Hello, chapters and advisors!

This document is meant to be your "Cliff Notes"© version of the instruction manual for using ICS (Version v4.0.1 08.04.2020), the recruitment management system used by your campus. It is written from our own personal experience with the software, so it is our hope that it will answer your questions quickly and efficiently … we know that when it comes to recruitment and membership selection, you often need answers and you need them now!

Should you have any questions or need additional help, please feel free to contact us or your region's College Panhellenic Specialist (CPS). You also can access ICS's chapter training video at http://tinyurl.com/ICS-Chapter-Training-Video.

All our best wishes for a very successful recruitment for you!

In our bonds,

Linda Henderson, ΔΨ

Sigma Sigma Sigma Sorority
Chief Panhellenic Officer
NPC RFM Senior Specialist

Phone: (609) 736-0766 (Eastern time)
E-mail: trisigma.cpo@gmail.com

www.trisigma.org

http://trisigmaphtraining.weebly.com/

Rebecca Calkins, EO

Sigma Sigma Sigma Sorority
College Panhellenic Coordinator
NPC RFM Specialist

Phone: (630) 631-9648 (Central time)
E-mail: Rebecca.calkins.trisigma@gmail.com

College Panhellenic Specialists:

|			
CPHS – Region 1	Michelle Hallett, EH	(610) 496-2193	m.hallet@live.com
	Laura M. Sweet, ΔΠ	(864) 979-3200	lsweetm@aol.com
CPHS – Region 2	Alison Wirth, EO	(217) 251-4740	sss.panhellenic2@gmail.com
	Brenda Ray, ΑΨ	(520) 561-9094	TriSigmaPanhellenic2k@gmail.com
CPHS – Region 3	Nikki Colletti, ΓΜ	(225) 362-6560	nikkiccolletti@gmail.com
CPHS – Regions 4 & 5	Kat Gillan, AZ	(205) 219-0726	katgillan75@gmail.com
CPHS – Region 6	Rebecca Calkins, EO	(630) 631-9648	Rebecca.calkins.trisigma@gmail.com

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Here is the main menu toolbar you should see across the top when you log in:

MENU #1 – Select ICS Partner

This is where you link your ICS account to OmegaRecruit if your chapter uses that to assist with membership selection and ranking of PNMs. Please follow instructions provided by our National organization.

MENU #2 – PNM Management
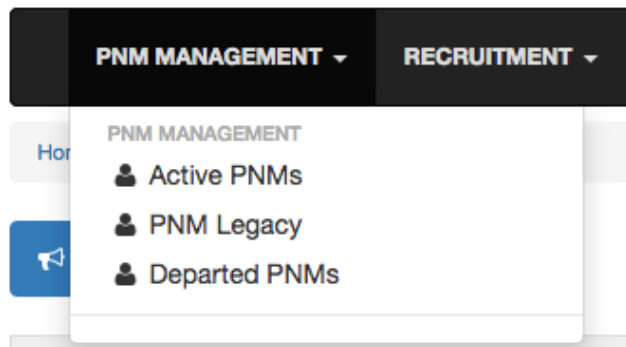
Active PNMs
- ➢ Where you will find the list of all "active" PNMs still in the system.

- ➢ Basic information on each PNM will be found on this main screen.

- ➢ Click on "View" to the left of a PNM's name to view additional details on that PNM. The College Panhellenic dictates what PNM information to available for the chapters to view.

- ➢ At the top left of the table, you will see the number of PNMs still active in formal recruitment.

PNM Legacy
➢ List of Tri Sigma PNMs going through formal recruitment this year.

➢ This information is provided by the PNM herself. You might want to verify that a PNM who claims she is a legacy is indeed one. Contact NHQ to do so.

➢ "Last, First" name columns are the PNM's name. The "Legacy Name" and "University" is the name and school of initiation of the PNM's mother, sister, grandmother, etc. who was a Tri Sigma.

Departed PNMs
➢ The list of all PNMs that have departed from formal recruitment and in which round (far right column).

➢ In the upper left part of the screen, you will find the total number of PNMs that have departed from formal recruitment up to that point.

➢ The chapter can use this list to help learn why a PNM who attended their party is no longer on the daily selection list.

➢ You can click on the arrows to the right of any column header to sort the upper gray horizontal field so as to sort by values in that column. For example, if you want to sort by the round from which the PNM departed, click the arrows next to "Round" and you will see that the PNMs are sorted by Round from which they departed.

MENU #3 – Recruitment

RECRUITMENT ▾	MEMBER MGMT ▾	CHANGE PASSWORD

ROUND SELECTIONS	REPORTS
Daily Selection	Regret With Interest
Verify PNMs - Invite	Return Statistics
View PNMs - NOT Invited	PNM Conflict List
Flex List - Add	Flex List Selections
Flex List - Remove	Flex Process Results
PNM Attendance	Daily Invitation Status
Final Selection	PNM Invitation Results
Final Selection List	Bid Match Results
	PNMs Available For Snapbid

SCHEDULES
1st Round Schedule
1st Round Schedule V2
Daily Event/Party Schedules

Round Selections

Daily Selection

This is where you enter your invite lists for each recruitment round.

In the middle of the screen, HAVE BULLETTED "PREVIOUS DAY VISITED" !!!!!

➢ Drop down and select the recruitment event round for which the chapter is making its invites (the round you are going into).

➢ If your campus utilizes a Secondary Quota for Upperclass students, you will need to bullet the pool for which you now want to make selections – either Primary Pool (the Freshmen) or Secondary Pool (the Upperclass women). If your campus does not utilize a Secondary Quota, you most likely will not see this option at all.

➢ Beneath the round selection, you will see the dates and times during which ICS grants access to the chapter to make their selections ("Open" and "Closed" information).

➢ You also will see "Min Selections: 0" and "Max Selections: x". The x number is the chapter's Carry Figure going into that round, the number of PNMs that the chapter is to be inviting to return.

➢ To make your invite selections, check the names of the PNMs that the chapter wishes to invite to the following round. As you check a PNM's name, you will notice that her row turns green.

➢ As you do this, you will see in the upper right a running tally of your number of "PNMs Selected" out of the number of "Total PNMs" that you had attending the recruitment round that you just finished.

➢ Another option for making selections … check on the box for "Select All" in the upper middle, underneath "Max Selections". Then de-select those PNMs that the chapter does not wish to invite back.

➢ Save your entries often by clicking on the blue SAVE button at the middle of the screen, above the PNMs' names. Feel free to SAVE frequently!

➢ **Double check the chapter's selections for accuracy !!!!!!!!!!!!!!** You can still make changes and corrections at this point.

➢ Now for the "point of no-return"! When you are certain that the selections are correct, click on the FINAL SAVE button. But before you do this, you might want to go to "Verify Selected Recruit" (see below) to view the chapter's invite list.

Verify PNMs – Invited

➢ Drop down and select the recruitment event round for which the chapter has entered its invites (the round you are going into).

➢ Should you notice that a PNM's name is missing, and your invite entry time has not yet expired, you can go back to Daily Selection and check her name to add her.

➢ You will see noted the number of "PNMs saved" to invite to the next round.

➢ This screen also enables you to export the invite list to Excel for printing.

➢ If you have not yet done FINAL SAVE under Daily Selection, be sure to go back and do so before continuing on.

View PNMs – NOT Invited

➢ Drop down and select the recruitment event round for which the chapter has entered its invites (the round you are going into).

➢ You will see the list of PNMs you have chosen to NOT invite back for that recruitment round. Verify that this correct. If not, go back to Daily Selection to make corrections.

Flex List - Add

This is where the chapter enters the PNMs for its Flex Plus List.

The length of this list is determined by the campus' NPC RFM Specialist.

This step cannot be completed until the chapter's FINAL SAVE is done in "Daily Selection".

➢ Drop down and select the recruitment event round for which the chapter has entered its invites (the round you are going into).

➢ If your campus utilizes a Secondary Quota for Upperclass students, you will need to bullet the pool for which you now want to make selections – either Primary Pool (the Freshmen) or Secondary Pool (the Upperclass women). If your campus does not utilize a Secondary Quota, you most likely will not see this option at all.

➢ **Remember that your Flex Plus List includes those PNMs you would add on to your invite list if you could invite more. It's a "wish list"!**

➢ Beneath the round selection, in the blue box, you will see the set length of the chapter's Flex Plus List as the "Maximum number of selections".

➢ On the left, you will see the "Flex List Available – Unselected/Uninvited PNMs". This is the list of PNMs who attended the chapter's previous round of events but that the chapter has chosen to not invite to the selected (upcoming) recruitment round. It is from this list that you will select the PNMs for your Flex Plus List.

➢ The order in which these PNMs are put onto the Flex Plus List VERY much matters!!!

➢ For example, if your Flex Plus List was to be 10 long, you can list up to 10 PNMs above and beyond those on your invite list. The first PNM on your Flex Plus List should be the very next PNM the chapter ranked after the last on the invite list. The second PNM on your Plus Flex List would be the second PNM the chapter ranked after the last on the invite list, etc.

➢ To place a PNM on the Flex Plus List, click on the arrow to the right of her name. You will notice that she is added to the right side of your screen, "Flex List Additions". Notice how you have a field in which you can re-order this list if necessary.

➢ Tri Sigma strongly encourages & advises the chapter to include as many on the Flex Plus List as the chapter is permitted as it is in the chapter's very best interest to do so. Should you have any

questions about creating this list, please contact your Assistant Director of Chapter Services, Regional Consultant, or College Panhellenic Coordinator immediately.

Flex List - Remove
This is where the chapter enters the PNMs for its Flex Minus List.

The length of this list is determined by the campus' NPC RFM Specialist.

This step cannot be completed until the chapter's FINAL SAVE is done in "Daily Selections".
If a Flex Minus List is requested by your NPC RFM Specialist, it is <u>required</u> to be provided by the chapter to the <u>full length requested</u>. Should a chapter not do so, Tri Sigma's NPC Delegate and RFM Specialists will be notified.

➢ Drop down and select the recruitment event round for which the chapter has entered its invites (the round you are going <u>into</u>).

➢ If your campus utilizes a Secondary Quota for Upperclass students, you will need to bullet the pool for which you now want to make selections – either Primary Pool (the Freshmen) or Secondary Pool (the Upperclass women). If your campus does not utilize a Secondary Quota, you most likely will not see this option at all.

➢ **Remember that your Flex Minus List includes those PNMs you would remove from your invite list if you had to. It essentially is an "uninvite" list.**

➢ Beneath the round selection, in the blue box, you will see the set length of the chapter's Flex Plus List as the "Maximum number of selections".

➢ On the left, you will see the "Flex List Available – Selected/Invited PNMs". This is the list of PNMs who attended the chapter's previous round of events and that the chapter has chosen to invite to the selected (upcoming) recruitment round. This list will be in alphabetical order. It is from this list that you will select the PNMs for your Flex Minus List.

➢ The <u>order</u> in which these PNMs are put onto the Flex Minus List VERY much matters!!!

➢ For example, if your Flex Minus List was to be 10 long, you are to list the 10 PNMs you would <u>not</u> invite if you had to do so. PNM #1 on this list would be the <u>very last</u> PNM in your rankings done to create your invite list. PNM #2 on this list would be the next to last PNM in your rankings, etc. Basically, <u>work up from the bottom</u> of your ranked invite list.

➢ To place a PNM on the Flex Minus List, click on the arrow to the right of her name. You will notice that she is added to the right side of your screen, "Flex List Removals". Notice how you have a field in which you can re-order this list if necessary.

➢ Should you have any question as to how to create your Flex Minus List, please contact your Assistant Director of Chapter Services or College Panhellenic Coordinator immediately!

PNM Attendance
This is where a chapter can confirm the PNMs that were matched to attend a given round.

➢ Drop down to select the desired round of recruitment.

- At the top of the table, you should see "*x* PNMs". *x* is the number of PNMs that matched to visit with Tri Sigma in that round.

- By default, the list is provided by party number (Party 1, Party 2, etc.). You can click o he arrows to the right of any column header so as to sort by that column header. For example, if you want to sort the PNMs alphabetically by last name, click on the arrows to the right of "Last" and you will see that the PNMs are sorted alphabetically by last name.

- The chapter can update this list to reflect the PNM(s) who were not in attendance at their parties that round. Do this by <u>un-checking</u> the PNMs' names then hit the blue SAVE button.

Final Selection
This is where the chapter enters its Bid List.

Remember that every PNM who was in attendance at the chapter's Preference Event(s) <u>must</u> appear on the chapter's Bid List. This does include those PNMs who would have been in attendance but had an excused absence. This is a NPC Unanimous Agreement.

- If your campus utilizes a Secondary Quota for Upperclass students, you will need to bullet the pool for which you now want to make selections – either Primary Pool (the Freshmen) or Secondary Pool (the Upperclass women). If your campus does not utilize a Secondary Quota, you most likely will not see this option at all.

- You will notice in the left column the names of all the PNMs who were in attendance at your Preference Round event(s). This list will include those PNMs who might have been excused from Preference Round but would have otherwise been present.

- In <u>rank order</u>, move over to your Bid List ("Selected and ranked", the right column) the names of the PNMs you attended your Preference event. Again, the order of the PNMs here is critically important! Tri Sigma legacies should be at the top of your Bid List!

- Upon verifying the accuracy of the chapter's lists, click on FINAL SAVE at the bottom of the screen. ICS will not permit you to FINAL SAVE until all PNMs listed in the center column have been placed on the Bid List.

Final Selection List
This screen will show the selections made by the chapter for their Bid List.

- Changes will be able to be made until time has expired for list entries. This can be done back on the Final Selection screen.

- This screen also enables you to export the invite list to Excel for printing.

Schedules

1st Round Schedule
- This screen allows the chapter to see what PNMs are attending each 1st Round party.

- Expand any chosen party in 1st Round by clicking on the + to the left of the party time.

➢ The "Group" in the far-left column refers to the recruitment counselor group to which the PNM belongs (if the campus utilizes these).

➢ This information will not be available until the schedule is posted by the F/SA.

1st Round Schedule V2
➢ This 1st Round Schedule Report will show you the PNM Counselor group and the PNMs that will be coming to each of your 1st Round events.

Daily Event/Party Schedules
➢ Drop down to choose the recruitment round for which you want to view the schedules.

➢ "# of Attendees" in the far right column will let you know how many PNMs will be attending that particular party in that round.

➢ Expand any chosen party in that round.

Reports

#2 ... Return Statistics
➢ This report will show the chapter's return percentage for each round of recruitment.

➢ "Original Invited" will reflect the number of PNMs provided according to its assigned Carry Figure for that round.

➢ "Actual Invited" may not equal "Original Invited" if the RFM Specialist needed to flex PNMs either onto or away from the chapter. For example, if the chapter's Original Invited = 25 but Actual Invited = 20, it means that the chapter was performing very well in that round of recruitment and that the RFM Specialist needed to flex 5 PNMs from that chapter's invite list so as to maintain the overall targets for all the chapters and getting them all to Quota.

➢ "Return" column will indicate the number of PNMs returning to you that round.

➢ The last column will contain the chapter's Accept % for that round.

#3 ... PNM Conflict List
➢ This screen will list the PNMs who have an excused absence for a recruitment round but otherwise would have been in attendance at Tri Sigma's event.

➢ Check here if a PNM that the chapter invited did not show up for a recruitment round.

➢ This information is entered by the College Panhellenic.

➢ It should be noted that many campuses do not make full use of this option. If a PNM is excused for a recruitment round, she often is not noted as such and will therefore not show up for the chapter in this report. Please check with your F/SA to clarify a PNM's status for the round.

#4 ... Flex List Selections
- ➤ Drop down for the recruitment round for which you want to view the chapter's selections for their Flex Lists.

- ➤ This screen will display the PNMs that that the chapter selected to be on its Flex Plus List ("Flex Type: Added") and its Flex Minus List ("Flex Type: Removed").

- ➤ This screen simply provides the list as the chapter entered the Flex Lists. It does NOT reflect how or if they were used by the RFM Specialist.

#5 ... Flex Process Results
- ➤ Once the schedule has been posted by the F/SA for a particular recruitment round, this screen will display the PNMs that were either added or removed by flexing in the invite matching process by the RFM Specialist.

- ➤ Drop down for the recruitment round for which you want to view the chapter's flex process results.

- ➤ If your campus utilizes a Secondary Quota for Upperclass students, you will need to bullet the pool for which you now want to make selections – either Primary Pool (the Freshmen) or Secondary Pool (the Upperclass women). If your campus does not utilize a Secondary Quota, you most likely will not see this option at all.

- ➤ The "Flexed" column will indicate if the PNM was added onto the chapter's invite list (Flex Matched) or if the PNM was removed from the chapter's invite list (Flexed Unmatched).

- ➤ If "No Records Returned" shows, that indicates the RFM Specialist did not flex any PNMs into the chapter's round nor did she flex any PNMs off of the chapter's invite list.

#6 ... Daily Invitation Status
- ➤ This screen will show the PNMs that were or were not matched to attend the chapter's events for the selected recruitment round.

- ➤ Drop down for the recruitment round for which you want to view the chapter's invitations and acceptance statuses.

- ➤ The list in its entirety constitutes the chapter's invite list for that round.

- ➤ PNMs who matched to attend the chapter's events that round will be listed as "Matched" in the far right column; PNMs who did not match to attend the chapter's events that round will be listed as "Unmatched".

- ➤ By default, the list is provided alphabetically by PNM name. You can click on the arrows to the right of any column header so as to sort by that column header. For example, if you want to sort by "Matched" versus "Unmatched", click on the arrows to the right of the column header "Match Status" and you will see that the PNMs are sorted by attendance status to that round.

#7 ... PNM Invitation Results
- ➤ Chapter will be able to view only their own chapter's results.

- ➤ Drop down to select the recruitment round for which you want information.

➢ This report yields every active PNM and indicates if she was invited to that chapter's round events and if she matched to attend your parties that round (far right column).

➢ You also will see if the PNM was on the chapters Flex Plus (+) or Flex Minus (-) List and what place on that list she held.

#8 ... Bid Match Results
➢ Once the F/SA posts the final bid matching results, the chapter will here be able to view their New Members!

➢ The "Group" in the far-right column, refers to the recruitment counselor group to which the PNM belonged (if the campus utilizes these).

➢ This screen also enables you to export the invite list to Excel for printing.

#9 ... PNMs Available for Snapbid
➢ Once bid matching is complete, this screen will show you all the PNMs who are available for snap bidding by a chapter that did not achieve Quota. In order for a PNM to be eligible for snap bidding, she must have at least gone through Round 1 of primary recruitment.

MENU #4 – Member Management
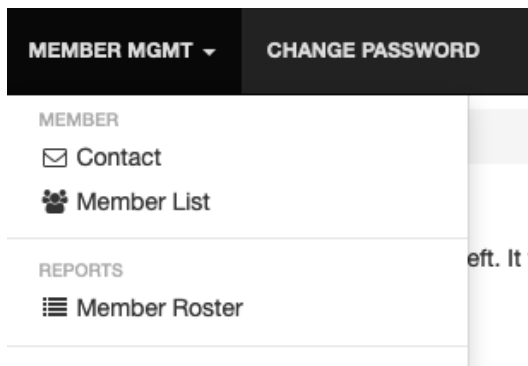
Member

Contact
➢ Tabs for Advisor, House, National, and Dues.

➢ Maybe make sure your own Advisor information is completed. The F/SA & CPH may or may not "require" that this information be completed and up-to-date.

Member List
➢ Some campuses may use this to track current chapter rosters. Again, up to the F/SA and CPH.

Reports

Member Roster
➢ Some campuses may use this to track current chapter rosters. Again, up to the F/SA and CPH.

MENU #5 – Change Password

Change Password

➢ It is recommended that only the Chapter Advisors, Chapter President, and Chapter Recruitment Director have the current chapter access password.

➢ While the actual access URL should remain the same, the chapter's password should be changed from one year to the next.

➢ Password must be at least 7 characters and contain 1 character that is not a number or a letter.