

The State Council and Chapter Portal is a functional tool that allows state and chapter leaders to manage officers, leaders and chairpersons. Use the following instructions and guidelines to help you navigate adding leader roles. A step-by-step video is also located in the Learning Library in the state/chapter portal.

Individuals with access to add leaders include the State Council president and president-elect and chapter president and president-elect.

Important note on editing leader roles after the term start date:

1. You must inform Component Relations if any of the following leaders change after they start their term on Jan. 1:
 - a. President
 - b. President-elect
 - c. Secretary
 - d. Secretary/Treasurer
 - e. Treasurer
 - f. Immediate Past President
 - g. Membership Chair

2. **The aforementioned roles are assigned special licenses allowing access to various areas within the State and Chapter Portal. If a member in one of these roles ends their term early, Component Relations will manage the licenses and ensure the license is transferred to the new leader accordingly.**

Adding a new Leader Role

1. **Log in to your Membership Portal Personal Snapshot**, scroll to the bottom and select your state council or chapter.
2. Select the **Leader Updates tab**. Here you will view your state council or chapter leaders.
3. **To add a new leader**, select **New** to the right of the page.
4. **Select Chapter and click next** to go to the *New Account Affiliation: Chapter screen*.
5. **In the Parent Account field**, type your state council or chapter name:
 - For example, Texas State Council or East Texas Chapter.
6. **In the Account field, type the leader name or member ID**
 - Note: If you type the full name, and there is more than one – for example, Mike Smith – a list of members and ID numbers will populate, and you can select the current account.
7. **Next, select the role from the Available box**. Scroll to find the role. Select and click the forward arrow and it will populate in the Chosen box. **Only choose one leadership role. Each leader role is entered individually.**
8. **Select the Start Date and End Date**
 - **Incoming leaders should start with 1/1/2025 and end with 12/31/2025 – or if a multi-year term, it must end 12/31.**
9. **Click Save & New** if you are adding multiple leaders. **Click Save** if you are only entering one person.
10. **Once you click Save** the leaders will populate in Leader Updates.

Editing Existing Leader Roles

1. Select the leader you wish to edit, click the down arrow in the far-right column and **select Edit**.
2. If you need to change the role, **click the role in the Chosen box** and select the back arrow. Then scroll to the correct role, select, and **click the forward arrow**.
3. If you need to change the dates, adjust accordingly.
4. **Click Save**.