

# Chapter Checklist

## **To log in:**

- Use your email address and password that you set with activation email.

## **Select an ICS partner:**

- Please select an ICS partner if your national uses Omega Recruit.

## **To view PNM's information:**

- Click on the "Pre-Recruitment" tab at the top of the page and then "PNM Management."
- Then click on "Active PNMs" to see who is active in the system. A list will be generated in the center of your screen.
- Click on "view" next to each woman's name to see her information allowed by council. Once you view a PNM's info, it will place a date viewed in the viewed column. If council updates the PNM's info, the "viewed" column will show "updated".

## **To view the legacy list:**

1. Click on the "Pre-Recruitment" tab at the top of the page and then "PNM Management"
2. Click on "legacy list" on the left-hand column.
3. It is your responsibility to verify/confirm legacies with your national/international office. You can delete women off of your legacy list on this screen. **PLEASE BE CERTAIN BEFORE YOU DELETE!!**

## **To view who has left recruitment:**

- Click on the "Recruitment" tab at the top of the page and then "Reports."
- Click "PNMs available for snapbids".

## **To make selections on who to invite after each round:**

- Click on the "Recruitment" tab at the top of the page then click "Round Selections" and "List Upload" on the left-hand side of the page.
- **Please make sure to select the correct Round name in the dropdown menu.**
- Select the round you are making selections **FOR. You are selecting people to come to the next round.**
- **Make sure the selection times are open.**
- Your chapter's minimum and maximum figures to invite back to each round are listed at the top of this screen in addition to any flex +/- numbers.
- The first screen under the recruitment tab is "**list upload**". This is a new screen for ICS and a new way to submit your lists for Daily rounds. In this screen you will upload the list of selected PMNs, and any flex add or flex remove lists in **one CSV file.**
- Your selection times must be open, **and** your maximum number must be set before you can upload your list. You might have a flex add and/or flex remove number showing on this screen, but not all chapters will see a flex add or flex remove number. All chapters will however see a maximum selection number.
- You can export the PNMs in the list below, if you choose or you can use any CSV file, the upload should only show PNM ID/number in column A, column B should be PNM first name, Column C should be PNM last name, but please be sure to delete any additional information in other columns before you upload the CSV file back into ICS. The only information that should be shown in Column D will be **flex rank numbers** if you have flex Add and/or Flex remove PNMs.
- **There should be no column names or headers on your CSV file before you upload.**
- The PNM selection list cannot exceed your maximum number. If you have flex add and/or flex remove lists, they cannot exceed the Max numbers shown on this screen.
- If you upload a list and there is a PNM that is no longer in the process the system will not allow you to upload that list until the PNM's information has been removed. You will then need to remove the PNM(s) before you can reupload. **Please be sure to refresh your screen before you reupload!**
- Your flex add list should be directly under your selection list with a blank row between your selection list and your flex add list. Your flex remove list must be under the flex add list with a blank row between your flex add and flex remove lists.
- You **must** put your flex add and flex remove lists in rank order as shown here.
- **IMPORTANT:** Once you are ready to click "choose file" you can then click the button to upload your list. Once uploaded you should click final save. If you stray from this screen once you upload your list, your upload **will not save**, so please click "final save" once the upload has been accepted.

- You will notice that the final save button changes to undo final save once clicked. You can undo a final save **only if your selection times are still open** if you have a primary and secondary list, you must upload your primary list first, click final save. Then you can upload your secondary list and click final save.

**To see who you have NOT selected for a round:**

- Click on the “Recruitment” tab at the top of the page and then “Round selections” and “**View PNMs NOT**” on the left-hand side of the page.
- Make sure you have selected the correct round in the drop down to see who you have invited back for that round.

**To keep track of attendance:**

- Click on the “Recruitment” tab at the top of the page and then “Round selections” and then “PNM attendance” on the left-hand side of the page.
- Click on Round’s name from the drop-down box in the center of the screen in the middle of the page.
- You can sort this list of clicking and dragging a column header into the gray area where it says, “Drag a columnheader here to group by that column.”
- Every PNM’s name will show up in the list of who was supposed to be at your event. **Uncheck** the box next to hername if she DID NOT ATTEND.
- This is not mandatory for you to complete. You may find it helpful to keep track of PNMs.

**To make your chapter selections after the preference event (your bid list):**

- Click on “Round Selection” on the left-hand column and then “Final Selection” to begin.
- A screen will come up with all PNMs in the left-hand column (available/regret column) that attended your Preference parties.
- You need to move PNMs to the list on the right in RANK ORDER. Use the up and down keys in black to move a girl in rank order.
- **IMPORTANT:** You must click on the “FINAL SAVE” at the bottom of the page to save your selections. This is how council receives confirmation that you have completed the list.

**To see your chapter schedule for any given round and who is attending:**

- All schedules will show under your “Schedules” folder.
- Your “1<sup>st</sup> Round schedule” and your “Daily Event/Party Schedules” will show once council posts that information.
- Make sure you have selected the correct event round on the drop down. Click on the arrow next to each party time to see your attendees for each round.

**To see your chapter’s bid list/bids matched:**

- Under “Reports” on the left-hand column of the page you will see your “Bid Match Results”.
- You will see your list of bids that have been matched to your chapter once Council has posted the new member lists.

**There are several other reports that you can view under the Report List if needed.**