

2018-2019 Step-by-Step Affiliation Instructions

1. Login to the FCCLA Portal using the following link: <https://affiliation.registtermychapter.com/fccla#>
 - Your 5 digit chapter ID is your username. If you cannot remember your 5 digit chapter ID, please select the black **Forgot Username** button and your username/ chapter ID will be emailed to you.
 - Your password is something you have created. National FCCLA cannot view your password. You may select the black **Forgot Password** button and your password will be emailed to you. If you need your password reset, please contact your state adviser.

2. After logging in, a chapter information page will appear. Please update the chapter adviser status if needed.

- Please make any advisers who are no longer part of your chapter inactive. Click on the check mark located under the word **Status** to make an adviser inactive. An adviser who is marked inactive will not be able to access the portal and you will not be charged adviser dues for the inactive adviser. A blue circle with a line through it will appear for all advisers who are made inactive. All advisers who appear with a check mark will be charged adviser dues and will have access to the portal.

Active adviser

Status



Status

Inactive adviser



3. Please enter your Principal's First Name, Last Name and Email – We are collecting this information so that we can recognize teachers and students for outstanding work and notify administrators of important FCCLA information.
4. Please select the highest grade level for your chapter using the drop down arrow.
 - This will be the highest grade level in which students can still participate within FCCLA within your chapter.
5. Please select one of the options on how to treat your graduating members. Your options are listed and described below.
 - Move onto the same chapter- All students moving on to the same school and same chapter.
 - Eligible for Alumni & Associates – This option is for students who have already graduated from the 12th grade at your school.
 - Move onto various chapters- This option is for students who have graduated from your school and are moving on to various chapters in various schools. This option is most often used when middle school students will be moving on to various high schools.
6. Once the information on the confirmation screen is complete, select the black **Confirm** button in the left corner.

7. Once you are logged into your chapter, select the red **Graduate** button on the top left side.

Graduate

8. Please graduate all applicable students out of your chapter (i.e. if an 8th grader graduated from middle school and moved on to high school or if a 12th grader graduated from high school and moved on to college, etc.). To do so, you will either need to select the black **Select All** button on the left side, or individually select the students who graduated from your school in the previous school year.

- Please double check that you are graduating your students to the correct location by looking at the Graduating School column. If you realize you have the incorrect location, you can click the Select button, located under the Change Destination column, and relocate the student to the correct location. If you graduated your students to various schools, you will need to select the location for each student you are graduating.
- For students who are graduating from high school and are moving to Alumni & Associates, please update the student's email address to one he/she will use after high school by using the Post-Graduation Email box.

Change Destination

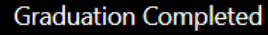
Select

Post-Graduation Email

Post-Graduation Email

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9. Scroll down and select the Graduation Completed button.




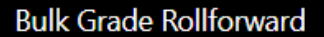
10. A pop up message will appear asking whether you are done graduating. If all information is correct and you are ready to move on, select the **Yes** button.

11. Next, select the red Edit Chapter Members button.



12. Please update all necessary information, including the student's grade, Individual Affiliation Type, Member Title, Email and Cell phone.

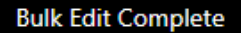
- To update the grade for all students in your chapter, you can use the Bulk Grade Rollforward button.
- If you need to drop a student from your chapter, now would be the time to do so using the **Drop** option. Select the students you would like to drop by placing a check mark next to the student's name. Then select the red **Drop Selected Students** button at the bottom of the page. Select **Confirm** in the pop up message that appears if you'd like to drop the students.



Click small square box in order to place a check mark in the box



13. Once all information is updated, scroll down to the bottom and select the black **Bulk Edit Complete** button on the right side.



14. A pop up message will appear. If all information is correct and you are ready to move onto the next step of the process, you should select the **Yes** button.

15. To add chapter members select the **Add Chapter Members** button and follow the instructions for one of the following three options:

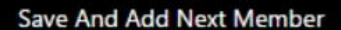
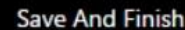
- For an Individual Entry- select the Individual Entry accordion.

1. Fill out all required information in the red outlined boxes.

2. Scroll down and select either the Save and Finish button or the Save and Add Next Member button.

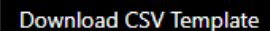
➤ Save and Finish- select this button if you are done adding students to your chapter.

➤ Save and Add Next Member- select this button if you would like to save the student you have just entered into the system and have more students to add to your chapter.



OR

- Bulk CSV Upload- this option is recommended for chapters entering 250 students or more. Select the Bulk CSV accordion.



1. Select the black **Download CSV Template** button.

2. Fill out all required information (first name, last name, grade, gender, individual affiliation type, demographic, member title, email, cell phone and DOB). *Please visit the Individual Entry accordion to view the options for individual affiliation type, demographic, and member title.*

3. Once all information is entered on the CSV file, we recommend saving it to your computer. Then upload the document to the portal by dragging the file into the blue box that says 'Drag files here'.

4. Once you scroll down, your students should be listed. If a student is highlighted in red, an error occurred and the information must be edited using the edit pencil in order for it to be saved. Any information highlighted in yellow are possible duplicates. If the student's information is white, it means you have successfully entered the student's information into the system.

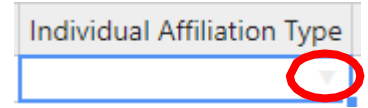
5. Scroll up and select **Save**. If you do not select Save the students will not be added to your chapter queue.



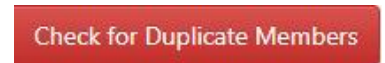
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OR

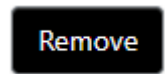
- **Bulk Member CSV Entry**- Use this method to copy and paste student's data from a CSV file. Use this method for 250 or less students. Select the Bulk Member CSV Entry accordion.
 1. Fill out all required information in the fields (first name, last name, grade, gender, individual affiliation type, demographic, member title, email, cell phone and DOB). *Please use the drop down arrows to view the options for individual affiliation type, demographic, and member title. You may need to open your browser wider or zoom out to see everything.*
 2. You can also download the CSV file from this page and complete the required information in each column for your students. Once the information is complete in the CSV file, highlight all the student information and use the Ctrl + C function to copy the data. Then go back to the FCCLA Portal and place your mouse cursor in the first Prefix box. Once your mouse is there, use the Ctrl + V function to paste your data into these boxes. If all information was completed correctly, the data should appear in the correct columns.
 3. Once all data is entered, Select the **Save** button then the **Confirm** button. *Note: the Export Data button will extract the information you have entered on your screen and download it to your computer. This button will not save the data into the system.*



16. Select the red **Check for Duplicate Members** button.



- If duplicates appear, you should place a check mark next to the student's name you would like to remove. Then select the black **Remove** button at the bottom of the page. If none of the students listed are duplicates, click the **Close** button. *Please note that if you select the Check for Duplicate Members button and a student has a 'Submit Date' next to their name, they have already been placed on an invoice and you would not want to submit affiliation for that student again.*



CHECK FOR DUPLICATE NAMES



First Name	Last Name	Submit Date	Remove
Ann	Johnson	07-24-2018	<input type="checkbox"/>
Ann	Johnson		<input checked="" type="checkbox"/>

17. Select the students you would like to submit for affiliation by using the select all button or individually selecting those you would like to appear on an invoice.



NOTE: Once you submit for a student and the name appears on an invoice, you are required to pay for the student. We do not edit, substitute, or delete invoices for affiliation. Please double check that you do not have duplicate students or students who should not be part of your roster in your chapter. Please make sure you have collected all funds before submitting for your students.

18. Select the red **Submit Affiliation** button. Please verify that the amount the system has calculated is correct BEFORE selecting the Confirm button.



- If you have students under the age of 13, you will need to select the **Confirm Consent Form** button before submitting. Once you click on the button, you will select the students you have the consent form from and select the **Save** button. Please keep the parent consent forms for your records.



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- The **Export P.O.** button will extract the information displayed on your screen and download it as a PDF to your computer. Downloaded membership fee information may be used for obtaining a P.O. for your school. Exporting the data will not create an invoice for your chapter. You must select the **Confirm** button in order to produce an invoice for the 2018-2019 affiliation year.

Export P.O.

19. After you have confirmed the total is correct, you will have the option to View your Invoice(s), Pay your Invoice(s), or to Pay your Invoice(s) Later.

- **View Invoice-** this will take you directly to your invoice where you can view all detailed information and print your invoice.
- **Pay Invoice** – this will take you directly to where you can pay using a Credit Card or enter in your PO number.

View Invoice(s)

Pay Invoice(s)

***Note:** A PO is not a form of payment, but rather a promise to pay an invoice. Students will not be affiliated FCCLA members until a check or credit card payment is received by National FCCLA.*

Pay Invoice(s) Later

- **Pay Invoice(s) Later-** this will exit the screen and keep you on the Members tab.

Please send all payments to the address that appears on the top of your invoice.