

# MyTDX.org Membership Management Guide & Timeline

## Registering New Members

Within a few weeks of accepting bids, all new members should have a record on [mytdx.org](https://mytdx.org).

A member with an Officer account type needs to do the following:

- Login to [mytdx.org](https://mytdx.org)
- Go to the “Members” header from the homepage and select “Add New Members.”
- From the Add new member screen, you will have three options.

The screenshot shows the 'Add member or new member' interface. At the top right is a button 'Import Member Data (.csv)'. Below it is a blue header 'Add member or new member' with a 'Help' icon. The main area contains instructions: 'This tool is useful for getting officers and New Members registered with your website or adding members who have yet to sign up. Alternatively, you may send out the link to your charge's public registration page, but you'll need to approve each account before they can log in: https://www.mytdx.org/psitetraton/register.php'. The form fields are: 'Name' with sub-fields 'First Name', 'Middle Name', 'Last Name', and 'Suffix' (marked 'required'), and 'Preferred First Name'; 'Personal E-mail' (marked 'required'); 'Local Account Type' with a dropdown menu set to 'New Member' (marked 'required'); and 'Send Activation Email?' with two radio buttons: 'No, add as a record only and don't invite them to create an account' and 'Yes, send activation email and pre-approve this user account' (selected). An 'Invite Member' button is at the bottom.

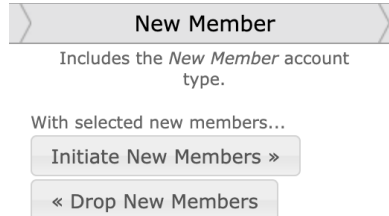
1. Invite members using the form fields
  2. Send new members the registration link. You will have to approve all sign-ups from the link
  3. Bulk important the data using a .csv file
- You can use any of these options. When adding New Members:
    - Select the account type New Member
    - Answer Yes to the send Activation Email Option
      - As a profile, New Members will set up a password and be able to access all Fraternity policies, resources, and publications. New Member Account types have restricted access to the Charge Only Document storage until they are moved to the Active account type.
  - Once all members have been added, complete the [New Member Registration Form](#)

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## **Initiating New Members**

Prior to the first degree of initiation, the Charge will need to do the following:

- Login to [mytdx.org](http://mytdx.org)
- Go to the “Members” header from the homepage and select “Transition Members.”
- Select all the names and the action that apply.



- “Initiate New Members” will generate initiation fee invoices, these are due prior to initiation.
- “Drop New Members” will move the members from New Member to Prospect
- Complete the [New Member Initiation Form](#)
  - Dropped records will have their affiliation removed
  - Initiation kits will be produced and mailed to the address submitted
- Upon payment of an initiation fee, the membership status on mytdx.org will move from New Member to Active.

## **Other Information:**

- Badges shall be presented at the 1st Degree of Initiation, signed shingles at the 2nd Degree of Initiation.
- The initiation kit includes a badge and membership certificate (shingle), welcome letter, and policy packet.
  - Each shingle needs to be signed by the Charge President.
- These kits are sent in USPS Priority packages.
- The name used on the certificate will come from the member’s mytdx.org profile and will be displayed as “First Middle Last, Suffix”