

# Sigma Pi Sigma, the Physics Honor Society



Induction guidelines 2014

# Sigma Pi Sigma Member Induction preamble to the traditional GREEN FOLDER

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Hello from beautiful downtown ACP – I greet you with tidings of GREEN.

You should be reading this information because you are either listed in our database as the Faculty Advisor for the Sigma Pi Sigma physics honor society chapter at your school or because you serve in some other leadership capacity in your department (for example, the department chair or SPS Advisor, among others).

Being the Sigma Pi Sigma Advisor and mentor to young physicists is an honor, so I congratulate you on your willingness to serve your students.

In 2011, the SPS National Office moved to an all online processes for Sigma Pi Sigma Induction requests. In 2014, we are making another move to a more user-friendly system. The selection of the new platform, *myhonorsociety.com*, was based primarily on feedback from advisors and students over the past three years. If you are no longer the Sigma Pi Sigma Advisor for your chapter, please contact us at [sigmapisigma@aip.org](mailto:sigmapisigma@aip.org) or call the office at 301-209-3007 to let us know of this change. We need your name and email address in order to enter you in to the new system.

The impetus for moving to a new system is to further reduce the time necessary to process inductions, and to ensure that members receive induction materials efficiently. Our new system will also address an issue of acquiring proper contact information from potential inductees during the induction process. In the new system, students will be required to complete full membership record prior to processing induction materials. Completing the member record is imperative so that the new honor society member can begin to receive their membership benefits, including *Radiations* magazine, a complementary year of SPS membership. Moreover, having contact information allows us to foster the connectedness among our membership that is in the spirit of the honor society.

In the following you will find:

- Overview of Sigma Pi Sigma, the Physics Honor Society, including the benefits of membership in the society
- Simplified overview of the new induction process
- Brief list of the functions available on the new induction site that we think advisors will find useful
- Detailed instructions for how to make a Sigma Pi Sigma induction happen at your school
- Detailed instructions for the use of the new Sigma Pi Sigma induction system on the *MyHonorSociety.com* platform.

If you have any questions or concerns, please do not hesitate to contact me at the numbers/email listed below. We here at the national office are very excited about this new opportunity to serve our students and the hard-working advisors that make this happen on campuses across the country.

Toni Sauncy  
Director, SPS and Sigma Pi Sigma

# Overview of Sigma Pi Sigma

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including the benefits of membership in the society

[Sigma Pi Sigma](#) exists to honor outstanding scholarship in physics; to encourage interest in physics among students at all levels; to promote an attitude of service of its members towards their fellow students, colleagues, and the public; to provide a fellowship of persons who have excelled in physics. Founded by students in 1921, Sigma Pi Sigma joined with the American Institute of Physics Student Sections in 1968 to form [The Society of Physics Students \(SPS\)](#). Today, Sigma Pi Sigma and SPS are still 'linked, but distinct'. This unique two-in-one society operates within the American Institute of Physics, a non-profit umbrella organization for ten other science societies.

- Election to Sigma Pi Sigma is a **lifetime membership**. Membership fees are collected upon induction, with no annual fee or additional fees thereafter.
- New members pay an induction fee of \$54 (\$60 for non-US addresses) at the time of their reception into Sigma Pi Sigma.
- This entrance fee includes a **complimentary one-year membership in the Society of Physics Students** (current SPS members will have a one-year extension in their memberships)
- Induction into the Sigma Pi Sigma Honor Society includes the **official Sigma Pi Sigma lapel pin**, a personalized **certificate of membership**, and a personalized membership **identification card**.

As a lifetime member of the physics honor society, each member receives

- a subscription to the semi-annual *Radiations Magazine*, the official publication of Sigma Pi Sigma
- notice of special events, such as **the Quadrennial Physics Congress** and other opportunities through quarterly emails from the Sigma Pi Sigma Director.
- invitation to participate in the **Sigma Pi Sigma LinkedIn career-networking site**.

In addition, the U.S. Civil Service Commission has stated that membership in a recognized national honor society (like Sigma Pi Sigma) **meets one of the requirements for entrance at the GS-7 level** in numerous professional and technical occupations in the Federal service.

Sigma Pi Sigma fees pay a portion of the cost of operations of the honor society. The remainder comes from SPS dues, alumni contributions, and AIP funds. Voluntary contributions of Sigma Pi Sigma members fund several annual programs that support undergraduate physics. To learn more about these programs at [www.spsnational.org/programs](http://www.spsnational.org/programs), and if you desire to help support them, please see <http://www.spsnational.org/about/support.htm>

# Simplified Overview of the Sigma Pi Sigma Induction Process

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*Beginning January 1, 2014*

- Sigma Pi Sigma URL for inductions:  
[sigmapisigma.myhonorsociety.com/account/login.cfm](http://sigmapisigma.myhonorsociety.com/account/login.cfm)
- Advisors must “Name” the new induction group
- Advisors must enter First name, Last name, and valid email address for inductees.
- Advisors may enter inductee list one-by-one, or by uploading a spreadsheet (template on Sigma Pi Sigma web page)
- Advisors may pay for the group by credit card or check, or students can be required to pay for themselves.
- Potential initiates receive an email invitation to join Sigma Pi Sigma, with a link where they can log on to accept the invitation and complete their profile. They then receive a follow up welcome letter with information about the induction date (as specified by the advisor).
- Advisors must set a deadline by which inductees must log on to accept the invitation to join. The DEADLINE MUST BE TWO WEEKS PRIOR TO INDUCTION DATE in order to avoid increased shipping charges.
- Sigma Pi Sigma Induction fee is \$54.
- Only those students that accept the invitation to induction will be processed through the system.

## Brief list of functionality in the new system

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The new Sigma Pi Sigma portal is a one-stop place to allow you as the Chapter Advisor to work with the National Office in the process of inducting new members to the physics honor society.

This portal is powered by MyHonorSociety.com and has been specifically customized for Sigma Pi Sigma. The induction workflow has not changed, you will have more flexibility on creating, editing and submitting the list of students, to easily communicate with them at all stages of the process and maintain a fluid communication with the National Office. At the same time the National Office will be able to easily monitor the inductions from all the Society's chapters and more efficiently prepare and mail you the materials you request.

You will be able to enter the candidates by uploading a file with the names and e-mails and we have provided you with templates for the invitation and the welcome letter. Your students will easily fill out the needed information and make the payment online or, if you have selected this option, you will be able to generate an invoice to submit a check to pay for all the inductions.

Besides the Induction Management System, the Chapter Advisor Portal will be the place to request supplies, report and update chapter officers (if needed), register for events, and edit advisor and other chapter contact information.

## Make a Sigma Pi Sigma induction happen!

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Timeline	ACTION
Early in the academic year	Set Sigma Pi Sigma Induction Ceremony date – review the guidelines set by the SPS Constitution for eligibility at your school.
<b>Minimum 4 weeks prior to induction ceremony</b>	<ul style="list-style-type: none"> <li>• Determine list of prospective new members<sup>1</sup> and alert them with invitations (paper or electronic).</li> <li>• Prepare a list of candidates who have accepted the invitation. In order to begin the online process, you must have for EACH inductee.               <ul style="list-style-type: none"> <li>▪ Full Name</li> <li>▪ Current (functional email address) required</li> </ul> </li> <li>• Decide how payment will be accomplished.<sup>2</sup> There are two options:               <ul style="list-style-type: none"> <li>○ Single bulk payment for the inductee group made during online registration process on the secure server. (PREFERRED)</li> <li>○ Request to receive an invoice for remission of payment via regular mail.</li> </ul> </li> </ul>
<b>At least three weeks before planned Induction Ceremony<sup>3</sup></b>	<ul style="list-style-type: none"> <li>• Enter the newest inductee names, email addresses and Serial Membership numbers into the Sigma Pi Sigma database:</li> </ul> <p style="text-align: center; color: #008000; font-size: 1.2em;"> <a href="http://sigmapisigma.myhonorsociety.com/account/login.cfm">sigmapisigma.myhonorsociety.com/account/login.cfm</a> </p> <ul style="list-style-type: none"> <li>• USERID: Your email address</li> <li>• PASSWORD: Click “forgot password?”</li> </ul> <p>After the inductees' names and email addresses are entered, the inductees will automatically be sent email requests to complete their membership profile, and payment reminders will go out to advisors or students depending on your selections.</p>

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<sup>1</sup> Your chapter's nominating committee (chaired by the Sigma Pi Sigma Chapter Advisor) makes this determination, in accordance with the [SPS Constitution](#) and your chapter's By-Laws.

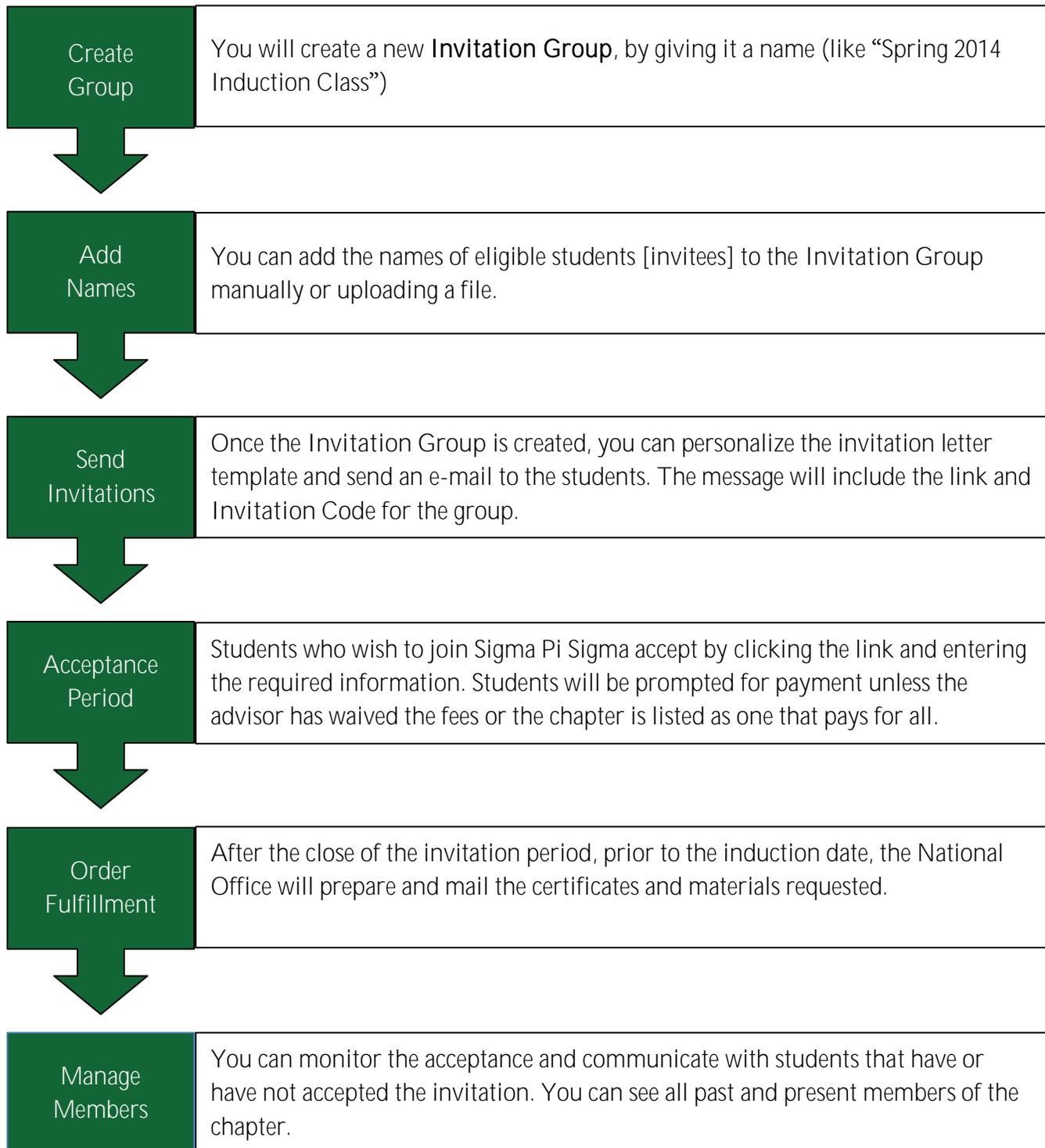
<sup>2</sup> Election to Sigma Pi Sigma is a lifetime membership. Each new member pays an induction fee of \$54 at the time of their reception into Sigma Pi Sigma. This fee includes all induction materials and a complimentary one year membership in the Society of Physics Students, along with other honor society benefits.

<sup>3</sup> Three weeks out allows for one week for students to accept the invitation and complete information in the MyHonorSociety.com system. The SPS National Office needs a minimum of 10 BUSINESS DAYS to guarantee that induction materials arrive in time.

# The Sigma Pi Sigma Induction Workflow

## Sigma Pi Sigma Induction Workflow Diagram

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# Instructions for Advisors-PLEASE READ CAREFULLY

## Starting the Sigma Pi Sigma Induction Process

Please enter [sigmapisigma.myhonorsociety.com](http://sigmapisigma.myhonorsociety.com) in your browser and logon into the system. If you don't know or forgot your password, please click the "Forgot password?" link and the system will generate and e-mail you a password. The e-mail address to enter is the one you used to register with the National Office. If you do not receive an email from MyHonorSociety.com to reset your password,



please check your spam. (see Appendix C) Please contact us at [sgimapisigma@aip.org](mailto:sgimapisigma@aip.org) or 301-209-3007 if you have any problems.

## General Navigation Information

Once you log in you will be redirected to your Dashboard. This is a "one-stop" overview of the current status of your Chapter. Along the left side of the screen you will find your main Chapter Advisor Portal Menu.

- Chapter Profile – Overview of information about your chapter, including addresses, e-mails, phone numbers and advisors.
- Invited Groups – Allows you to create and manage your groups of eligible students for induction.
- Message Templates – Allows you to create standard invitation and welcome messages for reuse (there are some templates already created by the National Office that you can edit as you want).
- Sponsors – Allows you to edit other advisor information for your chapter.
- Members – Allows you to find information about members in your chapter, both past and present.
- Supply requests – Allows you to order supplies for your chapter.
- Reports – Allows you to create exportable lists of current members and alumni.
- My Profile – Allow you to edit your own address, e-mail, phone and other account information.



Almost all of these areas have a data table that displays pertinent information, and all of the tables work similarly. We will look at one of these tables to get an idea of how they function. Each table includes several components.

## Sponsor information

In the MyHonorSociety system, the advisors are called “sponsors”.

The screenshot shows a web interface for a table titled "Sponsors". At the top right, there is a "Choose Columns..." dropdown menu (1). Below it is a "Quick Filter:" search box (3). On the left, there is a "Display 10 records per page" dropdown menu (2). The table has columns: First (5), Last (6), Dept. (4), Pos., Email, and Phone. Each column header has a small up/down arrow. The table contains three rows of data. Below the table, there is a "Showing 1 to 3 of 3 records" label (7) and a "Create New Sponsor..." button (9). On the far right, there are navigation controls (8).

First	Last	Dept.	Pos.	Email	Phone
Another	Advisor	Physics	Sigma Pi Sigma Co-Advisor	another@college.edu	
One	Professor		SPS Advisor	prof@college.edu	
First	Sponsor	Physics	Sigma Pi Sigma Advisor	first_sponsor@college.edu	

1. The **Column-Chooser** allows you to choose which columns of information appear in the table. Clicking the down arrow will display a list of available columns from which you can choose the ones you would like to view. Placing a check next to the column name makes that column appear in the table. Removing a check removes the column.
2. The **Rows-to-Display-Chooser**, a drop-down menu located directly below the file title, allows you to change the number of records that will appear in the table. You can use the drop-down menu to choose the number of records you wish to display per page. To browse from one page to another, you will use the Page Controls located below the table on the far right-hand side.
3. Located above the table at the far right side is the Quick Filter, which is an advanced search tool. This tool allows you to limit the records that display in the table. As you begin typing in the box, any data in any column that matches what you are typing will be displayed. So, for example, you are in the Sponsors table and need to edit the contact information for Angie Smith, an assistant sponsor. As you begin typing Angie into the box, the table will filter down to all records that contain Angie.
4. The header of the table contains up and down arrows for all columns that allow you to change the Sort Order of the column. At this time we only support sorting on one column at a time. A single white arrow in a field tells you how the data is currently being sorted.

5. The first column on the left-hand side of the table is your Action Column. This column will contain different icons that let you work with the data.

#### Common Actions

 Edit the details of the record. Depending on the record, this may just be a quick edit that gives you access to a limited number of data points you can edit.

 Deletes the record

#### Specialized Actions

 Used in conjunction with the “Quick Edit” icon above, this one gives you access to all the data points for editing.

 Import a prospective group for a file allows you to upload a file of names and e-mail address to create an Induction group.

 Send an e-mail.

6. The footer of the table contains a Filter for each column. While the Quick Filter above filters for data in any column, this filters data only for this specific column.<sup>4</sup>
7. Under the table on the left-hand side you will see a record count and a message that tells you how many records you are viewing.
8. The right-hand side under the table contains your page navigation that lets you traverse through the records.

 Jumps to the First Page of data

 Goes back one page of data

# shows what page number you are currently viewing

 Goes forward page of data

 Jumps to the Last Page of data

9. Finally, every table has an icon that will allow you to add a new record. It will always be distinguished by the white plus sign in a green circle icon. 

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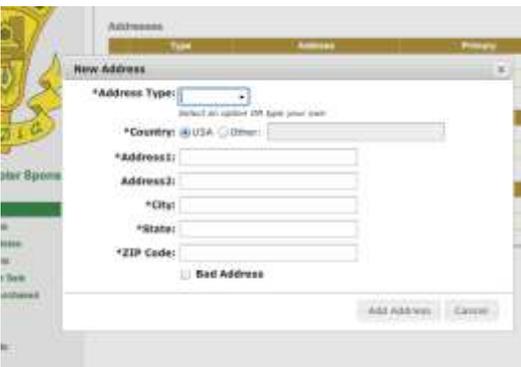
<sup>4</sup> See all the available operators in Appendix B.

## Chapter Profile

One of the first things you will want to do after logging in is to check your Chapter Profile for accuracy. While every effort has been made to ensure the integrity of the data transferred into the system, errors might occur. You will note that there are some pieces of information that you are allowed to edit, some you can edit that prompt a notification to the National Office staff, and some you are not allowed to modify. The Chapter Profile page is composed of three tabs: the General tab, the Contact tab, and the Sponsors, (i.e., Advisors) tab.

As the Chapter does not charge dues, please leave 0 in that space.

The Contact tab allows you to add and edit addresses and phone numbers associated with the chapter. These may or may not be your own address and phone number. Your personal address and phone number can be edited in My Profile area located at the bottom of the side menu bar.

A screenshot of a web application's 'New Address' form. The form is titled 'New Address' and has a 'Type' dropdown menu. Below the title, there is a field for '\*Address Type:' with a dropdown arrow. A note below this field says 'Default all options OFF, take your own'. The form contains several required fields marked with an asterisk: '\*Country:' with radio buttons for 'USA' and 'Other'; '\*Address1:'; 'Address2:'; '\*City:'; '\*State:'; and '\*ZIP Code:'. There is also a checkbox labeled 'Bad Address'. At the bottom right of the form are two buttons: 'Add Address' and 'Cancel'.

To add an address or phone number, click the green button with a plus sign located in the footer of the display table. A new window will be overlaid for you to enter the appropriate information. An asterisk (\*) indicates the field is required.

A chapter may have multiple addresses associated with it, but only one of those addresses can be the Primary address.

The Sponsors (Advisors) tab is where you can edit cosponsor and assistant sponsor data. You can also edit other sponsors in the Sponsors area from the menu on the left-hand side of the page.

# Induction Management Walkthrough

Once you have confirmed that the information for your Chapter is correct, you are now ready to create an invitation group by clicking on the Invitation Groups menu item. An invitation group is a set of students from your institution that meet eligibility requirements, as set forth by your Constitution, that you would like to invite to join Sigma Pi Sigma.

Once you assemble the list of prospective new members (in an Excel spreadsheet, for example – please see below) you will click Create a New Invitation Group located below the data table of Invitation Groups.

This will take you to the New Invitation Group form where you will fill some basic information

The screenshot shows the 'New Invitation Group' form. At the top, there's a green header with 'SIGMA PI SIGMA'. Below it, the title 'New Invitation Group' is displayed. A sub-header reads: 'Enter some basic information to create a new invitation group. After the record is created, you can proceed to edit details and import invitees.'

The form contains several input fields:

- \*Name:** A text box containing 'New Induction List'. Below it, a note says: 'Enter a friendly name, like "Spring 2010".'
- \*Invitations Expire:** A date field set to '04/24/2014', followed by time dropdowns for '11', '59', and 'PM', and a time zone dropdown set to 'UTC-04:00 (EDT)'. A note below reads: 'The National Office will not print certificates for your chapter until AFTER this date.'
- \*Induction Date:** A date field set to '05/25/2014'.
- \*Waiver Payment Method:** A dropdown menu set to 'Credit Card'. A note below says: 'You will pay for waivers by credit card after the invitations obse.'

There are two main sections for messages:

- Invitation:** A section with a 'Personalization' icon and a 'Template' dropdown set to 'Select a template'. A dropdown menu is open showing 'Invitation Letter' and 'Welcome to Sigma Pi Sigma Letter'. An 'Apply' button is next to it. Below is a rich text editor with a toolbar containing 'B', 'I', and other icons.
- Welcome Message:** A section with a 'Send Welcome Message' checkbox checked and a 'Personalization' icon. It also has a 'Template' dropdown set to 'Select a template' and an 'Apply' button. Below is another rich text editor with a toolbar.

Name – A “friendly” name for the invitation group is required. This is a way for you to quickly identify the group in the table. (Examples: Jan’s Sp11 undergrads, Fall2010, Sumr2012 grads, Ind 4/22/11, etc.)

Invitations Expire – This is the deadline for students to accept the invitation to join Sigma Pi Sigma. In order for the National Office to have time to print and mail certificates and pins to you before your induction ceremony, the deadline must be two weeks (ten business days) prior to the induction date.

Induction Date – This is the planned date of your induction ceremony or the date by which you need your certificates and pins in hand. This will be the date used by the National Office staff to meet the deadline of getting certificates printed and mailed in time for distribution on your campus.

Invitation – You can edit the provided template and tailor it to the needs of your Chapter and the forthcoming induction. The system allows for personalization of the e-mail by using a technique similar to mail-merge found in most word processors.

You can **personalize the provided template invitation e-mail** by adding variables that take on values specific to the recipient. [Note that the inserted information will appear *exactly* as it does in your imported table. Here's what you can use:

- **{name}** - The recipient's full name (first and last)
- **{first-name}** - The recipient's first name
- **{last-name}** - The recipient's last name
- **{e-mail}** - The recipient's e-mail address
- **{invitation-code}** - The group invitation code
- **{expiration-date}** - The invitation expiration date
- **{induction-date}** - The induction date

The variables must be entered exactly as they are written in bold above.

Please note that a link to accept the invitation online will be included automatically in all invitations. It will be inserted just after the text of your invitation.

Welcome Message – After accepting the invitation and paying the dues online, a Welcome Message and a receipt will be e-mailed to the student. The Welcome Message is where you should put detailed information a new member would need to know, such as the exact date and time and instructions for attending the induction ceremony, how to RSVP for a reception, etc. This message allows you to include only the most important information in the Invitation. Both the Invitation and the Welcome Message can benefit from the personalization commands mentioned earlier.

Your Welcome Message may need to be adjusted at various times throughout the process. What you want to say to a new member who registers before your Invitations Close date may differ from what needs to be said to someone registering after your induction ceremony has already taken place.

There is already a Welcome Message template that you can personalize as needed.

Once you click the Create Invitation Group, the page will reload and a new tab labeled Invitees appears. Click on this tab to enter your list of prospective inductees. There are two ways to add prospective members—either by manually entering names one at a time or by uploading a file of names as a bulk entry. Once you have created

the new group, you should see a box, **outlined in red**, which contains the unique Invitation Code for this new group.

## Manual Data Entry of Invitees

To enter the names one at a time, click the Add Invitee button located in the data footer. A form will appear for you to enter the three required fields.

- *The first name, the last name, and an e-mail address is required to enter a new invitee.*

Click Add Invitee button to add the student to the prospective group.

**NOTE: The invitees' names will appear exactly as they entered.** We suggest mixed cased and no middle names in your list of invitees (whether by manual entry or file

are or initials upload).

## Bulk Data Entry of Invitees from a File

To take advantage of the most efficient data entry feature of the Induction Management System, you simply upload a list of names directly to the Induction Group. The system can accept CSV, fixed-width text files, or Excel (xls or xlsx) files.

### Excel Files

The file needs to contain a single row for each student you wish to invite. include the first name, last name, address of the student. You may headers if you wish, but they are If you uploaded a Microsoft Excel will get a choice to tell the system which worksheet in the file contains the data.

1	First Name	Last Name	Email Address
2	NICHOLAS	AALERUD	nicholas.aalerud@example.com
3	LISA	ALZAIM	lisa.alzaim@example.com
4	Nancy	Anderton	nancy.anderton@example.com
5	Chris	Atencio	chris.atencio@example.com
6	Deborah	Berry	deborah.berry@example.com
7	PATRICIA	BETTS	patricia.betts@example.com
8	KATHRYN	BONY	kathryn.bony@example.com

row of data You need to and e-mail include not required. file, then you



You will be able to set which row to begin the import. If you included Headers in row 1, then you would most likely start the import in row 2. If you didn't include headers, then you will probably start the import in row 1.

### Delimited Text Files (CSV, TXT)

The file needs to contain a single row of data for each student you wish to invite. You need to include the first name, last name, and e-mail address of the student. Each field must be delimited, but which delimiter you use is immaterial. You may qualify your fields if you wish to, but that is not required. Headers are



optional as well.

The system is “smart” and reads your file to “guess” which qualifier and delimiters are being used. Before processing, it displays these guesses and allows you to make any modifications.



The delimited text file upload has a few more options for you to consider. The system will already have read your file and attempted to guess at the correct specifications. But, if it got any of them wrong, you will be able to change them prior to the import.

Delimiter – This is the character used to separate one data field from another.

Qualifier – This is the character used to differentiate your field data from your delimiter. If a qualifier exists, most generally it will be either a single-quote (‘) or a double-quote (“).

Start Import at Row – Allows you to set at which row to begin the import. If you included headers, then you would most likely start the import in row 2. If you didn’t include headers, then you would probably start the import in row 1.

### Fixed Width Files

The file needs to contain a single row of data for each student. You need to include their first name, last name, and e-mail address. You will be able to set the set the field lengths used after you upload the file to ensure that the fields start and stop at the appropriate intervals.



If your file is a fixed-width file, you will need to indicate the length of each field is by typing in the width of each column in your file and separating that by a comma. So, in the example here, the first name is 10 characters long, at which point, the last name starts. It is 20 characters long. Finally, e-mail address is 254 characters long.



Once you have your bulk file prepared, you can upload it from the Invitees tab by clicking the Import Invitees from File link.

This will take you to the page where you can select your file and upload it. Press the Browse button to open up an “Open File” dialog box and browse your computer for your prepared

file. Once the file has been located, click the Upload button to send the file to the system for processing.

The system will read the file and attempt to “guess” the format and prepare a preview of the data import. You will have the opportunity to make changes to any of the settings prior to importing the data. The settings available will be dependent upon what kind of file you have uploaded.

As you configure the appropriate settings, the system will show you a 10-record preview of how it plans to import the data. You can use the drop-down boxes located above each field to designate what kind of data

Data Preview:  
Based on the settings above, here is how the first 10 rows of your data have been parsed. Use the select boxes to designate which columns represent First Name, Last Name and Email values.

First Name	Last Name	Email
NICHOLAS	AALERUD	nicholas.aalerud@example.com
LISA	ALZAIM	lisa.alzaim@example.com
Nancy	Anderton	nancy.anderton@example.com
Chris	Atencio	chris.atencio@example.com
Deborah	Berry	deborah.berry@example.com
PATRICIA	BETTS	patricia.betts@example.com
KATHRYN	BONY	kathryn.bony@example.com
SARAH	BOOTH	sarah.booth@example.com
Jeffrey	Borg	jeffrey.borg@example.com
Darrell	Bottoms	darrell.bottoms@example.com

is contained by that field.

When all the appropriate settings are set and all three required fields have been designated, a green Ready box will appear with the Import Records button. Clicking it will add the contents of the file to the invitee group.

If there are any problems with your configuration, then the system will not display the green box but instead will display a red error box that informs you of the errors needing to be resolved.

Once you have entered your invitees, you will be able to send your invitations, which will automatically include the directions for students to accept the invitation and the invitation code.



**SECURITY NOTE:** Even if a student found another person's invitation, he could not use it to accept it as his own. The Induction Management System will block any student whose name and e-mail address have not been uploaded or entered into the Invitation Group. If a student was able to accurately guess the invitee's e-mail address, he could only succeed in registering and paying dues for the original invitee, not himself.

## Sending the Electronic Invitations

Click the Send Email Invitations<sup>5</sup> icon located in either the Invitation Groups dashboard or under the Invitees data table on the Invitees tab. This will take you to the page that allows you to



Preview the invitations. The preview page tells you how many e-mails you are about to send and lets you see how the merge worked. You can use the navigation control located at the bottom of the page to preview each e-mail.

*If you used a Personalization Code* to have the student names merged into your e-mail, you should see a student's name in the Preview. If you see the code instead of an actual name in the Preview, you have entered the code improperly. Hit Cancel to go back and edit your invitation message. When you are ready to send your invitations, just click the Send Invitations button.



## Adding More Invitees to an Invitation Group

Sometimes a sponsor will learn of one or more eligible students after the main group of invitations has already been sent. Sigma Pi Sigma does not have to create a new Invitation Group for these students.

- To manually add subsequent invitees to your current Invitation Group, Click in the pencil (✎) to edit the list, select the Invitees tab and click the Add Invitee button immediately below the table of invitees. This allows you to manually enter the three fields of data for one or more late invitees.



- After adding each new invitee, you will be taken back to the Invitees tab where you may notice that these new invitees do not have a check in the Invited column. Simply click the Send Email Invitations button at the bottom of the screen to have your original invitation sent to these “late” invitees.

<sup>5</sup> Refer to Appendix C for methods to ensure that your email invitations are not caught by institutions' anti-spam systems.

## Other Communications (Deadline Reminders, Information Changes, etc.)

Besides sending invitation and welcome e-mails, you can use the system to communicate with a) all the invitees, b) those invitees who have accepted the invitation, or c) those invitees who have not yet accepted an invitation. From the Invitation Groups tab, click on the name of the group containing the students you wish to message. Then go to the Invitees tab. Under the list of invitees, there is a text link to the right that reads Send Message to Invitees.

This will take you to the Invitee Message creation page.

- Invitation Group: Choose the invitation group to whom you wish to send a message.
- Send To: Choose the sub-group(s) of invitees with whom you wish to communicate.
- BCC: You may enter e-mail addresses for people who should receive a blind carbon copy of the e-mail.
- Subject: Enter a subject for the e-mail.
- Message: Type your message. You can use the same Personalization techniques you used in the invitation e-mail in the body of this message. If you are sending an invitation reminder message, be sure to copy and paste the Acceptance Instructions into the body of your message. This way the invitee can proceed directly from your reminder to online registration. Then preview your message and make any needed changes. Once you are happy with your message, click the Send Message button.

## Payment information: Bypassing, Waiving Dues Payment or Bulk Payment by Chapter

In some instances a Chapter will pay for the inductions instead of each individual student paying its own. *Please let the National Office know that your Department will make a single payment.*

First	Last	Email	Invited	Accepted	Bypass Code	Send Email??
Student	One	student1@college.edu	N	N		Y
Physical	Therapy	physical_1@college.edu	N	N		Y
Scholar	Two	scholar2@college.edu	N	N		Y

To waive or bypass the dues for a student, click the Dues-Bypass icon in the Invitees tab of the Invitation Group page. A confirmation box will appear to inform you that you'll still be required to pay the National Dues. When you click OK, the system will send an e-mail to the student that contains a single-use, dues-bypass code that they will be able to use to bypass the payment section during the acceptance process. When the invitation period closes, a notification will appear on your Dashboard that it is time to designate the method you will be using to pay the induction costs. This will need to be done before the National Office can print certificates for this Invitation Group.

## Certificate Reprints

Since members will be filling out their own contact information and will have access to their own “Member Portal” as soon as they pay dues, they will be responsible for and able to order their own reprints. However, if a certificate is received from the National Office damaged in some other way and you wish to request it be reprinted for the student, simply contact the office for a new certificate.

## Late Registrations

In order for you to receive all the materials on time for your induction and allow time to process all the information at the National Office no late registrations are accepted. Those students that did not respond by the deadline can be included in the next invitation group and will be inducted at a later date.

## Maintaining Your Chapter Contacts

Besides allowing you to manage your Invitation Groups, the Chapter Sponsor Portal also allows you to manage the sponsors and contacts associated with your chapter. We ask that you keep the name and address of your university’s president up-to-date there, as well.

## Add a New Sponsor

If you would like to add an additional sponsor, click the Create New Sponsor link and complete the form. After completing the form, the National Office will be notified that a new sponsor has been added to your Chapter.



- Title – This is the honorific title that might be associated with a person’s names, such as, Dr., Mr., Ms., et. al. *This is not the person’s position at the institution.*
- First Name – The sponsor’s first name
- Middle Name – The sponsor’s middle name
- Middle Name – The sponsor’s middle name
- Last Name – The sponsor’s last name
- Suffix – Any honorifics that need to be associated with the sponsor’s name that provides additional information about the sponsor.
- Department – The department in which the sponsor is employed at the institution.
- Position – The position of the sponsor at the institution.
- Send Mailings – If this sponsor should receive mailings, check the box.
- **E-mail** – The sponsor’s e-mail address
- Password – This is an initial password that you can set for the new sponsor so that he or she can access the Sponsor Portal. The sponsor will be required to change this initial password after logging in the first time.

After clicking the Create Sponsor button, the initial data will be saved, and the page will change to an Edit Sponsor page where you can add contact information.

## Edit a Sponsor

The Edit Sponsor form is very similar to the Add Sponsor form. However, there is an additional tab labeled Contact that you can use to add addresses and phone numbers to the sponsor. This operates like the address and phone number sections of the Chapter Profile.

## Change the Primary Sponsor/Liaison

While many Chapters have co-sponsors that share responsibility for the administration of the local Chapter, this system requires and only allows for one of the sponsors to be the Primary Liaison with the National Office. However, this information can be changed at any time.

Simply ensure that the sponsor who you wish to make the new Primary Liaison has been added to the Chapter Contacts. Then click on Chapter Profile, choose the new person from the **drop-down list** labeled Primary Liaison, and click the Save General Info button. The National Office will be notified of any changes to this field.

**The Primary Liaison MUST have a Primary Address, e-mail address, telephone number, and must have at least one address that is designated as a Mailing Address.**

## Members

This area allows you to find information about members of your chapter, both past and present. Simply use the data table to filter down or find the member and click the View Details () icon to see the member's record. See Appendix B for searching parameters. You can also use the Reports tab to pull various membership lists and reports into Excel spreadsheets for chapter use.

## Requests for Chapter Supplies

The final section of the Chapter Portal is the area that allows you to request supplies from the National Office. You will notice that the Supplies Request area is composed of three tabs:

- New Request Tab – allows you to create and submit a supply request to the National Office.
- Pending Request Tab – allows you to see a supply request that has been submitted, but has not yet been fulfilled by the National Office.
- Fulfilled request – allows you to see your history of supply requests already shipped by the National Office.

The screenshot shows the 'Supply Requests' web interface. At the top, there are three tabs: 'New Request', 'Pending Requests (0)', and 'Fulfilled Requests (0)'. Below the tabs is the 'Create New Supply Request' form. The form contains a table with columns for 'Qty.', 'Item', 'Each', and 'Extended'. The table has two rows: one for 'Sigma Pi Sigma Honor Chords (\$15.00)' with a quantity of 1, and another for 'LPS Priority (3-day) (\$20.00)'. Below the table, there is a 'Requested Delivery Date' field set to '1/9/2014' and a 'Special Instructions' text area. A 'Continue >>' button is at the bottom right. A note at the bottom states: 'You can review this request before it is submitted.'

Qty.	Item	Each	Extended
1	Sigma Pi Sigma Honor Chords (\$15.00)	\$15.00	\$15.00
	LPS Priority (3-day) (\$20.00)	\$20.00	\$20.00
	<b>Total:</b>		<b>\$35.00</b>

## Creating a Supply Request

While on the New Request tab, simply add a line item for each supply that you need.

In the Quantity field enter the number of this item that you need. The Item drop-down box lists the different supplies you can request. Choose the item you are out of that needs to be restocked. If a fee is associated the other fields will be updated as appropriate.

- Click the Add Another Item in the footer of the table to request an additional supply item and select another item from the drop-down menu.
- If you need the supplies very quickly, you can change the Shipping method here. Express shipments have corresponding charges.
- Enter in a Requested Delivery Date and any Special Instructions.
- Click the Continue Button to review your request and supply any shipping or billing information as necessary.

After completing the process, the National Office is notified of a Supply Request and will fulfill the order.

## Issue Notification Request

While every effort has been made to ensure that this system will run smoothly and efficiently, issues might arise. When this happens, please try to record any error messages that were displayed and document what task you were trying to complete. Then contact the National Office for initial technical support. If a student has a **registration problem that you're unable to solve, ask them to call the National Office from the computer from which they are trying to register.**

If the issue cannot be resolved by the staff at the National Office, they will contact the vendor for support. The vendor will then contact the chapter sponsor and work directly with the user via the most reasonable means to resolve the issues.

## Appendix A: Frequently Asked Questions and their Answers

### **HELP? I don't know what to do. Who should I call?**

Please know that you can call 301-209-3007 if you have any questions, or email [sigmapisigma@aip.org](mailto:sigmapisigma@aip.org).

### **I am missing some information about one of my students! What should I do?**

Unfortunately, you must have information (name, working email )in order to begin the induction process. The online system can be thought as the modern version of the old paper "MICs" (Membership Information Cards). Students were not allowed to be inducted into Sigma Pi Sigma until their card was complete. Likewise, we need information about the student to proceed with the induction.

### **I can't find our chapter's RED BOOK! How can I determine the last serial number used for my school?**

After logging on the system, the highest serial number in our database associated with your school will be displayed. You may use this as the database of record and use the next consecutive number. The SPS National Office does maintain an historic set of red books for every Sigma Pi Sigma chapter. However, the data contained in these books depends on what is submitted by chapter advisors over the years.

### **What if my students are already SPS Members? Is there a discount?**

Due to Association of College Honor Society (ACHS) regulations, all Sigma Pi Sigma inductees must be charged the same fee. All Sigma Pi Sigma inductees will receive a complimentary membership in SPS. Current SPS members will receive a complimentary one year extension to the SPS membership.

### **The \$54 induction fee seems high. How does it compare with other honor societies?**

The induction fee of \$54 is actually one of the lower induction fees reported by honor societies who are members of ACHS. Many other honor societies require additional annual fees to maintain membership. Sigma Pi Sigma does not.

### **What do Sigma Pi Sigma dues pay for?**

Sigma Pi Sigma membership lasts for a lifetime. Induction fees pay a portion of the cost of operations of the society. The remainder comes from SPS dues, alumni contributions, and AIP funds. Voluntary contributions of Sigma Pi Sigma members fund several annual programs that support undergraduate physics in a broad range of activities, projects and awards. All Sigma Pi Sigma members are encouraged to make themselves aware of the multitude of opportunities that exist through the SPS and Sigma Pi Sigma network. To learn more about these programs look at [www.spsnational.org/programs](http://www.spsnational.org/programs), and if you desire to help support them, please see <http://donate.aip.org>.

## Appendix B: Filter Operators

Using operators to filter the data in the data tables can allow you to quickly pinpoint specific members.

Syntax	Means
<b>expression</b>	like '%expression%'
<b>=expression</b>	exactly equals 'expression'
<b>!=expression</b>	does not equal 'expression'
<b>&gt;expression</b>	greater than 'expression'
<b>&gt;=expression</b>	greater than or equal to 'expression'
<b>&lt;=expression</b>	less than or equal to 'expression'
<b>&lt;expression</b>	less than 'expression'
<b>in (exp1 , exp2)</b>	in the list 'exp1,exp2'
<b>! in (exp1 , exp2)</b>	not in the list 'exp1,exp2'
<b>=NULL</b>	is NULL or blank
<b>!=NULL</b>	is notNULL or blank
<b>num1 - num2</b>	between num1 and num2, inclusive
<b>date1 - date2</b>	between date1 and date2, inclusive

Notes:

- No qualifiers (no single quotes) should be used.
- Valid date delimiters are '/' and '.' (no '-' because that's the range operator).
- Whitespace is generally ignored within operators: '! in (1,2,3)' works as well as '!in(1,2,3)' and '!in (1, 2, 3)'.
- Whitespace is maintained within string expressions though, so that 'Region V' is different than 'RegionV'.
- Operators should not be used for Boolean data types. Entering 1, Y, or T (case-insensitive) evaluates to true, and 0, N, F evaluate to false.

## Appendix C: Considerations to Ensure E-mail Delivery

If you will be using institution-provided e-mail addresses for the students you are inviting, you may need to work with your college's IT staff to ensure that e-mail invitations are not treated as spam. Many institutions employ institution-wide spam protection to prevent seemingly unwanted messages from being sent to faculty, staff, and students. While every effort has been made to ensure that our e-mail invitations do not appear as spam, some spam protection systems may still categorize the messages as spam.

All email generated by MHS comes from the email address: no-reply@myhonorsociety.com and the IP address: 65.182.212.242. You should ask your IT department to "whitelist" these addresses to help ensure your invitations reach your students.

**Do not assume that your institution's Information Technology Services will not** be blocking your Induction System invitations. We suggest you contact them as soon as possible with the information above to make sure that your students will receive all your messages.