"/> Initiation Report Completed?

[Start a New Probationary Class](#)

Initiation Report Status

Step Three: Verify Initiation Package Information

- The full name of each membership candidate and his selected initiation package will be displayed in the “Membership Candidate Information” section. Verify that this information is correct. If there are changes that must be made, click “Edit” next to the candidate’s name and make those corrections. If everything is correct, proceed to the next step.

PM Registration and Initiation Reporting

Review the information below. If everything is correct, click the "Complete Report" at the bottom of the page.

Membership Candidates Information

Initiation Date: 10/8/1898

Full Name	Initiation Package	Options
1. Mr. Joseph Sinfonia	Basic Package (\$117)	Edit

Step Four: Make Online Payment (OPTIONAL)

- One check for the entire amount is preferred. You may make payments online with a credit or debit card. Click “Add Credit Card Payment (Optional)” in the “Online Payment Information” section.

Online Payment Information (Optional)	
Grand Total:	\$117.00
No online payments recorded.	
Total due with initiation report:	\$117.00
Add Credit Card Payment (Optional)	

- Enter the required information for all fields. An additional 3% processing fee will be charged for each payment. This charge is not reflected in the “Total Payments recorded.” You will be required to verify that you are aware of this charge before you can add a payment by checking the checkbox above the “Add Payment” button. If you do not check this box your payment will not be recorded. Once all of your payment information is entered, click the “Add Payment” button. Do not click the button more than once, as it will record the payment multiple times, which will require you to then delete the extra payments.

Home About Us Leadership Headquarters News Resources Alumni Risk Management Store Publications Found	
MyDESKTOP You are logged in.	
My Profile Change My Password Screen Names	PM Registration and Initiation Reporting
Chapter Officer Tools	Card Type <input type="radio"/> MasterCard <input type="radio"/> Visa
Log Out	Name on Card <input type="text"/>
	Card Number <input type="text"/>
	Expiration Date Month <input type="text"/> Year <input type="text"/>
	Payment Amount <input type="text"/>
	Billing Zip Code <input type="text"/>
	Contact Phone <input type="text"/>
	<input type="checkbox"/> By checking this box you verify that you are aware an additional 3% processing fee will be charged to your card.
	<input type="button" value="Add Payment"/> - only click once
	<i>Payments made by credit card are not processed until the Initiation Report filing papers are received at the National Headquarters.</i>

- If you have entered any online payments, you can view, edit or delete them by clicking “View Credit Card Payments” in the same section.
- The total amount of the recorded payments (minus the 3% processing charges) is reflected next to “Total Payments Recorded”.
- The remaining balance owed, is shown next to “Total Due With Initiation Report.” This amount **must** be received at the National Headquarters with the Initiation Report. If it is not, the report **will not** be processed.

Step Five: Setting the Shipping Address

- Your chapter's mailing address has been selected automatically. If you wish to use a different address, click "Edit Shipping Address" and enter the desired shipping information.
NOTICE: Initiation packages cannot be sent to US Post Office Boxes.

Add Credit Card Payment (Optional)

Shipping Information

The chapter's general mailing address was automatically selected for shipping. If you wish to have the initiation materials sent to a different address, please update the address below.

Ship to: Phi Mu Alpha Sinfonia Fraternity
Gamma Gamma Chapter
State University
100 Main Street
Anytown, IN 44444

Edit Shipping Address

Complete Report

Back to Registry Manager

Step Six: Complete the Report

- Once the candidate, payment, and shipping information is verified, click "Complete Report" at the bottom of the page. This will take you to one last page that will ask you to verify that you want to complete the report. Once the report is completed, you will not be able to make further changes to the report. If you are confident that everything is ready, click "Yes"

Step Seven: Print the Report and Obtain the Required Signatures

- As with the registration cards, please remove any headers or footers (see Step Three under Probationary Member Registration above.)
- Each membership candidate **must** sign under his name on the generated report. Both the Report Preparer and the Faculty Advisor **must** sign the report where designated. If a report does not have these signatures, it **will not** be processed.

Sinfonia
2004



Leadership
Headquarters
News
Resources
Alumni
Risk Management
Store
Publications
Foundations

PM Registration and Initiation Reporting

Report 2021 committed

YOU ARE NOT DONE!!!

There is one more step.
Click [here](#) to print your report. Obtain the required signatures, and mail it to the National Headquarters with any pending payments. Your report will not be processed and no materials will be shipped until this has been done; no exceptions.

Back to Registry Manager

Step Eight: Mail the Report to the National Headquarters

- The report must be postmarked no later than two weeks (14 days) **before** the initiation date. Headquarters staff will not guarantee on-time initiation materials if your report is received after the deadline. **NO EXCEPTIONS.**

Step Nine: Follow-up!

- Once your report is complete, you will have a new entry under the “Initiation Report Status” section of the main online registration and initiation reporting page. This will let you know exactly where your report is in processing. If there are any problems with your report, the report preparer will be contacted by a member of the National Staff. If you are contacted, it is **EXTREMELY** important that you get back in touch with the National Staff as soon as possible.

That’s it! You are done!

If you follow these easy steps, you should have no problems in registering your probationary members and filing your initiation reports.

Q&A and Troubleshooting

What if a probationary members drops out or the chapter votes to end his membership after he is registered?

If a probationary member's membership is ended, all you need to do his delete him from the Class Roster. Go to "Edit Options" – "View Probationary Member" and click "Delete" next to the former probationary member's name.

We sent our cards in but have added a new probationary member since then. Do we need to send in a registration card for him?

Yes. You will not be able to continue on to the initiation report options until a properly prepared card has been received for every listed probationary member.

A few minutes ago I could access the online registration manager. Now it says I am not authorized to access the page. What happened?

More than likely your log in session has expired. Simply re-log in and continue where you left off. Sessions expire after a significant time of inactivity, so be sure you have everything ready to go when you get started.

We sent our cards in, but on the Registration Manager page it says they were sent "Incomplete". What should we do?

Contact Lyrecrest immediately. Do not wait until your next chapter meeting and do not wait for someone else to do it. If the message on the Registration Manager page reads that there are cards missing, the last names of the probationary members whose cards are missing will be displayed. It could also be that the appropriate signatures were not acquired. Regardless, the thing to do is contact the National Headquarters right away.

Phi Mu Alpha Sinfonia

Probationary Member Information Sheet

Title: _____

Full Name: _____

First

Middle

Last

Suffix: _____

Birth Date: _____

Address 1 Parents School Home Business

Line 1 _____

Line 2 _____

Line 3 _____

City _____ State _____ Zip _____

Country _____

Phone _____

Address 2 Parents School Home Business

Line 1 _____

Line 2 _____

Line 3 _____

City _____ State _____ Zip _____

Country _____

Phone _____

Mobile Phone: _____

Email: _____ URL: _____

Projected Graduation Date: _____ (if you don't know, guess)

Academic Class: Freshman Sophomore Junior Senior Graduate

Major: _____ Projected Profession: _____

Instrument/Voice _____

Initiation Package (you do not have to decide now)

Basic Package (\$117) Upgrade #1 (\$188) Upgrade #2 (\$205)

Notice to Chapter Officers:

This form is to be used to obtain your probationary members' information for the Probationary Members Registration process. Do not send this form to the National Headquarters. It is for your use and should be disposed of once you have completed the registration process. Your chapter is solely responsible for registering its probationary members.

Phi Mu Alpha Sinfonia
 National Headquarters
 10600 Old State Road
 Evansville, Indiana 47711-1399

Probationary Member Registration

Chapter:	Gamma Gamma	Chap #:	999
School:	State University	Prov #:	99

I, Mr. Joseph Sinfonia , do hereby assert my official intent to become a member of Phi Mu Alpha Sinfonia Fraternity and am willing to make the necessary commitment of time, effort, and finances to fulfill the obligations of membership. Furthermore, I do hereby certify that I have received, read, and will abide by and support the Fraternity’s *Risk Management Policies*. I also acknowledge that if I am aware of any violations of the Fraternity’s policies, I am required to report such violations immediately as prescribed in the *Protocol for Hazing Allegations*.

Mr. Joseph Sinfonia

Signature

Chapter Officer Verification	
We the undersigned do hereby attest that Mr. Joseph Sinfonia has been provided a copy of the current <i>Risk Management Policies</i> for thorough review and has been made fully aware of the required obligations to gain membership.	
<p>President</p> <p>_____</p> <p><i>Signature</i></p> <p>_____</p> <p><i>Print Name</i></p>	<p>Faculty Advisor</p> <p>_____</p> <p><i>Signature</i></p> <p>_____</p> <p><i>Print Name</i></p>

National Office Use Only			
PD	10/6/1898	PM	_____
RD	7/22/2004	RX	_____
SD	7/22/2004	PX	_____



Phi Mu Alpha Sinfonia
 National Headquarters
 10600 Old State Road
 Evansville, IN 47711

Office Use Only	
Report ID: 2021	
PM DATE	
ON TIME?	

Chapter Initiation Report

Initiation Date:
 Saturday, October 08, 1898
Postmark On or Before:
 Saturday, September 24, 1898

Chapter: Gamma Gamma School: State University	Chapter #: 999 Province #: 99
--	--

Member # (Office Use)	Full Name (Title First Middle Last Suffix)	Basic Package	Upgrade #1	Upgrade #2	Total
	Mr. Joseph Sinfonia Signature	X			\$117
Subtotals		\$117	\$0	\$0	\$117
Total Online Payments					\$0
Total Due with Report					\$117
Amount Enclosed					

Report Preparer Signature:
 Joseph H Sinfonia

Signature _____
 () _____ - _____
 Phone

Shipping Information:
 Phi Mu Alpha Sinfonia Fraternity
 Gamma Gamma Chapter
 State University
 100 Main Street
 Anytown, IN 44444

Faculty Advisor Signature:
 Print Name and Sign

Signature _____
 () _____ - _____
 Phone

Report ID: 2021