

# 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](http://www.hosa.org).
2. Click on "Login" to access the system.

3. Click on "Access Chapter Advisor Service."

The screenshot shows the HOSA website home page. At the top, there is a navigation bar with a "Home" link on the left and a "Login" link on the right. The HOSA logo, which includes the text "hosa" and "future health professionals", is centered. Below the navigation bar, the page is divided into several sections, each with a title and a brief description. The sections are: "Take a Test", "Online Testing Proctors", "Register as an Alumni Member", "Subscribe to the HOSA Newsletter", and "Local Chapter Advisors". Each section has a corresponding link on the right side. A red arrow points to the "Access Chapter Advisor Services" link in the "Local Chapter Advisors" section.

[Home](#)  [Login](#)

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**Take a Test**  
Are you competing in a HOSA Competitive Event? If so, this is the right place. The proctor should be helping you. Click Take My Test below to proceed to the login page. Make sure you listen and follow the proctor's instructions.  
[Take My Test](#)

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**Online Testing Proctors**  
Are you helping HOSA's Competitive Events program by serving as a proctor? HOSA appreciates your help. Click Proctor a Test below to access the system. You will find detailed instructions on how to complete the testing process once you login.  
[Proctor A Test](#)

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**Register as an Alumni Member**  
Once you register as an alumni member, you will not have to re-register each school year. If you happen to move, please come back and update your contact information.  
[New Alumni Registration](#) [Update Contact Information](#)

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**Subscribe to the HOSA Newsletter**  
Keep up with the latest news by signing up to have the HOSA Newsletter delivered directly to your inbox. Click Subscribe below to continue.  
[Subscribe](#)

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**Local Chapter Advisors**  
If you are the advisor to a local HOSA chapter, follow this link to complete Member Registration, register for regional, state, or national conferences, and identify proctors for online testing.  
[Access Chapter Advisor Services](#)

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

The screenshot shows the HOSA website login page for Local Chapter Advisors. At the top, there is a navigation bar with a "Home" link on the left and a "Login" link on the right. The HOSA logo, which includes the text "hosa" and "future health professionals", is centered. Below the navigation bar, the page is divided into several sections. The first section is "Local Chapter Advisors", which contains a form with two input fields: "Charter:" and "Password:". Below these fields is a "Login" button. The second section is "Take a Test", which contains a form with two input fields: "ID:" and "Password:". Below these fields is a "Login" button. The third section is "Online Testing Proctors", which contains a form with two input fields: "Username:" and "Password:". Below these fields is a "Login" button. The fourth section is "Update Alumni Registration", which contains a form with two input fields: "E-mail Address:" and "Password:". Below these fields is a "Login" button. At the bottom of the page, there is a "Submit" button.

[Home](#)  [Login](#)

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**Local Chapter Advisors**  
Charter:  Password:  [Login](#)

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**Take a Test**  
The test proctor will either enter your access ID and password for you or will provide both to you for you to enter. The ID and password are case sensitive and consist of the letters A-F and digits 0-9. If you have any trouble logging in, ask the proctor for assistance.  
ID:  Password:  [Login](#)

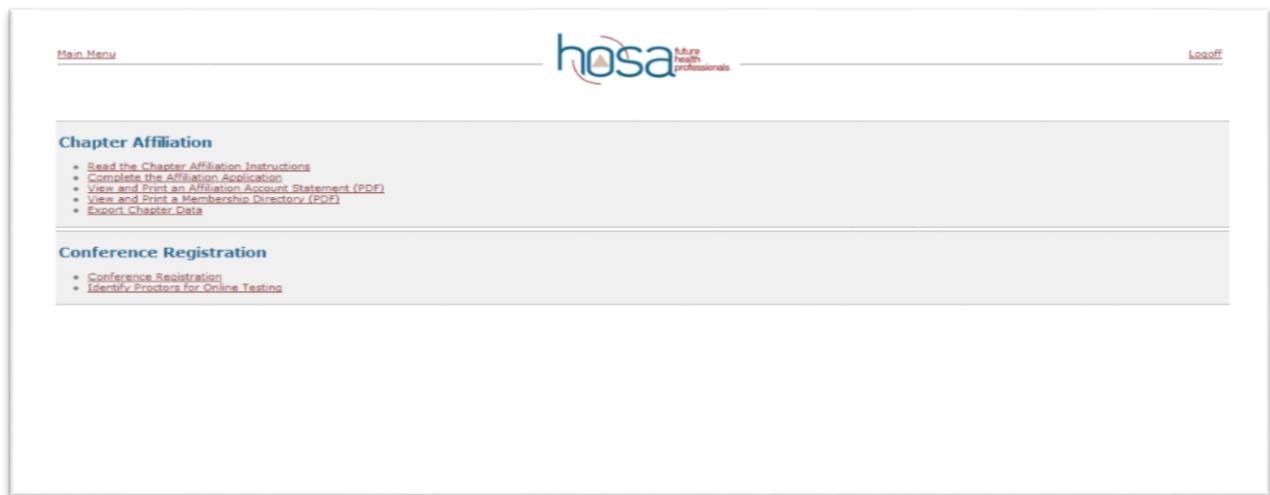
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**Online Testing Proctors**  
You should have received an e-mail including both a direct link to the proctor page and security credentials in case you do not have e-mail access on the computer available while you are proctoring the test. Enter those credentials below to access the system. Usernames and passwords are both case sensitive. The password consists of the letters A-F and the digits 0-9.  
Username:  Password:  [Login](#)

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**Update Alumni Registration**  
Make sure you use the e-mail address you provided during registration.  
E-mail Address:  Password:  [Login](#)  
If you forgot your password or registered prior to HOSA using passwords for alumni registration, fill in your e-mail address below to have a password e-mailed to you.  
 [Submit](#)

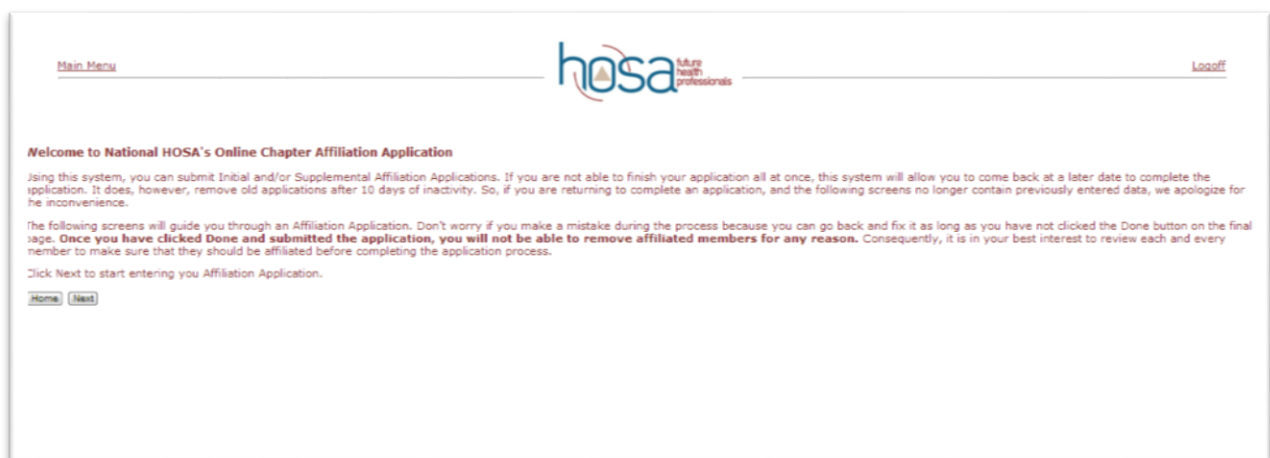
5. To begin entering members, select "Chapter Affiliation" from the main menu.



## Entering Your Chapter Affiliation

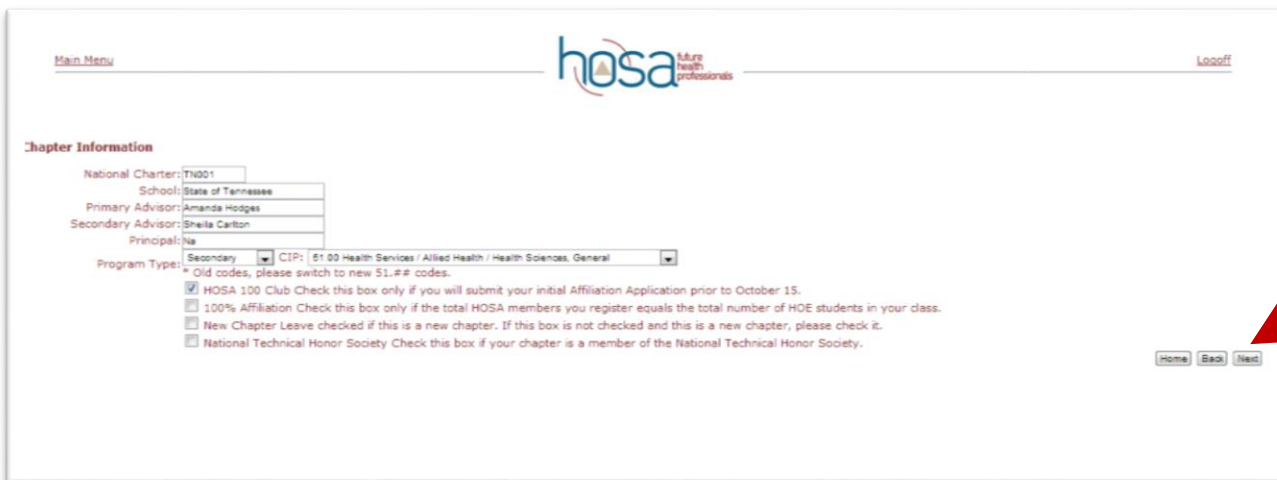
### Welcome Screen

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.**
    - 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.
    - 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 your chapter information. If your chapter has previously affiliated online, much of the information will already be complete.
  - National Charter number
  - School: please enter the full 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."



The screenshot shows the HOSA chapter information form. At the top, there is a navigation bar with "Main Menu" on the left, the HOSA logo in the center, and "Logout" on the right. The form is titled "Chapter Information" and contains several fields: "National Charter" (TN001), "School" (State of Tennessee), "Primary Advisor" (Amanda Hodges), "Secondary Advisor" (Sheila Carlton), and "Principal" (Na). Below these fields is a "Program Type" dropdown menu set to "Secondary" and a "CIP" dropdown menu set to "51.00 Health Services / Allied Health / Health Sciences, General". A note below the CIP dropdown states: "Old codes, please switch to new 51.## codes." There are four checkboxes with labels: "HOSA 100 Club" (checked), "100% Affiliation" (unchecked), "New Chapter Leave" (unchecked), and "National Technical Honor Society" (unchecked). Each checkbox has a brief instruction. At the bottom right of the form, there are three buttons: "Home", "Back", and "Next". A large red arrow points to the "Next" button.

## 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."

The screenshot displays the HOSA Future Health Professionals web application interface. At the top, there is a navigation bar with a "Main Menu" link on the left, the HOSA logo in the center, and a "Logout" link on the right. The main content area is divided into two sections: "Billing Information" and "Shipping Information".

**Billing Information**

First Name:  Last Name:   
Organization:   
Address:   
  
City:  State:  Zip:   
Phone:  Fax:   
Cell Phone:   
E-mail:

**Shipping Information**

☒ Shipping address and Billing address are the same.

At the bottom right of the form, there are three buttons: "Home", "Back", and "Next". A red arrow points to the "Next" button.

## 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.

The screenshot shows a web form titled "Chapter Demographics Information" with the hosa logo and "future health professionals" tagline. At the top left is a "Main Menu" link and at the top right is a "Logout" link. The form contains five numbered sections: 1. Total Health Science Education Participants, 2. Disadvantaged, 3. Handicapped, 4. Displaced, and 5. Non-traditional. At the bottom of the form are three buttons: "Home", "Back", and "Next". A red arrow points to the "Next" button.

## 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.

The screenshot shows a web form titled "Select Any Previous Members Affiliating Again This Year" with the hosa logo and "future health professionals" tagline. At the top left is a "Main Menu" link and at the top right is a "Logout" link. Below the title is a paragraph: "If any of your previous Members shown below are Affiliating this year, place a check in the box next to their information. When you click Next, you will have the opportunity to update their information." Below this is a table with four columns: "Selected", "Type", "Name", and "Contact". The table contains three rows of data. The first row has a checked checkbox, "PR", "Carlton, Bob", and "bob.carlton@hcahealthcare.com". The second row has an unchecked checkbox, "SS", "Dales, Mackenzie", and "-". The third row has an unchecked checkbox, "PS", "Garner, Julie", and "julietnhosa@gmail.com". At the bottom right of the form are three buttons: "Home", "Back", and "Next". A red arrow points to the "Next" button.

Selected	Type	Name	Contact
<input checked="" type="checkbox"/>	PR	Carlton, Bob	bob.carlton@hcahealthcare.com
<input type="checkbox"/>	SS	Dales, Mackenzie	-
<input type="checkbox"/>	PS	Garner, Julie	julietnhosa@gmail.com

## 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.

Membership List

- Add new members by entering their data in the first row of the table below and clicking "+".
- For members continuing from last year, complete any missing or modified data and click "Save All Changes".
- To delete a member, click the "-" button at the end of the member's row.

Type	Gender	Race	Class	First Name	Last Name	Phone	Email
Professional			Not Applicable	Bob	Carlton		bob.carlton@hosa.net

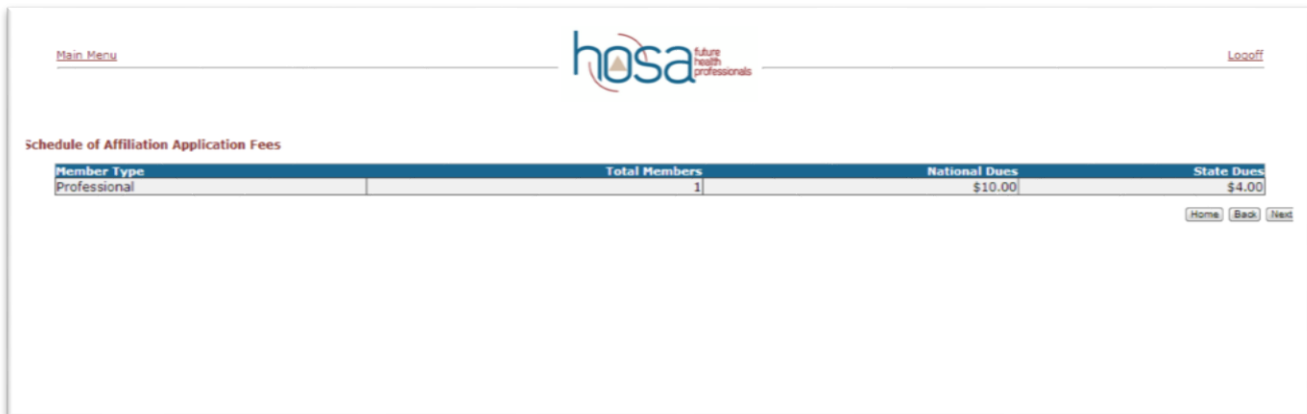
Save All Changes


Home Back Next

## 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."



Main Menu  Logout

**Schedule of Affiliation Application Fees**

Member Type	Total Members	National Dues	State Dues
Professional	1	\$10.00	\$4.00

Home Back **Next**

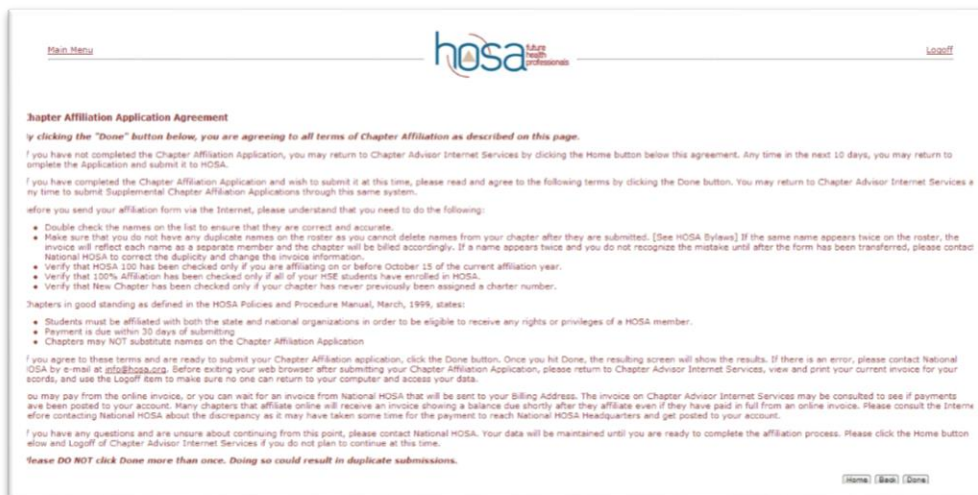
## Agreement Page


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.



Main Menu  Logout

**Chapter Affiliation Application Agreement**

*By clicking the "Done" button below, you are agreeing to all terms of Chapter Affiliation as described on this page.*

If you have not completed the Chapter Affiliation Application, you may return to Chapter Advisor Internet Services by clicking the Home button below this agreement. Any time in the next 10 days, you may return to complete the Application and submit it to HOSA.

If you have completed the Chapter Affiliation Application and wish to submit it at this time, please read and agree to the following terms by clicking the Done button. You may return to Chapter Advisor Internet Services any time to submit Supplemental Chapter Affiliation Applications through this same system.

Before you send your affiliation form via the Internet, please understand that you need to do the following:

- Double check the names on the list to ensure that they are correct and accurate.
- Make sure that you do not have any duplicate names on the roster as you cannot delete names from your chapter after they are submitted. [See HOSA Bylaws] If the same name appears twice on the roster, the invoice will reflect each name as a separate member and the chapter will be billed accordingly. If a name appears twice and you do not recognize the mistake until after the form has been transferred, please contact National HOSA to correct the duplicity and change the invoice information.
- Verify that HOSA 100 has been checked only if you are affiliating on or before October 15 of the current affiliation year.
- Verify that 100% Affiliation has been checked only if all of your HSE students have enrolled in HOSA.
- Verify that New Chapter has been checked only if your chapter has never previously been assigned a chapter number.

Chapters in good standing as defined in the HOSA Policies and Procedure Manual, March, 1999, states:

- Students must be affiliated with both the state and national organizations in order to be eligible to receive any rights or privileges of a HOSA member.
- Payment is due within 30 days of submitting.
- Chapters may NOT substitute names on the Chapter Affiliation Application

If you agree to these terms and are ready to submit your Chapter Affiliation application, click the Done button. Once you hit Done, the resulting screen will show the results. If there is an error, please contact National HOSA by e-mail at [info@hosa.org](mailto:info@hosa.org). Before exiting your web browser after submitting your Chapter Affiliation Application, please return to Chapter Advisor Internet Services, view and print your current invoice for your records, and use the Logout form to make sure no one can return to your computer and access your data.

You may pay from the online invoice, or you can wait for an invoice from National HOSA that will be sent to your Billing Address. The invoice on Chapter Advisor Internet Services may be consulted to see if payments have been posted to your account. Many chapters that affiliate online will receive an invoice showing a balance due shortly after they affiliate even if they have paid in full from an online invoice. Please consult the Internet before contacting National HOSA about the discrepancy as it may have taken some time for the payment to reach National HOSA Headquarters and get posted to your account.

If you have any questions and are unsure about continuing from this point, please contact National HOSA. Your data will be maintained until you are ready to complete the affiliation process. Please click the Home button above and Logout of Chapter Advisor Internet Services if you do not plan to continue at this time.

**Please DO NOT click Done more than once. Doing so could result in duplicate submissions.**

Home Back **Done**



## 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.

