***NEW FOR 2019*** Even if there are no changes to be made to board members, contact information, etc, all clubs will be required to verify that the information in the Club Admin Panel is up-to-date.

**STEP 1**
Login in to the Club Admin Panel at [https://alumni.msu.edu/get-together/club-admin/index.cfm](https://alumni.msu.edu/get-together/club-admin/index.cfm). If you’ve forgotten your username and/or password, click on either “Lost your club username” or “Lost your club password”.

For usernames - provide the account email address (this is the email address noted in the Club Contact section), and the username will be sent to that email address.

For passwords - provide the account username, and the username will be sent to the account email address. **Note that the MSU Alumni Office does not have a master list of alumni club passwords.**

If there are multiple people that maintain your club’s record in Club Admin, if you change the username and/or password, please notify them of the new information.
STEP 2
You will be directed to the “Dashboard” tab and the page will look like:

The online alumni club toolkit at alumni.msu.edu/get-together/alumni-clubs/alumni-club-toolkit.cfm is a compilation of resources that range from the essentials of basic alumni club administration to sample bylaws, requesting an email list to brand basics, as well as examples of successful strategies that alumni club leaders have utilized. It also includes specific resources for Give Green Day, Global Day of Service and service year-round, plus the monthly conference calls with the MSU Alumni International Board.

Spartans of Equestria
Identification

Board Members
Chair/President/Director:
Twilight Sparkle

... and you'll get an overview of the information the MSU Alumni Office currently has for your club.

(CONTINUED BELOW)
STEP 3
There are five sections to confirm, update and/or add information:
1. Contact and Address
2. Board Members
3. Award Recipients
4. Web/Social Media
5. Extended Profile
Click on the “Edit” button in each section to confirm, update and/or add information.
Note that the Contact and Address and Web/Social Media sections are combined once you click on the “Edit” button.
STEP 4 – CONFIRM, UPDATE AND/OR ADD YOUR CLUB INFORMATION
***IN ALL SECTIONS, ITEMS WITH A RED ASTERISK ARE REQUIRED***

BOARD MEMBERS SECTION
The initial page is an overview of the board members for your club. Review the information to ensure that it is accurate.

The “Last Updated” column notes when that particular person’s information was last updated. Any records that have a date prior to May 1, 2018 should definitely be reviewed and updated to reflect if that person is still a member of the board (and, if so, what their term dates are), or if they have left the board.

For all current board members, go into each active board member’s profile to confirm, update and/or add information so each profile is complete. A complete profile includes:
- Position
- First and last name
- Preferred phone
- Email
- Term start and end dates

Add any persons who have been elected or appointed to the board.
Delete any persons who are no longer a board member.

Why is this important? Anyone who is listed as a board member can act on behalf of your alumni club, including requesting mailing and/or email lists. Board members receive the monthly Alumni Club Leaders Update and initiative specific information, e.g., Give Green Day, from the MSU Alumni Office.
To edit current board member information:

1. Click on the “Edit” icon.

Why is this important? The MSU Alumni Office utilizes this information to send specific communications, including the monthly Alumni Club Leaders Update and initiative specific information, e.g., Give Green Day, to board members. Board member information should be edited when any of the information changes, e.g., a new email address, term start and end dates if they have been elected or appointed to serve another term.

2. On this page, you’ll confirm, update and/or add the following for each board member:
   - Position
   - First and last name
   - Preferred phone
   - Email
   - Term start and end dates

HELPFUL HINTS FOR COMPLETING THIS SECTION

“Position” = If the board member holds a position that is not listed in the drop down, choose “General Member” e.g., if the board member is the Philanthropy Chair, they should be denoted as “General Member”.

“Preferred Phone” = Preferred phone for the board member, not the club. Please use the following format: 111-222-3333.

“Email” = Preferred email address for the board member, not the club.

All board members must have a “Term Start Date” and “Term End Date”.

3. Click on “Update Person” at the bottom of the page.
To add a new board member:
1. Click on the “New Board Member” button.

2. Add the following for each board member:
   - Position
   - First and last name
   - Preferred phone
   - Email
   - Term start and end dates

HELPFUL HINTS FOR COMPLETING THIS SECTION

Refer to “Edit Board Member information” helpful hints above.

3. Click on “Add Board Member” at the bottom of the page.
To delete a person who is no longer a board member:
1. Click on the “X” icon.
2. A text box will appear that reads “Enter an explanation and hit the X button again to submit”. Enter an explanation (e.g., “no longer on board”, “moved”).
3. Click on the “X” icon a second time.

4. A text box will appear that asks “Are you sure you want to delete this club person? This action cannot be undone”. Click the “OK” button to delete.

Once all board member information is up-to-date, click on the Dashboard tab, or use the back button/arrow in the browser to navigate back to the club overview page.
CONTACT AND ADDRESS AND WEB/SOCIAL MEDIA SECTIONS
This page is an overview of the contact and web/social media information for your alumni club.

On this page you'll confirm, update and/or add the following:
- Primary contact person for the club
- Email for the club
- Club location
- Website and social media links

**HELPFUL HINTS FOR COMPLETING THIS SECTION**

No need to enter the “Password”. NOTE: Do not change the “Password” without informing other board members who access the Club Admin Panel.

“Primary Contact” = Primary contact person for club. The drop down menu is populated with board members from the board members section above.

“Email” = Club email address. This should be the email address where general inquiries should be directed. It can be a general club email or a specific person’s email.

“Preferred Phone” should be that of the Primary Contact. Please use the following format: 111-222-3333.

If you choose to “Restrict Phone”, the Preferred Phone will not appear on your club’s profile in the “Club Locator” section.

Why is this important? This information populates your club’s profile in the “Club Locator” section of the MSU Alumni Office’s website - alumni.msu.edu/get together/alumni-clubs/club-locator.cfm. If information is not provided or incorrect, alumni are not able to connect with, or contact, your alumni club.

The MSU Alumni Office also uses this information when we send emails/communications on your club’s behalf to alumni in your area in advance of specific initiatives, e.g., Give Green Day, or when promoting a club event.

**For Twitter, enter the URL, not the handle.**

**NEW for 2019** Add your club’s Instagram. Enter the URL, not the handle.

“MSU Gifts Scenario” is only for clubs that have an MSU-held scholarship(s). For these clubs, MSU University Development creates an online gift cart.

The MSU Alumni Office completes this.

***New for 2019*** Even if you do not change any information in this section, you must confirm that the information is up-to-date by checking the box. Then, click on “Update Club Contact Details” at the bottom of the section.
**HELPFUL HINTS FOR COMPLETING THIS SECTION**

“Club Location” subsection details a mailing address for the club. This can either be a neutral address, e.g. a PO Box, or a board member’s home address (preferably the “Primary Contact” above). This address is for “Office Use Only” and will not be publicly displayed. On occasion, MSU may mail materials, invitations, etc. to the club, so an address is required.

***New for 2019*** Even if you do not change any information in this section, you must confirm that the information is up-to-date by checking the box. Then, click on “Update Club Location” at the bottom of the section.
AWARD RECIPIENTS SECTION
This page is an overview of recipients of your alumni club award(s). Since this is a new section, we are only requesting award recipients from 2017, 2018, and/or 2019. If your club does not make awards, skip this section.

To add an award recipient:
1. Click on the “New Award Recipient” button.

2. Add the following for each award recipient:
   - First Name, Middle Initial and Last Name
   - Graduation Year
   - Award Name
   - Award Year

HELPFUL HINTS FOR COMPLETING THIS SECTION
We have a lot of names in our university database, so if you know the “Middle Initial” and/or “Graduation Year”, this will help us greatly!

If you do not know “Middle Initial”, please enter “N/A” in the space provided.

If you do not know “Graduation Year”, please enter “N/A” in the space provided.

3. Click on “Add Award Recipient” at the bottom of the page.

Once all award recipient information is up-to-date, click on the Dashboard tab, or use the back button/arrow in the browser to navigate back to the club overview page.
EXTENDED PROFILE SECTION
This page is an overview of the information about leadership, fiscal, communications, engagement and philanthropy for your club.

NOTE: Save each subsection as you go. Confirm that the information is up-to-date by checking the box even if you do not change any information in the subsection, and then click the “Update” button at the bottom of each subsection.

Why is this important? This information provides the MSU Alumni Office with an overview of your club, and indicates where resources may be needed, what technical support is necessary, and what training materials should be created.

And, as volunteers move in and out of your club, and MSU Alumni Office staff change, the information in this section is helpful during these transitions.
Leadership Subsection
In this subsection you’ll confirm, update and/or add the following:
- Board meeting and elections frequency.
- Does your club have bylaws.
  - A current copy of your club bylaws.
  - The year when your club bylaws were last reviewed.

HELPFUL HINTS FOR COMPLETING THIS SECTION
If you uploaded the club bylaws previously and they have not been updated since then, you do not need to reload the document.

The year when the club bylaws were last reviewed may not correspond to the year when they were last updated. A periodic review of bylaws is recommended and updates made if necessary. If you do not know the year of last review, please enter “20XX” in the space provided.

HELPFUL HINTS FOR UPLOADING DOCUMENTS
If a document has been uploaded, there will be an icon next to the field. If you hover over the icon, the name of the document will appear.

To upload a document, the document will have to be saved on the computer you’re using to complete the baseline. Then, click on the “Browse” button to upload the document.

For instructions on how to upload a document, click on “Read Upload Instructions.”

NOTE: If the uploaded document does not appear as an icon next to the field, you may have to refresh your web browser first.

***New for 2019*** Even if you do not change any information in this section, you must confirm that the information is up-to-date by checking the box. Then, click on “Update Leadership” at the bottom of the subsection.
Fiscal Subsection
In this subsection you’ll confirm, update and/or add the following:
- Financial institution where the club’s account(s) is/are held, and type(s) of account(s).
- Who’s authorized to sign on the club account(s).
- The clubs EIN/TIN.
- Is the club a 501(c)3.
- Does the club have liability insurance.
- Does the club have a W-9.

HELPFUL HINTS FOR COMPLETING THIS SECTION

“Financial Institution” = Name of the financial institution where the club account(s) is/are held.
If your club does not have any financial accounts, enter “No Accounts”.

For “Type of Account(s)” check all the boxes that apply.
If your club does not have any financial accounts, check the “Other” box. In the “Other account type” box that appears, enter “No Accounts”.

If your club does not have a TIN or EIN, enter “No Number”.

If you indicate that the club is a 501(c)3, you will have to upload the 501(c)3 determination letter.
If you uploaded the 501(c)3 determination letter previously, you do not need upload the document.

***New for 2019*** If you indicate that the club has a W-9, you will have to upload it.

***New for 2019*** Even if you do not change any information in this section, you must confirm that the information is up-to-date by checking the box. Then, click on “Update Fiscal” at the bottom of the subsection.
Communications Subsection
In this subsection you’ll confirm, update and/or add the following:
- If the club is using iModules. If not, what email communication system is the club using.
- If the club is using Eventbrite. If not, what event registration system is the alumni club using.

***New for 2019*** Even if you do not change any information in this section, you must confirm that the information is up-to-date by checking the box. Then, click on “Update Communications” at the bottom of the subsection.

Engagement Subsection
In this subsection you’ll provide:

HELPFUL HINTS FOR COMPLETING THIS SECTION
Only one file can be stored at a time in these fields. If you uploaded a document for last year’s baseline, we’ve saved this. So, when you upload a new document this year, it will automatically overwrite the old/existing one.

Click on “Update Engagement” at the bottom of the subsection.

HELPFUL HINTS FOR UPLOADING DOCUMENTS
To upload a document, the document will have to be saved on the computer you’re using to complete the baseline. Then, click on the “Browse” button to upload the document.

For instructions on how to upload a document, click on “Read Upload Instructions.”

NOTE: If the uploaded document does not appear as an icon next to the field, you may have to refresh your web browser first.
**Philanthropy Subsection**  
The MSU Alumni Office completes this subsection.

Once all leadership, fiscal, communications, and engagement information is up-to-date, click on the Dashboard tab, or use the back button/arrow in the browser to navigate back to the club overview page.

**STEP 5 – REVIEW ALL INFORMATION**  
If you need to make any changes, click on the “Edit” button in each section to do so. If everything looks great... 

**STEP 6 – PRINT OUT A CLUB OVERVIEW FOR YOUR CLUB RECORDS**  
1. Go back to the “Dashboard” tab if you’re not already there.  
2. Click the “Print” button in the “Contact and Address” section. 

3. This will generate a club overview that you can print and keep in your club records. 

**STEP 7 – LOG OUT AND YOU’RE DONE**  
The MSU Alumni Office will begin reviewing club certifications as they are received and we will contact you if we have any questions. 

Thank you and Go Green!