

BETABASE FREQUENTLY ASKED QUESTIONS FOR CHAPTERS

This document is intended for chapter officers and Advisors as we prepare for the transition to BetaBase.



BETABASE OVERALL

WHO WILL HAVE ACCESS TO BETABASE?

The full membership, including collegiate members and New Members will have access to BetaBase. Each individual member's views and functionality will be customized to their membership status, officer roles, etc.

SHOULD I USE MY CHAPTER OFFICER/ADVISOR GMAIL ACCOUNT TO CREATE MY BETABASE LOGIN?

We ask that all chapter leaders and Advisors with role-specific emails update their email address in their member profile before June 25, 2024, to a personal email address that is unique to them and not associated with a position email.

SOME OF OUR CHAPTER MEMBERS DON'T HAVE EMAIL ADDRESSES LISTED IN THEIR PROFILE. WILL THEY STILL BE ABLE TO ACCESS BETABASE?

After launch, Pi Phi will communicate with chapters about members who did not receive a BetaBase invitation and find alternative ways to invite them to the portal.

WILL CHAPTERS STILL USE GREEKBILL TO INVOICE DUES AND FEES TO COLLEGIATE MEMBERS?

Yes! There will be no changes to how chapters utilize greekbill to invoice their members. Greekbill will continue to integrate with BetaBase for accurate Automatic Financial Probation (AFP) record keeping.

CAN CANADIAN CHAPTERS USE BETABASE?

Yes! BetaBase will be available to all chapters, including those in Canada. BetaBase will offer Canadian chapters the same functionality as chapters in the U.S.



I'VE HEARD THERE IS A "FREEZE PERIOD" BETWEEN JUNE 25 AND JULY 22, 2024. WHAT IS THIS?

On June 25, Pi Phi will begin our final data export from our current database to our new database, Salesforce. This is a common occurrence in any database transition. After that date, many of the systems that currently interact with our database will be turned off. This includes activities such as updating your Member Profile, Sister Search, and eReports. Once members begin accessing the new portal, BetaBase, in July, database activities will be restored. Pi Beta Phi has planned for this period and the general member will likely not notice significant disruptions. We recognize that the freeze will create limitations for chapters and appreciate your patience during this transition.

HOW WILL MY CHAPTER RECEIVE RECRUITMENT INFORMATION FORMS (RIFS) OVER THE SUMMER?

RIFs submitted between June 25 and July 22 will be emailed directly to your chapter's pibetaphi.org email address (ex: akalpha@pibetaphi.org). Headquarters will also be able to pull a bulk excel export for you during this time. Please coordinate between the Chapter President and Recruitment Team to ensure you have a plan for forwarding RIFs from the chapter's email address. If your chapter cannot access your chapter email address, the Chapter President should contact Headquarters for assistance. After July 22, you'll be able to view and export RIFs submitted to your chapter in the BetaBase portal.

CHAPTER ROSTER MANAGEMENT

WILL OUR CHAPTER ROSTERS BE AUTOMATICALLY LOADED INTO BETABASE?

Yes! Chapters do not need to export or import their existing chapter rosters into BetaBase. For the smoothest transition, we recommend all chapters update their roster in eReports before June 25, 2024. After that date, any roster changes will need to be held until BetaBase is available for chapter leaders on July 22. When you access BetaBase on July 22, you will be able to view and update your chapter roster again in the new system.



WHAT IF I NEED TO MAKE A ROSTER CHANGE BETWEEN JUNE 25 AND JULY 22?

Hold onto any roster changes and member status change paperwork until after you've accessed BetaBase on July 22. Once in the portal, you'll be able to update member statuses and set the appropriate effective date if it has already passed.

I NEED A COPY OF MY ROSTER BETWEEN JUNE 25 AND JULY 22, WHAT SHOULD I DO?

If you know you'll need a copy of your chapter roster during the freeze period, you may want to export a copy from eReports before June 25, 2024. If that date has passed and you have an urgent need for your roster, contact ereports@pibetaphi.org for more assistance.

IS IT TRUE THAT MEMBERS WILL BE ABLE TO ELECTRONICALLY REQUEST MEMBER STATUS CHANGES IN BETABASE?

Yes! One of the most exciting updates coming with BetaBase is the ability for all members to access the portal and request changes to their membership status via electronic forms. Starting July 25, members can request Undergraduate Alumna Status (UAS), Immediate Financial Dismissal (IFD) and Resignation all within the portal. Upon their request, select chapter leaders and advisors are notified and/or prompted for review directly in the portal. This change will allow for more effective and efficient roster management in our Pi Beta Phi chapters!

CHAPTER REPORTING

I DON'T SEE THE SAME REPORTS AVAILABLE IN BETABASE AS WERE PREVIOUSLY AVAILABLE IN EREPORTS. ARE THESE REPORTS STILL REQUIRED AND WHEN WILL THEY BE AVAILABLE?

At launch, some of the reporting forms you typically complete may not yet be available in BetaBase. Pi Phi will add reporting forms into BetaBase on a rolling basis this coming year. Look out for updates on your required reports in the monthly Wine and Silver Blue News!



WILL A HISTORY OF REPORTS SUBMITTED BY MY CHAPTER IN PAST YEARS BE AVAILABLE IN BETABASE?

For most reports, a history prior to July 2024 will not be available in BetaBase. If you'd like to have a copy of previously submitted reports for your chapter's records, we recommend you export those files from eReports before June 25, 2024. After that date, Pi Beta Phi Headquarters may be able to access some historical records and can assist you via email at eReports@pibetaphi.org.

CHAPTER WEBSITES

ARE THE WEBSITES IN MEMBERPLANET GOING AWAY?

After June 30, memberplanet websites will no longer be available. Chapters will now be able to manage their website directly in the BetaBase portal. We encourage chapters to set up their websites after launch in July.

WHAT INFORMATION DO WE NEED TO GET FROM OUR MEMBERPLANET WEBSITE PRIOR TO THE TRANSITION TO BETABASE?

Prior to June 30, chapter leaders should save any copy, photos or graphics from their memberplanet site—whether you plan to include the content on your new site or simply don't want to lose the information.

WILL WE BE ABLE TO CUSTOMIZE OUR CHAPTER WEBSITE?

The new system provides a simpler, easy-to-use site builder. Similar to memberplanet, each website can be customized with copy and photos specific to your chapter.

ONLINE LEARNING CENTER

WHO HAS ACCESS TO THE ONLINE LEARNING CENTER?

All New Members, chapter leaders and Alumnae Advisory Committee (AAC) members will have access to the Online Learning Center.

