



PHI KAPPA PSI **Chapter Operations**

October 7, 2026

PHI KAPPA PSI FRATERNITY

Meeting Agenda

Upcoming Dates

Quarter & Trimester Billing

Reporting New Members

Initiation Reporting & Deadlines

Risk Management Education

Minimum Standards Requirements

Certificate of Insurance

Parent & Family Webinars

Ritual Inventory

Chapter News

Questions?

Important Upcoming Dates

PHI KAPPA PSI FRATERNITY 2026-27 YEAR AT A GLANCE		
AUGUST 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	SEPTEMBER 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	OCTOBER 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
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Semester School Census

- Fall Census Bills Due October 9th

Quarter School Census/Billing

- Census taken October 7th

Programming deadlines

- October 16th Explore Application deadline
- October 30th Pivot application deadline

Officer Transition Webinar

- October 26th

Chapter Operations Call

- Wednesday, November 18th

Quarter/Trimester Schools Upcoming Billing

Quarter and trimester schools will be billed on 10/7 which means they are due 30 days after that.

Failure to make payment within 30 days results in a fine of 10% of what is owed

Semester Schools Upcoming Bills

Semester schools were billed on 9/9 which means they are due by 10/9.

Failure to make payment by 10/9 results in a fine of 10% of what is owed

How to Report New Members

The screenshot displays the recruitment interface for Phi Kappa Psi Fraternity, divided into four main sections: Potential New Member, Bid Offered, Bid Accepted, and Deferred. The 'Bid Accepted' section is active, showing a list of members with their names, email addresses, and a 'NEW' status. A yellow circle highlights the 'Report' button in the top right corner of the 'Bid Accepted' section, with an orange arrow pointing to it. The interface also includes a search bar at the top and a 'Add Potential New Members' button in the top right corner.

Search Potential New Members

Potential New Member

No Potential New Members yet.

Bid Offered

No Potential New Members yet.

30 Bid Accepted

Kyle Williams
kylegwilly@gmail.com

Zach Yoder
yoderzach4@gmail.com

eric stojkovich
ericstojk@gmail.com

Roberto Bulleri
roberto.a.bulleri@gmail.com

Jake Gaul
jacobgaul2@gmail.com

Deferred

PNMs who may join later but not this recruitment period.

No Potential New Members yet.

PHI KAPPA PSI FRATERNITY

How to Report New Members

Quick Start Guide

How to access the Quick Start Guide

- Log into the Phi Psi Portal (portal.phikappapsi.com).
- Click on your chapter name in the top right corner of the Home page.
- Click on the "Quick Start Guide" tile.
- Refer to the videos:
 - "How do I add New Members to the Recruitment tool?"
 - <https://vimeo.com/504896383/8de1fadd6e>
 - "How do I report New Members to the Headquarters?"
 - <https://vimeo.com/504900919/78e087ce90>

Initiation Reporting

- The new member process must **not exceed six (6) weeks**.
- Initiation must be reported **within seven (7) days** to avoid a 10% late reporting fee.
 - All New Members must complete the Membership Agreement before they can be reported as initiated on Phi Psi Portal
- All Fall New Members should be reported as Initiated or Dropped New Member by **12/13**

Launcher Roster Officers Recruitment Statement ChapterDocs Minimum Standards Form Submissions Website Editor OmegaFi

Quick Start Guide

All Fields ▾ 🔍 Filter records here. Use asterisk * to perform a wildcard search. ★ Views ▾ ⬆️ Sort

View All Undergraduates

☐ Actions (1 / 44) ▾

- Send Phi Psi Portal Invites
- Update Contact's Status

	Status	Email
☒ Alex Moreira Bezerra	New Member	alexmb181@hotmail.com
☐ Austin Samson	Active	ajsamson05@gmail.com
☐ Blake Byerly	Active	farmerblake24@gmail.com
☐		

2026 – 2027 Minimum Standards Submissions

Standard	Form / Access	Completed By
Chapter Audit Submission	Chapter Audit	President (GP)
All active members complete the <i>Risk Management & General Insurance</i> module on Compass	<i>Phi Psi Portal</i> → <i>Compass</i>	<i>Progress tracked via Phi Psi Portal through Chapter Dashboards</i>
Chapter Operations Documents Submission	Chapter Operations Document	Corresponding Secretary (AG)
Minimum GPA Requirements Submission	Chapter GPA Requirements	Scholarship Chairman
Annual Budget Submission	Annual Budget	Treasurer (P)
Safe Social Event Plan Submission	Safe Social Event Plan	Risk Management Chairman
Chapter Grade Report Submissions	Chapter Grade Report Submission #1 Chapter Grade Report Submission #2	President (GP)
Completion of <i>Embark</i> by 100% of new members a. (who are initiated before 12/14/2025) b. (who are initiated before 06/14/2026)	<i>Phi Psi Portal</i> → <i>Compass</i>	<i>Progress tracked via Phi Psi Portal through Chapter Dashboards</i>
Completion of the <i>Ascend</i> officer training module on Compass within 45 days of beginning role	<i>Phi Psi Portal</i> → <i>Compass</i>	<i>President; Vice President; Treasurer; Corresponding Secretary; Fraternity Educator; Risk Management Chairman; Recruitment Chairman; Chaplain</i>
No invoices aged over 90 days for academic year	N/A	N/A
Completion of one (1) member safety educational program	Member Safety Educational Program	Risk Management Chairman
Form 990 Tax Document submitted to the IRS and National Fraternity	Form 990 Tax Document	Treasurer (P)

Risk Management Education

2026–2027 Annual Requirements

- **ALL ACTIVE MEMBERS** must complete the Risk Management & General Insurance course in Compass by 10/18/2026
- **Chapter must complete 1 Member Safety Program (Due 6/13/2027):**
 - Mental Health
 - Drug & Alcohol Abuse
 - Hazing & Fraternity Education
 - Criminal Liability & Basic Legal Concepts
 - Sexual Violence Prevention
 - Fire Prevention
 - Bystander Intervention

2026 – 2027 Minimum Standards Due Dates

Deadline #1 - Sunday, October 18, 2026

- Chapter Audit
- Chapter Operations Documents
- Chapter GPA Requirements
- Annual Budget
- Safe Social Event Plan
- Completion of Risk Management and General Insurance Module

Deadline #2 - Sunday, December 13, 2026

- Chapter Grade Report #1 (Spring 2026 Term Report)
- Completion of Embark by 100% of new members who initiated before December 13, 2026

Deadline #3 - Sunday, June 13, 2027

- Form 990 Tax Document
- Member Safety Education Program
- Chapter Grade Report #2 (Fall 2026 Term Report)
- Completion of Embark by 100% of new members who initiated between December 14, 2026, and June 13, 2027
- Chapter Community Service and Philanthropy (Pending ability of Re-Members)

Chapter Dashboards & Standards Tracking

Member Compliance

[Incomplete Agreements](#)[Embark by Member](#)[RMI by Member](#)

Forms and Modules assigned to members to be completed

Program	Description	Total Required Completion
Phi Kappa Psi Membership Agreement	All Collegiate Member are required to sign agreement once	✓ 33/33 Standard Met
Embark Program	All New Members this year are required to complete	✓ 0/0 Standard Met
Risk Management & General Insurance Program	All Returning Members this year are required to complete	⊘ 24/33 Standard Not Met

Officer Compliance

[Ascend by Position](#)

Officers are required to take ASCEND courses specific to their position within 45 days of entering their role.

Program	Total Modules Completed
Ascend Program	⊘ 2/6 Standard Not Met

PHI KAPPA PSI FRATERNITY

Certificate of Insurance

The Chapter Certificate and to request a certificate with a university or venue named as additionally insured:

1. Go to the Phi Psi Portal Resources
2. Select Chapters and Colonies Folder > Risk Management and Insurance Folder > Insurance Folder
3. Select file “Certificate of Liability Insurance”
 - Use “Additionally Insured Instructions” if your school has other request

Some Chapters have requested certificates that have been created. To find these certificates:

1. Select your chapter in the top right-hand corner next to your name
2. Select Chapter Docs
3. If a certificate has been made for your chapter, you will find it here.

Parent & Family Engagement

2026–2027 Webinar Series

Orientation for Parents & Families of New Members

- ✓ *Tuesday, October 27th @ 8:00pm ET*
- ✓ *Wednesday, March 10th @ 8:00pm ET*



Inventory of Chapter Ritual Items

Chapters will soon be asked to complete an inventory of their Ritual Items. Form must be submitted to receive new Ritual Books.

Please locate your chapter's:

- ✓ *Baldrics*
- ✓ *Lamps*
- ✓ *Ritual book*
- ✓ *Replica badge*
- ✓ *Bible/Roll book*



Chapter Ritual Inventory Form

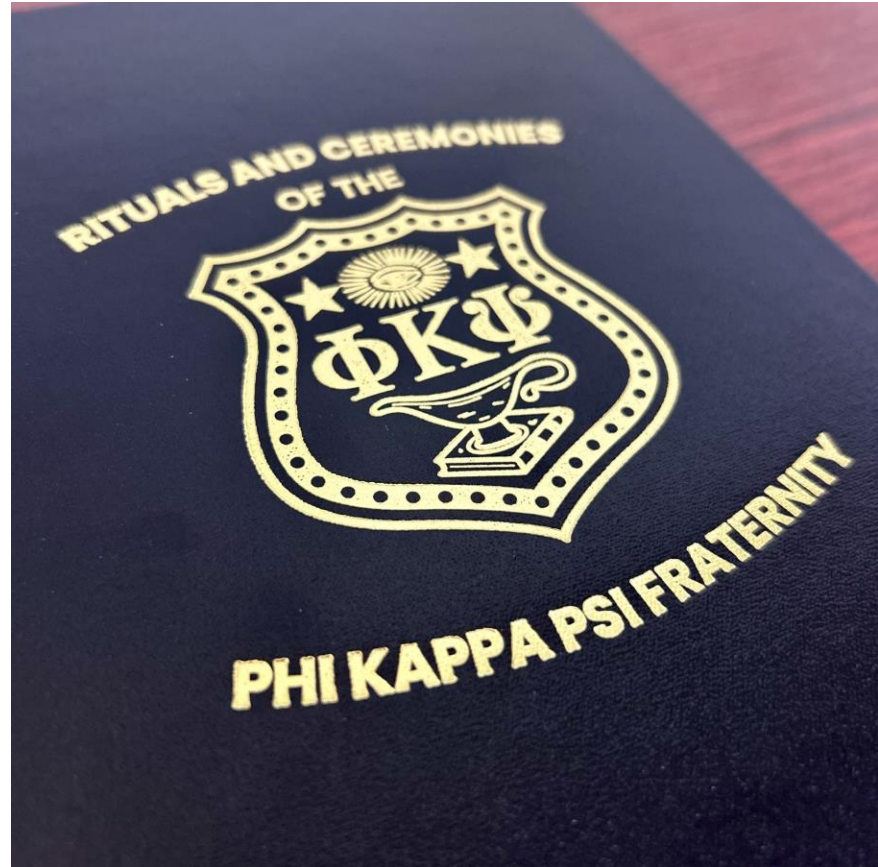
Scan or click the QR code



New Ritual Books Are on the Way!

Each chapter will soon receive **3 new copies** of the ***Ritual Book***!

Please be sure to provide an accurate mailing address where your chapter can securely receive this delivery.



Explore & *Pivot*

EXPLORE

January 3-6, 2027 | NYC



PIVOT

March 14-20, 2027 | Tampa, FL



Accessing Risk Management & General Insurance

 PHI KAPPA PSI
FRATERNITY

Home My Learning



Click the buttons to choose your Learning Path



Click the buttons to choose your Learning Path



Training Library

 Risk Reduction ▲

 RMGI

RMGI



Required Risk Management & General Insurance Course
Due: 10/18/2026 (Due in 52 Days)
This content is recurrent training.
This course reviews the Phi Kappa Psi Risk Management and General Insurance policies.

Embark Access for New Members

[Home](#) [Phi Psi HQ Admins](#) [Phi Psi Portal FAQs](#) [Get Involved](#) [Order of the SC](#) [Executive Council](#) [Resources](#) [Email Archives](#) [Member Referral](#) [Chapter Stats](#)

Hello,

Quick Links

Jump to the tools you use



Update My Profile



My Learning
(Compass)



Find a Member



Mental Health
Resources



Pay Chapter Invoices



Report Lost Brothers

Chapter Stats — Top 10

[View Full Dashboard](#)

Chapters ranked by total active member count · Updated daily

[MEMBERSHIP](#)

[SERVICE HOURS](#)

[MIN STANDARDS](#)

1 Mississippi Alpha members

309

2 Texas Alpha members

225

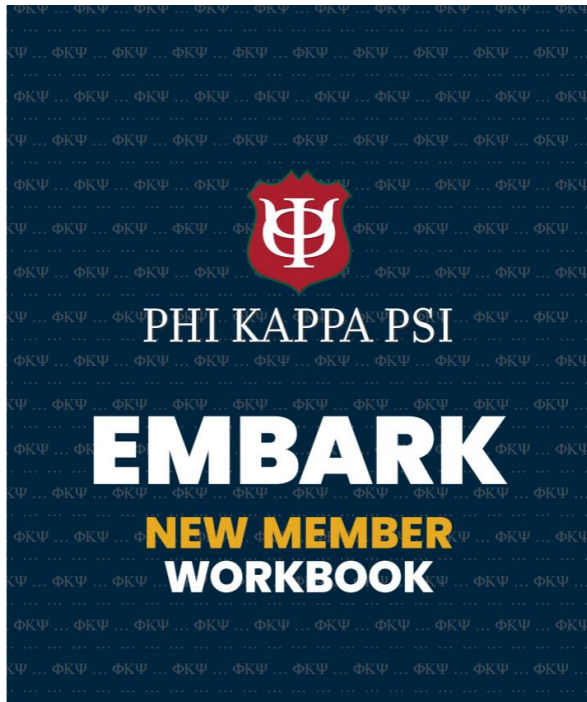
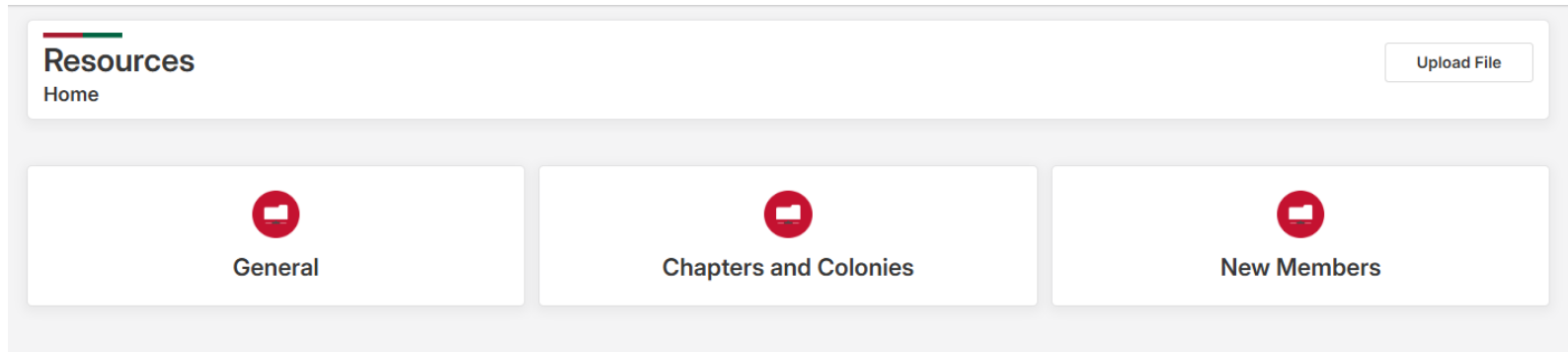
3 Alabama Alpha members

207

4 Tennessee Epsilon members

206

Embark Access for New Members



WEEK THREE: SPIRITUALITY – CARING FOR YOURSELF & OTHERS

PRE-WORK

Prior to this meeting, you should complete the Week Three online content in Compass:

- Mind, Heart and Soul
- Let's Talk About Mental Health
- Handling Stress
- Coping Mechanisms
- Mental Health Conversation Techniques

REFLECTING ON SPIRITUALITY

When have you felt most supported by others, and how can that shape how you support your brothers?



MIND, HEART, AND SOUL

Phi Kappa Psi believes in holistic development of members and utilizes the Mind, Heart, and Soul framework. This model guides members in achieving optimal wellness by emphasizing growth in three core domains each containing dimensions that reflect our Creed and opportunities for members to achieve wellness and have a healthy and rewarding life.

MIND

Areas of wellness focused on how you think, learn, and make contributions.

- > **Intellectual Wellness:** Creativity and growth through gaining knowledge and skills.
- > **Occupational Wellness:** Contributing and finding purpose through work.
- > **Financial Wellness:** Understanding finances and building a strong financial future.

HEART

Areas of wellness focused on relating to people, environment, and lived experiences.

- > **Physical Wellness:** Incorporating healthy habits into your regular routine.
- > **Environmental Wellness:** Being aware of how you interact and impact your community.
- > **Emotional Wellness:** Navigating emotions and coping with situations.

SOUL

Areas of wellness focused on values, meaning, and connections.

- > **Spiritual Wellness:** Knowing and living according to your beliefs, values, and ethics.
- > **Social Wellness:** Curating a network that provides belonging and connection.
- > **Cultural Wellness:** Reflection and awareness of differences to promote understanding.

- The **New Members** folder includes the New Member Workbook.
- This can be either **downloaded or printed out.**
- New members should have access to this for all in-person Embark meetings.

Embark Access for New Members

 Home My Learning



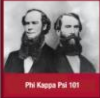


Click the buttons to choose your Learning Path



	Alcohol Awareness - Lesson 3 Due: 12/13/2026 This course provides a review on what happens to your body after you consume alcoholic beverages, as well as how you can keep others safe during, and after, alcohol consumption. <i>This course should take approximately 20 minutes to complete.</i>	Passed Launch
	Hazing Awareness & Prevention Due: 12/13/2026 This course describes and defines hazing, identifies members' responsibilities, describes how to report violations, and defines the consequences of hazing. <i>This course should take approximately 30 minutes to complete.</i>	Passed Launch
	Sexual Assault Prevention Due: 12/13/2026 (Due in 107 Days) This course describes key terms associated with sexual assault, defines consent, identifies the prevalence of sexual assault on college campuses, recognizes why bystanders do not intervene, and describes members' responsibilities. <i>This course should take approximately 20 minutes to complete.</i>	Not Attempted Launch

Week 2

**Phi Kappa Psi 101**
This Content has the following prerequisites:
Sexual Assault Prevention
Due: 12/13/2026 (Due in 107 Days)
In this course, you will learn the basics of Phi Kappa Psi and some of the things that make us unique. With a history of over one hundred and seventy years, we will cover important milestones and points of interest.
This course should take approximately 20 minutes to complete.

**The Values and Creed of Phi Kappa Psi**
This Content has the following prerequisites:
Phi Kappa Psi 101
Due: 12/13/2026 (Due in 107 Days)
Joining Phi Kappa Psi means taking an oath and committing yourself to upholding the values of the Fraternity. This course provides foundational information about our core values and The Creed of Phi Kappa Psi.
This course should take approximately 10 minutes to complete.

**Authentic Leadership**
This Content has the following prerequisites:
The Values and Creed of Phi Kappa Psi
Due: 12/13/2026 (Due in 107 Days)
How do you effectively lead in a fraternity? What are ways you can build trust, strong relationships, and a positive culture? This is what authentic leadership is all about! Authenticity shouldn't just be a buzzword, rather it should be the daily practice of aligning your values and actions. This course explains how you can be an authentic leader, best work with others, and help your chapter thrive.
This course should take approximately 20 minutes to complete.

Embark Resources for Fraternity Educators



[Home](#) [Phi Psi Portal FAQs](#) [Get Involved](#) [Resources](#) [Email Archives](#) [Member Referral](#) [Chapter Dashboard](#)

Resources

[Home](#) > [Chapters and Colonies](#) > [Fraternity Education Folders](#)



Fraternity Educators



New Members

- The primary resource for Fraternity Educators is the **Embark Facilitator Guide** available in the Phi Psi Portal.
- **Implementing Embark** is a course available in Compass via Additional Learning or the Fraternity Educators learning path.

Resources

[Home](#) > [Chapters and Colonies](#) > [Fraternity Education](#) > [Fraternity Educators Resources](#)

Filter by Folder ▾

13 Records

Title	Publication Date	Action
0 - Embark Facilitator Guide	Aug 08, 2025	Download
0 - Embark New Member Workbook	Aug 08, 2025	Download
2023 Campfire Workbook	Dec 09, 2024	Download
Big Brother Ceremony	Aug 12, 2026	Download
Elevate Resources for Fraternity Education	Aug 07, 2025	Download
Embark 101	Dec 09, 2024	Download
Induction Ceremony	Aug 12, 2026	Download
NIC Brotherhood Building Activities Guide	Apr 09, 2025	Download
Relationship Building Activity - Cross the Line	Sep 08, 2025	Download
Relationship Building Activity - Four Corners	Sep 08, 2025	Download
Relationship Building Activity - Human Scavenger Hunt	Sep 08, 2025	Download
Relationship Building Activity - Telephone Chain	Sep 08, 2025	Download
The Manual of Phi Kappa Psi	Dec 09, 2024	Download

Ascend for Officers & Chairs

- Once listed as an officer or chair in the Phi Psi Portal, an individual will receive an email about their Ascend courses.
- Upon login, a member see a button with their position title listed. This will include the **position based-course**.
 - They will also have six Foundations of Chapter Leadership courses and up to six Leadership Skills courses.
 - If they are in multiple roles, there will be a button for each role.
- **Ascend courses** should be completed within the first 45 days someone is in their role.



Training Library

Curriculum

 Ascend ▲

 Ascend

 Foundations of Chapter Leadership

 Leadership Skills

Ascend



Scholarship Chairman Training

The purpose of this course is to educate Scholarships Chairs on the specific duties and responsibilities of their position and provide them with the tools they will need to succeed.

This course should take approximately 25 minutes to complete.

Not Attempted

Launch

Fraternity and Sorority Experience Survey (FSSES)



FRATERNITY AND SORORITY
EXPERIENCE SURVEY

Multi-year partnership with the Piazza Center at Penn State

- We want to hear about the current undergraduate Fraternity experience
- Distributed via email to active members who joined prior to 8/1/2026
- Responses are anonymous, and collected through October
- Regular reminders will be sent to those who have participated



Scan to check your
chapter's participation

PHI KAPPA PSI FRATERNITY

COALITION OF FRATERNAL RIGHTS SURVEY (CFR)

MAKE YOUR VOICE HEARD!

Your perspective can help shape future advocacy and priorities for the fraternal community.

- Conducted in partnership with the Coalition of Fraternal Rights
- Responses are completely anonymous
- Takes only 7–10 minutes to complete

Your feedback will help national fraternal leaders better understand and reflect the values of members like you.

**PARTICIPATE IN
THE SURVEY**



**SCAN THE
QR CODE**

CHAPTER OFFICER CALENDAR

**SUBSCRIBE
and SYNC all
IMPORTANT
DATES directly to
YOUR PHONE!**



WE WANT **YOUR** CHAPTER NEWS!

We want to share your good news on social and in *The Shield* magazine!

Tell us about your service projects, recruitment numbers, and philanthropy events.

Fall submissions are due Dec. 15!



FOLLOW US ON SOCIAL!



@phikappapsi

GET YOUR PHI PSI GEAR



**Find licensed
PKP merch at**

shopphikappapsi.com

amazon.com/phikappapsi

phipsistore.com

SHOP
PHI KAPPA PSI



Questions?

PHI KAPPA PSI FRATERNITY