

Instructions for Using the Web Portal to Submit Your Officer Report

The Secretary is responsible for obtaining the information for all officers including: name, officer position, and e-mail address. Submit this information to your Counselor to log into the Web portal.

At this time, counselors are the only officers with access to the Web portal. To begin the process, counselors go to the KDP Members-Only Web Portal at wp.kdp.org (or use the box on the front page of the KDP Web site).

- 1) On the left, select Login. Use your e-mail address for your username and your member ID for your password.
- 2) Select **Chapter Management** from the menu options on the left.
- 3) Select your chapter and then click the **Officers** button to display a list of all your officers.
- 4) To add new officers, click the **Members** button. *(If an officer does not appear on this list, he or she is inactive or not yet initiated. Please contact the member about renewing his or her membership. If not yet initiated, contact KDP and ask for a record to be created for the officer.)*
- 5) Look through the list and find the member you wish to add as an officer, write down or copy his or her e-mail address, and then click the **Officers** button.
- 6) Scroll down to the bottom of the list and click the **Add New Officer** button.
- 7) Type or paste the member's e-mail address into the E-mail search field. Click the **Search** button, and then click **Select Member**. Clicking **Select Member** immediately creates the officer record in CRM.
- 8) In the CRM record, specify the person's title/role. Then set the correct beginning and ending dates. The default beginning date is 7/1/08 and the default ending date is 6/30/09. (If an officer started in January, change the beginning date to 1/1/08 and the ending date to 12/31/08, with replacement officers starting 1/1/09.)
- 9) Click the **Save** button. Click the **Save** button again to display the updated list of your officers.
- 10) To make additional changes to your officer list, repeat steps 5–9.

For more complete directions with screen shots, please go to:

http://www.kdp.org/pdf/chapterservices/Officer_Report_Instructions.pdf

If you have problems submitting the officers using the Web portal, call your Regional Chapter Coordinator at 800-284-3167 or e-mail mcs@kdp.org.