## Chapter Portal Instructions Contents

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Student Chapter Portal – Login (My Account)

We are pleased to announce that the functionality within the Student Chapter Portal via the Login (My Account) has been significantly revamped to allow our OSA chapter officers the ability to maintain their chapter information.

New functionality included:

- Provide portal access to chapter advisors, chapter profile and advisor information
- The ability to update chapter contact and other information.
- The ability to search for and add chapter advisors, officers and chapter members.
- The ability to certify both chapter members and officer rosters during the annual reporting period.

Individuals with the officer role of President, Vice President, Secretary, Treasurer, Advisor or Co-Advisor can reach the portal by logging into Login (My Account) using their individual credentials. Once logged in, officers access the portal by clicking on the Student Chapters tab. The chapter portal includes the chapter information as well as advisor, officer, member, former officers and former members sections.
# Chapter Information form

The *Chapter Information* form allows additions and updates to the chapter name (required), chapter address (required), chapter email (required) and chapter website. It also displays the affiliated organization(s), chapter code and chapter status. The information can be edited via the edit buttons.

## Chapter Information

<table>
<thead>
<tr>
<th>Contact Information</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chapter Name:</strong></td>
<td><strong>Affiliated Organizations:</strong></td>
</tr>
<tr>
<td>Rochester Optics Student Chapter</td>
<td>University of Rochester</td>
</tr>
<tr>
<td><strong>Mailing Address:</strong></td>
<td><strong>Chapter Code:</strong></td>
</tr>
<tr>
<td>Rochester Optics Student Chapter</td>
<td>UCR</td>
</tr>
<tr>
<td>275 Hutchison Road</td>
<td></td>
</tr>
<tr>
<td>Rochester NY 14627</td>
<td></td>
</tr>
<tr>
<td><strong>Chapter Email:</strong></td>
<td><strong>Chapter Status:</strong></td>
</tr>
<tr>
<td></td>
<td>Approved</td>
</tr>
</tbody>
</table>

## Websites

| business: | https://sa.rochester.edu/clubs/OSA/about |

[EDIT]
Click on the “Edit” button located next to Contact Information to update your chapter’s information. The question mark next to the field will give you additional detail regarding that field. You can also add a website or edit your existing website via the Add and Edit buttons.

![Edit OSA My Account Chapter Contact Information](image)

- **Chapter Name:** UR OSA Student Chapter
- **Address Line 1:** 275 Hutchison Road
  - Required
- **Address Line 2:** Wilmot Bldg
- **City:** Rochester
  - Required
- **Country:** UNITED STATES
  - Required
- **State/Province:** New York
  - Required
- **Zip/Postal Code:** 14620
  - Required
- **Chapter Email:** ur.student.osa@gmail.com
  - Required

[Save] [Cancel]
Advisors

Only one advisor and one co-advisor can be assigned. If there is an available advisor or co-advisor slot, an "Add" button will appear on the form in the top right portion of the page. If the chapter has an advisor or co-advisor with an active term, that individual's information will display, along with an "Edit" button.

Chapters must have one advisor, and may have one co-advisor. Advisors and co-advisors must be faculty members at the chapter's institution and cannot be OSP Student members.

<table>
<thead>
<tr>
<th>Position</th>
<th>First Name</th>
<th>Last Name</th>
<th>Institution</th>
<th>Member Type</th>
<th>Term Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advisor</td>
<td>P. Scott</td>
<td>Carney</td>
<td>University of Rochester</td>
<td>Individual</td>
<td>01/01/2018</td>
</tr>
</tbody>
</table>
Adding an advisor or co-advisor

Clicking on the "Add" button takes you to a search screen where the advisor’s First Name, Last Name and Email are entered. All of these fields are required before searching.

Upon clicking "Search", close matches will be displayed.

If your advisor is not in the search results, you can send an email with instructions for becoming your chapter’s advisor.
Clicking on the "Add" button next to the advisor's or co-advisor's information takes you to the "Add Chapter Officer" form. The following fields/options are available:

- Position (required) – select the advisor or co-advisor option from the drop down list
- Term Start Date (required) - defaults to today's date but is editable
- Term End Date - typically left blank as advisors/co-advisors do not have set terms

Click on “Save” to add the information to your chapter record.
Removing an existing advisor or co-advisor record

Clicking "Edit" next to an existing advisor or co-advisor's name, takes you to an update form. Only the term end date is editable - typically used to remove the advisor or co-advisor in order to add a new advisor. Advisors or co-advisors whose terms have ended will be listed on the Former Officers in the chapter portal.

Enter the term end date for the advisor or co-advisor and click on “Save”.

If the advisor or co-advisor role selected to be added is currently filled, you will receive one of the following messages:

- "Chapter advisor already exists, please select co-advisor from the drop-down."
- or "Chapter co-advisor already exists, please select advisor from the drop-down."

The new role must be chosen before the advisor/co-advisor relationship can be saved. If you are trying to change to a new advisor or co-advisor you may need to end date the current advisor or co-advisors relationship prior to adding the new advisor or co-advisor. Please see section above titled “Removing an existing advisor or co-advisor.”
If the search results do not return the advisor's/co-advisor's information, officers can send an email to the advisor by clicking on a link at the bottom of the search page. Doing so produces a box with a pre-populated message to be sent to the email address used in the search. The message is not editable. Clicking on send triggers the email.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Institution</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cathy</td>
<td>Johnson</td>
<td>The Optical Society</td>
<td><a href="mailto:zzcathyjohnson304@z3.yahoo.com">zzcathyjohnson304@z3.yahoo.com</a></td>
</tr>
<tr>
<td>Cathy</td>
<td>Johnson</td>
<td>The Optical Society</td>
<td><a href="mailto:zzcathyjohnson304@z3.gmail.com">zzcathyjohnson304@z3.gmail.com</a></td>
</tr>
<tr>
<td>Cathy</td>
<td>Johnson</td>
<td>OSA</td>
<td><a href="mailto:zzcathyjohnson304@z3.yahoo.com">zzcathyjohnson304@z3.yahoo.com</a></td>
</tr>
<tr>
<td>Cathy</td>
<td>Johnson</td>
<td>OSA</td>
<td><a href="mailto:cjjohnson@ose.org">cjjohnson@ose.org</a></td>
</tr>
</tbody>
</table>

If your advisor is not in the search results, you can send an email with instructions for becoming your chapter's advisor.
Within the email is a single-use link for the advisor to accept the designation.

The Rochester Optics Student Chapter Student Chapter has designated you as its chapter advisor. To accept this invitation, click here and log into your OSA account. If you do not have an OSA profile, you will be required to set one up before confirming.

For assistance, email chaptersandsections@osa.org

OSA Chapters and Sections

Clicking the link takes the advisor/co-advisor to a page where he or she accepts the designation.
Officers

Officers now have the ability to update their officer roster via the chapter portal. An "Add" button on the top of the form allows new officers to be added. An "Edit" button next to each existing officer's term information allows you to update/extend the term end date if the student is continuing on in that role or end date the current officer if that officer term has ended. The current roles available are: President, Vice President, Secretary, Treasurer and Other Officer. Only one president, vice president, secretary and treasurer can be added through the portal. An unlimited number of other officers can be added.

Note: A new officer may not be added to the position unless the start date of the new term is greater than the end date of the existing officer's term. Upon "Save" if position selected is filled for any portion of the term dates specified for the president, vice president, secretary or treasurer, the message "This position is filled for term dates specified." is shown. You will have to adjust the term start/end date for either the existing or new officer in order to add the new officers. Note: An officer with a future term that does not overlap an existing officer term will be accepted. For example - It is perfectly acceptable to enter a new officer with a term start date of 1/1/2019 if the existing officer's term end date is 12/31/2018.

![Officers Table]

Note: Student chapter officers are required to be OSA Student members, as well as chapter members.

<table>
<thead>
<tr>
<th>Position</th>
<th>First Name</th>
<th>Last Name</th>
<th>Institution</th>
<th>Term Start Date</th>
<th>Term End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>Brandon</td>
<td>Dube</td>
<td>University of Rochester</td>
<td>09/01/2016</td>
<td>12/31/2018</td>
</tr>
<tr>
<td>Vice President</td>
<td>Kyle</td>
<td>Guzek</td>
<td>University of Rochester</td>
<td>02/22/2018</td>
<td>12/31/2018</td>
</tr>
<tr>
<td>Secretary</td>
<td>Jaren</td>
<td>Ashcraft</td>
<td>Optical Society of America</td>
<td>09/01/2016</td>
<td>05/31/2018</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Luis</td>
<td>Aleman-Castaneda</td>
<td>University of Rochester</td>
<td>02/20/2018</td>
<td>01/31/2019</td>
</tr>
<tr>
<td>Other Officer</td>
<td>Yule</td>
<td>Bodell</td>
<td>University of Rochester</td>
<td>12/01/2015</td>
<td>05/31/2018</td>
</tr>
<tr>
<td>Other Officer</td>
<td>Saumya</td>
<td>Choudhary</td>
<td>University of Rochester</td>
<td>02/21/2018</td>
<td>12/31/2018</td>
</tr>
<tr>
<td>Other Officer</td>
<td>John</td>
<td>Pirog</td>
<td>University of Rochester</td>
<td>09/01/2016</td>
<td>05/30/2018</td>
</tr>
<tr>
<td>Other Officer</td>
<td>David</td>
<td>Lippman</td>
<td>University of Rochester</td>
<td>09/26/2016</td>
<td>04/30/2018</td>
</tr>
</tbody>
</table>

Showing 1 to 8 of 8 entries
Adding an officer

Click the "Add" button which will take you to the Add - OSA My Account Chapter Officer form.

Select the individual from the dropdown list.

- Individual (required) - Drop-down of those individuals qualified to be chapter officers will be displayed. The following requirements have to be met in order to appear in the dropdown list.
  - Requirements include:
    - Chapter member with an "approved" status
    - OSA Student member

Select the Position (required) - Drop-down including president, vice president, secretary, treasurer and other officer positions
Select the Title (optional) most often used for other officers
Enter Term Start Date (required) - defaults to today's date but is editable
Enter Term End Date (required) - date is up to the student but typically aligns with either the end of the academic or calendar year

Click on “Save”
Editing or ending an officer term

Clicking "Edit" next to an existing officer's information takes you to the Edit - OSA My Account Chapter Officer form. If the officer is continuing on in the same position, you can extend the officer’s term end date for another year. If the officer term has come to an end, you can enter the term end date to end the officer's term.

The fields displayed on this form are:
- Chapter name (read-only)
- Individual name (read-only)
- Position (read only)
- Title (optional)
- Term start date (read-only)
- Term End Date (editable)
Chapter Members

The Members section contains a list of current and pending members of the student chapter. This is where the chapter officer can approve or decline chapter members’ applications. The functionality within the Members section has been expanded to include the ability to add new chapter members directly via the portal.

The information displayed includes First Name, Last Name, Institution, Term End Date, OSA Member status and Chapter Member status. (If an individual is NOT an OSA member, the OSA Member status will be highlighted in red.) Each of the columns is sortable. The "Add" button will allow you to add new members to your chapter and the "Edit" button will allow you to extend or end a chapter member’s status.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Institution</th>
<th>Term End Date</th>
<th>OSA Member</th>
<th>Member Type</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luke</td>
<td>Broadley</td>
<td>RMIT University</td>
<td>12/31/2018</td>
<td>Yes</td>
<td>Student</td>
<td>Approved</td>
</tr>
<tr>
<td>Marco</td>
<td>Capelli</td>
<td>ARC Centre for Nanoscale Biophotonics</td>
<td>10/31/2018</td>
<td>Yes</td>
<td>Student</td>
<td>Approved</td>
</tr>
<tr>
<td>Markus</td>
<td>Knoerzer</td>
<td>Royal Melbourne Institute of Technology</td>
<td>12/31/2019</td>
<td>Yes</td>
<td>Student</td>
<td>Approved</td>
</tr>
<tr>
<td>Rekha</td>
<td>Raju</td>
<td>RMIT University</td>
<td>04/30/2018</td>
<td>No</td>
<td>Non-Member</td>
<td>Approved</td>
</tr>
<tr>
<td>Crispin</td>
<td>Szyczik</td>
<td>RMIT University</td>
<td>11/30/2019</td>
<td>Yes</td>
<td>Student</td>
<td>Approved</td>
</tr>
<tr>
<td>test</td>
<td>test</td>
<td>test</td>
<td>03/31/2018</td>
<td>No</td>
<td>Non-Member</td>
<td>Approved</td>
</tr>
<tr>
<td>Litty</td>
<td>Thakkekara</td>
<td>Royal Melbourne Institute of Technology</td>
<td>04/30/2018</td>
<td>Yes</td>
<td>Student</td>
<td>Approved</td>
</tr>
</tbody>
</table>
Adding a chapter member

Clicking on the "Add" button takes you to a search screen where the student's First Name, Last Name and Email are entered. All of these fields are required before searching.
Upon clicking "Search", close matches will be returned.

Select the “Add” button next to the individual that you want to add as a chapter member.
Enter Term Start Date (required) - defaults to today's date but is editable

Enter Term End Date (required) - date is up to the student but typically aligns with either the end of the academic or calendar year

Status (required) defaults to Approved but is editable.

- **Approved** – Chapter membership has been approved by a chapter officer.
- **Declined** – Chapter membership has been declined by a chapter officer.
- **Pending** – Chapter membership request has been sent to chapter officers to review.
- **Changed University** – Individual is a student at a different institution.
- **Graduated** – Individual has graduated and is no longer a student
- **Inactive** - Individual's chapter membership has ended/expired.

Click on “Save” to add the student to the chapter.
The Thank you page will display.

Click on “Finish” to complete.

If search results do not return the correct student's information, you can send an email to the student with instructions for joining the chapter directly.
If the individual you are searching for is not in our database, email your chapter member with instructions for joining the chapter.

Clicking the link pops a message which is emailed to the student upon "Send". The message is not editable, and is sent to the address used in the search.

To: ptorri@osa.org

Subject: Become a chapter member

An officer or advisor from the Rochester Optics Student Chapter Student Chapter has indicated that you are interested in becoming a chapter member.

To join the chapter go to My Account and log in or create an OSA profile. Then click on the Student Chapter tab and select the chapter.

Thank you,
OSA Chapters and Sections
An officer or advisor from the Rochester Optics Student Chapter Student Chapter has indicated that you are interested in becoming a chapter member.

To join the chapter go to My Account and log in or create an OSA profile. Then click on the Student Chapter tab and select the chapter.

Thank you,
OSA Chapters and Sections

Clicking the link in the email takes the student to "My Account", where, after logging in or creating an account, the student can join a chapter directly by going to the Student Chapter tab.
Editing a student’s chapter membership

Clicking the "Edit" button adjacent to the chapter member's information takes you to the Edit-Chapter Relationship Status form.

![Example screenshot](image)

You can change the term end date to extend the student’s membership with the chapter. You can select any of the following status options depending on the situation:

- **Approved** – Chapter membership has been approved by a chapter officer.
- **Declined** – Chapter membership has been declined by a chapter officer.
- ***Pending** – Chapter membership request has been sent to chapter officers to review.
- **Changed University** – Individual is a student at a different institution.
- **Graduated** – Individual has graduated and is no longer a student.
- **Inactive** – Individual's chapter membership has ended/expired.
Pending members should be reviewed by officers and the appropriate status should be selected and saved. Typically, the officer would change the status from Pending to either Approved or Declined.
Annual Report Submission

The officer and member roster portion of the Annual Report has been moved to the chapter portal. From November 1-December 31 of each year, an option to certify the Member and Officer roster will be available via the portal as part of the annual report process. After you update your Officer and Member rosters, you will need to click on the “I confirm that this list accurately reflects the current chapter officers” and the “I confirm that this list accurately reflects the current member roster”.

The chapter must have the president, vice president, secretary and treasurer positions filled in order to certify the rosters. If any of those positions are vacant, the following message is displayed. "Your chapter must have a president, vice-president, secretary and treasurer before the roster can be certified." Upon filling vacant positions, this message will be hidden and the certification checkbox will not be greyed out anymore.
The chapter's member roster must have at least five OSA Student members in order to certify the roster. If the chapter does not meet this criteria, the message "Chapters must have at least five OSA Student members before a chapter roster can be certified." appears. Once you have the five Approved OSA student members, this message will be hidden and the certification checkbox will not be greyed out anymore.
A link to Foundant, OSA Grants Database will appear on the chapter portal and can be used by officers or advisor to submit the chapter's annual report.