

# Adding New Leaders in the Chapter Portal site

1. Login to the Chapter Portal site (<https://chapter.aia.org>) using your website credentials.
2. Go to My Chapters tab.
3. Select your Community Group (Component).
4. Select the “Chapter Info” tab.

The screenshot shows the 'AIA Chapter Portal' interface for 'AIA Fort Lauderdale'. The 'Chapter Info' tab is selected, displaying a form for 'Directory Information' and a 'Leadership' section. The 'Directory Information' form includes fields for Directory Address, City, State, Country, Zip Code, Website, and social media profiles. The 'Leadership' section shows a table of 21 items, sorted by Term End Date, with columns for Contact, Role, Position Title, Term Start Date, and Term End Date. A 'New' button is visible in the top right corner of the Leadership section.

| Contact                    | Role  | Position Title           | Term Start Date | Term End Date |
|----------------------------|-------|--------------------------|-----------------|---------------|
| <a href="#">Leon Cases</a> | Other | Immediate Past President | 1/1/2022        | 12/31/2022    |

5. Scroll down to the “Leadership” section.
6. Select “New”.

The screenshot shows the 'New Leadership' modal form overlaid on the Leadership section. The form has a title 'New Leadership' and a close button (X). It contains the following fields:

- \* Contact: Search Contacts... (with a search icon)
- \* Role: A dropdown menu currently showing '--None--'
- Position Title: A text input field
- \* Term Start Date: A date picker field
- Term End Date: A date picker field

A red arrow points from the 'New' button in the background to the 'Contact' field in the modal. A red 'Save' button is located at the bottom center of the modal.

7. In popup, add Contact, Role, Position Title, Term Start Date and Term End Date. Select Save. Here is a video showing how to add a new leader: <https://app.screencast.com/vU3CKTTx6JGIJ>.
  - a. **NOTE on CONTACT:** there are a lot of duplicate Contact records and same name Contact records in the database.
    - i. The easiest way to find the member's correct Contact record is to use their AIA Number to search for the Contact. You can find this number on the "Active Member Roster" report.
    - ii. You can use the First and Last Name of the member to search but make sure you are selecting the correct Contact record before saving the record. If you find you have added the incorrect Contact record, reach out to your Component Engagement resource for assistance as you cannot delete or edit a record after adding.
  - b. **NOTE on ROLE:** The Role field is a dropdown list. You must choose one of the available fields to complete the process.
  - c. **NOTE on POSITION TITLE:** The Position field is a text field to allow you to enter the title you use to designate a leader for a particular position.
  - d. **NOTE on TERM DATES:** While only the Term Start Date is required, we suggest adding a Term End Date for all Roles except Staff.
8. After adding all leaders you want to report, reach out to your Component Engagement resource to let them know the process has been completed. The list is below.

#### **State components and U.S. territories**

2500 or more members - Jen Schlueter - [JenSchlueter@aia.org](mailto:JenSchlueter@aia.org)

1000-2499 members - Amy Richards - [AmyRichards@aia.org](mailto:AmyRichards@aia.org)

Less than 1000 members - Ann Dorough - [AnnDorough@aia.org](mailto:AnnDorough@aia.org)

#### **Staffed local domestic components**

1000 or more members - Amy Richards - [AmyRichards@aia.org](mailto:AmyRichards@aia.org)

Less than 1000 members - Ann Dorough - [AnnDorough@aia.org](mailto:AnnDorough@aia.org)

#### **All-volunteer domestic components**

Ruben Ramales - [RubenRamales@aia.org](mailto:RubenRamales@aia.org)

#### **International components**

Jen Schlueter - [JenSchlueter@aia.org](mailto:JenSchlueter@aia.org)