



Sigma Theta Tau International
Honor Society of Nursing®

Online Induction System Manual

All chapters of the Honor Society of Nursing, Sigma Theta Tau International (STTI) use the Online Induction System to create a new induction, upload and invite candidates, and pull reports related to your induction. Use the contents of this manual to utilize the system successfully. If you have additional questions, email chapserv@stti.org, or telephone 888.634.7575 (U.S./Canada toll-free) or +1.317.634.8171 (International).

Table of Contents

[Creating a New Induction](#)

Edit Contact Information

Edit Ceremony

Edit Ceremony Fees

Induction Summary Page

[Uploading Candidates to an Induction](#)

Download a Template

Upload the Template

Managing Errors

Adding a Single Candidate

Editing a Candidate's Information

[Sending Messages to Candidates](#)

Schedule the Invitation

Schedule Reminders

[Pulling Reports](#)

Types of Reports

[Accessing Previous Inductions](#)

Creating a New Induction

In this system, you will be able to create an induction any time you want to invite candidates. According to the bylaws, your chapter must invite and induct eligible members a minimum of one time per year. You can choose to have an induction ceremony, a virtual ceremony, or no ceremony with each induction. You can also separate inductions by campus. This will allow you to invite and induct members in the way that is most convenient for them!

There are a few questions you should be able to answer before creating a new induction, so you have all the necessary information to complete each step:

- Who will serve as the induction contact? This person should be comfortable answering questions from candidates.
- Will the chapter be purchasing honor cords for candidates? If your chapter selects “yes,” the candidate will not see the honor cord purchase option when they accept their invitation.
- Will there be a ceremony associated with this induction? If so, will it be in-person or virtual?
- Is the chapter going to charge any additional fees? Please keep in mind that these will be charged in addition to the membership dues.

To create a new induction:

Sign in to the Chapter Management System at <http://management.nursingsociety.org>, using your STTI email address on file and your STTI password. Click on “Online Induction System” in the orange “Important Links” box

The screenshot displays the STTI Chapter Management System interface. It is divided into several sections:

- Announcements:** Contains information about upcoming deadlines and events, including a 1-week deadline for the Annual Report and details about the 2015-2016 Certificate of Insurance.
- STTIconnect Chapter Newsletter Editor:** Provides instructions on how to share important chapter news through the monthly e-newsletter and offers a webinar to tour STTI's virtual platforms.
- Officer and Committee Chair Report:** Allows chapter leaders to update their roster using add, edit, or remove buttons.
- Important Links:** A highlighted orange box at the bottom left containing the link for the Online Induction System.

Click "Create a new Induction"

Welcome to the Induction System

Click on a current or previous induction to edit or review details, or create a new induction.




Edit Contact Information

Select the campus that the induction is for, and who the contact person is for that induction. The contact information for the induction contact will be displayed for candidates who have questions – so it should be whoever is comfortable answering those questions.

If you need two induction contacts, please select "Yes" in the "Additional Contact for Chapter Induction" area, and select from your chapter's current leaders to input a second contact.

Edit - Contact Information

Select Campus

Primary Chapter Contact for Induction

Induction contacts should be able to answer candidates' questions.

Additional Chapter Contact for Induction

Do you need an additional contact for induction? Yes No

Enter in the mailing address for the induction. If there are any induction materials that need to be delivered – this is the address at which they will arrive.

| |
|----------------------------|
| United States of America |
| Name of Shipping Recipient |
| Address Line 1 |
| Address Line 2 |
| City |
| Choose a State/Territory |
| Postal Code |

Next, ensure the correct individual is listed as the current chapter president. The president’s name will appear on the invitation to candidates.

Chapter President Verification

The president will sign the membership invitation. Please verify that the chapter president's contact information is correct.

President Name

[Update Information](#)

Next, you will select if you are going to purchase honor cords for your inductees. ***If you select “yes” to purchase them, candidates will not see it as a purchase option when they are accepting their invitation.***

Edit - Honor Cords

Honor Cord From the Chapter

Will your chapter purchase an honor cord for each inductee?

Yes No

Edit Ceremony

Select your ceremony details. In the “Type of Ceremony,” you will be choosing from a Live Ceremony Event, a Virtual Ceremony, or No Ceremony (where you just invite and induct the individual and recognize them in some other way).

If there is a ceremony attached to your induction, you will also complete a ceremony date, time, and time zone.

Ceremony Date

March 13, 2017



Time and Timezone

6:00 PM



Eastern Time (US & Canada) (UTC -5)



Respond-by Date

February 26, 2017



The respond-by date will default to two weeks prior to the induction, so there is enough time for STTI to prepare materials to be delivered to the chapter for the event. ***If you select an alternate date that is closer to the induction, you may not receive your materials on time.***

If you have a speaker for your ceremony, you can enter their name and additional details next. These fields are not required.

Ceremony Speaker

Please type the full name of the speaker in the text field below.

Name of Speaker

Position/Title

Organization Affiliation

Edit Ceremony Fees

Next, you will be adding in any additional (option) fees that the chapter has set to cover the cost of your induction ceremony.

Please note: You will see the new-member dues on the left side. These cannot be changed by the chapter, and will automatically be charged to your new members. You are only determining if you would like to charge an amount in addition to these dues. ***You do not need to add the dues to your total – they are already accounted for.***

Please indicate whether the ceremony fee will be required for ALL candidates, regardless of attendance. If you mark “yes,” all candidates will have to pay that additional fee in addition to their membership dues.

Edit - Ceremony Fees

| | |
|---|--|
| New-Member Dues These are set fees that cannot be changed within this system. | Optional Ceremony Fee |
| International Society Dues USD \$69.50 | Ceremony Fee: <input type="text" value="0"/> |
| New-Member Dues USD \$28.50 | Ceremony Fee Required for Inductees Not Attending? <input type="radio"/> Yes <input checked="" type="radio"/> No |

In the next area, you can limit the number of guests and charge fees for those guests. You can choose to either:

- **Limit the venue** – This will fill up on a first come, first served basis. So, if you set the venue limit at 200, the first candidates to respond will be able to bring as many guests as they would like as long as that limit has been hit.
- **Limit the number of guests per inductee** – Which will ensure that each candidate, regardless of when they respond, has the same number of invited guests who are allowed to attend the event.

Candidates will be able to set the number of guests when they accept the invitation and pay for the induction.

You can also set different fee amounts for adults and children.

Guests

Limit Number of Guests

Venue Attendance Limit:

Guests Per Inductee:

Guest Fees

Adult Guest Fee:

Child Guest Fee:

At the very bottom of the page, the fees that are being charged to candidates will be summarized for you. You can see the different amounts that will be charged to those who are attending the ceremony, not attending the ceremony, and if they are bringing any guests.

This summary accounts for the membership dues that will be charged to candidates, as well.

Summary of Fees

Non-Attending Inductee

A single inductee who is **NOT** going to attend the induction ceremony would pay:

\$98.00

Attending Inductee

A single inductee who is going to the induction ceremony or is required to pay the induction ceremony fee would pay:

\$98.00

Attending Inductee With Guests

A single inductee who is going to the induction ceremony with guests

Adults



Children



would pay:

\$98.00

Please ensure that the amounts are correct before moving on to the next screen.

Induction Summary Page

After you have entered in all the required information, you will be brought to the **Induction Summary page** to double-check that all your information is correct. If you need to go back in the system, you can use the “Edit” button next to the appropriate area.

Primary Chapter Contact for Induction

Michelle Coburn
michelle@stti.org
7657207825

Edit

Chapter President Verification

Margaret M Calarco

Edit

Induction Mailing Address

550 W North St
Indianapolis IN 46220

Honor Cords

Honor Cord From the Chapter

Your inductees will purchase their own honor cords.

Edit

Ceremony

Ceremony Date and Time

11/28/2015
6:00 PM

Edit

Ceremony Location

550 W North St
Indianapolis IN 46202

Edit

Respond-by Date

November 14, 2015

Edit

Ceremony Speaker

Edit

Ceremony Fees

Induction Ceremony Fee

\$10.00

Ceremony fee is required for inductees not attending.

Edit

Guests

5 Guests per inductee

\$10.00 Adult Guest Fee

\$5.00 Child Guest Fee

Edit

By hitting "Submit," you are agreeing that you have reviewed the induction details completely. Changes will not be accepted once this information is submitted.

Submit

Uploading Candidates to an Induction

Once your induction is finalized, you will come back to the main Induction System screen. Instead of hitting "Create a new Induction," you will click on the induction that you just created to open up a menu of options.


To add candidates to your induction, click on the "Upload" button from your panel.

Welcome to the Induction System

Click on a current or previous induction to edit or review details, or create a new induction.

Create a new Induction

Aug 29, 2016 Current

| | | | | |
|--|--|---|--|--|
|  Edit |  Upload |  Email |  Manage |  Report |
|--|--|---|--|--|

Download a Template

You can download a template from this page, if you did not already have the correct template from the All Chapter Officers workgroup. Copy and paste your candidates' information into this template. Do not add columns to the list before uploading it. This will ensure that your upload is successful, by only using the fields that are needed in the STTI database

Both CSV and Excel documents will be accepted by this system.

Please download the sample, fill out all of the fields, and upload load it using this page. This system will only accept file formats csv and Excel files 2007 and above (xlsx).

Download the CSV

Download the XLSX

Upload the Template

Once you are ready to upload the candidate list, hit the “**Choose File**” button to find the list saved on your computer. Once you’ve chosen the file from your computer, hit “**Upload Inductee List.**”

Upload Inductee List


Choose File

No file chosen

Upload Inductee List

The system will tell you in real time which candidates are being uploaded, and let you know what percentage of the list has been uploaded

6%

We are currently processing your request. Below will show the active import process in real time. 

| Name | Email | Status |
|-------------------|-----------------------------------|--------------------------------|
| McMillen, Valarie | Chapter-Test521670@mailinator.com | Inductee imported successfully |
| Lara, Renata | Chapter-Test932841@mailinator.com | Inductee imported successfully |
| Duong, Millicent | Chapter-Test312848@mailinator.com | Inductee imported successfully |
| Jamieson, Geneva | Chapter-Test177207@mailinator.com | Inductee imported successfully |
| Hayward, Randall | Chapter-Test800810@mailinator.com | Inductee imported successfully |

If there were no errors, it will notify you that all of the candidates have been uploaded successfully.

Upload

100% Complete

100 out of 100 individuals have been uploaded.

Managing Errors

If there are any errors with your candidates – such as missing information – the system will generate a message to you, so you can fix the error before moving on. Click on the red box to open the list of errors:

Upload

 We have detected errors in your upload for your review.

587: Unable to import this person at this time, as they are already in another active Induction.

Total error count: 1

Click on the error to read the full message. You will then have an option to edit the user's information, if applicable, before moving on to issue the invitations.

Candidates who had been previously invited, but who did not accept the invitation, will automatically be moved to your induction with the upload.

Upload

 We have detected errors in your upload for your review.

587: Unable to import this person at this time, as they are already in another active Induction.

FirstName: Michelle

LastName: Coburn

AddressLine1: 550 W. North St

City: Indianapolis

State: IN

PostalCode: 46202

Country: UNITED STATES

EmailAddress: michelle@stti.org

MembershipType: U

ExpectedGraduation: 12/25/2015

EventId: 4fa9b697-131e-41fb-bd94-99868b57f923

[Edit User](#)

Total error count: 1

Uploading a Single Candidate

There will be times when you will need to add 1 or 2 candidates after you have already uploaded the main list on the upload screen. To add a single candidate, go back to your induction dashboard and select the “Manage” button.

| Date | University Affiliation / Location | Status | | |
|----------------------|-----------------------------------|-----------------------|------------------------|------------------------|
| Aug 29, 2016 | | Current | | |
| Edit | Upload | Email | Manage | Report |

Click on the “New Inductee” button to add a single candidate to your induction

Manage - Inductee List

Add Inductees

New Inductee

Review Nurse Leaders

The next screen will ask you to put in their information. The required fields are the first and last name, email address, mailing address, and inductee type (nurse leader, graduate student, etc.). Be as thorough as you can – this will save your candidate from having to input information when they accept the invitation.

Member Information

First Name

First Name

Middle Name

Middle Name

Last Name

Last Name

Credentials

Credentials

Date of Birth

September 3, 2015

Email

Please indicate your primary Email Address!

+ Email Address

Address






Please indicate your primary Address!

+ Address

Once you save the candidate's information, they will appear in the "Manage" area with the rest of your candidates.

Editing a Candidate's Information

The "Manage" page will also allow you to edit a candidate's information. This may be necessary if you accidentally have a typographical error in someone's name or contact information.

| Date | University Affiliation / Location | Status | | |
|--|--|---|---|--|
| Aug 29, 2016 | | Current | | |
|  Edit |  Upload |  Email |  Manage |  Report |

Once you are on the “Manage” page, search for the person using the search box on the right side of the screen. They will appear on a list, below, to allow you to click on their name and edit their information.

Manage - Inductee List

Add Inductees

New Inductee

Review Nurse Leaders

Find Inductees

Inductees can be listed by email status, or can be searched by first name, last name, or email address.

Search: Email Status

OR

Coburn



Inductees

Select from the list to edit an inductee

| Constitid | First Name | Last Name | Status |
|-----------|------------|-----------|---------------|
| 1436457 | Michelle | Coburn | Not Specified |






Sending Messages to Candidates

Next, you need to schedule your invitation to deliver to your candidates. From the dashboard, click the “Email” button to get started

Welcome to the Induction System

Click on a current or previous induction to edit or review details, or create a new induction.

Create a new Induction

| Date | University Affiliation / Location | Status | | |
|--|--|---|--|--|
| Aug 29, 2016 | | Current | | |
|  Edit |  Upload |  Email |  Manage |  Report |

Schedule the Invitation

This system facilitates the invitation process by providing chapters with a pre-scheduled invitation. On the first screen, you will be choosing the date that you would like to deliver your invitation. Please note that the invitation is pre-written and is NOT customizable. This will ensure that all candidates are receiving the same invitation message, regardless of the chapter.

Select the date you would like it to deliver to candidates. **You will not be able to select today's date.** It will default to tomorrow's date, but you can also schedule it a few days into the future.



Schedule the Invitation

This Online Induction System facilitates the process by providing chapters with a customizable email invitation. While default text is provided, your chapter has an opportunity to provide additional verbiage about your ceremony or other details of importance for candidates.

Once the chapter sends the invitation, STTI will use the provided text to deliver a second one to your candidates' mailing address. This will ensure that everyone receives his or her invitation.

Choose your invitation message:

Standard

Select your invitation send date:

September 3, 2015



This is what the invitation looks like. Remember, the text cannot be changed by chapters:



Sigma Theta Tau International
Honor Society of Nursing®



Dear Carrie,

Congratulations! I'm pleased to invite you to join Nu Eta Chapter of the Honor Society of Nursing, Sigma Theta Tau International (STTI), a global community of outstanding nurses dedicated to advancing world health. Your dedication to scholarship, leadership, and service make you an exceptional candidate for membership in STTI.

In addition to recognizing you for your achievements in nursing, STTI provides you with access to resources from one of the largest professional nursing organizations in the world. From expert career advice and continuing nursing education to top-notch events and leading research journals, joining STTI connects you with leaders at all levels in the healthcare industry.

No matter what stage of your nursing career, you belong here, at STTI. Now is your time to join the best and the brightest in the nursing profession!

Yes, I accept the invitation to join.

[Learn more about STTI membership.](#)
[Watch a short video to check out exclusive STTI benefits.](#)

We look forward to inducting you into Nu Eta Chapter.

Sincerely,

Brenda Thompson

President

Once the chapter sends the email invitation, STTI will deliver a second invitation to your candidates' mailing address. This letter includes the instructions of how to accept online:

1. Visit <http://join.stti.org>
2. Select "I am accepting and invitation to join" and enter your email address and last name.
3. Create a password and click "Submit" to be complete the membership application.

If candidates approach you and let you know that they did not receive the email message, please share this text with them so they can accept online. They can also accept over the phone with Member Services at 888-634-7575 (US/Canada toll-free) or +1.317.634.8171 (International).

If you work at the university, you can also ask the I.T. Department to whitelist nursingsociety@stti.org to allow those messages to come through in the future.

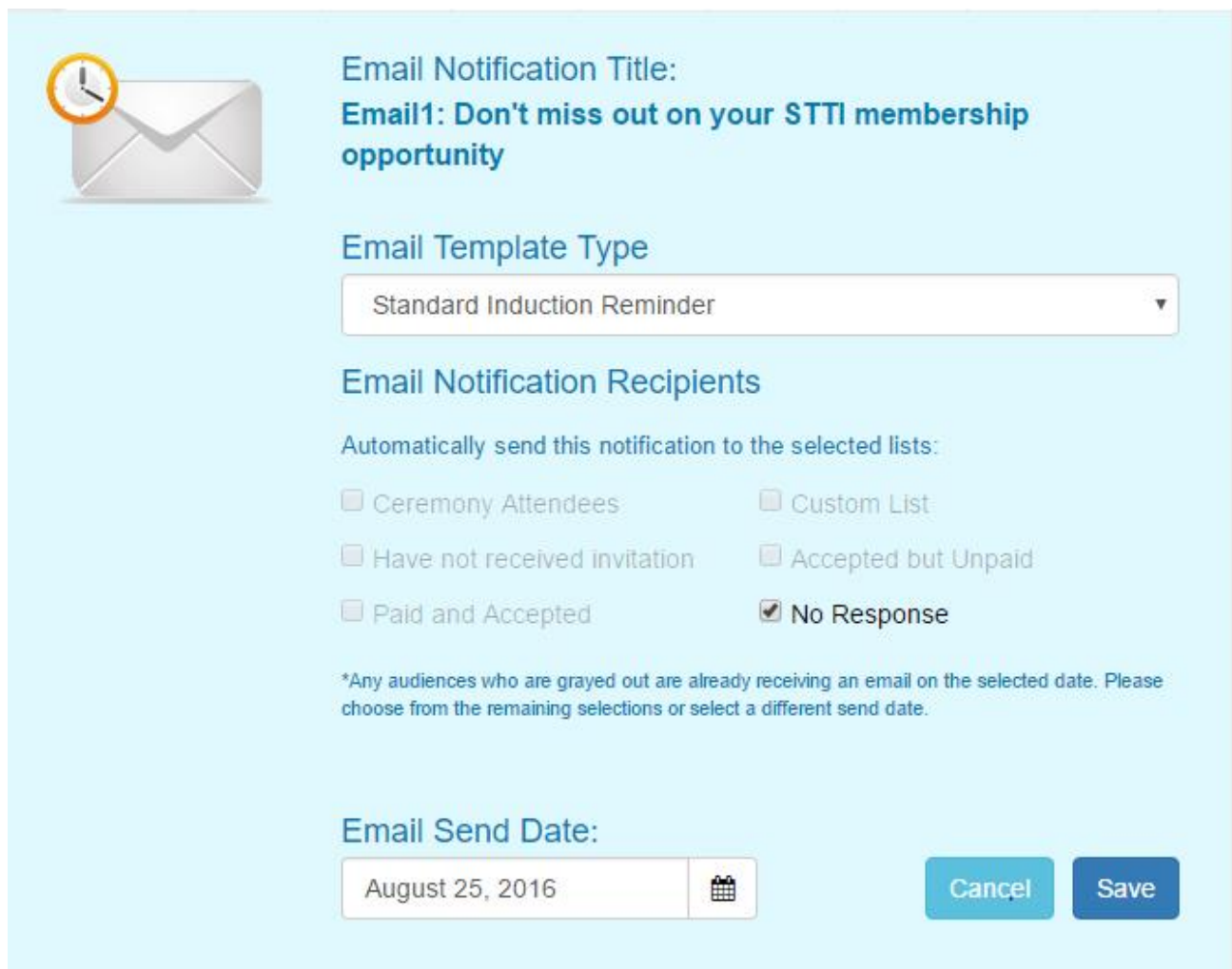
Schedule Reminders

On the next page, you will be able to schedule additional reminders and messages that you would like to deliver to your candidates. Simply click the “Create new email notification button” to set up the message.

[+ Create new email notification](#)

This will allow you to select your recipients, type in a new message to that selected group, and select the day you would like the message to deliver. This allows you to work ahead and ensure that reminders are delivered to the necessary individuals, without you having to go back in the system each time.

The Standard Induction Reminder may only be sent to those who have not responded.



The form is titled "Email Notification Title:" and contains the following fields and options:

- Email Notification Title:** Email1: Don't miss out on your STTI membership opportunity
- Email Template Type:** Standard Induction Reminder (dropdown menu)
- Email Notification Recipients:** Automatically send this notification to the selected lists:
 - Ceremony Attendees
 - Custom List
 - Have not received invitation
 - Accepted but Unpaid
 - Paid and Accepted
 - No Response
- Email Send Date:** August 25, 2016 (with a calendar icon)
- Buttons:** Cancel and Save

*Any audiences who are grayed out are already receiving an email on the selected date. Please choose from the remaining selections or select a different send date.

This is what the standard reminder message looks like. Again, your chapter cannot change the text:



Sigma Theta Tau International
Honor Society of Nursing®



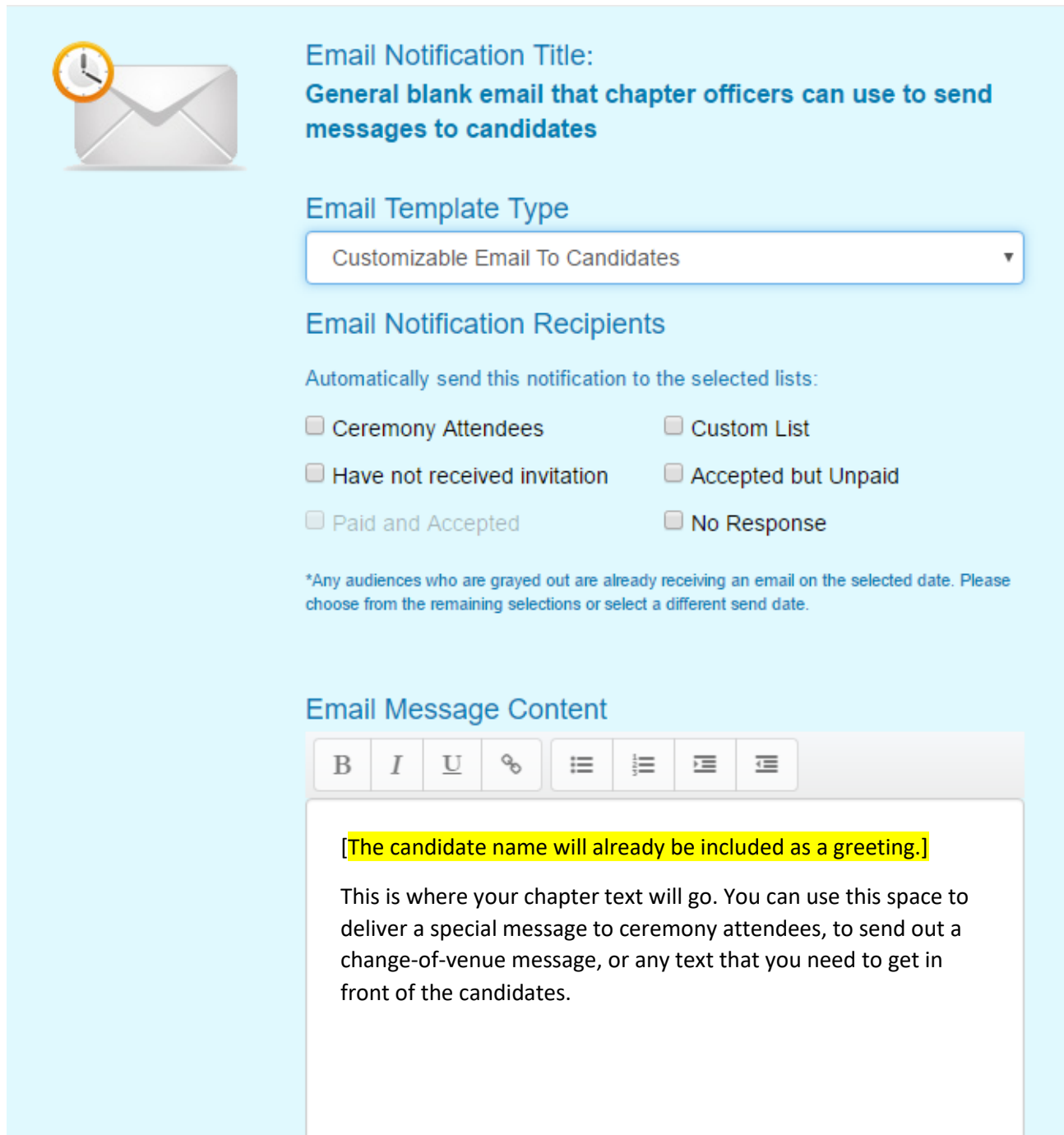
Congratulations on your invitation to join the Honor Society of Nursing, Sigma Theta Tau International (STTI)! Your invitation is still open.

Membership is a mark of distinction that signifies your commitment to academic and professional nursing excellence and scholarly practice.

Accept this invitation today to connect with a global network of nursing peers. Please respond by 7 September 2016.

I accept this invitation to join STTI.

There is a third option to send a customized message. In this option, your message can say whatever you would like, and you can also select the recipient list.



The image shows a light blue interface for configuring an email notification. On the left is an icon of a white envelope with a clock face. The main content area is titled "Email Notification Title:" and contains the text "General blank email that chapter officers can use to send messages to candidates". Below this is a section for "Email Template Type" with a dropdown menu set to "Customizable Email To Candidates". The "Email Notification Recipients" section includes a heading "Automatically send this notification to the selected lists:" followed by six checkboxes: "Ceremony Attendees", "Custom List", "Have not received invitation", "Accepted but Unpaid", "Paid and Accepted", and "No Response". A note below the checkboxes states: "*Any audiences who are grayed out are already receiving an email on the selected date. Please choose from the remaining selections or select a different send date." The "Email Message Content" section features a rich text editor toolbar with icons for bold, italic, underline, link, bulleted list, numbered list, left-align, and right-align. The text area contains a yellow-highlighted placeholder "[The candidate name will already be included as a greeting.]" and a paragraph: "This is where your chapter text will go. You can use this space to deliver a special message to ceremony attendees, to send out a change-of-venue message, or any text that you need to get in front of the candidates."

If you select the “Custom List” on your reminder message, you will need to start typing the name or email address of the individual(s) you would like to receive that specific message. It will find the candidate(s) email address for you to select:

Email Template Type

Select an Email Template ▼

Email Notification Recipients

Automatically send this notification to the selected lists:

| | |
|---|---|
| <input type="checkbox"/> Ceremony Attendees | <input checked="" type="checkbox"/> Custom List |
| <input type="checkbox"/> Have not received invitation | <input type="checkbox"/> Accepted but Unpaid |
| <input type="checkbox"/> Paid and Accepted | <input type="checkbox"/> No Response |

Custom List Addresses

Enter multiple email address

- zzChapter-Test200432@mailinator.comzz

Select that email address, and begin typing any other individuals who need to receive that particular message, until you have selected everyone.

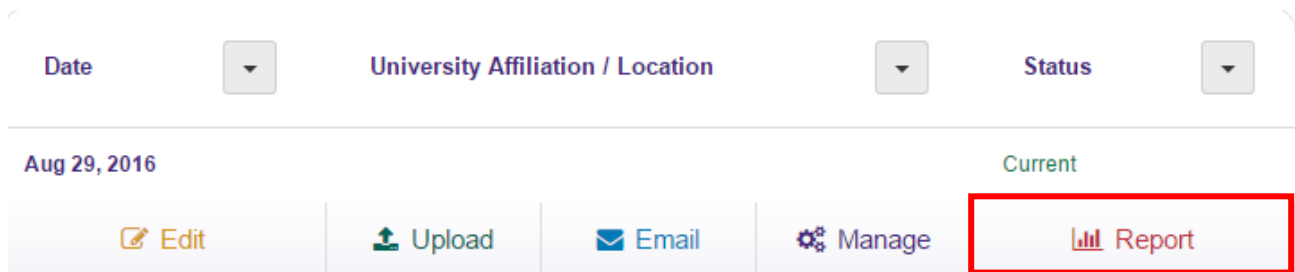
The system will not allow you to email individuals who are not candidates of that particular induction.

Once the induction lapses, you will no longer be able to send emails to that list of inductees – your chapter will need to use your regular communication channels.

Pulling Reports

There are several reports available to your chapter. The reports are designed to provide information back to you so you can have a successful induction.

To pull a report, click on the “Report” button on the induction dashboard



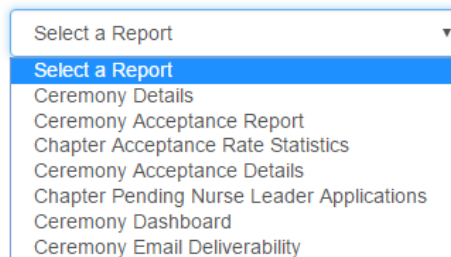
Types of Reports

Next, select the report that you would like to pull. You will be choosing from:

- Ceremony Details – This will tell you which candidates have accepted the invitation; whether they are attending the ceremony; and if they are bringing any guests.
- Chapter Acceptance Rate Statistics – This report will show your chapter any trends in your acceptance rate, so you can set goals to increase this number over the years.
- Chapter Pending Nurse Leader Applications – If there are any pending Nurse Leader applications that your chapter needs to review and make a determination on, they will be available in this report.

Reports



Report Selection



Accessing Previous Inductions

After your induction has passed, you will still see it in your induction dashboard. The navigation will allow you to pull reports, copy the induction details, or delete it from the list.

Deletion is only recommended for inductions that were never completed, so you can have a historical look at what inductions have taken place at the chapter level.

| | |
|--|--|
| Dec 3, 2015 | Past |
|  View |  Report |

Questions?

Email chapserv@stti.org, or telephone 888.634.7575 (U.S./Canada toll-free) or +1.317.634.8171 (International). You can also submit a Consultation Request Form to request a one-on-one meeting with STTI staff on any chapter-related topic or training need, including how to use the Online Induction System.