



PEOPLESOFT – QUICK GUIDE

STATE STAFF: SUBMITTING ONLINE ROSTERS FROM STATE TO NATIONAL

Once members have been added online to People Soft and processed through Advisor Approval they are then ready to be processed on the State level and submitted to National for final processing.

Menu Path: Membership System > Process > State Roster Approval

1. The screen will read, “Search By: State ID begins with _____”. Enter your state abbreviation in the open box (for example: AL). Click on SEARCH on the screen or click ENTER on your keyboard.
2. The chapter numbers will appear on your screen of rosters that have reached the State level of processing for your state. If you didn’t enter the members into PeopleSoft you might want to print a chapter roster or run a Batch Detail report in order to identify these members. You can use whatever method is appropriate for your state for receiving payment from your advisors and determining when to forward rosters on to National for processing. You will receive an invoice from National once the National level of processing is complete.
3. When you are ready to submit the roster to National click on any State ID on the list of chapters that appears on your State Roster Approval screen. This will pull all your state’s rosters into the State Approval screen. You can either select specific chapters to approve by clicking on the Select for Batch button by that chapter’s name or you can click on the Approve All Chapters button at the top of the list to approve all the chapters at once.
4. Click SAVE at the bottom of the screen once you are done. Watch for the word Save to appear on the upper right side of your screen.
5. Once you have saved your rosters click on Submit Roster for Processing on your menu.
6. The first time that you submit a roster for processing you will need to create a Run Control ID (a “name”) to identify the process that you will be using. Click on the Add A New Value tab. In the blank space type, “submit” and then click add. This will “name” this process. Next time you submit rosters you can just enter “submit” in the Run Control ID field in the Find an Existing Value and click on search.
7. On the roster submission screen make sure that the Processing Type is set for State (it may default to this setting). Business Unit should read “ORG”; Set ID should read “SHARE” (these should default to these settings). Your State ID should be your state abbreviation plus 4 zeros (for example: AL0000). Once these are all selected click on the RUN box at the top of the page.
8. Everything should preset on the next page. Click OK.
9. This will bring you back to the roster submission page. Click on the Process Monitor link at the top of your screen. This will take you to the Process Monitor. Click on the Refresh button, top right, until it reads “Success” under the Run Status header. Once this says Success your rosters will have been submitted to National successfully. The status of the chapters that you have processed will also show up as ST, state approved, on that chapter’s record the next time you run a Batch Detail Report for your state.