Step-by-Step Affiliation Instructions

Before you begin

Gather all the information you will need, including your chapter's charter number and password. You will be asked to provide the following information about each member that you affiliate:

- Classification (grade or class in school)
- Gender
- Race
- Email address (optional)
- Phone number (optional)

Take the time to read the information provided before you proceed. It is particularly important to understand a few unique features of online affiliation:

- You may exit the program at any time and finish the process later.
- When your information is complete, you will click the "Done" button.
- **Once you submit an application, you will not be able to remove affiliated members for any reason**. Your chapter is obligated to pay for all students and adults entered into the system. It is strongly recommended that you collect each person's affiliation dues prior to adding them to the affiliation system.

Accessing the Chapter Affiliation System

1. Go to www.hosa.org.

2. Click on "Login" to access the system.

3. Click on "Access Chapter Advisor Service."

4. Enter your charter number and password, and then click "Login."

5. To begin entering members, select "Chapter Affiliation" from the main menu.
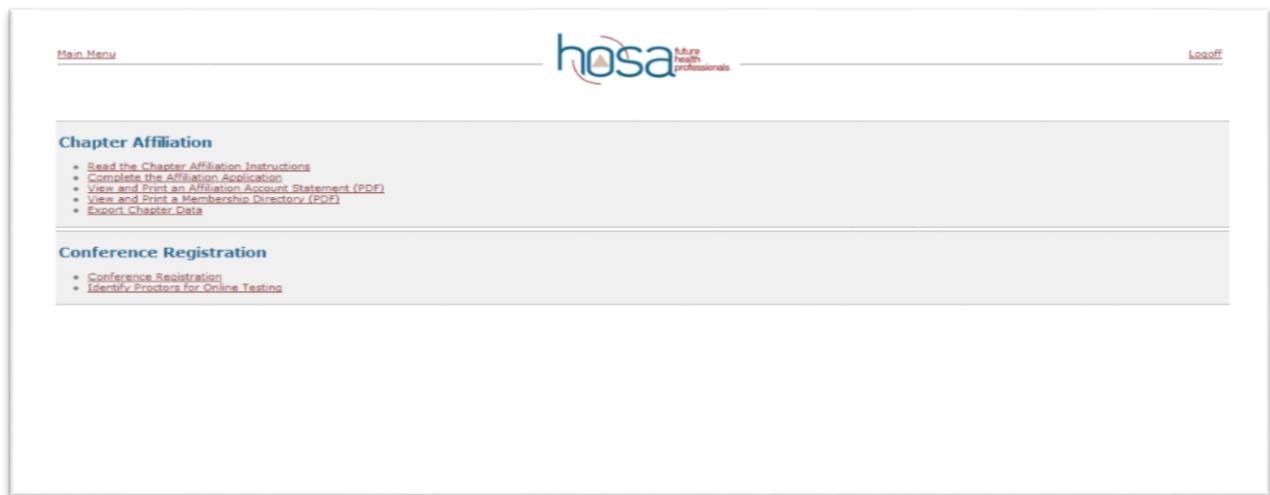
Entering Your Chapter Affiliation
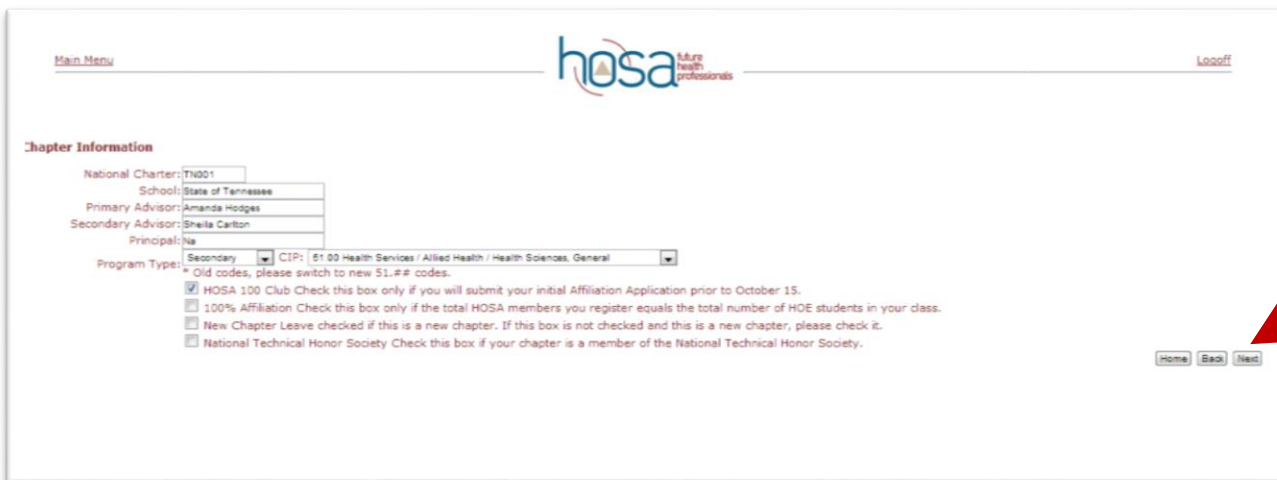
Welcome Screen

6. Carefully read the entire "Welcome" screen.
   - **Pay close attention to the last section, as it explains that you will be charged for any duplicates that you enter.**
     o It is highly recommended that you print an updated roster each time that you login to the system to add students in order to track which students you have already affiliated.
     o You may wish to keep a separate checklist showing which students have paid their dues, which students have been entered into the system, etc.

7. Click "Next" to enter the affiliation system.
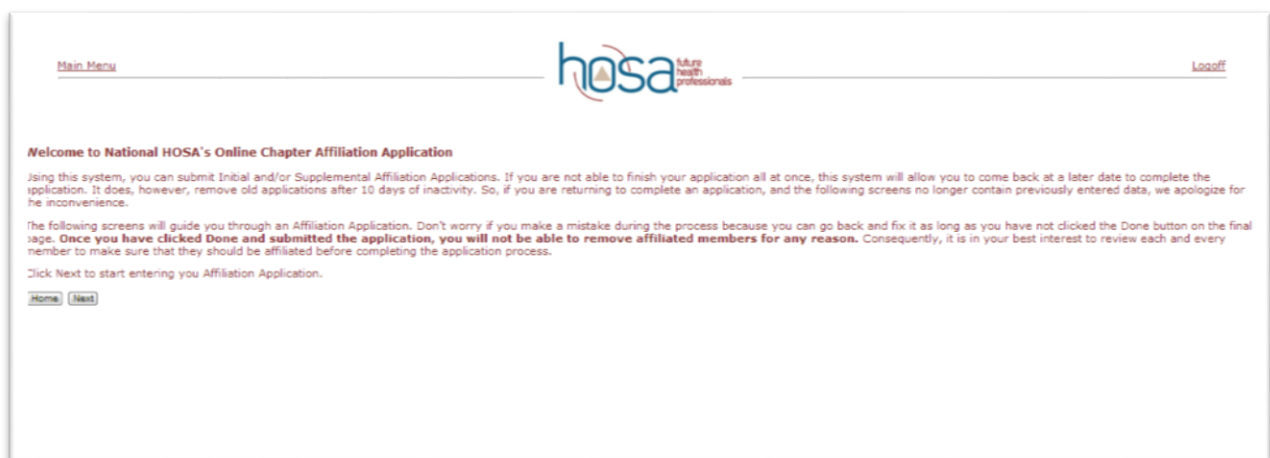
Chapter Information

8. Complete/update you chapter information. If your chapter has previously affiliated online, much of the information will already be complete.

   - National Charter number
   - School: please enter the <u>full</u> name of the school
   - Name of advisor: please enter one name. You will have an opportunity to identify other chapter advisors when you enter their membership information.
   - Name of principal, dean, or administrator
   - CIP Classification of Instruction Programs (This should default to 51.00. If not, you should select 51.00.)
   - Program type: if the chapter contains a mixture of members, to what division to most members belong.
   - HOSA 100 Club: check this box if affiliation is submitted on or before Oct. 15.
   - 100% Affiliation: check this box if all students enrolled in the health science technology education program are members of HOSA.
   - New chapter: check this box if this chapter has not been previously assigned a charter number.
   - National Technical Honor Society: check this box if this chapter is a member of the National Technical Honor Society.

9. When you finish, click "Next."

Billing Information - Shipping Information

10. Enter/update your chapter's billing and shipping information on the appropriate screen. There will be two separate screen that will require information to accommodate your chapter's needs.
    - First and last name of chapter advisor (for chapter with more than one advisor, please enter the lead advisor's name here)
    - Organization - School name
    - Address - School address
    - Phone/Fax - Main school number or the direct line to classroom
    - Cell - Lead advisor's cell phone number
    - Email - Lead advisor's email address

11. If your billing and shipping addresses are the same, select the box next to that option to avoid re-entering the same information on a separate screen.

12. If your billing and shipping addresses are different, you will be directed to a separate screen where you will enter the physical shipping address for your school.

13. When you have completed all billing and shipping information, click "Next."

Chapter Demographics

Often, government agencies and health care groups request information about the characteristics of the members of our organization. On occasion, special scholarships or opportunities are available to members of a certain group.

14. Provide the information for the national organization regarding the demographics of your chapter.
15. Once you have completed the demographic data, select "Next" to begin entering member information.

Returning Members

16. If your chapter affiliated members last year, you should see a list of those members with a checkbox to the left of each member. If a member on the list is affiliating again this year, click the checkbox to place a check next to their name.

17. Once all returning members have been checked, click "Next". You will have the opportunity to update the contact information and grade classification on the subsequent screen.

Adding New Members

This screen shows all of the members on **this** affiliation application. If you have already completed the affiliation process for other members, they will not be shown here.

18. If you selected members from last year, you should see them listed. For the 2017-18 school year, the "Gender" and "Race" fields will be incomplete for any returning members. Both fields must be completed to submit your affiliation application.

19. The first row of the list of members will always be blank. Enter new members in this row and click the "+" button at the end of the row to add the member. Member information requested includes:

    a. Member type: Select the appropriate member type.
    b. Gender
    c. Race
    d. Classification: Current level of educational enrollment. Professional members may be classified as "Not Applicable."
    e. Name

20. The returning members selected on the previous screen should automatically appear on this screen. Complete any missing or modified data, and be sure to update their "Class" to reflect their current grade level.

21. Add new members by entering their data in the first row of the table below and clicking "+."

22. To delete a member, click the "-" button at the end of the member's row.

23. If you see any errors above the membership list or fields outlined in red, you **must correct the errors before the system will save your members. Leaving the browser without correcting the errors will result in data being lost.**

24. Use "Save All Changes" to save any changes you make to member information.

25. When all members are complete and no errors are present, click "Next" to continue.
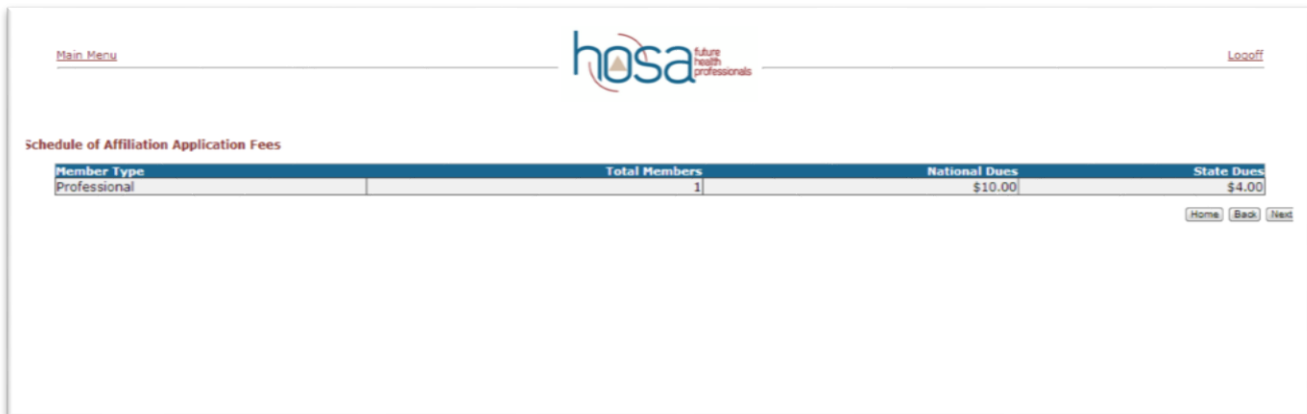
Application Fee Schedule

This screen will show how many members are on your affiliation application and what the state and national association dues total will be.

26. Carefully review the charges for your newly added members. If you agree, select "Next."
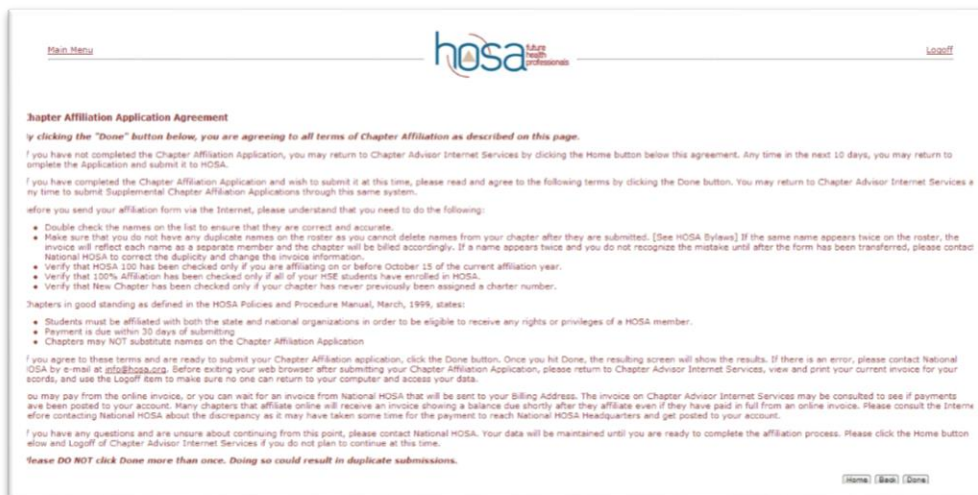

Agreement Page

This screen provides one final opportunity for you to confirm that the membership information being submitted is completely correct.

27. If you have not completed the initial application and are going to resume at another time to add more names before forwarding, select "Home."

28. If you have completed the application and have verified it for accuracy, select "Done."

29. If you select done, you may add supplemental members at another time by selecting "Chapter Affiliation" from the main menu.

View Account Statement

30. After you submit your application by selecting "Done," you may print out an invoice for your chapter dues by selecting "View Account Statement" from the main menu.

View Membership Directory

31. Select this option from the main menu to print out a chapter membership list.