

# New Candidate Online Process

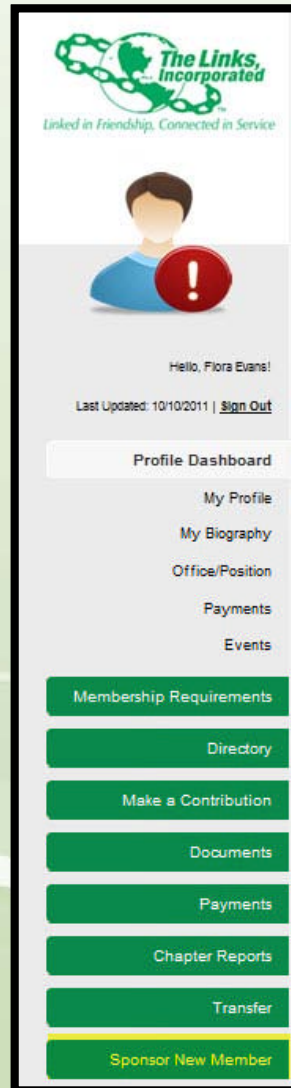
**Technology Committee**

**Fall 2012**

**Revised 10/2012**



# Initial Members Only Page



- To access the form, log into the Members Only Section.
- Go to the bottom and select **“Sponsor New Member”**.



# Initial Members Only Page



- Once you click “**Sponsor New Member**”, there are two choices:
  - **New Member Profile and Induction Request**-To search for a former member for reinstatement or to enter a new candidate.
  - **My Candidates**-Provides a listing of candidates you have submitted or saved, as the sponsor.
- This list will only show those candidates where you are listed as the sponsor and not members you submitted on behalf of another member.



# New Member Profile: Search Page

Candidate Search

Member Profile and Induction Request

Please use the search option to check for existing candidates not accepted or declined membership, member reinstatements, or Heir-O-Links. Heir-O-Links added to the member profile have an existing record in the database.

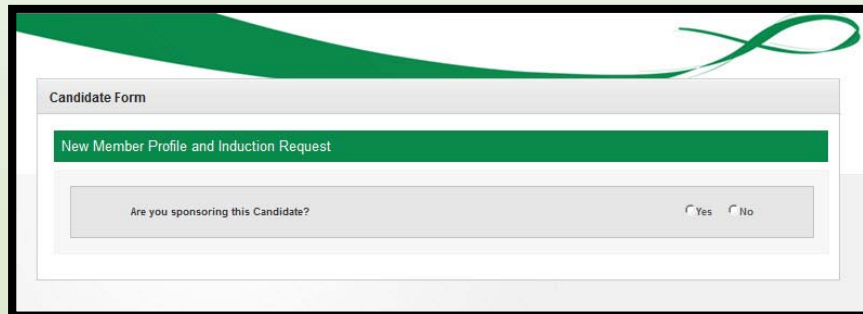
First Name :  Last Name :

If you do not see the candidate in the list, [click here](#) to submit a New Member Profile and Induction Request.

- If the candidate is an existing candidate not accepted or declined membership, reinstated member, or HOL search the database by entering their first and last name; then click the search button.
- If the candidate does not appear in the list or if the candidate does not meet this criteria, click the green bold **“click here”** to proceed.



# New Member Profile Form

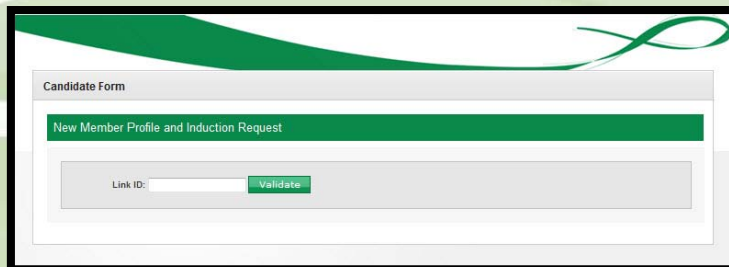


Candidate Form

New Member Profile and Induction Request

Are you sponsoring this Candidate?  Yes  No

- On the next screen, you have the option of submitting a candidate on behalf of yourself or another member.
- If you are submitting the candidate on your behalf, click yes and proceed to the next screen.
- If you are submitting a candidate on behalf of another member, click no. The next screen will appear for you to enter their Link ID number.



Candidate Form

New Member Profile and Induction Request

Link ID:



# New Member Profile Form

Candidate Form

**New Member Profile and Induction Request**

**Sponsor's Information**

Link ID:	122050
Chapter:	Pilot Chapter
First Name:	Peggy
Middle Name:	
Last Name:	Scott
Maiden Name:	

**Candidate's Information**

\*New  Reinstatement

Proposed Induction Date:	<input type="text"/>	(mm/dd/yyyy) *
First Name:	<input type="text"/>	*
Middle Name:	<input type="text"/>	*
Last Name:	<input type="text"/>	*
Maiden Name:	<input type="text"/>	*
Address:	<input type="text"/>	*
City:	<input type="text"/>	*
State:	<input type="text"/>	☑ *
Zip Code:	<input type="text"/>	*
Country:	United States of America	☑ *
Home Phone:	<input type="text"/>	(000-000-0000) *
Daytime Phone:	<input type="text"/>	(000-000-0000) *
Email:	<input type="text"/>	*
Candidate's Occupation/Expertise:	<input type="text"/>	☑ *
Candidate's Age Range:	<input type="text"/>	☑ *

- There are two sections to the form.
- The 1<sup>st</sup> part is the **Sponsor's Information** section. Your information should be here, unless you are completing the form on behalf of someone else.
- The 2<sup>nd</sup> part is the **Candidate's Information** section. Complete the form with the appropriate information.
- If the candidate is a former member of the organization, verify the "Reinstatement" button has been selected.
- If the candidate is an existing candidate or HOL, verify the "New" button is selected.
- The balance of the form is exactly like the hard copy form.
- All asterisk fields must be completed to successfully submit a form or to save a form.



# New Member Profile Form

Candidate's Age Range: [dropdown] -

Number of Children: 0 [dropdown]

Children's Age Range: [text] (youngest - oldest)

If married, provide Spouse's name below

Spouse's First Name: [text]

Spouse's Last Name: [text]

Spouse's Occupation: [dropdown]

Has the Candidate ever been a member of The Links, Incorporated?  Yes  No

Chapter: [dropdown]

Is prospective member a daughter of a Link?  Yes  No

Enter the Member's ID below

Member ID: [text]

- If this is a reinstated member, confirm that the yes button has been selected. Their former chapter information will auto-populate.
- If the prospective member is a DOL, click yes and enter the mother's Member ID number, then click the validate button. This will populate the mother's information.



# New Member Profile Form

The screenshot displays a web form titled "New Member Profile Form" with the following sections and fields:

- Qualifications (List specific qualities beneficial to The Links, Incorporated and this chapter)**: A large text input field with a "Spell Check" link below it.
- Interpersonal Qualities (Potential for Friendship)**: A text input field with a "Spell Check" link below it.
- Candidate Documented Record of Community Service (Organization/Agency; type of service performed; length of involvement)**: A text input field with a "Spell Check" link below it.
- Honors and Awards**: A text input field with a "Spell Check" link below it.
- Community and Civic Involvement (Including organizations to which she belongs and has leadership positions)**: A text input field with a "Spell Check" link below it.
- Hobbies and Interests**: A text input field with a "Spell Check" link below it.
- Additional Information**: A text input field with a "Spell Check" link below it.

At the bottom of the form, there are three buttons: "Submit", "Save", and "Cancel".

- Complete the rest of the form.
- Once complete, either click **SAVE** to come back to it later, click **SUBMIT** or **CANCEL** to exit without keeping the form.
- You should verify all information is correct. You cannot edit the form after it has been submitted.
- Once submitted, the form will repopulate in a gray status, which can then be printed.
- This completes the process for entering a New Member Form.
- An email notification is sent to the Chapter VP informing them a form has been submitted.
- An email notification is sent to the sponsor, indicating their form was successfully submitted.



# New Member Profile Form

The screenshot shows a web interface titled "Candidate For Membership". It features a green header bar with the text "Member Profile and Induction Request". Below this, there are two main sections: "Saved Induction Requests" and "My Candidates".

**Saved Induction Requests**

First Name	Last Name	View Application
Sally Sue	Jackson	👁

**My Candidates**

First Name	Last Name	View Application	Category
Jane	Dove	👁	Candidate

- To view completed forms or to access a saved form, click **“Sponsor New Member”** and then **“Candidate”**.
- Click the eye under **“View Application”** to bring up the form.
  - **Saved Induction Request:** Allows you to continue entering information for submission.
  - **My Candidates:** Allows you to bring up completed forms, which can then be printed. Go to the bottom of the form to locate the print button.



# New Inductee Online Workflow Process

Technology Committee

Fall 2012

Revised 10/2012

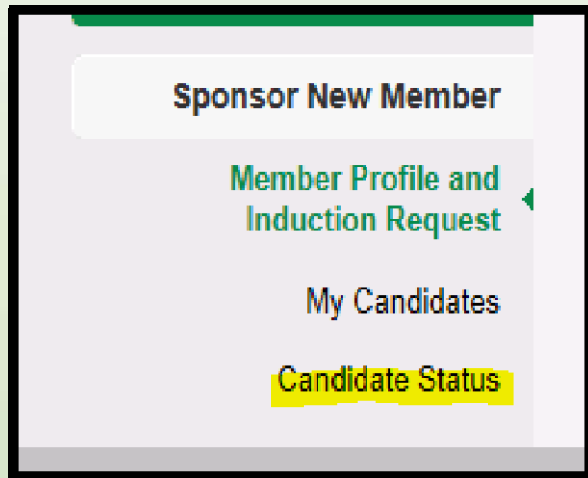


# Workflow & Approval Process

- The online workflow process, mimics the paper flow process.
- An email notification is sent to the Vice President of Membership indicating a form was entered.
- The Link who receives this is determined by the chapter profile and is listed as either the Vice President, Vice President-Membership or 1<sup>st</sup> Vice President.



# Workflow & Approval Process



- To access forms successfully submitted, the VP logs into the Members Only Section of the Website.
- Click **“Sponsor New Member”** to access the pull down and then select **“Candidate Status”**.
- All approving officers have access to the **“Candidate Status”**
- An email notification is not required to proceed with the approval process.



# Workflow & Approval Process

Candidate Status									
Candidate Status (Chapter Membership Chair Approval)									
Chapter	Candidate (click to view profile)	Candidate Status	Proposed Induction	Chapter Membership Chair	Candidate Resides within Boundaries	Chapter President	Area Director	Executive Director Approval	Candidate Response
Pilot Chapter	<a href="#">Pat Doe</a>	Denied - 09/12/2012	5/17/2011	09/12/2012	No				
Pilot Chapter	<a href="#">Alexis Doe</a>	Denied - 09/26/2012	5/17/2011	09/26/2012	No				
Pilot Chapter	<a href="#">Jackie Doe</a>	New	6/12/2013	09/08/2012	No	09/08/2012	09/08/2012	09/08/2012	09/12/2012
Pilot Chapter	<a href="#">Jane Ann Dove</a>	New	5/12/2013	10/09/2012					
Pilot Chapter	<a href="#">Sally Sue Hagen</a>	New	6/1/2013	<a href="#">Approve / Deny</a>					
Pilot Chapter	<a href="#">Rebecca Jonzey</a>	New/Daughter	5/21/2013	<a href="#">Approve / Deny</a>					

[Print](#)

- Submitted candidates for your chapter will be listed on this screen.
- Click the candidate's name to access their form, which can be printed for chapter meeting.
- Once the chapter has voted, the Chapter VP will come back to this screen to record the chapter's vote.
- Approved candidates will move forward to the Chapter President.
- Denied candidate will not be available to the Chapter President for approval and their status will change to Denied under the Candidate Status column.



# Workflow & Approval Process

Candidate Status

Candidate Status (Chapter President Approval)

Chapter	Candidate (click to view profile)	Candidate Status	Proposed Induction	Chapter Membership Chair	Candidate Resides within Boundaries	Chapter President	Area Director	Executive Director Approval	Candidate Response
Pilot Chapter	Pat Doe	Denied - 09/12/2012	5/17/2011	09/12/2012	No				
Pilot Chapter	Alexis Doe	Denied - 09/26/2012	5/17/2011	09/26/2012	No				
Pilot Chapter	Jackie Doe	New	6/12/2013	09/06/2012	No	09/06/2012	09/06/2012	09/06/2012	09/12/2012
Pilot Chapter	Jane Ann Dove	New	5/12/2013	10/09/2012	Yes / No				
Pilot Chapter	Sally Sue Hagen	New	6/1/2013		No				
Pilot Chapter	Rebecca Jonzey	New/Daughter	5/21/2013		No				

Print

Candidate Status

Candidate Status (Chapter President Approval)

Chapter	Candidate (click to view profile)	Candidate Status	Proposed Induction	Chapter Membership Chair	Candidate Resides within Boundaries	Chapter President	Area Director	Executive Director Approval	Candidate Response
Pilot Chapter	Pat Doe	Denied - 09/12/2012	5/17/2011	09/12/2012	No				
Pilot Chapter	Alexis Doe	Denied - 09/26/2012	5/17/2011	09/26/2012	No				
Pilot Chapter	Jackie Doe	New	6/12/2013	09/06/2012	No	09/06/2012	09/06/2012	09/06/2012	09/12/2012
Pilot Chapter	Jane Ann Dove	New	5/12/2013	10/09/2012	Yes	Approve / Deny			
Pilot Chapter	Sally Sue Hagen	New	6/1/2013		No				
Pilot Chapter	Rebecca Jonzey	New/Daughter	5/21/2013		No				

Print

- The Chapter President will receive an email notification in their chapter's email account for all approved candidates (XXXX@linksinc.org).
- The Chapter President will go into the system and confirm approved candidates.
- The Chapter President will only be able to make decisions on candidates which have been approved by the Chapter Vice President.
- The Chapter President will need to complete two columns:
  - Candidate Residency Column
  - Chapter President Approval Column



# Workflow & Approval Process

Candidate Status									
Candidate Status (Chapter President Approval)									
Chapter	Candidate (click to view profile)	Candidate Status	Proposed Induction	Chapter Membership Chair	Candidate Resides within Boundaries	Chapter President	Area Director	Executive Director Approval	Candidate Response
Pilot Chapter	Pat Doe	Denied - 09/12/2012	5/17/2011	09/12/2012	No				
Pilot Chapter	Alexis Doe	Denied - 09/28/2012	5/17/2011	09/28/2012	No				
Pilot Chapter	Jackie Doe	New	6/12/2013	09/09/2012	No	09/09/2012	09/06/2012	09/06/2012	09/12/2012
Pilot Chapter	Jane Ann Dove	New	5/12/2013	10/09/2012	Yes / No				
Pilot Chapter	Sally Sue Hagen	New	6/1/2013		No				
Pilot Chapter	Rebecca Jonzey	New/Daughter	5/21/2013		No				

[Print](#)

- As highlighted above, approved candidates will then be forwarded to the Area Director for approval; after which they will go to the national office for approval from the Executive Director.
- Once the Executive Director has signed off on a candidate, an email notification will be sent from National to the chapter's email account (XXXXX@linksinc.org), to inform the chapter they can proceed w/the membership intake process.



# Workflow & Approval Process

Candidate Status									
Candidate Status (Chapter President Approval)									
Chapter	Candidate (click to view profile)	Candidate Status	Proposed Induction	Chapter Membership Chair	Candidate Resides within Boundaries	Chapter President	Area Director	Executive Director Approval	Candidate Response
Pilot Chapter	Pat Doe	Denied - 09/12/2012	5/17/2011	09/12/2012	No				
Pilot Chapter	Alexis Doe	Denied - 09/28/2012	5/17/2011	09/28/2012	No				
Pilot Chapter	Jackie Doe	New	6/12/2013	09/06/2012	No	09/06/2012	09/06/2012	09/06/2012	09/12/2012
Pilot Chapter	Jane Ann Dove	New	5/12/2013	10/09/2012	Yes / No				
Pilot Chapter	Sally Sue Hagen	New	6/1/2013		No				
Pilot Chapter	Rebecca Jonzey	New/Daughter	5/21/2013		No				

[Print](#)

- Once the candidate has responded to the invitation to join the chapter, the chapter will return to the status screen to record the candidate response. This notifies national to bill the candidate who accepted the invitation their dues and fees. New Members will show on the new member online payment roster with a balance due, after billing. All new member dues and fees must be submitted online.
  - Candidates who accept will see a date populate in the field.
  - Candidates who decline will see **“Declined”**, followed by the date.



# National Technology Committee

If you have any questions, please feel free to reach out to any member of the committee.

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Veronica Chapman, Central Area Chair  
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Kimberleigh DeLaine, Eastern Area Chair  
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