



Honor Board in Anchorbase


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KEY TERMS

Workflow: This may also be referred to as a task. A workflow is a collection of actions which allow you to navigate various phases of Honor Board procedure. For purposes of this guide, it refers to the workflows which allow you to execute both Standard and Automatic Procedure, and are appropriately named the Automatic Procedure and Standard Procedure Workflows.

Locating a workflow: All Honor Board-related workflows are found in the Social Standards tab of the toolbar at the top of the Anchorbase site. Depending on the size of your screen, you may need to click on the three stacked, horizontal lines  to access the full list of tabs. From there, hover over the Honor Board section in the drop down. An additional Tasks drop down will appear for you to select the correct workflow.


Step: Each workflow passes through five steps before being finalized. These steps are consistent across all Anchorbase workflows and include: Overview, Selection, Additional Info, Validation and Receipt.

Radio button: A radio button is the item that must be selected in order to complete an action in the workflow. Each button represents a single activity within the workflow and consists of questions to collect the necessary information and accompanying documentation required per Honor Board procedure. This may also be referred to as a button and appears in the Selection step of the workflow. For all workflows in Anchorbase, the default radio button is the “No Action” radio button (previewed below.)

Note: Some radio buttons are programmed so that they “grey out” upon completion of that button. This means that you will not be able to complete that button again until a different button or action is completed. Buttons that have greyed out will look like button 4 below. There are notes within this guide as to how this effects the various buttons or activities.



Reports: A report is a central place within Anchorbase where officers and advisers can view the information that has been submitted via workflows and other tasks. Several reports have been created for the Honor Board platform specifically and have been outlined in greater detail later in this guide.

Locating a report: All Honor Board-related reports are found in the Social Standards tab of the toolbar at the top of the Anchorbase dashboard. Depending on the size of your screen, you may need to click on the three stacked, horizontal lines () to access the full list of tabs. From there, hover over the Honor Board section in the drop down. An additional Reports drop down will appear for you to select the correct report.

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Notification/Automated Email: Members, local advisers, members of the Regional Team or other Fraternity volunteers may be notified of the completion of a radio button to help Honor Board procedure move along and ensure any necessary subsequent action is completed. In this guide, we outline specifically who will be notified and when they will receive the email as a result of completing a radio button. It is paramount that information submitted be accurate prior to completion to ensure that any subsequent notifications are also accurate.

Note: Email notifications are not sent immediately upon completion of a button. Emails are scheduled to send at a specific time each day, so if the button is completed prior to the daily send time, the notification will be sent on the same day as the button is completed. *If the button is completed after the daily send time, the member will be notified the next day.*

AUTOMATIC PROCEDURE

Automatic Procedure Workflow

The Automatic Procedure Workflow is where nearly all actions related to automatic procedure will be completed. This task shall be completed by the appropriate officer and will require occasional maintenance to ensure accurate records. The appropriate officer will be able to submit an Automatic Procedure Notification (APN) and update the terms of the APN when appropriate via this task.

There are several officers who have access to the Automatic Procedure Workflow. These officers and the reasons for which they should be completing the workflow are outlined below:

vp: communications shall complete the task for attendance-related APNs.

director: house management/chapter property shall complete the task for housing-related APNs.

director: scholarship shall complete the task for scholarship-related APNs.

vp: social standards can complete the task as necessary.

chapter president can complete the task as necessary.

Honor Board Adviser can complete the task as necessary.

Note: Finance-related APNs are still issued and distributed to the appropriate member through greekbill. Information about which members have received finance-related APNs will automatically pass from greekbill to Anchorbase to ensure records are accurate in both places.

Submitting an Automatic Probation Notification

Members in violation of specific bylaws and standing rules shall receive an APN and will be placed in poor standing per Delta Gamma policy.

Button 1: Submit APN

In order to complete this action, the appropriate officer must know the name of the member(s) in question, the nature of the violated bylaw or standing rule and the anticipated end date for the member's probation period. Finance-related APNs shall be submitted through the Honor Board section of greekbill.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks and select Automatic Procedure Workflow from the Tasks drop down.

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2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page to proceed to the Selection step.
3. In the Selection step, find the member(s) for whom you're issuing an APN and select button 1 (Submit APN).
4. Once you have identified all members, click Continue at the top or bottom right of the page to proceed to the Additional Info step.
5. Enter the information as prompted.
 - a. Please note you can click "Apply to All" if the information requested is consistent across all selected members.
6. Once you have input the requested information, click Continue to proceed to the Validation step.
7. Carefully review the information to ensure accuracy, then enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step.
8. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted.

Upon completion of this button, the member in question will receive an automatically generated copy of her APN and instructions on how to submit an appeal. The vp: social standards and HBA are also copied. This notification is scheduled to send at 6:42 am CT.

This button does not grey out upon completion in the event a member receives multiple APNs within a short span of time.

Updating an Automatic Probation Notification

Upon receipt of her APN, the member in question may the complete the outstanding item or task which led to the initial violation of a bylaw or standing rule. If this occurs, the member may be returned to good standing.

Button 2: Update APN

This button can only be selected if a member is currently on probation. In order to complete this action, the appropriate officer must know the name of the member(s) in question, have confirmation of satisfactory completion of the outstanding item or task and the appropriate new end date of the member's probation period.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks, and select Automatic Procedure Workflow from the Tasks drop down

2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you're updating an APN and select button 2 (Update APN)
4. Once you have identified all applicable members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
 - a. Please note you can click "Apply to All" if the information requested is consistent across all selected members
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Note: Any officer may select the Void APN option from the dropdown when the APN is no longer necessary and does not meet any other update or appeal criteria. If the APN is valid and the member wishes to appeal the APN, the member should follow the standard action appeal process discussed below.

Upon completion of this button, the member in question will receive an update regarding her standing with the chapter. The vp: social standards and HBA are also copied. This notification is scheduled to send at 6:44 am CT.

This button will grey out upon completion.

Appeals

A member may have reason or desire to appeal her recently received APN. Appeals are submitted via the Delta Gamma member site (explained in detail in the [Submitting an Action Appeal](#) section) and are approved by the RCS/CAC/NCC only. The RCS/CAC/NCC will complete a workflow in Anchorbase to confirm her decision regarding the appeal, and upon completion, the member in question, vp: social standards and HBA will be notified of the RCS/CAC/NCC's final decision via automated email. If the member's appeal is approved, the member will be returned to good standing as of the date of receipt of the email and all reports will be updated appropriately.

Specific guidance for the RCS/CAC/NCC is in the [Notes for the RCS/CAC/NCC](#) section.

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STANDARD PROCEDURE

Submitting a Statement of Obligation Review

Statement of Obligation Reviews (SORs) are submitted electronically via the [Delta Gamma member site](#). Members will need to log in to the website in order to submit an SOR. Instructions on how to reset their account password can be found on the login page by clicking “Trouble Logging In?”.

In order to complete this action, the member submitting the SOR must know the name and chapter of the member(s) for whom she is submitting an SOR; detail about the actions or behavior pertaining to Delta Gamma and/or chapter policy, State and Federal laws or University policy violations; and any accompanying documentation which explains or supports the actions and behavior detailed previously.

Once logged into the member site, perform the following steps:

1. Find the Tools and Resources tab on the toolbar at the top of the page. Navigate to the Honor Board section of the tab and from there, select Statement of Obligation Review Submission.
2. Carefully read the help text outlining expectations when submitting an SOR and download the SOR Template to be used later
3. Click Add SOR Submission at the bottom of the page
4. A new window will appear to search for the member in question
5. Enter the member’s first and last names when prompted
6. A list of all collegiate members with that name will appear. Please select the correct member based on the member’s current chapter affiliation
7. Once you have identified the correct member, click Select Member
8. A new window will pop up. The name of the member selected will appear in the top left of the page and cannot be edited
9. Please answer Yes or No to the questions as outlined. If you select No, please provide additional information which support the No response
10. Once the questions have been answered and additional information has been provided, scroll to the questions which include a file upload. The first of these questions is required and the SOR Template for this question was downloaded previously
11. Complete the SOR Template as prompted
12. Upload the SOR Template and any supplementary documentation in the fields provided
 - a. **Note:** The maximum file size that can be uploaded is 40 MB. If you are interested in uploading a lot of documentation, including photographs

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or video, please either provide links to the original content (on Instagram, TikTok, YouTube, etc.), or embed original photos and video within a Word or Pages document to maximize the amount of documentation submitted. If you are not able to upload all of the documentation you would like to submit, please prioritize the documentation which most clearly demonstrates the actions or behaviors you reference previously.

13. Carefully review the information outlined to ensure accuracy
14. Scroll to the bottom of the page
15. Read the bolded statement carefully
16. Enter your full name as prompted at the bottom of the page to certify the information provided is accurate and that you have read the previous statement
17. Click Save & Close to submit the SOR
18. A copy of the SOR submitted will appear at the bottom of the original page in the member site for your records

Upon submission of the SOR, the vp: social standards of the chapter of the member in question will receive an automated email alerting her that an SOR has been submitted and is ready for her review.

Standard Procedure Workflow

Formal Hearing Documentation

There are several actions in Anchorbase that must be completed to properly document a member's formal hearing proceedings. This section covers the actions completed by the vp: social standards (or her designee) and the Honor Board Adviser (HBA).

Note: You **cannot** hold simultaneous formal hearings for the same member. If you receive a second SOR on a member who is currently participating in standard procedure and Honor Board determines a second formal hearing is necessary, please consult your RCS/CAC/NCC about how to proceed with holding the second formal hearing. Please refer to the section [Holding Simultaneous Formal Hearings](#) for more information about how to document a second formal hearing in Anchorbase.

Button 1: Allegation Assessment

This shall be completed every time an SOR has been submitted and Honor Board has held the Allegation Assessment during the weekly Honor Board meeting. In order to complete this action, the appropriate officer must know the name of the member(s) in question, the nature of the violation, the unique key(s) for the

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applicable SOR(s) and the anticipated date for the member's formal hearing (if applicable).

Note: If multiple SORs have been submitted for one member, and after conducting the allegation assessment only some of the SORs will be discussed in a formal hearing, **the Allegation Assessment button should be first completed to document which SORs will not lead to a formal hearing.** Once the Allegation Assessment step has been submitted for the SORs not leading to a formal hearing, you may proceed with completing the Allegation Assessment step for the SORs that will be discussed in a formal hearing with the member.

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

1. Find the Social Standards tab on the toolbar at the top of the page. Hover over the Honor Board section in the drop down. An additional drop down will appear. From there, hover over Tasks and select Standard Procedure Workflow
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you have completed an Allegation Assessment for and select button 1 (Allegation Assessment)
4. Once you have identified all members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion of this button, the member subject to review will receive a Formal Hearing Letter and Notice of Rights with a hyperlink to view their SOR via the [Delta Gamma member site](#). The vp: social standards and HBA are also copied. This notification is scheduled to send at 6:12 am CT.

This button will grey out upon completion. The member subject to review will now also appear on the Compliance Packet Report.

Button 2: Confirm Formal Hearing

In order to complete this action, the appropriate officer must know the name of the member(s) who had a formal hearing, the date the formal hearing was held,

whether the member was in attendance, the recommended sanction, a copy of formal hearing minutes, confirmation of the member(s) university enrollment and confirmation of outstanding debt.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks and select Standard Procedure Workflow
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you are completing a confirmation of formal hearing for and select button 2 (Confirm Formal Hearing)
4. Once you have identified all members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion of this button, the member subject to review will receive confirmation of the recommended sanction from her formal hearing and instructions on how to submit an appeal. *This notification is new to the standard procedure process and is sent to both members who were in attendance and were absent for their formal hearing.* The vp: social standards and HBA will also be copied. This notification is scheduled to send at 7:18 am CT.

Note: If you are completing this task to submit updated information to the RCS/CAC/NCC, please answer “Yes” to the question “Submitting updates to Compliance Packet?” to ensure the member subject to review is not notified a second time.

Once submitted, the Compliance Packet Report will be updated and is ready for review by the HBA and RCS/CAC/NCC. This button will grey out upon completion.

Button 3: HBA Approval (Optional)

This step shall be completed by the HBA only. HBA approval is not required and if not completed, will not impede the next steps in the process. This button will grey out upon completion.

Specific information about Button 3 is outlined in the [Notes for the Honor Board Adviser](#) section.

Button 4: Outcome

In order to complete this action, buttons 1 and 2 must be complete and the RCS/CAC/NCC must have rendered her final sanction. If you are unable to select button 4, please confirm that the earlier steps have been submitted. The appropriate officer must know the name and information of the member(s) who had a formal hearing and the completion status of the member(s) sanction term(s).

Please refer to the [Holding Simultaneous Formal Hearings section](#) for additional guidance on completing this button.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks and select Standard Procedure Workflow
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you are reviewing and select button 4 (Outcome)
4. Once you have identified all members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion of this button, the member subject to review will receive a notification of her sanction term being completed, and if applicable, that she has been returned to good standing. The vp: social standards and HBA will also be copied. This notification is scheduled to send at 7:18 am CT.

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Upon completion, the member(s) in question will no longer appear in the Weekly Activity Log unless a second formal hearing is necessary or the member is otherwise on probation. Completion of this button will reset the standard procedure process for the member subject to review.

RCS/CAC/NCC Review and Decision Making

Once buttons 1 and 2 of the Standard Procedure Workflow have been submitted and finalized, the RCS/CAC/NCC will be notified and prompted to review the Compliance Packet Report and render her decision. If the RCS/CAC/NCC has any questions regarding the information submitted, she will connect with the vp: social standards and/or HBA as needed for additional clarification.

Specific guidance for the RCS/CAC/NCC is in the [Notes for the RCS/CAC/NCC](#) section.

Appeals

A member may have reason or desire to appeal Honor Board's recommended sanction. Appeals are submitted via the Delta Gamma member site (explained in detail in the [Submitting an Action Appeal](#) section) and are approved by the RCS/CAC/NCC only. The RCS/CAC/NCC will take the member's appeal into consideration prior to rendering her final decision. Once the RCS/CAC/NCC has documented her final decision in Anchorbase, the member subject to review, vp: social standards and HBA will be notified of the final decision via automated email. The Weekly Activity Log will be updated automatically to reflect the final sanction.

Expulsions

In the event Honor Board and/or the RCS/CAC/NCC has endorsed the recommendation for a member's expulsion from the Fraternity, the formal hearing documentation will undergo additional levels of review before a final decision is rendered. If the RCS/CAC/NCC endorses an expulsion recommendation, all pertinent paperwork will subsequently be reviewed by the Fraternity Director: Standards. If the Director: Standards does not endorse the recommendation, the expulsion will no longer be considered and the member subject to review will be placed on probation for an appropriate amount of time as deemed by the RCS/CAC/NCC. The member subject to review, vp: social standards and HBA will receive confirmation of this decision via an automated email signed by the RCS/CAC/NCC.

If the Director: Standards endorses the expulsion recommendation, all pertinent documentation will be reviewed by the Council Trustee: Collegians. As with the Director: Standards, the Council Trustee: Collegians will either endorse the recommendation or not. If she does not endorse the recommendation, the member subject to review, the vp: social standards and HBA will receive confirmation that the member is no longer being considered for expulsion and will be notified of her probation period via automated email. If the Council Trustee: Collegians endorses the recommendation, the documentation is then finally reviewed by our Fraternity

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Council. Only by majority vote of our Fraternity Council can a member be expelled from the Fraternity. If the vote does not pass, the member subject to review, vp: social standards and HBA will be notified that she is no longer being considered for expulsion and of the length of her probation period via automated email in a manner consistent with the other two levels of review.

Early Alumnae Status

Requests for Early Alumnae Status are submitted through the Manage Roster task in Anchorbase (Roster > Tasks > Manage Roster). Upon submitting a member's request, the RCS/CAC/NCC will be notified to review the request and make a decision. After the RCS/CAC/NCC reviews the request, the request will follow the same approval process as outlined in the above Expulsion section.



Each time the request is reviewed and a decision is confirmed, the member seeking EAS will receive an update via email and the vp: social standards, HBA and RCS/CAC/NCC where appropriate will be copied. These updates will confirm if the request is no longer being considered, the request has moved to the next approval level and EAS will be granted.

REPORTING IN ANCHORBASE

There are several reports in Anchorbase that populate and summarize the documentation and data submitted via the various Honor Board workflows. These reports update automatically based on the most recent information and documents submitted via Anchorbase and the member site, so if you believe a report is inaccurate please double check that you have correctly submitted the appropriate information and documentation.

All Honor Board-related reports are located in the same spot within Anchorbase. Once you have logged in to Anchorbase, perform the following steps:

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Reports and select the report you wish to review
2. Each report has several filter views. These can help you narrow down the amount of information you see populated in the report. They may include academic year, region, chapter and, date range start and date range end fields. Once you've used the fields to narrow down the information, click "View Report" in the right-hand corner to see the updated report

3. Now that you see the updated report, you can either continue to view the report in Anchorbase, download the report in a variety of formats or print out the report.
 - a. There are additional tools to help you manipulate the data further if you choose to view the report in Anchorbase. There is a search field located on the right-hand side of the report toolbar to help you find a specific data point. If the report carries over multiple pages, you can use the arrows on the left-hand side of the toolbar to move forward and backward within the pages of the report
 - b. To download the report, click on the floppy disc icon  in the report toolbar and a drop down of various file formats will appear. Select the format that best suits your needs and uses
 - c. To print the report, click the printer icon  in the report toolbar and a pop-up window will appear to create a printer-friendly version of the report

Compliance Packet Report

The Compliance Packet Report is essential to the functionality of the standard procedure process. This report will be reviewed by the HBA and RCS/CAC/NCC for all currently pending formal hearings. In the event of an expulsion recommendation, a version of the report will also be viewed by the Director: Standards and potentially members of Council. This report will include all of the information submitted via buttons 1 – 3 of the Standard Procedure Workflow including links to the SOR and the formal hearing minutes and shows only currently pending formal hearings. Once a member subject to review has received her final sanction from the RCS/CAC/NCC, documentation from her formal hearing will no longer appear in this report.

Adviser Activity Log

The Adviser Activity Log is a resource for the ATC and should be viewed weekly. This report lists the members who are on Excused Status and the duration of their status and members who are in poor standing due to automatic and standard procedure. This is a great reference for ATCs and chapter presidents to know which members are not eligible to vote during chapter meetings and recruitment.

Weekly Activity Log

The Weekly Activity Log is a resource for the vp: social standards, HBA and RCS/CAC/NCC and should be viewed weekly. This report provides a summary of all outstanding Honor Board activities, including details regarding members who are still fulfilling the terms of their sanctions resulting from formal hearings, members

on probation from APNs and women who are currently on Excused Status. Given the sensitive nature of some of the information in this report, it is only viewable by the chapter president, vp: social standards, HBA and RCS/CAC/NCC.

Summary Activity Log

The Summary Activity Log provides a summary of all Honor Board activities in a given semester. This should be viewed at the end of a term by the vp: social standards and RCS/CAC/NCC. This report summarizes all automatic and standard procedure activities and Excused Status approvals based on type and nature of violation. This report is viewable by the chapter president, vp: social standards, HBA, ATC and RCS/CAC/NCC.

OTHER HONOR BOARD ACTIVITIES

Submitting an Action Appeal

In the event a member wishes to appeal her formal hearing sanction or an APN, she will now do so via the [Delta Gamma member site](#). This is the same location as where SORs are submitted. Action appeals (for both standard and automatic procedure) are submitted via the member site. *Every member of the chapter gains access to the member site upon claiming her account during the new member period, so both new members and members have access to this platform.*

In order to complete this action, the member in question must be prepared to explain her reasoning as to why she believes her activity should be appealed and provide any relevant accompanying documentation to support her explanation.

Once logged into the member site, perform the following steps:

1. Find the Tools and Resources tab on the toolbar at the top of the page. Navigate to the Honor Board section of the tab and from there, select Action Appeal Submission
2. Carefully read the help text outlining expectations when submitting an appeal and download the Letter of Appeal Template to be uploaded later
3. Click the + icon in the lower left-hand side of the page above the table
4. A pop up will appear to complete the action appeal form
5. Please indicate the type of action being appealed and provide the date of the formal hearing if applicable
6. Complete the Letter of Appeal Template to provide clear explanation as to the reason for your appeal
7. Upload your Letter of Appeal and any supplementary documentation in the file upload fields provided
 - a. **Note:** The maximum file size that can be uploaded is 40 MB. If you are interested in uploading a lot of documentation, including photographs or screenshots, please embed the documentation within a Word or Pages document to maximize the amount of documentation submitted.
8. Carefully review the information outlined to ensure accuracy
9. Scroll to the bottom of the page
10. Click Save & Close to submit the SOR
11. A copy of the submitted action appeal will appear at the bottom of the original page in the member site for your records

Upon submission of the action appeal, the RCS/CAC/NCC will receive an automated email alerting her that an appeal has been submitted and is ready for her review.

Weekly Meeting Minutes

Honor Board's weekly meeting minutes are also submitted in Anchorbase. Any member of Honor Board is able to complete this task.

Once you have logged in to Anchorbase, perform the following steps to submit new meeting minutes:

- 1.** Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks and select Weekly Meeting Minutes
- 2.** Review the Overview step prior to clicking Continue at the top or bottom right of the page
- 3.** Find the check boxes on the left-hand side of the screen next to the form with the "On Demand" status. This will allow you to complete a new meeting minutes submission. If you need to edit a previously submitted form, select the appropriate form. All previously submitted forms will appear in this step
- 4.** Once you have identified the correct form, click Continue to proceed to the Additional Info step
- 5.** Enter the information as prompted
- 6.** Once you have input the requested information, click Continue to proceed to the Validation step
- 7.** Carefully review the information to ensure accuracy
- 8.** Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
- 9.** Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion of the Weekly Meeting Minutes workflow, the RCS/CAC/NCC is notified to review the documentation submitted. Once she has reviewed the weekly minutes, she will confirm her review within the workflow itself, and the vp: social standards will receive a confirmation email confirming this activity. If the RCS/CAC/NCC has any questions or comments, those will be left for vp: social standards review in the comment section at the bottom of this workflow.

ADDITIONAL CONSIDERATIONS

Holding Simultaneous Formal Hearings

You may encounter the scenario in which Honor Board receives an SOR for a member who is currently participating in a formal hearing and Honor Board determines a second formal hearing is necessary. Anchorbase **cannot** support documenting simultaneous formal hearings so you must first end the standard procedure process for the first formal hearing before proceeding with documenting the second formal hearing. To formally end the standard procedure process in Anchorbase, Button 4 (Outcome) of the Standard Procedure Workflow must be completed. This is the appropriate button to use if you must end standard procedure in Anchorbase before the member in question has satisfactorily completed the sanction resulting from her first formal hearing. In this scenario, answer “No” to the question “Member satisfactorily fulfilled sanction terms?” This will end the process and you’ll be able to begin the process again for this member.

The vp: social standards is the Subject of an SOR

The vp: social standards has access to nearly all tasks and reports within the Honor Board platform. Because of this, it is important to restrict her access to the platform as soon as it is known she is the subject of an SOR to ensure fairness in the Honor Board process. Normally, both the vp: social standards and HBA receive an automated email confirming that an SOR has been submitted in the member site. If the vp: social standards is the subject of the SOR that has been submitted, she will not be notified and only the HBA will receive notification. Via the automated email, the HBA will be notified to temporarily remove the vp: social standards from her officer role on the Anchorbase Officer roster. This is the only way to restrict access to the Honor Board tasks and ensure the vp: social standards does not receive additional notifications related to her officer duties. If Honor Board determines a formal hearing is necessary, the vp: social standards will receive emails related to her pending formal hearing as appropriate.

The Chapter Does Not Have an HBA

If a chapter does not have a designated Honor Board Adviser (HBA), then the duties and responsibilities of the role default to the Advisory Team Chairman (ATC). To ensure the ATC receives the necessary automated emails resulting from the Honor Board process, the ATC should list herself as the HBA on the chapter’s Anchorbase adviser roster until a permanent HBA replacement is identified and trained.

Restricting Access to Submitted SORs

Upon being notified of a formal hearing, the member subject to review will have access to a page within the member site which shows all active SORs of which she is the subject. The member is not able to see the name of the member who submitted an SOR. When Honor Board completes the Allegation Assessment button and indicates that certain SORs will not be discussed in a formal hearing, or after a formal hearing has concluded, the SORs identified are removed from this page the member sees. This ensures that when the member comes in for a formal hearing, she sees only the SORs that will be discussed during that hearing. In the event a member is the subject of multiple SORs, Honor Board should first document which SOR(s) will not lead to a formal hearing and then complete the Allegation Assessment button a second time to document the SOR(s) that will be discussed in a formal hearing.

If unapplicable SORs are still visible when the member is notified of the formal hearing, either because they were not correctly documented or a new SOR was submitted after the member was notified of a hearing, the vp: social standards, chapter president, HBA or RCS/CAC/NCC can individually hide the SORs that should not be visible to the member. To do this, log into the member site and find the SOR(s) which should be hidden from view. Open each SOR and at the bottom of the form, click the check box labelled "Do Not Display." This will hide the SORs from the view of the member subject to review but they will remain visible to Honor Board and the RCS/CAC/NCC until additional action as appropriate is taken.

FREQUENTLY ASKED QUESTIONS

I am the vp: social standards and I am trying to designate which SORs will be discussed in a formal hearing versus those that will not. How do I do this?

The View SOR Submissions page in the member site includes a column titled “Key” which provides a key ID for each SOR submitted about a member. Each key is unique to one SOR and will not be duplicated for the member. You will want to make note of the key(s) for the SOR(s) that will lead to a formal hearing and the key(s) for the SOR(s) that will not lead to a formal hearing, as this information is necessary when you complete the Allegation Assessment button. There are three questions for you to select SORs based on the member’s name and the key. When completing the Allegation Assessment button, indicate first the SOR(s) that will not lead to a formal hearing and then complete the Allegation Assessment button a second time to document the SOR(s) that will lead to a formal hearing.

A member with a currently pending formal hearing is the subject of a second SOR about a different concern. What should Honor Board do?

The Honor Board platform in Anchorbase **cannot** support documenting two simultaneous formal hearings. In the event that a member requires two formal hearings to discuss separate concerns, the first formal hearing must be fully documented and concluded in Anchorbase before the second formal hearing can be appropriately documented. Please confirm with your RCS/CAC/NCC how to proceed with holding the second formal hearing. If it is confirmed that the formal hearing should be held right away, complete the Outcome step (button 4) of the Standard Procedure Workflow and answer “No” to the question “Member satisfactorily fulfilled sanction terms?” This will formally end the current process so that Honor Board can begin the process again for this member.

To ensure the member subject to review sees only the SOR(s) that will be discussed in the first hearing, log into the member site, open the new SOR(s), and click the check box “Do Not Display” at the very bottom of the form. This box should be unchecked after the first hearing has concluded to ensure the member can see the hidden SOR(s) for the second hearing.

The vp: finance submitted APNs through greekbill and the members were notified. Is there anything else that needs to be done?

Finance-related APNs should continue to be submitted through greekbill. Upon completion, information about the member and their APN will automatically pass from greekbill to Anchorbase to ensure the Anchorbase reports are accurate. There is no additional action needed once the APN has been submitted through greekbill.

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How does a member know how to submit an appeal to her Honor Board action (resulting from either standard or automatic procedure)?

All members should have reviewed the Honor Board introduction video and have access to the Navigating Honor Board Online resource. These resources outline how to submit action appeals for both automatic and standard procedure. In addition to these resources, members are reminded of the process via automated email.

After a member's formal hearing, she along with the vp: social standards and HBA receive an automated email confirming Honor Board's recommended sanction. This email is sent to all members who are the subject of a formal hearing, regardless of whether they attended their formal hearing. Included toward the end of this email is information on how to submit an action appeal via the member site.

Similarly, information on how to submit an appeal to an APN is included in the APN notification email.

I'm a member of Honor Board and I completed the Confirm Formal Hearing step in the Standard Procedure Workflow and realized I submitted inaccurate information or documentation. What do I do?

If the Honor Board Adviser has not yet completed her approval step, notify her as soon as possible so that she can deny the approval for the compliance packet. This will allow you to re-submit the Confirm Formal Hearing step to include the accurate information; please be certain to answer "Yes" to the question related to submitted updated information. If the HBA has already submitted her approval of the compliance packet, notify your RCS/CAC/NCC so that she can send the compliance packet back to Honor Board. You will then be able to re-submit the Confirm Formal Hearing step and the accurate information; please be certain to answer "Yes" to the question related to submitted updated information.

A new member is the subject of an SOR and Honor Board determines a formal hearing is necessary. Is the process for documenting her formal hearing any different?

No, the process for documenting a formal hearing in Anchorbase is the same for both new and initiated members.

When a member is notified of her upcoming formal hearing, what information is she able to see?

Members receive confirmation of the date, time and location of their upcoming formal hearing, a copy of the Notice of Rights and a link to a unique page in the member site where they can see all applicable SORs of which they are the subject.

To remain in alignment with procedure, the member is not able to see the name of the member who submitted the SOR.

Why do we have to upload paper copies of meeting minutes instead of typing the meeting notes within the various tasks?

At this time, Anchorbase is not able to accept strings of text which exceed 240 characters. Given the nature of meeting minutes and the detail expected, all meeting minutes must be captured in another format (like a Word or Pages document) and uploaded for review by the RCS/CAC/NCC.

A chapter officer has been removed from office resulting from an RCS/CAC/NCC decision. Why didn't the Officer Roster report update automatically?

Due to limitations of the system, the Officer Roster is unable to update automatically based on Honor Board activity. Any steps completed to document that an officer has been removed from office (including completion of the RCS/CAC/NCC Officer Removal task, formal hearing sanction or receipt of an APN) are for documentation and notification purposes only. The member in question and appropriate officers will be notified of the officer's removal from office but the chapter president or other appropriate adviser must complete the Update Officer task (Roster > Tasks > Update Officers) to ensure the Officer Roster report is accurate.

The RCS/CAC/NCC's sanction is more severe than the sanction recommended by Honor Board and the member subject to review wishes to appeal, what should they do?

This member should follow the standard process for submitting an action appeal and complete the form on the member site. Once they have submitted their appeal, the RCS/CAC/NCC will be notified to review the appeal. Once the RCS/CAC/NCC has reviewed and considered the appeal, the member will receive written confirmation of the RCS/CAC/NCC's final sanction.

It's the end of the fall term. A member has recently been granted Excused Status beginning in the spring but in the meantime has received an APN and does not appear in the Automatic Procedure Workflow. Why can't we see the member?

The member does not appear in the Automatic Procedure Workflow because her Excused Status roster change is currently pending. Pending activities in Anchorbase are defined as activities that are submitted with a future effective date or were submitted and are currently awaiting approval. The most common pending activities include roster changes (Excused Status, remove no resignation Form, resignation, etc.) and other member status changes like receiving an APN. If a member has a pending activity, chapter officers and volunteers will not be able to submit another activity; this is true for all tasks in Anchorbase (not just Honor Board-related tasks) and activity types. In this example, because the member has a

pending Excused Status roster change with a future effective date, a chapter officer cannot issue an APN until either the Excused Status goes into effect or other actions are taken to fix the concern. If it is not appropriate or possible to wait for the pending activity to go into effect, please contact anchorbase@deltagamma.org for assistance.

NOTES FOR THE HONOR BOARD ADVISER

The information shared in the preceding sections is important for all members of Honor Board to understand to ensure successful utilization of the platform. Additionally, there are a few steps and processes that are completed or supported by the HBA, and this section outlines those unique tasks and activities in specific detail.

Standard Procedure Workflow

Button 3: HBA Approval

The Honor Board Adviser only shall complete this step. In order to complete this action, the HBA must know the name of the member(s) who had a formal hearing, the date the formal hearing was held, and have reviewed the Compliance Packet Report. This step is not required but should be completed in a timely manner.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks and select Standard Procedure Workflow
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you are reviewing a compliance packet and select button 3 (HBA Approval)
4. Once you have identified all members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
 - a. Please note you can click "Apply to All" if the information requested is consistent across all selected members
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

If the HBA approves of the information in the Compliance Packet Report, upon completion of this button the RCS/CAC/NCC will receive a notification to review and approve the formal hearing documentation. If the HBA does not approve of the

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information in the Compliance Packet Report, the vp: social standards will be notified to review the information submitted and make any necessary changes. HBA Approval is not required and if not completed, will not impede the next steps in the process.

This button will grey out upon completion.

Honor Board-related Reporting

One of the major benefits of utilizing Anchorbase for the Honor Board process is that we have greatly if not entirely reduced the need to manually populate reports on a weekly and semesterly basis. Instead of maintaining Weekly and Adviser Activity Logs, reports have been designed to show the same information in a consistent format, and the reports update automatically.

Although the reports update automatically, there are a few maintenance activities that Honor Board must complete for the reports to be as accurate as possible. While it is an Honor Board responsibility to maintain the reports, it is beneficial for the HBA to review them periodically and help nudge Honor Board to submit updated information when appropriate.

Full descriptions of the Honor Board reports referenced below can be found in the [Reporting in Anchorbase](#) section.

Maintenance of the Weekly and Adviser Activity Logs

Both the Weekly and Activity Logs show information about Excused Status approvals, current APNs and formal hearing sanctions with varying degrees of specificity. They are also updated via the same tasks, so we can generalize the process of maintaining both reports.

Excused Status approvals are updated automatically based on the end date of the member's requested status, so there is no additional maintenance necessary. Once a member's approved Excused Status end date has passed, the member will no longer appear on both reports.

APNs are updated automatically based on the end date indicated by the Submit APN step of the Automatic Procedure Workflow. If a member satisfactorily fulfills the expectation which led to her APN ahead of this end date, the appropriate officer should complete the Update APN step to indicate the new end date for her probation period. Once this task has been submitted, the member's status and these reports will update automatically.

Information about finance-related APNs is sent automatically from greekbill to Anchorbase. No additional action is necessary to document or update reports related to finance APNs.

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Due to the variance in sanctions resulting from a formal hearing, Honor Board will need to pay particular attention to maintaining the accuracy of formal hearing information displayed in these reports. With the exception of members who receive probation, re-hold formal hearing or expulsion as their sanction, Honor Board must submit the Outcome step of the Standard Procedure Workflow to conclude the formal hearing and update these reports. The Outcome step can be used to confirm the member satisfactorily fulfilled the terms of her sanction or to indicate that the member did not fulfill the terms and thus needs an additional formal hearing. Both options will update the reports appropriately.

Compliance Packet Archive Report

The HBA has access to the Compliance Packet Archive report. This report shows all finalized compliance packets for members currently on the roster; it will not show women who have graduated or have otherwise left the chapter (excluding Excused Status). This report may be used to confirm whether a member has participated in previous formal hearings and see what the nature of the concern(s) and outcome of those proceedings entailed, which may be helpful context for pending proceedings. This information can be shared in generalities with Honor Board but should not be downloaded and shared in its entirety.

Restricting Access to the Platform

As explained earlier in this guide, if the vp: social standards is the subject of an SOR, only the HBA will receive an email notification of this SOR with the additional message to temporarily remove the vp: social standards from the officer roster. This same process should be used for any other member of Honor Board who is the subject of the SOR. It is not necessary to automatically remove other CMT officers from office when they are the subject of an SOR.

Note: Removing an officer from the officer roster restricts her access to the entirety of Anchorbase, so the chapter president or other appropriate officer should be notified to step in and complete any necessary officer-specific tasks. Additionally, the officer will not be notified automatically as a result of her removal from the officer roster, so a conversation with the officer is necessary to ensure she is aware of her situation and what is expected of her.

To remove a member of Honor Board from the officer roster, please perform the following steps:

1. Find the Roster tab on the toolbar at the top of the page. From there, hover over the Tasks section and select Update Officers
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the office position(s) that need to be updated and select the checkbox on the left-hand side of the screen next to the appropriate position(s)

- 4.** Once you have identified all officer positions to be updated, click Continue to proceed to the Additional Info step
- 5.** Click on the “Find a Member” text in the middle of the screen
- 6.** Select the checkbox of the “Vacant Position” option. You will be returned to the main “Additional Info” page
- 7.** Use the appropriate date for the position start date question, then Click Continue to proceed to the Validation step
- 8.** Carefully review the information to ensure accuracy
- 9.** Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
- 10.** Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

NOTES FOR THE RCS/CAC/NCC

All preceding sections are relevant to the RCS/CAC/NCC and may be used to both understand how the Honor Board platform functions and assist in troubleshooting concerns. In addition to what is previously outlined, there are tasks and reports created specifically for RCS/CAC/NCC completion and review. These tasks and reports are outlined in this section in addition to tips and best practices.

Note: Please ensure you select the correct chapter from the dropdown in the top right of the screen before completing any of the steps outlined below.

RCS/CAC/NCC Approval Task

Button 1: APN Appeal

Information about submitting APN appeals can be found in the [Appeals](#) section. After a member submits an action appeal in the member site, the RCS/CAC/NCC will receive an automated email prompting her review of the submitted appeal and completion of the appropriate task in Anchorbase.

This button can only be selected if a member is currently on probation. In order to complete this action, the RCS/CAC/NCC must know the name of the member(s) who have submitted an appeal and if applicable, the appropriate new end date of the member's probation period.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks, and select RCS/CAC/NCC Approval Workflow from the Tasks drop down
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you're reviewing an APN appeal and select button 1 (APN Appeal)
4. Once you have identified all applicable members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
 - a. Please note you can click "Apply to All" if the information requested is consistent across all selected members
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy

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8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion of this button, the member in question will receive an update regarding the status of her APN appeal based on the information submitted. The vp: social standards and HBA are also copied. This notification is scheduled to send at 6:00 am CT.

If no additional decision is required for this member, the member will disappear from the task upon completion.

Button 2: Send Back to HB (Optional)

This step shall be completed if the information submitted by Honor Board is inaccurate, the minutes submitted do not meet expectations or the information submitted is incomplete or otherwise insufficient.

Note: This should not be used when the formal hearing must be re-held due to procedural error; the process of re-holding a formal hearing has been captured in a different step.

Once Honor Board has completed button 2 (Confirm Formal Hearing) of the Standard Procedure Workflow, the RCS/CAC/NCC will receive an automated email prompting her review of the Compliance Packet Report and completion of the appropriate next step in Anchorbase.

This button can only be selected if the member's formal hearing has been held and appropriately documented by Honor Board. In order to complete this action, the RCS/CAC/NCC must know the name of the member(s) who have received a recommended sanction and have reviewed the documentation captured in the Compliance Packet Report.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks, and select RCS/CAC/NCC Approval Workflow from the Tasks drop down
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you're reviewing a compliance packet and select button 2 (Send Back to HB)

4. Once you have identified all applicable members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted. Please be as specific as possible when outlining the necessary updates
 - a. Please note you can click “Apply to All” if the information requested is consistent across all selected members
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion of this button, the vp: social standards will be notified of the need to re-submit the compliance packet. The HBA is also copied. The officer will be able to see the specific notes provided by the RCS/CAC/NCC but is reminded to reach out to the RCS/CAC/NCC directly for additional information or clarity. This notification is scheduled to send at 7:24 am CT.

This button will grey out upon completion.

Button 3: Sanction

Once Honor Board has completed button 2 (Confirm Formal Hearing) of the Standard Procedure Workflow, the RCS/CAC/NCC will receive an automated email prompting her review of the Compliance Packet Report and completion of the appropriate next step in Anchorbase.

This button can only be selected if the member’s formal hearing has been held and appropriately documented by Honor Board. In order to complete this action, the RCS/CAC/NCC must know the name of the member(s) who have received a recommended sanction and have reviewed the documentation captured in the Compliance Packet Report.

Note: If a hearing must be re-held due to procedural error, please select the sanction “Re-Hold Hearing” to ensure the member subject to review, vp: social standards and HBA are properly notified of next steps.

Note: If the sanction includes multiple penalties (i.e. probation and a fine), the RCS/CAC/NCC should use a combination of the “Confirm final sanction” and “If applicable, please outline the terms of the penalty” questions. If one of the penalties results in a change to the member’s status (including probation, re-hold hearing, and expulsion), select the appropriate sanction from the drop-down of the “Confirm

final sanction” question. This ensures the member’s status is updated appropriately within Anchorbase. Any subsequent penalties can be documented via the “If applicable, please outline the terms of the penalty” question via the text box. The member subject to review will see whatever is typed in this box in the email notification she receives confirming her sanction, so be specific and concise.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks, and select RCS/CAC/NCC Approval Workflow from the Tasks drop down
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you’re reviewing a compliance packet and select button 3 (Sanction)
4. Once you have identified all applicable members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
 - a. Please note you can click “Apply to All” if the information requested is consistent across all selected members
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion of this button, the member subject to review will receive notification of her final sanction. The vp: social standards and HBA are also copied. In the event the RCS/CAC/NCC sanction is more severe than Honor Board’s recommendation, the member subject to review will be reminded of her right to appeal this decision via the standard process. This notification is scheduled to send at 7:18 am CT.

This button will grey out upon completion.

Button 4: Sanction Appeal (Optional)

This step shall be completed if the member subject to review has submitted an appeal to the RCS/CAC/NCC decision when the RCS/CAC/NCC decision is more severe than Honor Board’s recommendation.

This button can only be selected if the RCS/CAC/NCC has rendered a final sanction for the member subject to review. In order to complete this action, the RCS/CAC/NCC must know the name of the member(s) who have submitted an appeal to the RCS/CAC/NCC sanction and have reviewed the appeal via the member site.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks, and select RCS/CAC/NCC Approval Workflow from the Tasks drop down
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you're reviewing a compliance packet and select button 4 (Sanction Appeal)
4. Once you have identified all applicable members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted. Please be as specific as possible when outlining the necessary updates
 - a. Please note you can click "Apply to All" if the information requested is consistent across all selected members
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion, the member subject to review will receive confirmation of the RCS/CAC/NCC final decision. The vp: social standards and HBA are copied. This notification is scheduled to send at 7:26 am CT.

If no additional decision is required for this member, the member will disappear from the task upon completion.

Button 5: Expulsion Review (Optional)

This button shall be completed when a member's expulsion recommendation is no longer being considered by the Director: Standards or Council Trustee: Collegians, or if Council's vote on the expulsion did not pass.

This button can only be selected if the Director: Standards, Council Trustee: Collegians, or Council does not endorse the expulsion recommendation. In order to complete this action, the RCS/CAC/NCC must know the name of the member(s) who were being considered for expulsion and an appropriate end date for the member's probation period.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks, and select RCS/CAC/NCC Approval Workflow from the Tasks drop down
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members for whom you're reviewing a compliance packet and select button 5 (Expulsion Review)
4. Once you have identified all applicable members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
 - a. Please note you can click "Apply to All" if the information requested is consistent across all selected members
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion, the member subject to review will receive confirmation they are no longer being considered for expulsion and the terms of their probation. The vp: social standards and HBA are copied. This notification is scheduled to send at 7:02 am CT.

If no additional decision is required for this member, the member will disappear from the task upon completion.

Button 6: Early Alumnae Status

This button shall be completed when a member's Early Alumnae Status request has been supported by Honor Board.

This button can only be selected if Honor Board submits a request for EAS. In order to complete this action, the RCS/CAC/NCC must know the name of the member(s) seeking EAS. Once you have logged in to Anchorbase, perform the following steps:

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop-down. An additional drop-down will appear. Hover over Tasks, and select RCS/CAC/NCC Approval Workflow from the Tasks drop-down.
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page.
3. Find the members for whom you're reviewing a compliance packet and select button 6 (Early Alumnae Status).
4. Once you have identified all applicable members, click Continue to proceed to the Additional Info step.
5. Enter the information as prompted.
 - a. Please note you can click "Apply to All" if the information is consistent across all selected members.
6. Once you have input the request information, click Continue to proceed to the Validation step.
7. Carefully review the information to ensure accuracy.
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and ready to complete the button. Click Continue to proceed to the Receipt step.
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted.

Upon completion, the member seeking EAS will receive confirmation you have reviewed the request and made a decision. The vp: social standards and HBA are copied. If you support the request, the notification is scheduled to send at 2:34 pm CT. If you do not support the request, the notification goes out at 2:33 pm CT.

If no additional decision is required for this member, the member will disappear from the task upon completion.

Officer Removal

This task shall be completed when an officer is to be removed from office and this action did not result from a formal hearing.

In order to complete this action, the RCS/CAC/NCC must know the name of the member(s) who are being removed from office and her officer position title.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks, and select Officer Removal from the Tasks drop down
2. Carefully read the Overview step prior to clicking Continue at the top or bottom right of the page
3. Find the members being removed from office
4. Once you have identified all applicable members, click Continue to proceed to the Additional Info step
5. Enter the information as prompted
 - a. Please note you can click "Apply to All" if the information requested is consistent across all selected members
6. Once you have input the requested information, click Continue to proceed to the Validation step
7. Carefully review the information to ensure accuracy
8. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
9. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Upon completion, the member in question will receive confirmation that they have been removed from office. The vp: social standards and ATC are copied and are prompted to update the Officer Roster in Anchorbase. This notification is scheduled to send at 7:22 am CT.

Weekly Meeting Minutes

Honor Board is expected to submit meeting minutes for their weekly meeting via the Weekly Meeting Minutes task. Upon submission by Honor Board, the RCS/CAC/NCC will receive an automated email prompting her to review the submitted minutes.

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

1. Find the Social Standards tab on the toolbar at the top of the page. From there, hover over the Honor Board section in the drop down. An additional drop down will appear. Hover over Tasks and select Weekly Meeting Minutes
2. Review the Overview step prior to clicking Continue at the top or bottom right of the page

3. Find the check boxes on the left-hand side of the screen next to the form. Select the form with the most recent submission date. All previously submitted forms will also appear in this step
4. Once you have identified the correct form, click Continue to proceed to the Additional Info step
5. Review all information submitted by Honor Board and the attached minutes
6. Scroll to the bottom of the form to find the question for the RCS/CAC/NCC only and answer appropriately. If you wish to leave a comment for Honor Board, particularly if you do not approve the minutes, please leave those comments in the provided text box
7. Once you have reviewed the information and answered the RCS/CAC/NCC question appropriately, click Continue to proceed to the Validation step
8. Carefully review the information to ensure accuracy
9. Enter your name and date as prompted at the bottom of the page to certify the information is accurate and are ready to complete the button. Click Continue to proceed to the Receipt step
10. Anchorbase will provide you with a receipt to confirm the information you have entered has been submitted

Once the RCS/CAC/NCC approval portion has been completed, the vp: social standards will receive an automated email confirming her review. The vp: social standards is directed to go back into the submitted form to review the RCS/CAC/NCC comments when appropriate. If extensive revision is necessary or a larger conversation may be warranted, it is advised that another means of communication, either via email or phone, is utilized to ensure clarity of the message and depth of understanding.

Additional Reports

Regional Summary

The Regional Summary report was created in place of the Summary Activity Logs previously submitted to the Director: Standards on a semesterly basis. This report is accessible to all RCS/CAC/NCCs and the Regional Director of each region. The report provides a summary of all Excused Status, Automatic and Standard Procedure activities and is continually updated. The report will show data based on the academic year.

Compliance Packet Archive

A record of all formal hearings that have been finalized will appear in the Compliance Packet Archive report. This report should be utilized when considering a final sanction for a member subject to review and will be particularly useful when

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considering an expulsion recommendation. Each prior compliance packet for a given member will appear as a separate entry.

RCS/CAC/NCC EAS Report

The RCS/CAC/NCC EAS report provides you with the information submitted by Honor Board about a member seeking EAS. This report should be utilized when considering a request for EAS. Once you confirm your decision regarding a member's EAS request, the member will fall off the report.

Other Tips & Best Practices

Incognito Windows

Anchorbase and the member site are two sides of the same coin; what this really means is that they are both accessing and inputting information to our one central database. Because of this, you may experience issues in having multiple windows open at the same time and trying to input information in one or more of those windows. Incognito windows are a way around this issue.

Example: You are reviewing a compliance packet and want to have the compliance packet report, the RCS/CAC/NCC Approval Workflow and the SOR open at the same time. All of these items are found either in the member site or Anchorbase, so while you are able to have them all open in normal windows, you will likely find you are unable to successfully complete tasks in the different windows. If you begin to input information in one place (the RCS/CAC/NCC Approval Workflow, for instance) you may find yourself logged out of that or other windows when you navigate away from the task to view one of the other windows, thus losing your work. To avoid this, try opening the RCS/CAC/NCC Approval Workflow in one window and then open all other tasks or reports in incognito windows.

- To open an incognito window when using a mouse or laptop trackpad with buttons (like PC or other non-Apple laptops): When hovering over the task or report name in the Anchorbase tabs, right click with your mouse on the task or report you wish to open. Select "Open in new incognito window" from the menu that appears.
- To open an incognito window on a computer with a trackpad without buttons (like Apple laptops): When hovering over the task or report name in the Anchorbase tabs, use two fingers to click on the task or report you wish to open. Select "Open in Incognito Window" from the menu that appears.

Timestamps and Amount Owed Information

You may see timestamps or Amount Owed information throughout Anchorbase tasks. These pieces of information are a standard part of the Anchorbase and member site platforms, and thus are always a default part of our tasks and reports. For Honor Board specifically, this information is not relevant and is recorded solely because that information is always there, regardless of whether it is relevant to the task or questions asked.

- Timestamps for SORs and action appeals: The default for this information is to show 12:00 am. Neither the SOR nor the action appeal submission forms ask questions related to specific times, only questions related to the date, so this information can be ignored.
- Amount Owed column: When completing a task in Anchorbase, you may see an Amount Owed column in the Receipt step of the task (the very last step of every task submitted.) For Honor Board specifically, this column is not utilized and will not show any information related to the information submitted previously; for example, it will not show how much money is owed by a member, even if that number is included in an answer to one of the questions. This column can be ignored.

Knowing What Tasks to Complete & When

In the RCS/CAC/NCC Approval Workflow, members will appear if they have received an APN *and* have submitted an appeal to that APN, or the member's formal hearing has been held and is ready for RCS/CAC/NCC review. You will know which first step to take based on the buttons you can select. If the member has received an APN and has submitted an appeal, you should only be able to select button 1 (APN Appeal) for that member. If the member has a pending formal hearing, you will be able to select the buttons related to standard procedure.

Once you have completed the appropriate first step, the button completed will either grey out (meaning you cannot select that button option) or the member will disappear entirely from your task list. Paying close attention to the buttons and their current state (whether or not they can be clicked) will help you monitor which members are awaiting a decision.

Impact of Pending Anchorbase Activities

Pending activities in Anchorbase are defined as activities which are submitted with a future effective date or were submitted and are currently awaiting approval. The most common pending activities include roster changes (Excused Status, Remove No Resignation Form, resignation, etc.) and other member status changes like APNs. If a member has a pending activity, chapter officers and volunteers will not be able to submit another activity until the previous activity goes into effect. This is true for all activity types. If a member has a pending APN with a future effective date, the chapter officers will not be able to submit an Excused Status roster change until that APN goes into effect or other actions are taken to fix the concern. If Honor Board is ever in the position of needing to submit a second activity while the first activity is pending, direct them to contact anchorbase@deltagamma.org for assistance.

It is not an uncommon occurrence for a member to resign her membership in the middle of her formal hearing proceedings. In the event this happens and the officers are diligent in submitting the member's resignation paperwork, the member will not appear in the RCS/CAC/NCC Approval workflow because of the pending or approved resignation roster change.

To confirm whether a member has a pending or approved resignation, review the Member Status Changes report in Anchorbase (Roster > Reports > Member Status Changes.) When you open the report, you will see a variety of filters at the top. Find and click on the filter titled “Pending Approval?” and select “All” from the drop down that appears. This will show you both pending and finalized roster changes. You can further filter by region, chapter and a date range.