A. **Introduction:**

   1. **While the Faculty Adviser, FA, would like to eliminate payments & data collection, some preparation is required to use OIS, the DMD Online Induction System.**

      a. **A chapter financial account, <u>not</u> on the school system.**
          The school is not going to allow PayPay access to their system.

      b. **A PayPal account that's linked to that financial account.**
          This PayPal account <u>must</u> be dedicated to OIS, who will capture/process all error messages.

      c. **Highly recommended is a separate email address for OIS messages**
          Besides the students asking OIS-related questions, the OIS System, PayPal and DMD Central Office will all be sending OIS-relevant information and questions. Best to have these elsewhere from your already-busy email box.

B. **Steps to Implement OIS "connection"**

   1. **Unless the chapter is <u>only</u> on OIS, we suggest establishing a Virtual Co-Chapter.**
      Call the DMD Executive Director to discuss this practicality.

   2. **Complete the FA OIS Agreement**
      This is the "sign-on" document that explains responsibilities of both parties.

   3. **Submit the Agreement to Central Office and obtain your CompositeID**
      This is the identifying unique to your campus that permits OIS to process your information uniquely.

   4. **Configure PayPal for OIS use.**
      There are a couple of switches to set in your account to support OIS operation.   We'll provide instructions and help you walk through it when you're ready.

   5. **Prepare your InviteID list.**
      We will explain what to do with the list of students to invite and how to convey that information to OIS.

      a. **A sample template to compute InviteID's unique to your campus.**
          This provides a unique private document that does not reveal the student's privacy information.

      b. **A sample Invitation (merge) Letter to invite the students.**
          It invites the students, informs them of their InviteID, explains the CompositeID and the URL to use.

   6. **Determine an end-date 'Expiration Date' for the students to reply.**
      There is a point where you must know the group with which you are dealing.

   7. **Decide if there will be an on-campus ceremony to invite them to.**
      This is where you decide: one resident group vs virtual or both.

C. **Solution Attributes**

   1. **Qualification by Registrar thru FA**

2. **FA Uploads with Unique InviteID**

3. **FA Invites Selected Students**

4. **Student "Logon" with InviteID**

5. **Bylaws Presented, Pledge Required**

6. **Payment is Rendered (w/selected shipping)**

7. **Member # issued; materials shipped**

8. **Three emails finalize the event**

   a. **PayPal accepts payment**

   b. **OIS shows Member # or Alumni ID**

   c. **UPS Informs of tracking**

D. **Control**

   1. **FA controls eligibility & invitations**

   2. **FA controls duration of invitation cycle**

   3. **FA retains desire level of campus ceremony**

   4. **FA controls costs & price**

   5. **Student verified through InviteID**

   6. **Digital signature via security question**

   7. **Student does the data entry**

   8. **System requires PayPal payment**

   9. **Ships within 1-2 business days**

   10. **Invoice comes to FA with data from students**

E. **Payments**

   1. **Student payment shows in PayPal Acct**

   2. **Pending payments (eChecks) delay completion**

   3. **Incoming funds include any dues & assessments**

   4. **Invoiced at time a batch is shipped**

   5. **All funds already in chapter's PayPal**

   6. **Payment to CO via PayPal to PayPal transfer**

   7. **Funds easily moved, PayPal to Bank Acct, for other use**

F. **Student Sees . .**

1. **Chapter's Regular Membership Fee**
   Would include dues, regalia & chapter fee

2. **Plus $2 add-on for DMD OIS costs**

3. **Selects & Pays Shipping Costs**

4. **Selects method of payment**

5. **Gets a tracking # in 1-2 business days**

G. **OIS Limitations**

1. **Just adding the second school.**

2. **Special handling is required for: APO's, USPS, POB, International**

3. **Bulk ships to campuses a separate version**

H. **What's in it for the FA?**

1. **No membership order form**

2. **No data entry spread sheet**

3. **No student payments**

4. **Improved cash flow**

5. **Improved data collection**

6. **Ease in completing Chapter Reports**
   OIS will provide # of Invites, Solds and Acceptance Rate.
   PayPal will provide the dollars involved.

I. **What's the FA requirements?**

1. **Open a pair of accounts**

2. **Learn to use OIS**

3. **Follow the protocols**

4. **Your Virtual Chapter is separate from your Campus Chapter and its ceremony.**
   That does not prevent you from inviting the OIS members to be recognized at your ceremony.