



Sigma Theta Tau International  
**Honor Society of Nursing<sup>®</sup>**

**Online Induction System  
Orientation and Training Manual**

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# I. Background of the System

## Introducing the online induction system...

The induction process is one of the most important administrative tasks that your chapter undertakes. No other work so immediately affects the vitality of your chapter and the organization as a whole. We are pleased to offer chapters a quick and easy online system to manage their inductions and send invitations electronically in order to expedite the process.

**NOTE: It is recommended that you utilize the Internet Explorer Web browser when using the online induction system. If you utilize Netscape as your Web browser you may experience difficulties in using some interactive components of the system.**

In a nutshell, a series of Web pages have been designed to allow chapters to:

- Send headquarters pertinent induction information
- Upload eligible candidates
- Initiate invitation and reminder messages to candidates
- Track responses and payments
- Generate attendee and other reports

The process begins by your chapter providing headquarters basic information about your induction and compiling a list of your eligible candidates on a spreadsheet template provided by headquarters. Once that list of candidates is uploaded into the system, you may revise provided invitation messages or create your own and send them electronically to your candidates. **For a recommended induction process timeline, please refer to the appendix.**

## We can help. Contact us ...

Headquarters staff is available to assist you in learning the online induction system. If you have any questions, please contact the **Constituent Center** at [chapserv@stti.iupui.edu](mailto:chapserv@stti.iupui.edu) or **888.634.7575 (U.S./Canada)** or **317.634.8171 (Direct)**.

## Benefits for chapters ...

Chapters using the online induction system will enjoy:

- Decreased time needed to manage inductions;
- Increased time to focus on other aspects of the chapter including connecting with members;
- Decreased workload for faculty counselors;
- Ability to have immediate information about candidates;
- Ability to personalize chapter-specific messages to candidates.

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## Benefits for prospective members ...

Prospective members using the online induction system will enjoy:

- Immediate understanding of honor society values and benefits;
- A quick and easy process for applying for membership;
- Immediate contact with headquarters and the chapter;
- Ability to know status of the process;
- Ability to pay online by credit card; and
- Ability to come back for information if needed about the induction.

## Before you get started ...

You will need to know the following information before getting started:

### **Induction information**

- Date
- Location
- Address
- Time
- Speaker (optional)

### **Chapter fees**

- Chapter dues (for verification purposes only, chapter dues cannot be changed through the induction system)
- Induction ceremony fee (for member) -*optional*
- Induction ceremony fee (for guest) - *optional*

### **Shipping information (where materials should be shipped)**

- Name
- Address
- E-mail address
- Telephone number

### **Induction contact person information**

- Name
- E-mail address
- Telephone number

**NOTE:** Headquarters does not require the use of the membership intent form or membership endorsement form. However, if your chapter chooses to use those forms as part of your induction process, **you will need to collect those forms on your own prior to using this online induction system.**

## II. Using the System

### Logging into the system ...

To access the Online Induction Management System:

- Go to [www.nursingsociety.org/Chapters](http://www.nursingsociety.org/Chapters)
- Once you are on the “Chapter Information” Webpage, click on “Management System” (Please refer to Figure 1: Chapter Information Webpage)

Figure 1: Chapter Information Webpage ([www.nursingsociety.org/Chapters](http://www.nursingsociety.org/Chapters))

The screenshot shows the website interface for Sigma Theta Tau International Honor Society of Nursing. At the top, there is a logo and a 'Renew today!' button. Below is a navigation bar with tabs for 'Chapter Information', 'Community', 'Marketplace', and 'Membership', along with a search box. A secondary navigation bar includes 'Directory', 'Merchandise', 'Management System', 'Regions', 'Start a Chapter', and 'Tools & Resources'. The main content area is titled 'Chapter Information' and features a large banner image of people working at a computer. Below the banner, there are several sections: 'Directory', 'Merchandise', 'Management System' (circled in red), 'Delegate Information', 'Chapter Awards', 'Regions', 'Start a Chapter', 'Tools & Resources', 'Leadership Training', and 'Membership Initiatives'. A 'What's New' section lists recent updates, and a 'Spotlight on Chapters' section highlights community service and anniversaries. At the bottom, there is a banner for 'Attend an STTI LEADERSHIP SUMMIT' and a footer with logos for 'Alliances' including STTI Platinum Plus Visa Credit Card, Sigma Theta Tau International Foundation for Nursing, nursing KNOWLEDGE INTERNATIONAL, Virginia Henderson International Nursing Library, and the International Academic Nursing Alliance.

*Start by Clicking on  
“Management System”*

In order to access the Chapter Management System you will need to enter your e-mail address and password. If you have not re-set your password, the default is set to your 7-digit member ID number. Click on “Log In” to proceed. Please refer to Figure 2: Chapter Management System Login.

**NOTE: Only chapter officers (holding any position) may logon to the Chapter Management System.** If your term of office has expired you will need to contact the Constituent Center.

*Figure 2: Chapter Management System Login*

Chapter Management System > Login 21<sup>st</sup> December 2009

**Welcome chapter leaders to the NEW chapter management system!**

Within the chapter management system, you will be able to:

- Change Officers
- Add your chapter news to STTI Connect
- Download chapter rosters
- Connect to the Induction System
- Order printed products
- Submit required reports

You will use your e-mail address and member number in the login fields below. If you are having difficulty signing in please call STTI headquarters at 888.634.7575 (U.S./Canada) or +1.317.634.8171 (International)

Log In

Email Address

Password

Remember me next time.

Log In

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Click on “Induction System” in the Important Links section to access the Online Induction System. Please refer to Figure 3: Chapter Management System.

Figure 3: Chapter Management System

**Chapter Management** 10<sup>th</sup> May 2010

**Welcome to the revised Chapter Management System!**  
The applications within this system will allow you to update chapter officers, submit chapter news for inclusion in STTI's monthly member e-newsletter, and download membership rosters. Important links provide access to the online induction system, chapter directory listing, and other vital information and documents. For additional information about how to utilize this new system, please review the **Quick Tips** document in the Links section below.

Additional features will be added in the future, so be sure to visit this resource often! If you need any assistance with any of these functions, please contact Chapter Services at 888.634.7575 (US/Canada) or +1.317.634.8171 (International).

**Announcement**  
**Training**  
Go to the Leadership and Training page to register for these and other training opportunities

- 11 May 3 p.m. EDT - Train, Transition and Track
- 13 May 11 a.m. EDT - Train, Transition and Track
- 18 May 3 p.m. EDT - A Common Thread: The benefits of social networking for STTI Chapters
- 20 May 11 a.m. EDT - A Common Thread: The benefits of social networking for STTI Chapters

Chapter Annual Report Instructions and Sample Questions are now available. The 2009-2010 chapter annual report will be due 2 August 2010.

**Important Links**

- Nursing Society Home
- Chapter Federal ID Number
- Print On Demand
- Update Online Chapter Directory
- Chapter Resources Database
- Quick Tips using the new Chapter Management System
- Leadership and Training page
- **New Induction System**
- Induction System
- 2009-2010 Chapter Annual Report Instructions and Sample Questions
- 2009-2010 Chapter Annual Report Form

**STTI Connect** Chapter Newsletter Editor  
Share important chapter news through **STTI Connect**. The monthly e-newsletter (formerly Create the Future) is delivered to all active STTI members. Announce chapter meetings, activities, awards, and solicit feedback! Enter your chapter news below. [Need help?](#)

**STTI Membership**  
Visit [www.nursingsociety.org/Membership](http://www.nursingsociety.org/Membership) to learn about new benefits, resources, campaigns and other aspects of your STTI membership.

[Edit Your News](#)

**Officer and Committee Chair Report**  
Update your chapter leader roster using the add, edit, or remove buttons below. Please have a list of these individuals before starting this process. Chapters should submit changes as soon as officer changes occur.

**Current Chapter Leaders** [Add individual](#)

Position	Name	Start Date	End Date
Counselor			
Counselor			
Counselor			
Delegate One			
Delegate Two			
Governance Chair			
Leadership Succession Chair			
President Elect			
President			
Publicity Chair			
Secretary			
Treasurer			
Vice President			
Vice President			

To view past, current or future chapter leaders select from the list below.  
**Current Chapter Leaders** ▼

\*If a member has an email on file, they will receive a message that his/her term has been updated.

To begin, click on “New Induction System”

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## Navigating the online induction system ...

Upon entry into the Online Induction System, chapter leaders will be able to select from several options:

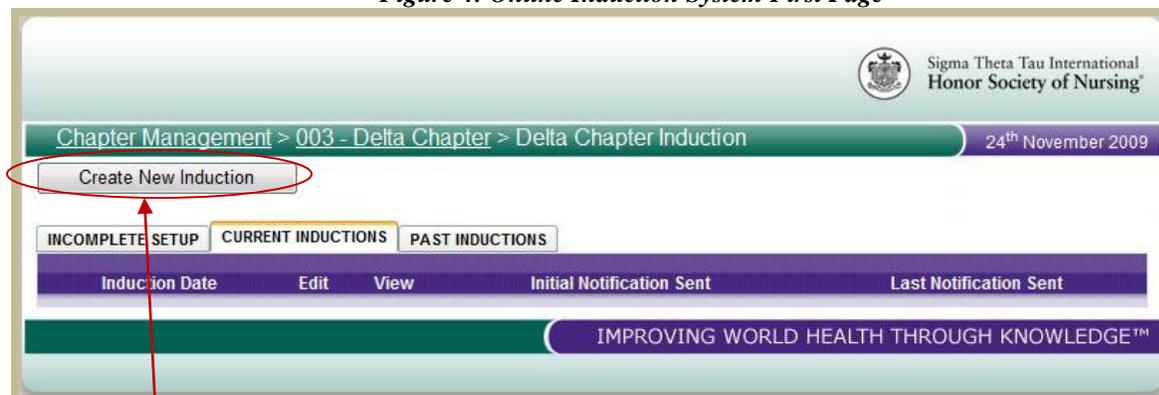
- *Create New Induction*
- View inductions currently being set up (*Incomplete Setup*)
- View or edit *Current Inductions* – send additional invitations or reminders and run reports
- View *Past Inductions*

Please refer to Figure 4: Online Induction System First Page.

**NOTE:** The “Current Inductions” tab will automatically display unless a chapter has inductions pending in the “Incomplete Setup” tab.

## Creating a New Induction ...

*Figure 4: Online Induction System First Page*



*To begin, click on “Create New Induction”*

## Info & Location Tab

The first step in setting up a new induction is to input the induction date, time, and location information. Chapters may also include information about the induction speaker.

**NOTE:** All required fields are marked with a **red** asterisk.

Figure 5: Info & Location Tab

**NOTE:** At-Large chapters have the ability to manage inductions by school or for the entire chapter all at once. All the schools of the at-Large chapter are pre-loaded into the drop-down menu and any can be selected. If the chapter is holding one combined induction, select “All”.

The system will automatically populate the respond by date based on the induction date entered under the Induction Information area. A minimum of two weeks' time is required to ensure the timely delivery of induction materials including membership cards and certificates.

Figure 6: Info & Location Tab Completed

Delta Chapter Induction > Induction 21<sup>st</sup> December 2009

INFO & LOCATION CONTACT & FEES SHIPPING INFO SUMMARY

\* Required field

**Induction Information**

\* School: University of Kansas  
Speaker: Karen H. Morin, RN, DSN, ANEF  
\* Induction Date: 05/15/2010  
\* Induction Start Time: 12 AM 00  
\* Respond by Date: 5/1/2010

**Induction Location**

Location Title: Union Hall  
\* Country: UNITED STATES  
Address 1: 100 Campus Way  
Address 2: Room 500  
Address 3:  
\* City: Kansas City  
State/Province: KS  
Postal Code: 66160  
If you do not have a zip code, please enter 'N/A'

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*The respond by date is automatically calculated by the system to allow sufficient time for the delivery of induction materials.*

*This date is editable by the chapter; however, if the date selected is within two weeks of the induction date, a chapter leader will need to indicate that they are aware that materials may not arrive on time.*

\* Respond by Date: 05/07/2010

**The respond by date is less than 14 days from your induction date. The chapter's induction materials, membership certificates and cards may not reach the chapter before your induction. Please adjust the respond by date, or check the box below to acknowledge this notification.**

I have read the above statement and understand that induction materials may be received after our induction date.

## Contact & Fees Tab

The next step in creating a new induction is to indicate who will be serving as the chapter's contact person and what fees, if any, the chapter will be charging inductees and guests to attend the induction ceremony.

The individual who is entered as the **Induction Contact** is the individual who will be contacted by STTI headquarters should there be any questions about the chapter's induction or inductees. This individual's name and contact information is also provided to inductees in case they need to contact someone at the chapter with questions about the induction ceremony.

Figure 7: Contact & Fees Tab

Delta Chapter Induction > Induction 11<sup>th</sup> January 2010

INFO & LOCATION CONTACT & FEES SHIPPING INFO SUMMARY

\* Required field

### Induction Contact

Select Contact

\* Full Name: \*

\* Email Address: \*

\* Phone Number: \*

Carbon Copy: \*

To add multiple email addresses, separate with a semi-colon

### Induction and Fees

Chapter Name: Delta Chapter

Chapter Number: 003

Chapter President and Credentials: Carol Elliott CRNA, PhD [Please update here](#)

Chapter Dues: \$25.00

International Dues: \$65.00

Any Fees - (US \$)

\* Inductee: \*

\* Guest(s): \*

\* Induction Ceremony Fee Required:  Yes  No

\* Honor Cords Purchase Option:  Yes  No

Back Next

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All chapter leaders are automatically loaded into the induction system and any one of them can be selected as the Induction Contact by clicking on the down arrow in the Select Contact box.

If additional chapter leaders wish to be contacted when messages are sent to the Induction Contact person by STTI headquarters, their e-mail addresses can be entered into the "Carbon Copy" field. Multiple e-mail addresses need to be separated by a semi-colon.

Non-chapter leaders can also be identified as induction contacts and their information can be manually entered into the fields provided.

In the **Chapter Information and Fees** section of the Contact & Fees tab, chapters may enter induction ceremony fees, verify the chapter president on file, and determine if chapter inductees should have the option of ordering honor cords.

**NOTE: Your chapter dues are auto-filled for you and are not adjustable.**

The Chapter Verification of Renewal Fees form is available online from January to 15 March of each year. For more information about adjusting chapter fees, please contact headquarters at [chapserv@stti.iupui.edu](mailto:chapserv@stti.iupui.edu).

If you are planning to charge an induction ceremony fee, enter the amount on this screen. In addition, you may enter your induction ceremony fee for guests, if applicable. Please refer to Figure 8: Chapter Information and Fees.

Chapters also have the option of **requiring** the ceremony fee even if the inductee does not plan to attend. By selection “Yes” to “Induction Ceremony Fee Required,” the ceremony fee set for inductees will still be charged to the inductee even if they do not plan to attend the ceremony.

If you are planning to purchase honor cords for your inductees, please select “No” to “Honor Cords Purchase Option.” By doing this it will remove the option from the jewelry page that inductees will see as they complete their registration.

In this section, chapters will verify that the president that is currently on file for the chapter is still correct. To change the listing, simply click the “Please update here” link to be taken to the Officer and Committee Chair Report where changes can be made.

*Figure 8: Chapter Information and Fees*

The screenshot shows a web form titled "Chapter Information and Fees" for the "Delta Chapter" (Chapter Number: 003). The form includes fields for "Chapter President and Credentials" (Carol Elliott CRNA, PhD, with a "Please update here" link), "Chapter Dues" (\$25.00), and "International Dues" (\$65.00). Under "Induction Ceremony Fees - (US \$)", there are input fields for "\* Inductee" and "\* Guest(s)". Below these are radio button options for "\* Induction Ceremony Fee Required" (Yes/No) and "\* Honor Cords Purchase Option" (Yes/No). The "Yes" option for the ceremony fee is selected. Red callout boxes provide instructions: one points to the fee fields stating that separate fees can be set for inductees and guests in US dollars; another points to the "Induction Ceremony Fee Required" radio buttons, stating that fees for non-attendees are required by selecting "Yes"; a third points to the "Honor Cords Purchase Option" radio buttons, stating that if honor cords are purchased, "No" should be selected to prevent direct orders from STTI headquarters; and a fourth points to the "Induction Ceremony Fee Required" radio buttons, stating that if a chapter does not want to charge fees, they must select "0" (zero).

**NOTE:** Your chapter will be mailed ceremony fees 60 days following the induction date. Chapter dues payments will be mailed with the quarterly chapter checks.

## Shipping Info Tab

This tab requires chapters to indicate where they would like induction materials shipped. The person entered here will receive membership certificates, membership cards and welcome packets sent by STTI headquarters. Please refer to Figure 9: Shipping Information.

**NOTE:** Materials typically arrive at least seven (7) days prior to induction date.

The address entered **cannot** consist of a Post Office Box or Campus Box since the materials are sent via UPS.

*Figure 9: Shipping Information*

The screenshot shows a web form titled "Shipping Information" for the "Delta Chapter Induction > Induction" process, dated "22<sup>nd</sup> December 2009". The form is part of a multi-step process with tabs for "INFO & LOCATION", "CONTACT & FEES", "SHIPPING INFO", and "SUMMARY". A red asterisk indicates required fields. The form includes a header for "Sigma Theta Tau International Honor Society of Nursing" and a navigation bar. The main content area contains instructions: "Your induction materials include personalized member certificates, membership cards and welcome packets for candidates who have completed an online application. Do not enter a Post Office Box or Campus Box. Materials are shipped via UPS." Below this are several input fields: "\* Full Name:", "\* Phone Number:", "\* University Name/Campus:", "\* Country:" (with a dropdown menu showing "Select Country"), "\* Address 1:", "Address 2:", "Address 3:", "\* City:", "\* State/Province:" (with a dropdown menu showing "Select Province/State"), and "\* Zip/Postal Code:". A note below the zip code field says "If you do not have a zip code, please enter 'N/A'". At the bottom of the form are "Back" and "Next" buttons. The footer of the page contains the text "IMPROVING WORLD HEALTH THROUGH KNOWLEDGE™".

## Summary Tab

The **Summary Tab** provides an overview of what was entered on each subsequent tab. To make a change to any of the information entered, simply click on the appropriate tab to navigate back to that area. Once changes have been made, click on the “Next” button at the bottom of that tab to navigate back to the summary page.

Figure 10: Summary Tab

Delta Chapter Induction > Induction 22<sup>nd</sup> December 2009

INFO & LOCATION CONTACT & FEES SHIPPING INFO **SUMMARY**

Please review and submit if the information is correct.

**Induction Information**

Induction Date: 15 May 2010  
Induction Start Time: 12:00 AM  
Respond by Date: 01 May 2010  
Speaker: Karen H. Morin, RN, DSN, ANEF

**Induction Location**

Location: Union Hall  
Address 1: 100 Campus Way  
Address 2: Room 500  
Address 3:  
City: Kansas City  
State/Province: KS  
Zip/Postal Code: 66160  
Country: UNITED STATES

**Induction Contact**

Full Name: Jane Doe  
Email Address: jdoe@mail.com  
Phone Number: 1234567890  
Carbon Copy:

**Chapter Information and Fees**

Chapter Name: Delta Chapter  
Chapter Number: 003

*If a change needs to be made to any of the data entered, simply click on the appropriate tab to navigate back to that area.*

To complete the set up of the induction, click “Submit” at the bottom of the summary page.

# Managing Inductees...

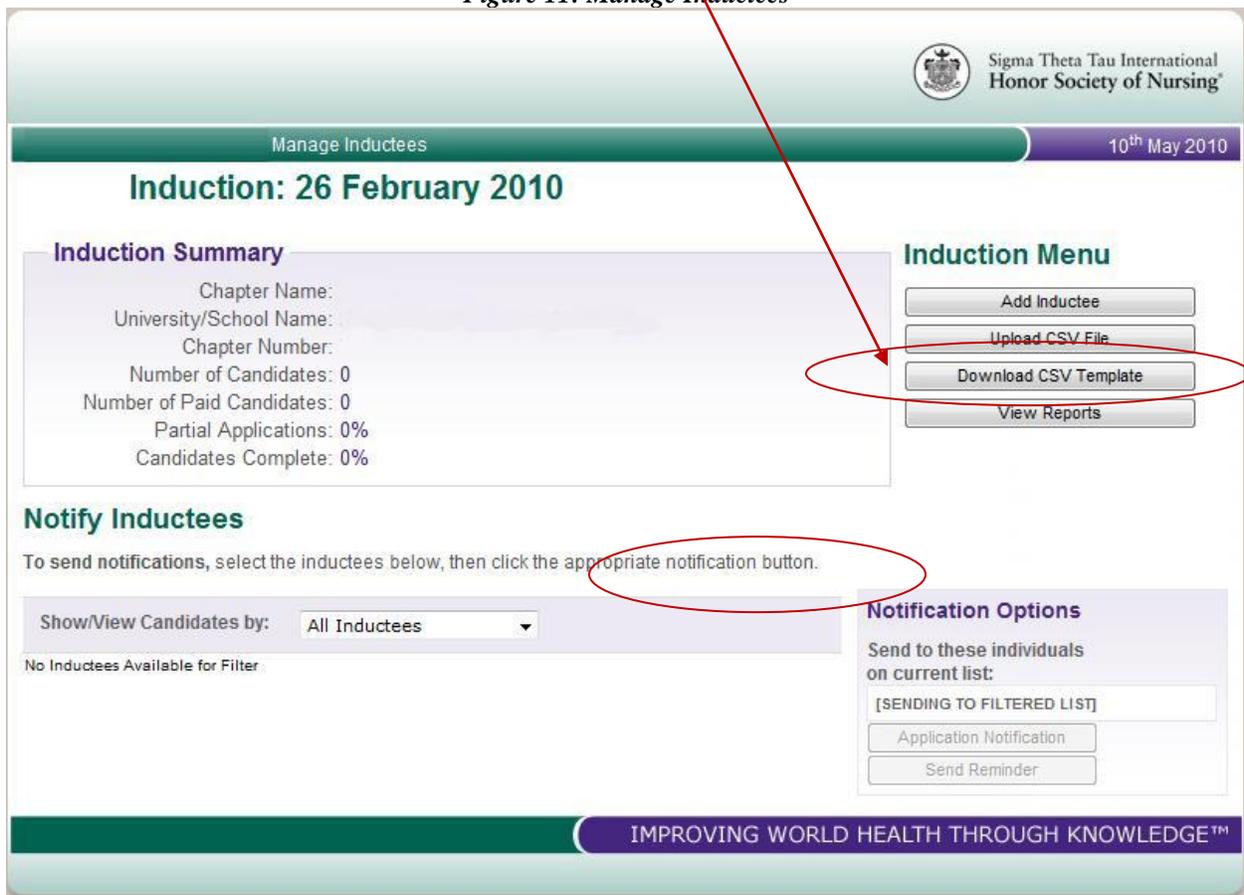
You are now ready to add inductees into the system in order to send invitations.

There are two ways to enter inductees into the system – one at a time or by creating and uploading an electronic file.

Unless the chapter has only a few inductees, or an inductee was left off the original list, the uploading of an electronic file is recommended since adding individual inductees to the system one at a time can be time consuming.

To start, click on “Download CSV Template.” This template must be used in order to upload inductees into the system. Column heading must match exactly, therefore please do not customize or add any additional columns to the template and use as is.

Figure 11: Manage Inductees



Note: Multiple files can be uploaded during the process. If you have additional candidates to add, please either upload a second file or add them by using the “Add Individual Inductee” selection.

Once you click on Download CSV Template, you may receive a pop-up message asking if you want to save or open the document. Click “Open” to view the template. Microsoft Excel will open, and you should see a screen like the one in Figure 12: Sample Template.

**Figure 12: Sample Template**

	A	B	C	D	E	F	G	H	I	J	K	L
1	First/Given Name(s)	Middle Name (if applicable)	Last/Family Name(s) (Surname)	Address Line1	Address Line2	City	State	Zip	Country	Email	Membership Category(U - Undergraduate   G - Graduate   D - Doctoral   N - Nurse Leader)	Expected Graduation Date
2	Mike		Doe	123 Main Street		Winchester	VA	22602	UNITED STATES	mdoe@stti.org	U	12/21/2009
3												
4												
5												
6												
7												
8												
9												
10												

**NOTE: Line 2 will be pre-populated with “Mike Doe” to illustrate what information needs to go in each column. This line needs to be deleted before you SAVE your file and prepare to upload. However, DO NOT delete the header row in line one!**

You may now begin entering your eligible candidate information in the sample template. We encourage you to upload a list of ALL eligible candidates, not just those who have filled out intent forms (if the chapter selects to still use them). By uploading ALL eligible candidates, you can increase the pool of people who accept membership by taking advantage of headquarters’ automated reminder system.

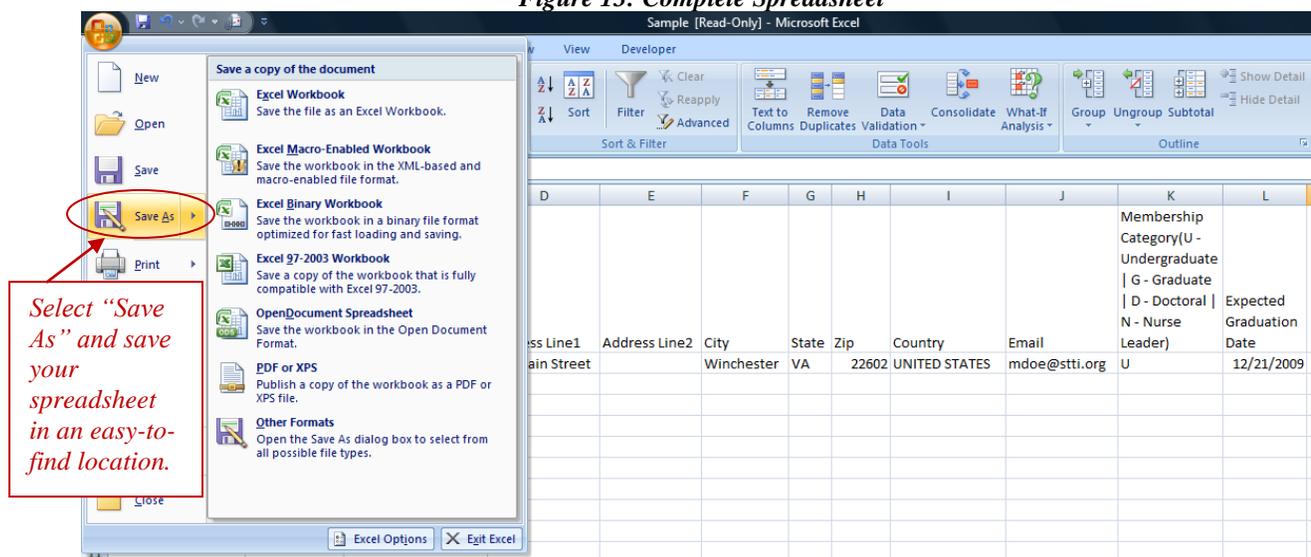
**Tips for entering your candidate information:**

- Begin entering data in Row 3. **Do Not overwrite the first row – it is the header row and is required for a successful upload.** Row two provides a sample.
- You will be asked to provide each candidate’s first, middle and last name (**name on certificate will appear as you type it here**); address; city; state (state/province); zip (postal code); country; e-mail address; membership category; and (expected) graduation date.
- Do not change, add or delete columns. **THIS IS VERY IMPORTANT!**
- For ease of viewing, you may resize the column by double clicking or dragging the right line of each column.
- Use correct punctuation and capitalization. The data you enter will be **exactly** what the member sees and what is entered into the STTI member database. **(DO NOT use commas, number signs or periods in any field other than the email address – this will result in an upload error.)**

- **E-mail address is required.** This system will not function without an e-mail address for every candidate. If the candidate does not have an e-mail address please have them sign up with a free service: Yahoo, Hotmail, or Gmail.
- In the “Membership Category” column (column K), enter the appropriate code:
  - “U” for undergraduate student;
  - “G” for graduate/master’s student;
  - “D” for doctoral student; or
  - “N” for nurse leader.**NOTE:** Please enter **only** the single letter for this identifier.
- **Before you save your file, remove the sample by deleting Row 2.**

Once you have entered all of your eligible candidates, you must save your file. Go to the File menu and click “Save As.” Be sure to save your file of eligible candidates in a place that you will remember and be able to locate. Please refer to Figure 13: Complete Spreadsheet.

**Figure 13: Complete Spreadsheet**



**NOTE:** If prompted, click “Yes” to keep the workbook in a CSV format.

Once the document is saved, you may close out of Microsoft Excel and return to the online induction system to upload your file.

**TIP:** Since the system will not accept a CSV file without e-mail addresses, use an online system like [www.mailinator.com](http://www.mailinator.com) to create false e-mail addresses if a legitimate one is not available for an inductee.

**CAUTION:** If uploading false e-mail addresses for inductees, they will not receive the e-mail notification but will receive a mailed invitation letter. Note that many STTI member benefits are delivered electronically, so it is worth the effort to secure legitimate e-mail addresses for all inductees to ensure they receive all benefits upon joining.

To upload the CSV file you just created, click on “Upload CSV File.”

*Figure 14: Upload CSV File*

Manage Inductees 10<sup>th</sup> May 2010

## Induction: 26 February 2010

### Induction Summary

Chapter Name:  
University/School Name:  
Chapter Number:  
Number of Candidates: 0  
Number of Paid Candidates: 0  
Partial Applications: 0%  
Candidates Complete: 0%

### Induction Menu

- Add Inductee
- Upload CSV File**
- Download CSV Template
- View Reports

### Notify Inductees

To send notifications, select the inductees below, then click the appropriate notification button.

Show/View Candidates by: All Inductees

No Inductees Available for Filter

#### Notification Options

Send to these individuals on current list:

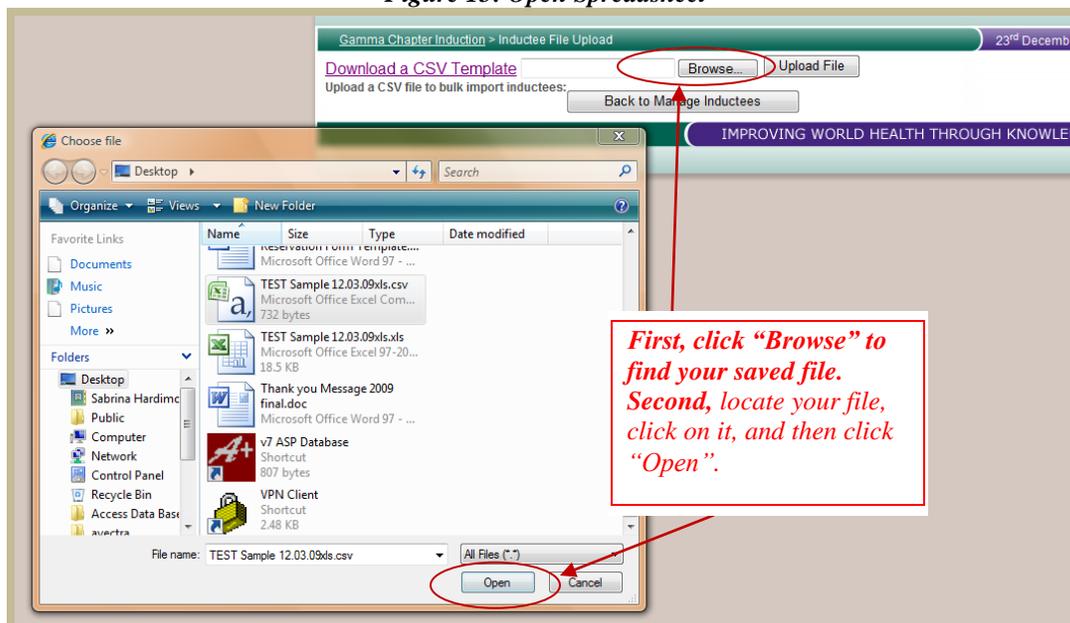
[SENDING TO FILTERED LIST]

- Application Notification
- Send Reminder

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Click the “Browse” button. Open your file of eligible candidates by browsing through your file directories to the place where you saved the list. After you have located the document, click “Open.” Please refer to Figure 15: Open Spreadsheet.

**Figure 15: Open Spreadsheet**

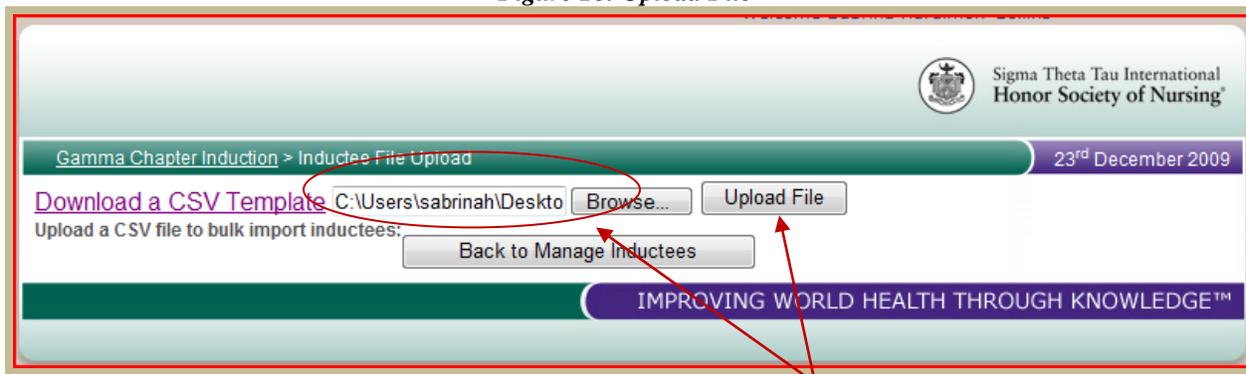


Your file name and location will now appear in the text box beside the “Browse” button. Please refer to Figure 16: Upload File.

Click “Upload File.”

**NOTE:** If you receive an error message that indicates you are not authorized to access, your session may have timed out. Simply close out of the online induction system and re-enter.

**Figure 16: Upload File**



*Note that your file's location will automatically appear. Once it appears, click “Upload File” to complete the uploading process.*

You also have the opportunity to add inductees one at a time by clicking “Add Individual Inductee.”

*Figure 17a: Add Individual Inductee*

Manage Inductees 10<sup>th</sup> May 2010

### Induction: 26 February 2010

**Induction Summary**

Chapter Name:  
University/School Name:  
Chapter Number:  
Number of Candidates: 0  
Number of Paid Candidates: 0  
Partial Applications: 0%  
Candidates Complete: 0%

**Induction Menu**

- Add Inductee
- Upload CSV File
- Download CSV Template
- View Reports

**Notify Inductees**

To send notifications, select the inductees below, then click the appropriate notification button.

Show/View Candidates by: All Inductees

No Inductees Available for Filter

**Notification Options**

Send to these individuals on current list:

[SENDING TO FILTERED LIST]

- Application Notification
- Send Reminder

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You will then see the form below and can enter each inductee's information. Click "Submit" when done.

**Figure 17b: Add Individual Inductee**

The screenshot shows a web form titled "Add Individual Inductee" for the Delta Chapter of Sigma Theta Tau International Honor Society of Nursing. The form is set against a light purple background and includes a "Submit" button. The form fields are as follows:

- Chapter Name: Delta Chapter
- School: University of Kansas
- Chapter Number: 003
- Induction: Delta Induction: 15 May 2010
- \* First/Given Name(s): Jack
- Middle Name (if applicable): E
- \* Last/Family Name(s) (Surname): Doe
- \* Country: UNITED STATES (dropdown menu)
- \* Address Line 1: 123 Somewhere Lane
- Address Line 2: (empty)
- \* City: Indianapolis
- \* State/Province: IN (dropdown menu)
- \* Zip/Postal Code: 46123
- If you do not have a zip code, please enter 'N/A'
- \* Primary Email Address: j.e.doe@mail.com
- (Expected) Graduation Date: 06 (June) / 1991 (dropdown menus)
- \* Inductee Type: Undergraduate (dropdown menu)

A red asterisk indicates that the fields marked with an asterisk are required. A "Submit" button is located at the bottom left of the form area. The page footer includes the text "IMPROVING WORLD HEALTH THROUGH KNOWLEDGE™" and the date "22<sup>nd</sup> December 2009".

Once you have uploaded a CSV file, or entered an individual inductee, you have the opportunity to review your list of inductees.

To edit candidate information after you have already uploaded your list, simply click on the “pencil” next to the inductee’s last name.

Figure 18: Review Candidate List

The screenshot displays the Sigma Theta Tau International Honor Society of Nursing web application interface. At the top, the logo and name of the organization are visible. The main navigation bar includes "Manage Inductees" and the date "10<sup>th</sup> May 2010". The central heading is "Induction: 01 June 2010".

The "Induction Summary" section provides the following data:

- Chapter Name:
- University/School Name: All
- Chapter Number:
- Number of Candidates: 5231
- Number of Paid Candidates: 1608
- Partial Applications: 5%
- Candidates Complete: 39%

The "Induction Menu" contains two buttons: "Add Inductee" and "Upload CSV File".

The "Notify Inductees" section includes a dropdown menu for "Show/View Candidates by:" set to "All Inductees" and a table of candidates. The table has columns for "Last/Family Name(s) (Surname)", "First/Given Name(s)", and "Last Notific". The first row shows "ABAD" with a pencil icon next to the name, which is circled in red. Below it are "ABADILLA", "ABADILLA", and "ABBONDANZA".

An inset window titled "Gamma Chapter Induction > Inductee" shows the edit form for a candidate. The form includes the following fields:

- Chapter Name: Gamma Chapter
- School: University of Iowa
- Chapter Number: 002
- Induction: Gamma Induction: 17 March 2010
- \* First/Given Name(s): Jim5
- Middle Name (if applicable):
- \* Last/Family Name(s) (Surname): Hicks
- \* Country: UNITED STATES
- \* Address Line 1: Something
- Address Line 2:
- \* City: Fishers
- \* State/Province: IN
- \* Zip/Postal Code: 46038
- If you do not have a zip code, please enter 'N/A'
- \* Primary Email Address: Jim5@mailinator.com
- (Expected) Graduation Date: 04 (April) / 1993
- \* Inductee Type: Undergraduate

A "Submit" button is located at the bottom of the form. The footer of the application reads "IMPROVING WORLD HEALTH THROUGH KNOWLEDGE™".

To send an invitation or reminder, click the drop down box/arrow area beside “Show/View Candidate’s by.” There are five options to select from. Below these options are explained.

**All Inductees** – Communication will be sent to all candidates no matter the status. (This should be sent chosen after your initial upload.)

**Initial Contact** – Communication will be sent to those who have not responded to the application.

**Partially Completed** – Communication will be sent to those that have started, but have not complete, the application.

**Application Completed** – Communication will be sent to those who have completed their application.

**Paid** – Communication will be sent to those candidates who have paid.

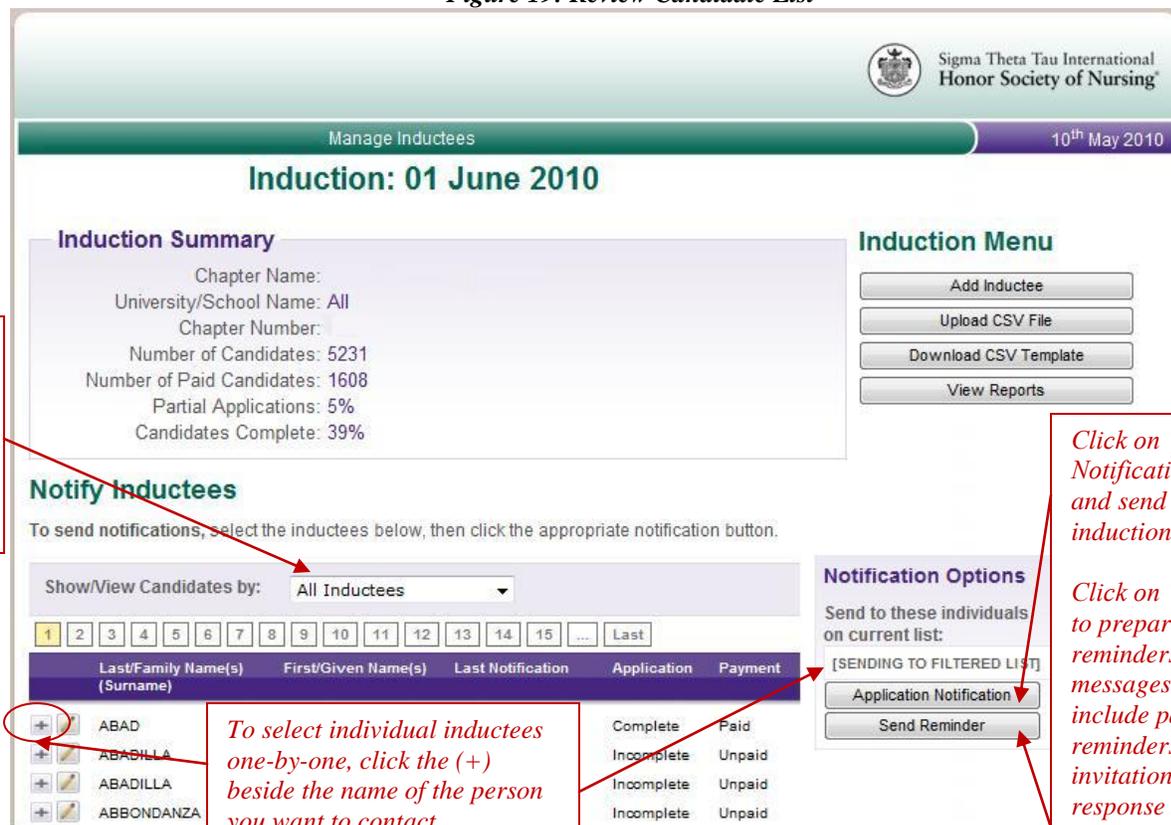
**Unpaid** – Communication will be sent to those candidates who have completed the application but have not paid.

After you have made your selection from the list, you can then select “Application Notification” or “Send Reminder.”

If you need to send an individual notification you can select the candidates name by clicking on the (+) sign by their name. The name will appear in “sending to filtered list”.

You can then select “Application Notification” or “Send Reminder.”

Figure 19: Review Candidate List



To select all uploaded inductees at once, click this box.

To select individual inductees one-by-one, click the (+) beside the name of the person you want to contact. The name(s) will appear in the “send to these individuals on current list” box.

Click on “Application Notification” to prepare and send the initial induction invitation. Click on “Send Reminder” to prepare and send reminders or follow-up messages. This could include payment reminders, second invitations in case a response has not been received, notifications that something has changed in terms of induction time or

Once you have chosen the message you would like to send, the suggested text provided on the new screen is a standard invitation, but you may edit the text. Type your own message by clicking inside the text box, or copy text from a Microsoft Word document and paste it into the text box. Please refer to Figure 20: Invitation to Candidates.

Figure 20: Invitation to Candidates

Delta Chapter Induction > Manage Inductees 11<sup>th</sup> January 2010

**Application Notification**

The suggested e-mail text below can be customized to fit your chapter's needs. To edit the text, simply make your changes below.

Many nurses often say that nursing chose them early on. For others, the calling came later in life. Regardless of the reason why you chose the profession, through your academic achievements and/or your personal commitment to nursing excellence, you have proven that nursing is the profession for you.

Because of your academic success and dedication to nursing, the Delta Chapter of the Honor Society of Nursing, Sigma Theta Tau International invites you to become a member of one of the largest and most prestigious nursing organizations in the world. It's an honor to join. A benefit to belong!

<http://www.nursingsociety.org/AboutUs>

However, honor society membership is more than an academic destination; it's a rewarding connection with nurses at the local, regional, and international levels who share your passion to make a difference in the health of the world's people. This global community of nurses has never been more important than it is today as we work together to assure a bright future for the nursing profession. The honor society will help you help others, whether through professional development, career resources, or community involvement at the local level or beyond.

<http://www.nursingsociety.org/membership/benefits>

As a member, I have personally considered my induction into the honor society as one of the most important highlights of my nursing career and I encourage you to accept this invitation to join. We look forward to you being a part of our chapter. You belong here...the Honor Society of Nursing, Sigma Theta Tau International.

Please accept this invitation by responding no later than Saturday, May 01, 2010 by clicking the following link [Accept Membership](#)

The Delta Chapter's induction ceremony will be held on:  
Saturday, May 15, 2010 at 12:00 AM

The ceremony will take place at:  
Union Hall  
100 Campus Way  
Room 500  
Kansas City, KS 66160

Look forward to inducting you into Delta Chapter.  
Sincerely,  
Carol Elliott CRNA, PhD  
Delta Chapter President

Preview Notification Send

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*This portion of the invitation text is not editable. It is pre-populated based on the information entered by the chapter when setting up the induction.*

---

**NOTE:** Your candidates will be invited to join the honor society in two ways. The first will be an e-mail from the induction contact person you identify and using the text your chapter provides here, which will be linked to the candidate application page. From the application page, your candidate will complete the acceptance form and pay the appropriate fees. A formal letter from your chapter will also be generated and sent from headquarters. The letter will include a membership brochure and information on how to complete the application form.

Once you have finalized the text for the invitation, you may preview the e-mail to be sent by clicking on "Preview Notification."

*Figure 21: Preview*



Upon returning to the Application Notification page, simply click "Send" to e-mail the invitations to your inductees.

The Induction Summary page allows you to track the progress of your induction. The "First Notification" and "Last Notification" columns track the dates when the initial invitations and reminder messages were sent. It also tracks which inductees have started or completed their membership application as well as who has paid. A "Partial" listing in the "Application" column indicates that an inductee has started the application, but has not completed the process.

The page also provides the chapter with information about acceptance and completion rates.

Figure 22: Induction Summary

**Induction Summary**

Chapter Name:  
 University/School Name: All  
 Chapter Number:  
 Number of Candidates: 5231  
 Number of Paid Candidates: 1608  
 Partial Applications: 5%  
 Candidates Complete: 39%

**Induction Menu**

- Add Inductee
- Upload CSV File
- Download CSV Template
- View Reports

**Notify Inductees**

To send notifications, select the inductees below, then click the appropriate notification button.

Show/View Candidates by: All Inductees

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 ... Last

Last/Family Name(s) (Surname)	First/Given Name(s)	Last Notification	Application	Payment
ABAD			Complete	Paid
ABADILLA			Incomplete	Unpaid
ABADILLA			Incomplete	Unpaid
ABBONDANZA			Incomplete	Unpaid

**Notification Options**

Send to these individuals on current list:

[SENDING TO FILTERED LIST]

- Application Notification
- Send Reminder

*Chapters can track their progress with these at-a-glance statistics.*

*Each inductee's responses are tracked making it easy to determine which inductees need to receive reminder messages.*

To send a reminder message, simply click on "Send Reminder."

The suggested text provided on the screen is a standard follow-up e-mail, but you may edit the text: type your own message by clicking inside the text box, or copy text from a Microsoft Word document and pasting it into the text box. Reminder messages may be utilized to remind inductees to accept the invitation to join; remind those who have accepted the invitation but have not paid to remit payment; or may also be used to provide inductees with information about the induction itself including time or location changes that may need to be communicated.

Figure 23: Reminder Message

Delta Chapter Induction > Manage Inductees 11<sup>th</sup> January 2010

### Reminder Message

Recently you received an invitation to join the Delta Chapter Chapter of the Honor Society of Nursing, Sigma Theta Tau International, however, we have not heard from you! It is not too late for you to still accept the invitation and be included in our upcoming induction ceremony. Please respond today to ensure you are recognized for your success.

Since membership has such an important impact on your nursing career you can't afford to miss this opportunity.

Honor society membership will provide resources for you to:

- Network with other nurses locally as well as internationally
- Build and manage your career
- Expand your nursing knowledge
- Earn Continuing Nursing Education Credit

Accepting membership not only celebrates your achievements but is an opportunity for you to celebrate and connect with other students and nursing leaders in the community.

We look forward to having you become a part of our chapter!

Please accept this invitation by responding no later than Saturday, May 01, 2010 by clicking the following link [Accept Membership](#)

The Delta Chapter's induction ceremony will be held on:

Saturday, May 15, 2010 at 12:00 AM

The ceremony will take place at:  
Union Hall  
100 Campus Way  
Room 500  
Kansas City, KS 66160

Look forward to inducting you into Delta Chapter.  
Sincerely,

Carol Elliott CRNA, PhD  
Delta Chapter President

Preview Notification Send

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After exiting the system, chapter officers can re-enter the induction system anytime. To track the progress of your induction click “View” next to the chapter induction date.

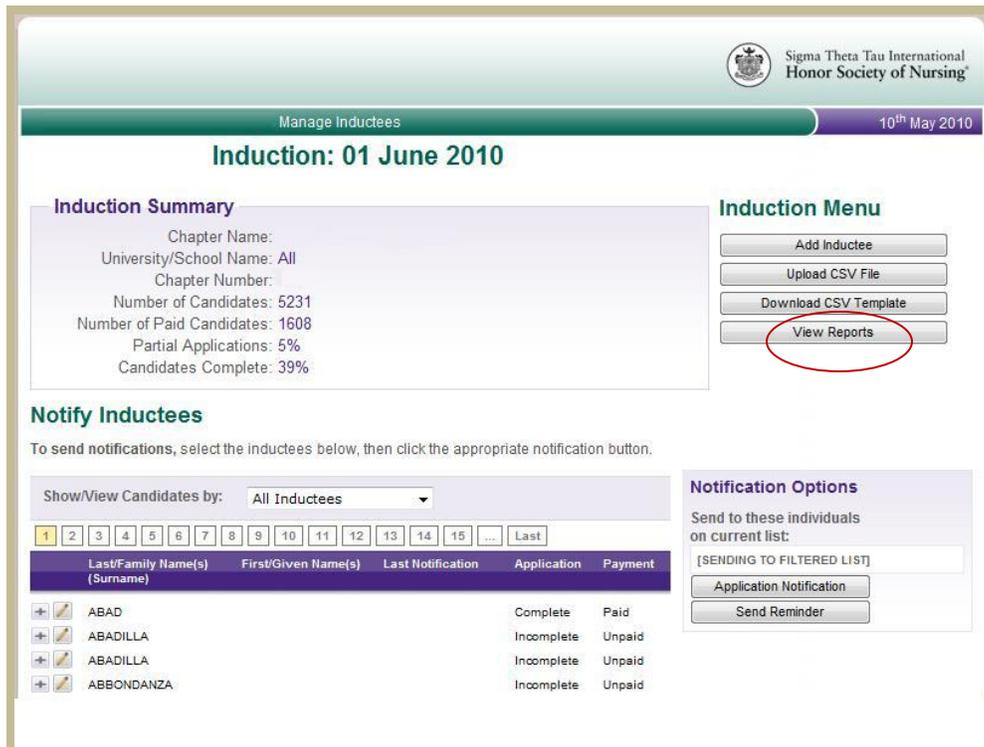
Figure 24: Main Induction Page



## Reporting Functions

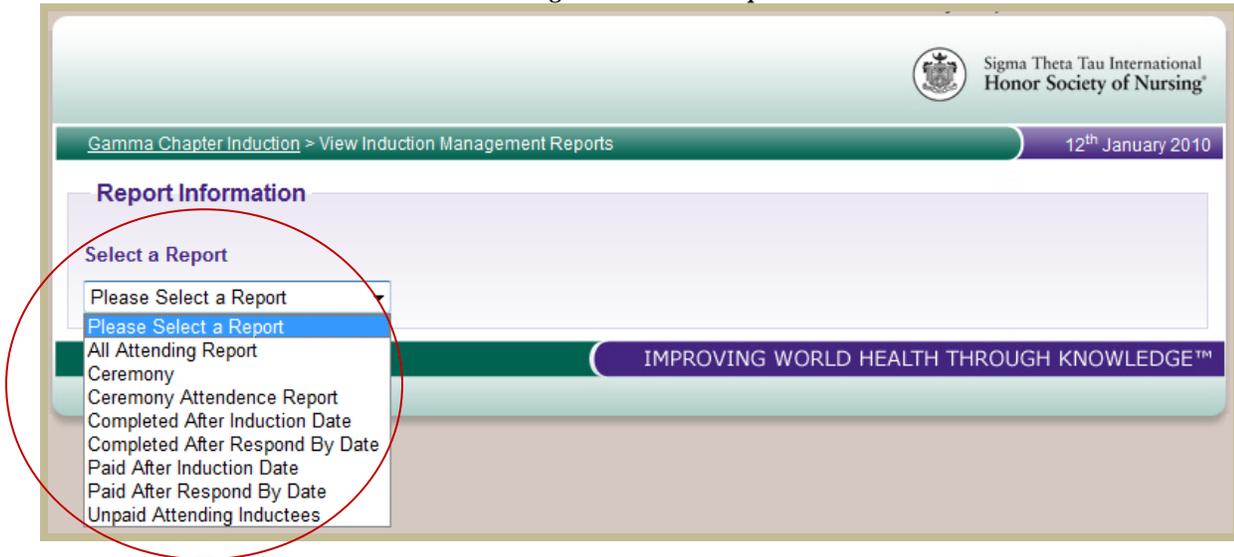
In order to track inductee responses and determine induction ceremony attendance, chapters have access to several reports. To access these reports, click on “View Reports” on the Induction Summary page.

Figure 25: View Reports



Next, select the report you would like to generate from the drop-down menu.

**Figure 26: Select Report**



To generate your report, click “Standard.”

**Figure 27: Generate Report**



Next, select a format type for your report. The CSV or Excel format is used most often.

Figure 28: Report Format

Paid					
Attending					
Name	Address	Email	Phone	# of Guests	Ceremony Bal.
Jim7Hicks	Something Fishers IN 46038 UNITED STATES	Jim7@mailinator.com		2	\$0.00
Timmy4Doe	123 Main Street Winchester VA 22602 UNITED STATES	Timmy4@mailinator.com		0	\$0.00
2				2	\$0.00
2				2	\$0.00
Unpaid					
Attending					
Name	Address	Email	Phone	# of Guests	Ceremony Bal.
Jim4Hicks	Something Fishers IN 46038 UNITED STATES	Jim4@mailinator.com		0	\$20.00
Phi3Jones	Something Fishers IN 46308 UNITED STATES	Phi3@mailinator.com		2	\$40.00
2				2	\$60.00
2				2	\$60.00
Total Candidates: 4				4	\$60.00

To complete the export process, click on “Export.”

Figure 29: Report Export

---

## Definitions and Reports :

Commonly used terms:

**Paid** – Candidate has completed the application and paid the necessary fees for membership, plus any additional items.

**Unpaid** – Candidate has completed the application, but the fees have not been paid.

**Not Registered** – means the candidate has not completed the application nor paid any fees.

**Acceptance Report:** This report will list ALL candidates, paid, unpaid and not registered. Candidates are separated out into each of these groups. The report indicates the number of guests that inductees plan to bring and lists balance due amounts for both the ceremony and membership fees.

**Ceremony Attendance:** This report lists all inductees that have accepted the invitation to join and have indicated that they plan to attend the induction ceremony. The report also indicates the number of guests that inductees plan to bring. If the inductee has a balance due for the ceremony or membership fee, this is also noted and inductees are separated into four groups – paid/attending, paid/not attending, unpaid/attending and unpaid/not attending.

**Induction Overview:** This report provides chapters with a summary overview of their inductions. It includes a count of candidates, the number that have accepted (broken down into paid and unpaid), the number that have not responded to the invitation, the acceptance rate, and a count of those attending the ceremony including guests.

**Completed/Paid After Respond by Date:** These reports lists all inductees that accepted or paid the invitation to join after the “respond by” date listed on the invitation. It also indicates if the inductee still has a balance due or if they have paid in full.

**Completed/Paid After Induction Date:** These reports lists all inductees that accepted or paid the invitation to join after the induction date has past. It also indicates if the inductee still has a balance due or if they have paid in full.

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## Additional items . . .

- When headquarters receives an application, the chapter leader whose contact information was entered will receive an e-mail notification. In addition, you may always check back on the “Track Progress and Send Messages” screen to view candidate status at a glance.
- As mentioned on earlier pages, your membership cards, membership certificates and welcome packets will arrive to the address provided on the shipping information screen **approximately seven (7) days prior to your induction date.**
- Remember that headquarters staff is available to assist you in any way as you become familiar with the online induction system. If you have any questions or concerns, please contact the **Constituent Center** at **memserv@sti.iupui.edu**, **888.634.7575 (U.S./Canada)** or **317.634.8171 (Direct)**.

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## III. Appendix

### Online Induction Management System Recommended Timeline

Step	Timeline
Set Up Induction Information and Fees	8-12 Weeks Prior to Induction Ceremony
Upload Candidate File and Send Invitation	8-12 Weeks Prior to Induction Ceremony
Send Reminder E-Mail Message(s)	6-8 Weeks Prior to Induction Ceremony
Confirm Candidates Have Completed Applications	5 Weeks Prior to Induction Ceremony
Contact Unresponsive Candidates	5 Weeks Prior to Induction Ceremony
Process is Complete; Headquarters Prepares Certificates	4 Weeks Prior to Induction Ceremony
Headquarters Mails Certificates	1-3 Weeks Prior to Induction Ceremony