



## How to Update Your Anchorbase Roster

Your chapter's Anchorbase roster is your official roster. Delta Gamma Fraternity uses this roster for a variety of purposes, including billing. It is imperative that this roster is kept up to date. This document explains how to update a member's status in the database.

### HOW TO VIEW YOUR CHAPTER'S ROSTER ON ANCHORBASE:

There are two ways to view your chapter's roster on Anchorbase:

1. Once you have logged in to Anchorbase, perform the following steps:
  - Click on the "Roster" tab on the toolbar at the top of the page
  - Move your mouse to "Reports"
  - From there, select which roster you wish to view

OR

2. Once you have logged in to Anchorbase, perform the following steps:
  - Click on the "Roster" tab on the toolbar at the top of the page
  - Move your mouse to "Tasks"
  - From there, select "Manage Roster"

### HOW TO UPDATE A MEMBER'S STATUS

To make changes to your Anchorbase roster, please refer to the following steps. Multiple officers oversee the roster change processes within your chapter. The roster changes each position oversees are different and are explained in the following pages.

If you believe a situation does not apply to any of the following status types, actions or explanations, please email your Collegiate Development Specialist at [CollDept@deltagamma.org](mailto:CollDept@deltagamma.org). From there, the appropriate staff members will gather additional information from you depending on the reasons for adding or removing a member.



## Roster Changes the vp: member education Oversees

### ADDING NEW MEMBERS TO THE ROSTER

Once a new member accepts her bid from Delta Gamma, the chapter will need to add her to the chapter roster in Anchorbase. If you have multiple new members, you have the option to add these women to the roster individually or in bulk.

#### Option 1: One at a Time

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Add New Members”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. Please enter the new member’s information in the designated fields
6. Once you have entered the new member’s information in the designated fields, click “Add Person”
7. Repeat steps 5 and 6 until all new members appear in the box at the bottom of the screen
8. You may edit or delete the information you have already entered by clicking the writing utensil image or the “x”
9. Once all new members appear in the box at the bottom of the screen, click “Continue” at the bottom of the page
10. Enter the new member’s Bid Day and recruitment type in the appropriate fields
11. Please note you can select “Apply to All” if the new members you are entering have the same Bid Day and recruitment type
12. Once you have filled out the appropriate fields regarding Bid Day and recruitment type, click “Continue” at the bottom of the page
13. Type your name and date in the designated fields to certify that the information is correct
14. Once you have certified that the information is correct, click “Continue” at the bottom of the page
15. Anchorbase will provide you with a “Receipt” page to confirm that the information you have entered has been submitted



## **Option 2: All at Once**

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Add New Members”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. Click “Add Person from File”
6. Click “Download Template File”
7. Populate the Template File with the required information
8. Ensure you save the file in .CSV format
9. Click “Upload File”
10. From there, click “Select” to choose your file
11. Then, click “Upload File”
12. Ensure data from the file is correct, and click “Add New Member(s)”
13. Once all new members appear in the box at the bottom of the screen, click “Continue” at the bottom of the page
14. Enter the new member’s Bid Day and recruitment type in the appropriate fields.
15. Please note you can select “Apply to All” if the new members you are entering have the same Bid Day and recruitment type
16. Once you have filled out the appropriate fields regarding Bid Day and recruitment type, click “Continue” at the bottom of the page
17. Type your name and date in the designated fields to certify that the information is correct
18. Once you have certified that the information is correct, click “Continue” at the bottom of the page
19. Anchorbase will provide you with a “Receipt” page to confirm that the information you have entered has been submitted



## Roster Changes the vp: communications Oversees

### GRADUATION

Once a member has completed her undergraduate studies and receives her degree from the institution, she will become an alumna! You will need to update her status and remove her from the chapter's Anchorbase roster. You will need to know the member's graduation date and the email address they would like to use for Delta Gamma communication post-graduation. This should be an email address that will not expire upon graduation. Once you have logged in to Anchorbase, perform the following steps:

1. Click on the "Roster" tab on the toolbar at the top of the page
2. Move your mouse to "Tasks"
3. From there, select "Manage Roster"
4. Carefully read the "Overview" step prior to clicking "Continue"
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all members who are graduating by selecting bubble 4 (Graduate).
7. Once you have made your selections, click "Continue" at the bottom of the page
8. Enter the graduation date of the member(s)
9. Please note you can select "Apply to All" if the graduating members have the same graduation date
10. Enter the member's personal email address into the text box, which will update their email address with Executive Offices so that they continue to receive Fraternity communications
11. Once you have selected the graduation date, click "Continue" at the bottom of the page
12. Type your name and date in the designated fields exactly as they are shown to certify the information is correct
13. Once you have certified the information is correct, click "Continue" at the bottom of the page
14. Anchorbase will provide you with a "Receipt" page to confirm the information you have entered has been submitted
15. Once your graduates have been submitted, you will receive an email confirming your submission and listing the women who will be marked as alumnae



## **TRANSFER**

When a member transfers from one institution with a Delta Gamma chapter to another, an email will automatically be sent to the new chapter once the previous chapter submits the member as a transfer student using Anchorbase. To affiliate with the new chapter, the woman must be in good financial standing at her previous chapter and her GPA must meet the new chapter's good standing requirement. If the woman wishes to affiliate, please reference "Option 2: Member is joining the chapter" for the next steps. If the member does not wish to affiliate, she will be considered a collegiate member of Delta Gamma and will be governed by the policies relating to unaffiliated transfers. If an initiate of your chapter ever returns to your chapter, she must become a collegiate member of your chapter again.

### **Option 1: Member is leaving the chapter**

If the institution to which this member is transferring does not have a Delta Gamma chapter, or if the member withdraws from your institution, she becomes an alumna member of Delta Gamma. She is not eligible to join another NPC organization. However, if she transfers to an institution with a Delta Gamma chapter, she may affiliate with that chapter.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the "Roster" tab on the toolbar at the top of the page
2. Move your mouse to "Tasks"
3. From there, select "Manage Roster"
4. Carefully read the "Overview" step prior to clicking "Continue"
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all members who are transferring or withdrawing from school by selecting bubble 1 (Transfer/Leave School)
7. Once you have made your selections, click "Continue" at the bottom of the page
8. Please fill in the required fields with the appropriate information
9. If the member is transferring to a school with a Delta Gamma chapter, please select that information in the drop-down menu provided
10. If the member is transferring to a school without a Delta Gamma chapter, please input the name of the new school in the designated field



11. If the member is withdrawing from school, please check the box that denotes “Not Continuing Higher Education”
12. Once you have filled out the appropriate fields, click “Continue” at the bottom of the page
13. Type your name and date in the designated fields to certify the information is correct
14. Once you have certified the information is correct, click “Continue” at the bottom of the page
15. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted

### **Option 2: Member is joining the chapter**

If a transfer student wishes to affiliate with your chapter, you will receive an automated email informing you of this member’s arrival on campus. Once you receive this email and the Affiliation Ceremony is held per the Rituals Handbook, you may add this member to your roster using the following process. Prior to affiliation, the member should be educated on the chapter’s bylaws and standing rules, dues and fees, and live-in requirements.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage Affiliates”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. In the “Selection” step, there is a navy box that reads “Add Member to List”
6. Click this box and search for the member in question using her first and last name
7. Once you have found the correct member, click the check box on the left side of the screen that corresponds with this member
8. From there, the member you selected will appear in the “Selection” step
9. Mark the member who wishes to affiliate by selecting bubble 1 (Affiliate)
10. Once you have filled out the appropriate bubble, click “Continue” at the bottom of the page
11. Type your name and date in the designated fields to certify the information is correct
12. Once you have certified the information is correct, click “Continue” at the bottom of the page
13. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted



### **Option 3: Member is returning to the chapter**

If an initiate of your chapter ever returns to your chapter, she must become a collegiate member of your chapter again or resign her membership.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage Affiliates”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. In the “Selection” step, there is a navy box that reads “Add Member to List”
6. Click this box and search for the member in question using her first and last name
7. Once you have found the correct member, click the check box on the left side of the screen that corresponds with this member
8. From there, the member you selected will appear in the “Selection” step
9. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
10. Mark the member(s) who is/are returning to the institution by selecting bubble 3 (Return to Chapter)
11. Once you have made your selections, click “Continue” at the bottom of the page
12. Please fill in the required field with the appropriate information
13. Input the date of this member’s return
14. Once you have filled out the appropriate fields, click “Continue” at the bottom of the page
15. Type your name and date in the designated fields to certify the information is correct
16. Once you have certified the information is correct, click “Continue” at the bottom of the page
17. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted



#### **Option 4: Member is not joining the chapter**

If you have a transfer student who does not wish to affiliate with your chapter or is not eligible for affiliation, that woman will be considered a collegiate member of Delta Gamma until her graduation, except in case of another event that qualifies for a change in membership. She will be governed by the policies relating to unaffiliated transfers. As an unaffiliated transfer, she will not appear on your Anchorbase roster.

#### **MEMBER MISSING FROM ROSTER**

If a woman is missing from your roster, the appropriate staff member will investigate and will be in touch regarding any action that may need to be taken. Please email your Collegiate Development Specialist at [CollDept@deltagamma.org](mailto:CollDept@deltagamma.org).

#### **MEMBER MISSING FROM CHAPTER**

If a woman has been missing from your chapter for at least one academic term and multiple, unsuccessful attempts have been made to contact this woman to fill out a Resignation Form, the following process allows this woman to be removed from your roster.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage Roster”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all members who missing by selecting bubble 6 (Remove No Resignation Form)
7. Once you have made your selections, click “Continue” at the bottom of the page
8. Please fill in the required fields with the appropriate information
9. Once you have filled out the appropriate fields, click “Continue” at the bottom of the page
10. Type your name and date in the designated fields to certify the information is correct
11. Once you have certified the information is correct, click “Continue” at the bottom of the page





12. Anchorbase will provide you with a “Receipt” page to confirm that the information you have entered has been submitted. Once you have completed this step, the task will be sent to your ATC for her approval, and finally to the CDS. Once your submission is approved or denied, you will receive an email confirmation

## 5<sup>TH</sup> YEAR ALUMNA STATUS

Collegiate chapter membership is normally for four years. A woman who is in school for a fifth year as an undergraduate and who has completed at least two years of membership in the Fraternity may assume alumna status with the approval of the advisory team chairman (ATC). A woman who is entering her fifth year of school is not required to obtain 5<sup>th</sup> Year Alumna Status if she wishes to remain a collegian.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage Roster”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all members who are applying for 5<sup>th</sup> Year Alumna Status by selecting bubble 3 (5<sup>th</sup> Year Alumna Status)
7. Once you have made your selections, click “Continue” at the bottom of the page
8. Please fill in the required fields with the appropriate information
9. Once you have filled out the appropriate fields, click “Continue” at the bottom of the page
10. Type your name and date in the designated fields to certify the information is correct
11. Once you have certified the information is correct, click “Continue” at the bottom of the page
12. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted
13. Once approved by the ATC, the status update will be considered complete



## Roster Changes the vp: social standards Oversees

### RESIGNATION

A woman who resigns her membership to Delta Gamma must be removed from your roster. In order to do this, you must upload her completed resignation form to Anchorbase so that it may be reviewed by a Collegiate Development Specialist at Executive Offices.

#### Option 1: Initiated Member

Resignation forms for initiated members can be found in the Delta Gamma Library using [this link](#). Please note that you must log in to download this form.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage Roster”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all members who are resigning by selecting bubble 2 (Resigned)
7. Once you have made your selections, click “Continue” at the bottom of the page
8. Please fill in the required fields with the appropriate information
9. Please upload a completed Resignation Form in the “Upload Paperwork” section
10. Once you have filled out the appropriate fields and have uploaded a completed Resignation Form, click “Continue” at the bottom of the page
11. Type your name and date in the designated fields to certify the information is correct
12. Once you have certified the information is correct, click “Continue” at the bottom of the page
13. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted
14. Once this has been completed, your submission will be available for review by your Collegiate Development Specialist. Once your submission is approved or denied, you and the member resigning will receive an email confirmation.



## Option 2: New Member

A new member who has resigned may be re-extended a bid, only if she has not joined another NPC organization. If the new member returns within one year from the date she received her original bid, her bid is still active, and she may rejoin the chapter without having to have a bid re-extended to her. Resigned members cannot be removed from your roster until a completed Resignation Form has been uploaded to Anchorbase and reviewed by a Collegiate Development Specialist at Executive Offices. Resignation forms can be found in the Delta Gamma library using [this link](#). Please note that you must log in to view/download this form.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage New Members”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all new members who are resigning by selecting bubble 1 (Resigned)
7. Once you have made your selections, click “Continue” at the bottom of the page
8. Please fill in the required fields with the appropriate information
9. Please upload a completed New Member Resignation Form in the “Upload Paperwork” section
10. Once you have filled out the appropriate fields and have uploaded a completed New Member Resignation Form, click “Continue” at the bottom of the page
11. Type your name and date in the designated fields to certify the information is correct
12. Once you have certified the information is correct, click “Continue” at the bottom of the page
13. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted
14. Once this has been completed, your submission will be available for review by your Collegiate Development Specialist. Once your submission is approved or denied, you and the member resigning will receive an email confirmation.



## **REVERSE AFFILIATION**

No two Delta Gamma chapters are the same. Therefore, if a woman affiliates with a new chapter and realizes that the new chapter is not a good fit, she may reverse her affiliation. Please note that this form is only for women who have transferred and affiliated with a new Delta Gamma chapter. If a woman initiated at your chapter returns to your institution, she must be an active collegiate member of your chapter.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage Affiliates”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all members who wish to reverse their affiliation by selecting bubble 2 (Reverse Affiliation)
7. Once you have made your selections, click “Continue” at the bottom of the page
8. Please fill in the required fields with the appropriate information
9. Once you have filled out the appropriate fields, click “Continue” at the bottom of the page
10. Type your name and date in the designated fields to certify the information is correct
11. Once you have certified the information is correct, click “Continue” at the bottom of the page
12. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted
13. Once this has been completed, your submission will be available for review by your ATC and Collegiate Development Specialist. Once your submission is approved or denied, you and the member in question will receive an email confirmation.



## **EXCUSED STATUS**

An initiated member may apply for Excused Status one academic year following her Initiation and for a maximum of three (3) semesters or terms. This status may be extended for any of the following reasons: financial hardship, attendance, non-resident/abroad, academic/professional and special circumstances. Before a roster change can be made in Anchorbase, a member applying for Excused Status will need to submit a completed Excused Status Application to the vp: social standards, gather all relevant documentation reflecting a need for the status and attend an in-person meeting to discuss the application. Should a member require any financial accommodation, the vp: finance and the chapter financial adviser must be consulted. Members granted Excused Status by Honor Board need to be marked appropriately in Anchorbase to inform any changes on greekbill.

Please note that being approved for Excused Status does not dismiss members from upholding the terms outlined in a signed Room Agreement. If a woman is approved for Excused Status, she is still responsible for the terms in her most recently signed Room Agreement, if applicable.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage Roster”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all members who are granted Excused Status by selecting bubble 6 (Excused Status)
7. Once you have made your selections, click “Continue” at the bottom of the page
8. Please fill in the required fields with the appropriate information
9. Once you have filled out the appropriate fields, click “Continue” at the bottom of the page
10. Type your name and date in the designated fields to certify the information is correct
11. Once you have certified the information is correct, click “Continue” at the bottom of the page
12. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted



## EARLY ALUMNAE STATUS

Honor Board submits the [Early Alumnae Status \(EAS\) Request Packet](#) to their RCS/CAC/NCC through Anchorbase. Only Council may grant EAS for “extreme circumstances.” Requests for early alumnae status for “extreme circumstances” must be in writing and submitted to Honor Board. After Honor Board and advisory team chairman review, the request must be sent to the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator who reviews the request and, if in support, forwards it to the Fraternity Director: Standards. From there, if the Fraternity Director: Standards is in support, she then forwards it to Council for the final decision. Honor Board cannot grant early alumna status. Women who are recommended for EAS will only be removed from your roster once Council has voted to support the recommendation; they are collegiate members of your chapter until Council has voted. Once Council has voted to support the recommendation of EAS, the chapter and member will be notified, and the member will be marked as an alumna and removed from your roster.

Once you have logged in to Anchorbase, perform the following steps:

1. Click on the “Roster” tab on the toolbar at the top of the page
2. Move your mouse to “Tasks”
3. From there, select “Manage Roster”
4. Carefully read the “Overview” step prior to clicking “Continue”
5. At the top of the page, there is a key denoting which number bubbles are associated with the various roster changes
6. Mark all members who are requesting EAS by selecting bubble 7 (Early Alumnae Status)
7. Once you have made your selections, click “Continue” at the bottom of the page
8. Please fill in the required fields with the appropriate information
9. Once you have filled out the appropriate fields, click “Continue” at the bottom of the page
10. Type your name and date in the designated fields to certify the information is correct
11. Once you have certified the information is correct, click “Continue” at the bottom of the page
12. Anchorbase will provide you with a “Receipt” page to confirm the information you have entered has been submitted



## **EXPULSION**

Honor Board submits Expulsion recommendation to their Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator (RCS/CAC/NCC). Only Council may expel a member from Delta Gamma. Honor Board cannot expel a member; they can only recommend a member for expulsion. After Honor Board makes a recommendation for expulsion, all applicable documents are sent to the RCS/CAC/NCC who reviews the recommendation and, if in support, forwards it to the Fraternity Director: Standards. From there, if the Fraternity Director: Standards is in support, she then forwards it to Council for the final decision. Women who are recommended for expulsion will only be removed from your roster once Council has voted to support the recommendation; they are collegiate members of your chapter but are on Probation until Council has voted. Once Council has voted to support the recommendation of expulsion, the chapter and member will be notified, and the member will then be removed from your roster.