

Hi I'm Kelsey! Introduce yourself in the chat and let us know which institution you're representing!

Organization Transitioning

Make sure organizations are set up for success during the reregistration period!

This webinar is most relevant for Account Admin, but we will show org leaders how to complete transition at the beginning!

Organization Transitioning

Make sure organizations are set up for success during the reregistration period!

Agenda

1. Welcome
2. Transition Your Org
3. Transitioning FAQs
4. Step-by-step
5. Personalization
6. Q&A
7. Close



Post-Webinar Survey

- 2 minutes!
- We love knowing what you like or would like improved!
- Really helps me (Kelsey) out when presenting to my bosses 😊
- I'll provide a link at the end or you will get an email tomorrow!!!

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* 3. Overall, were you satisfied with your training?

Yes

No

* 4. On the following scale, how **helpful** and **informative** was the training webinar?

1 - Not Helpful

2

3 - Neutral

4

5 - Helpful

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

Org Transitions

What is organization transitioning?

1. Organization reregistration

1. A time for updating your organization!
2. Org leaders must edit and resubmit for for approval

2. A setting under the Organization “Manage” tab



Why set up transitioning?

- Lessen your administrative load
- Track the process
- Officers will automatically get privileges
 - Only time that user permissions will auto update
 - No need to go into individual profiles to grant privileges



Complete Transitions

(as an organization leader)

Who can complete transition?

- Officers with “edit organization” access
- Users with “edit organization” access

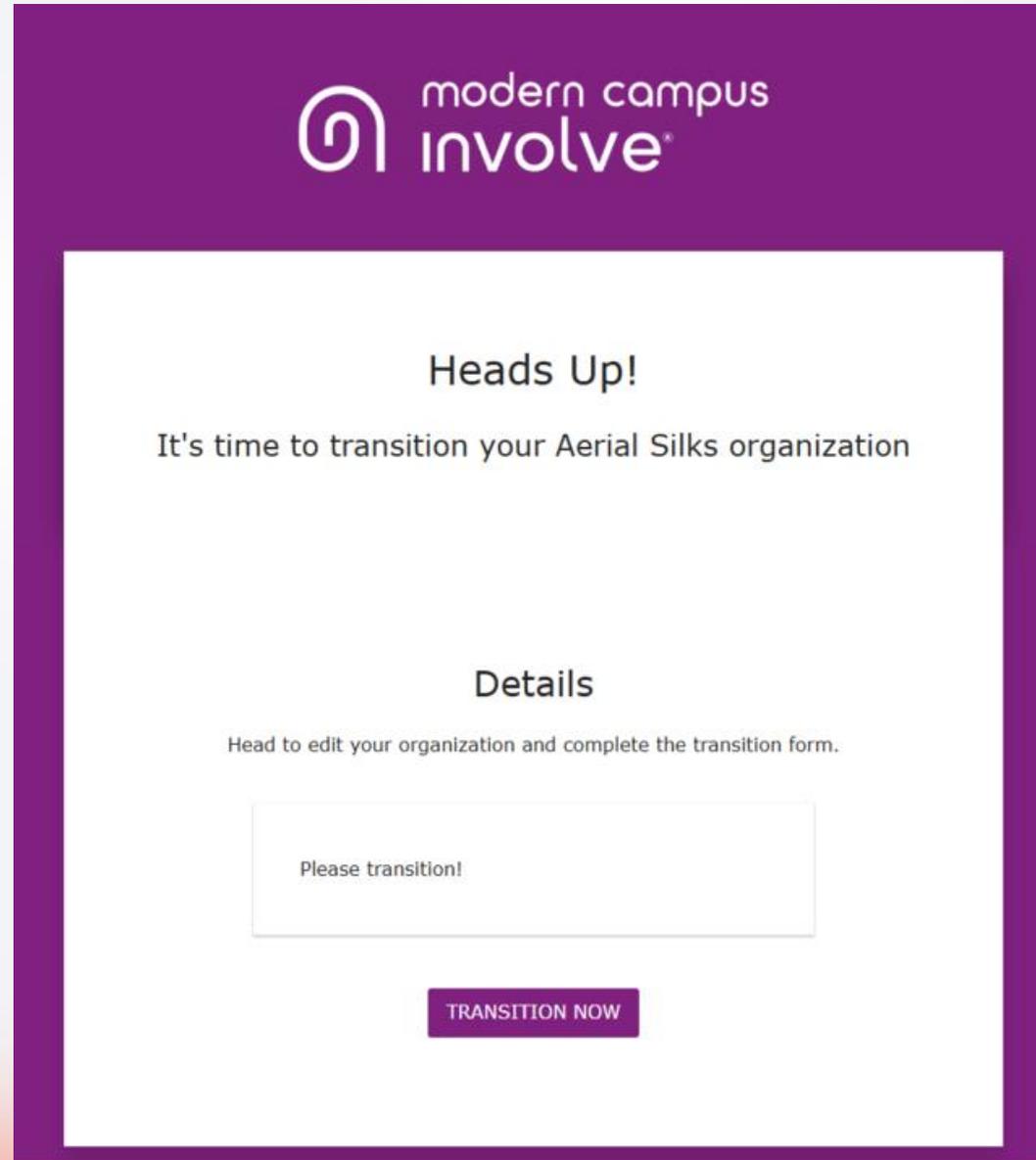
Additional Rights

- Edit Organizations
- Create Events
- Delete Events
- Event Approval
- Create Users
- View Person Profiles

When is it time?

- You will receive an email when admin are ready for transition.
- Click “Transition Now” to complete transition.

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The screenshot shows an email notification from Modern Campus. At the top, the logo for 'modern campus involve' is displayed. The main heading is 'Heads Up!' followed by the text 'It's time to transition your Aerial Silks organization'. Below this, a section titled 'Details' contains the instruction 'Head to edit your organization and complete the transition form.' A large, empty rectangular box is present, with the text 'Please transition!' centered inside it. At the bottom of the email content, there is a purple button with the text 'TRANSITION NOW' in white capital letters.

Be read to...

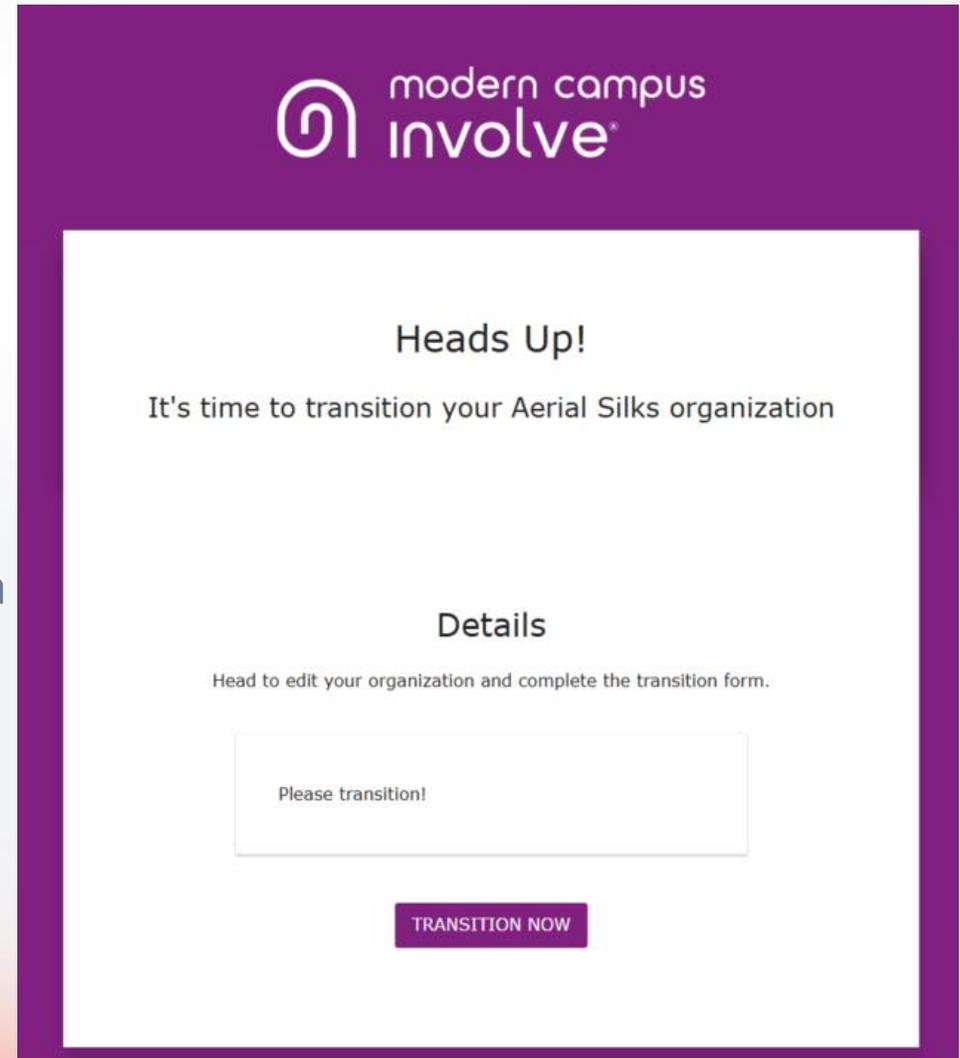
- Update your organization leaders
- Update your roster
- Provide any additional details or feedback required by your administrators.

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Method 1: Directly from your email

- Click the link in your transition email
- Make ANY changes to your org form
 - Update leaders
 - Update roster
 - Update meeting time
 - Add new information in the “About” section
 - You **MUST** make an edit
- Select “Submit”



Method 2: From the Admin Dashboard

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The screenshot displays the 'Organizations' admin dashboard. At the top, there are three summary cards: 'Active Organizations' (25), 'Unique Members' (86), and 'Average Members' (6.20). Below these is a search bar and a table of organizations. The table has columns for Title, Category, Meeting Time, Meeting Location, Members, and Status. The 'Computer Club' row is highlighted, and an orange arrow points to its 'In Transition' status. A dropdown menu is open for this row, with 'Transition' circled in orange.

Title	Category	Meeting Time	Meeting Location	Members	Status
Computer Club	Social	Everyday 10:00 PM	Computer Lab #3	4	In Transition

1. Go to the Organization Landing Page
2. Find your organization

Organizations

ORGANIZATIONS REQUESTS OFFICERS MANAGE

25 Active Organizations

86 Unique Members

6.20 Average Members

Search Organizations

STATUS AND CATEGORY FILTER

Title	Category	Meeting Time	Meeting Location	Members	Status
Computer Club	Social	Everyday 10:00 PM	Computer Lab #3	4	In Transition

EXPORT

Transition
Roster
Documents

3. Click the three stacked dots
4. Select “Transition”

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The screenshot displays the 'Organizations' management interface. At the top, there are navigation tabs for 'ORGANIZATIONS', 'REQUESTS', 'OFFICERS', and 'MANAGE'. The dashboard features three key metrics: 25 Active Organizations, 86 Unique Members, and an Average of 6.20 Members. A search bar is provided for finding organizations, with filters for STATUS, AND, CATEGORY, and FILTER. The main table lists organizations with columns for Title, Category, Meeting Time, Meeting Location, Members, and Status. The 'Computer Club' is listed as 'Social' with a meeting time of 'Everyday 10:00 PM' at 'Computer Lab #3' and 4 members, currently in 'In Transition' status. An orange arrow points to the 'In Transition' button for this club. A dropdown menu is open, showing 'Transition', 'Roster', and 'Documents' options, with a white mouse cursor hovering over the 'Transition' option.

Title	Category	Meeting Time	Meeting Location	Members	Status
Computer Club	Social	Everyday 10:00 PM	Computer Lab #3	4	In Transition

5. This will bring you to your organization form.
6. Change **SOMETHING** to show the “Submit Button”
6. Fill out all required fields, make updates to information and roster!

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The screenshot shows a web form for creating an organization. On the left is a vertical sidebar with various icons. The main form area contains the following sections:

- Transition**: A section with the question "How was the year?" and a text input field. A red mouse cursor is pointing at this section.
- Contact Information**: A section with two text input fields labeled "Contact Name" and "Contact Email".
- Social Media**: A section with a text input field.
- Cover Image ***: A section with a note: "The cover image should represent something about your organization. We recommend NOT including text as the image is resized and text overlaid automatically." Below the note is a preview area showing a dog's head and three triangles.

7. Scroll back up, hit “Submit for Approval”

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The screenshot shows a web interface for an 'Organization Transition' form. On the left is a vertical sidebar with various icons. The main content area has a header 'Organization Transition' and a green button labeled 'SUBMIT FOR APPROVAL' with a dropdown arrow. Below this is a 'Basic Information' section with a text input field for 'Organization Name' containing 'Delta Delta Delta'. Underneath is an 'About' section with a rich text editor toolbar and a text area containing the text 'Can I help ya, help ya, help ya?'. A white mouse cursor is pointing at the 'SUBMIT FOR APPROVAL' button.

Involve transition demo

- Complete the transition for an organization
- Show the transition specific questions on the org registration page
- Update roster

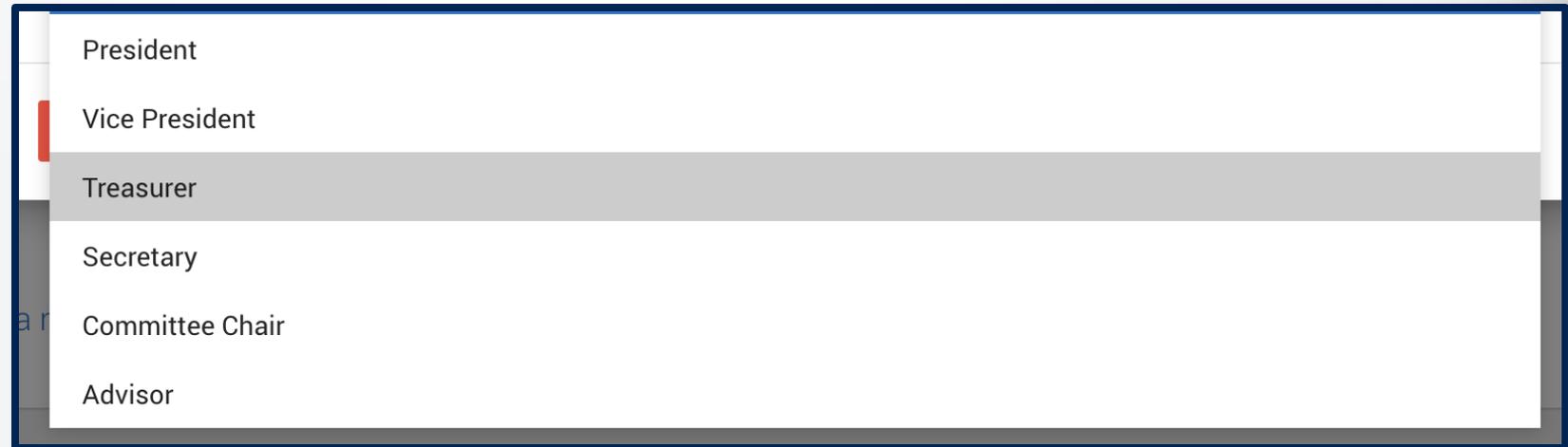
Transitioning FAQs

Who will get the transition notification / email?

- ALL Leaders

- President
- Vice President
- Secretary
- Treasurer
- Committee Chair
- Advisory

- ALL Advisors



Who can set up transitioning?

- Campus Administrator
- WITH Manage Transitioning turned on

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Role
REMOVE

Role

Campus Administrator

Organizations Features

Manage Transitioning

Enables the ability to set and manage transitioning settings for organizations. Additionally enables the ability to notify and deactivate organizations due to transiting.

Manage Active Requirements

Enables the ability to set and manage active requirements for organizations. Additionally enables the ability to notify and deactivate organizations due to active requirements.

Can I disable transitioning?

- No! Once an organization has been placed in the transitioning process, you cannot reverse the process!
- Reminder: You are NOT required to transition all (or even any) of your organizations.
 - Make use of categories!



What happens if they don't complete transition?

- They will be unable to add folks to their roster
- They cannot fill out the event registration form
- They will be flagged as

23

Your organization's roster cannot be changed while in transition. ×

Delta Delta Delta

In Transition

Past Due

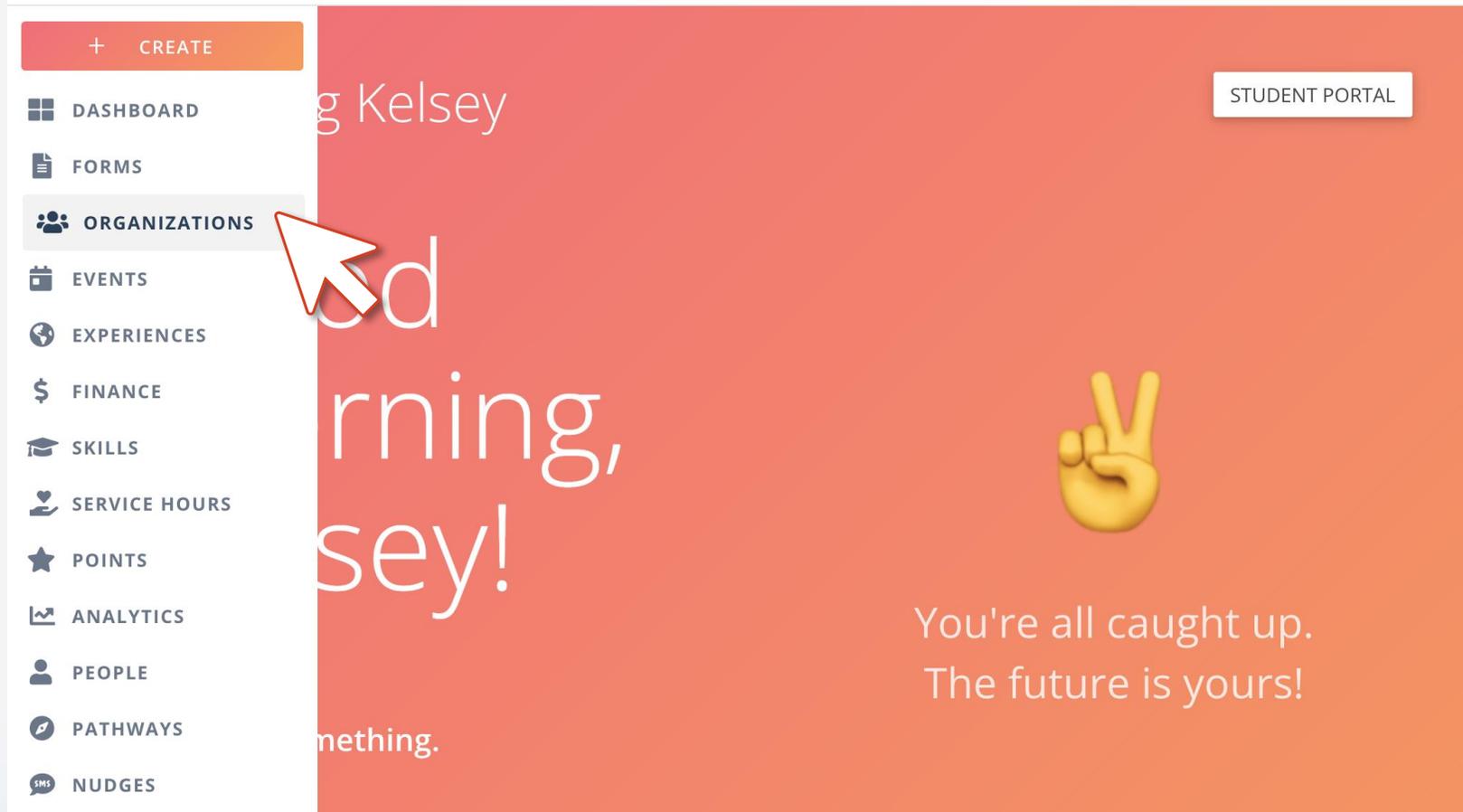
The organization leaders won't do it! 😞

- Follow up
- Provide clear messaging
- Provide instructions (we have an article!)
- Provide incentives!

Enable Transitions

(as an administrator)

1. Select “Organizations” from the admin portal



2. Select “manage”

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Organizations

ORGANIZATIONS REQUESTS OFFICERS MEMBERSHIP DRAFTS **MANAGE**

20 Active Organizations

16 Unique Members

2.30 Average Members

Search Organizations STATUS AND CATEGORY FILTER

Title	Category	Meeting Time	Meeting Location	Members	Status	
Career Services	Department				Active	⋮

3. Scroll to “Transitioning”

4. Choose “Enable & Setup Transitioning”

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Organizations

ORGANIZATIONS REQUESTS OFFICERS MEMBERSHIP DRAFTS MANAGE

Active Requirements SAVE REQUIREMENTS

Create requirements for organizations to follow in order to stay active. Then notify or deactivate them if they fail to meet requirements.

Required Events Attended
Require the following events to be attended by officers of the organization.

Events

Minimum Members MANAGE

Require the organization to have a minimum amount of active members.

Categories CREATE

Search Organization Categories

Title	Organizations
Affinity	1
Club	10
Department	3
Faith Based	1
Gaming	1
Greek Life	1

Help

- 5. Hit the check mark to select individual orgs.
- 6. Select all organizations you want to complete the process.

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Organizations Failing The Transition Required Requirement NEXT STEP

Select organizations you would like to notify or deactivate. By default, all are selected. Currently selecting 5 organizations.

Search Organizations TRANSITION STATUS CATEGORY

<input checked="" type="checkbox"/> Name	Last Notified	Members	Categories	Transition Date
<input checked="" type="checkbox"/> Delta Delta Delta Past Due	Never	3	Greek Life	8/31/2023, 1:41:33 PM
<input checked="" type="checkbox"/> Koller Derby Past Due	Never	3	Intramural Sports	8/31/2023, 1:41:33 PM

6. OR select by organization category!

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Organizations Failing The Transition Required Requirement

Select organizations you would like to notify or deactivate. By default, all are selected. Currently selecting 3 organizations.

NEXT STEP

✓

TRANSITION STATUS ▾

CATEGORY ▾

✓ Name		Last Notified	Members	Categories	Tra
✓ The Creme de Bananas	Past Due	Never	3	Club	8/31/2023, 1:41:33 PM
✓ Trashy Cricketinis	Past Due	Never	0	Club, Service	8/31/2023, 1:41:33 PM
✓ Walking Around	Past Due	Never	4	Club	8/31/2023, 1:41:33 PM

CATEGORY ▾

- Club ✓
- Greek Life
- Intramural Sports
- Service

- 7. Select your deadline
- 8. Write a custom message
- 9. Select “Next Step”

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Custom Message

Custom Message

Add a custom message to the email notification that will be sent to the organization officers and advisors.

H1 H2 H3 H4 H5 H6 P PRE ”

B *I* U

WORDS: 101 CHARACTERS: 727

Hi Org Leaders,

It's time to transition your student organization for the upcoming year!

Transitioning ensures your new officers have the right permissions and access to manage your group. Organizations that do **not** complete this step will be unable to host events and may be at risk of deactivation—so don't wait!

Learn more about the process here: <https://involve-support.moderncampus.com/hc/en-us/articles/16510532483853-How-To-Transition-Your-Organization>
(There's a short video guide linked above if you need help!)

Bonus: The **first 10 organizations** to complete their transition will get first pick of their table location at the Fall Org Fair!

Thanks for your leadership,
Kelsey Seale

Cricket University Office of Student Life



Explain transitions.



Provide guidance or tutorial.



Provide incentive.



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Provide incentive.

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Kelsey Seale

Cricket University Office of Student Life



8. Confirm your information

9. Select “Enable Transition For Selected”

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Transition Setup

ORGANIZATIONS > DATE & MESSAGE > PREVIEW

Preview ENABLE TRANSITION FOR SELECTED (1)

Confirm the organizations you have selected and custom message you're sending.

1 Organizations Selected EDIT

Career Services

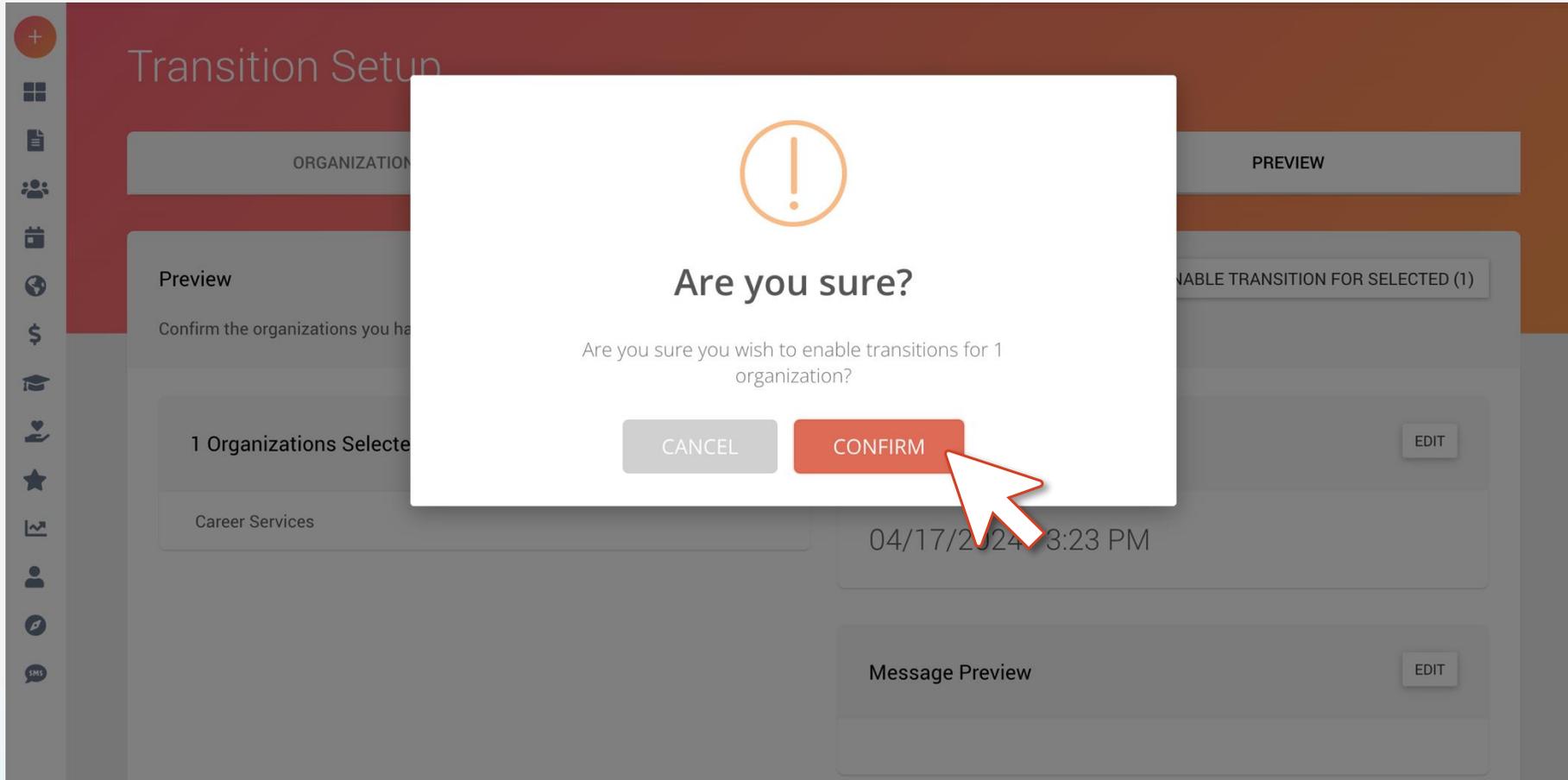
Transition Deadline EDIT

04/17/2024 - 3:23 PM

Message Preview EDIT

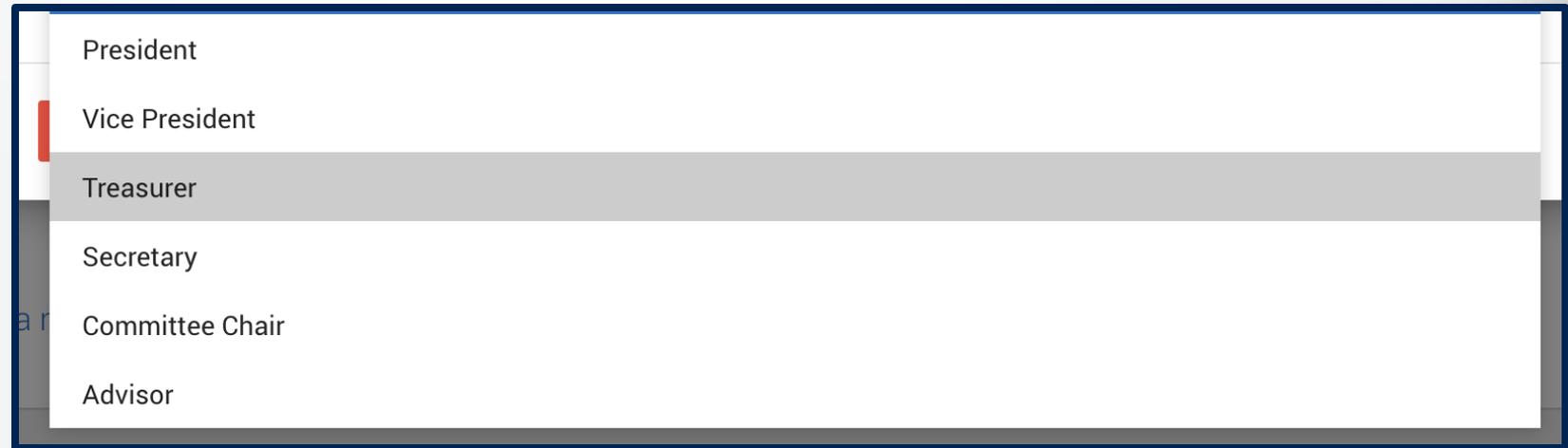
10. Confirm and you are all done!

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Reminder: Notification goes to...

- ALL Leaders
 - President
 - Vice President
 - Secretary
 - Treasurer
 - Committee Chair
 - Advisory
- ALL Advisors



Involve demo

- Show setting up the transitions for all orgs in the “club” category
 - Highlight the value of setting up and using categories
- Show the org admin dashboard that clubs are now in transition

Once transition is ON you cannot turn it OFF!

Every organization will have to complete the transition process before they are able to add members or host events.

Personalize the form!

Why are you asking organizations to complete the transition process?

Do you want to
gather
information?

Do you want to
have leaders
reflect?

?

Do you want to
gather
information?

Do you want to
have leaders
reflect?

?

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What are you LEARNING?

Possible custom questions

- Did you update your officers? YES/NO
 - This is HUGE because it automatically updates permissions
- Did you add new constitution? YES/NO
- Ask students what their goals are
- What success they had this year
- What challenges they had this year
- How can your office offer support to their organization this year...
- *Ask for more suggestions in the comments?*

Customize your organization registration form

1. Navigate to the forms page on your admin portal

The screenshot shows the Modern Campus admin portal interface. On the left is a navigation sidebar with a '+ CREATE' button at the top. The 'FORMS' menu item is highlighted with a red mouse cursor. Other menu items include DASHBOARD, ORGANIZATIONS, EVENTS, EXPERIENCES, FINANCE, SKILLS, SERVICE HOURS, POINTS, ANALYTICS, PEOPLE, PATHWAYS, and NUDGES. The main content area is titled 'Organizations' and features a '+ ADD' button. Below the title are tabs for REQUESTS, OFFICERS, MEMBERSHIP, DRAFTS, and MANAGE. A summary section displays three cards: '20 Organizations', '17 Unique Members', and '2.40 Average Members'. Below the summary is a search bar for 'Search Organizations' with filters for STATUS, AND, CATEGORY, and FILTER. At the bottom, a table lists organizations with columns for Category, Meeting Time, Meeting Location, Members, and Status. A sample row shows 'In Transition' for Category, 'Department' for Meeting Time, 'In' for Meeting Location, and 'In' for Members.

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2. Select “Edit” on your Organization Registration Form

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Search: organi

Title	Created by	Content Type	Responses	Views	Status
2023 Student Leader Excellence Award Nomination	Kelsey Seale		13	31	⋮
Event Registration	Mike Janofsky	Event	17	48	⋮
Organization Registration	Mike Janofsky	Organization	21	40	⋮

- Edit
- View Responses
- View Response Summary
- Respond From Admin
- Respond From Portal
- Deactivate

3. Add a **field group** and name it “Transition”

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The image shows a split-screen view of the Modern Campus Form Builder. On the left, a form titled "Organization Registration" is being edited. It includes sections for "Categories", "Meeting Time", "Meeting Location", "How was the year?", "Contact Information", and "Cover Image". A red rounded rectangle highlights a new field group named "Transition" that has been added to the form. On the right, the "Form Builder" sidebar is open, showing the "FIELDS" tab. Under the "Layout" section, the "Field Group" widget is selected, with a red mouse cursor pointing to it. Other widgets visible include "Date/Time", "DateTime", "Email", "File Upload", "Signature", "Image Search", "Content", "Image", and "Header".

4. Add your custom transition questions and information.

Organization Registration

Register your campus group.

Categories *

Meeting Time Meeting Location

Transition

You will need to complete the campus safety training before the start of next semester. [Sign up here](#)

What are your goals for next year? * How was the year?

How do you rate support from the Student Affairs office?

1 2 3 4 5

Form Builder

FIELDS FORM SETTINGS

Basic

△ Text ▮ Number ≡ Choice

Advanced

🕒 Date/Time 🕒 DateTime ✉ Email

📎 File Upload ✍ Signature 🔍 Image Search

Layout

△ Content 👤 Field Group ⤴ Header

🖼 Image

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5. Make them “required” if you want to make sure they’re answered.

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Transition

What are your goals for next year? *

How was the year?

How do you rate support from the Student Affairs office?

1 2 3 4 5

Field Description

Field Size

X-SMALL MEDIUM

Required

Hide Response From Admin

Hide Response From Portal

6. Select “Conditionals”

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The screenshot displays a form editor interface. On the left, a preview of a form titled "Transition" is shown. It contains two questions: "What are your goals for next year?*" with a text input field, and "How was the year?" with a text input field. Below these is a rating question: "How do you rate support from the Student Affairs office?" with a 5-point scale (1-5). Below the preview, there are sections for "Contact Information" (with a "Contact Name" field) and "Cover Image" (with an "UPLOAD" button). On the right, a settings panel is open. It includes a "Field Description" text area, a "Field Size" selector with options X-SMALL, SMALL, MEDIUM (selected), and LARGE, and two checkboxes: "Hide Response From Admin" and "Hide Response From Portal". At the bottom of the settings panel, there are three expandable sections: "Field Group Settings", "Conditionals" (highlighted with a red mouse cursor), and another section partially visible.

7. Select “Show” if “All” of the following match. “Registration Status” “Is” “Transition.”

◀ Conditional Logic

ADD LOGIC

Create conditional rules to show and hide fields based on the responding user and other fields.

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Show if All of the following match.

Target	Operators	Registration Statuses
<input type="text" value="Registration Status"/>	<input type="text" value="Is"/>	<input type="text" value="Transition"/>



Involve demo

- **Add a field group for transition**
 - Include a “how supported did you feel this year as an org leader”
 - What are some successes and challenges you had this year?
 - Did you update the org leaders for next year?
- **Set conditional logic**
- **Show the difference between org registration and an org in transition**

Incentivize the Process!

Incentives

- Tie transitioning to SGA funding
- Additional funding
- First pick for a table at the Org Fair
- Get creative!
- Do you use incentives during reregistration?
Share in the chat!

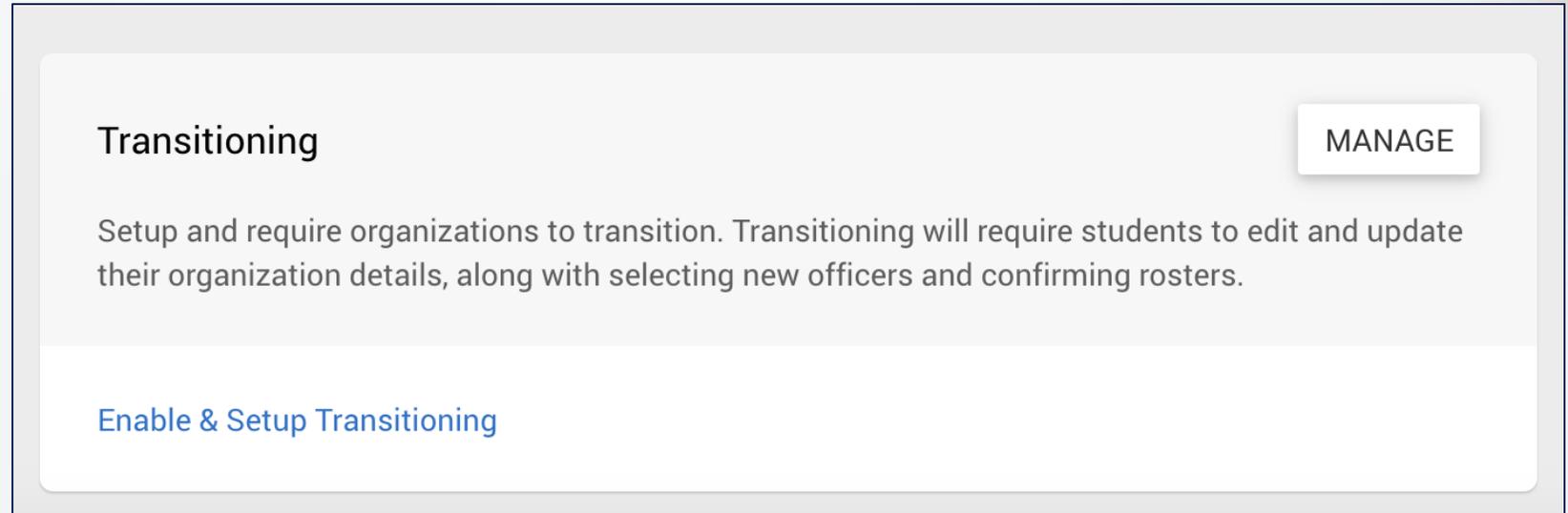


Check in on transitions

Check on Transitions

- Go to “Manage”
- Scroll to “Transitioning”
- Click “Manage”

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The screenshot shows a user interface for 'Transitioning'. At the top left, the word 'Transitioning' is displayed. To its right is a white button with the text 'MANAGE'. Below the title, there is a paragraph of text: 'Setup and require organizations to transition. Transitioning will require students to edit and update their organization details, along with selecting new officers and confirming rosters.' At the bottom of the section, there is a blue link that reads 'Enable & Setup Transitioning'.

Check on Transitions

- You will see all organizations in the transitioning process
- Select those you would like to message / deactivate

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Organizations Failing The Transition Required Requirement

Select organizations you would like to notify or deactivate. By default, all are selected.

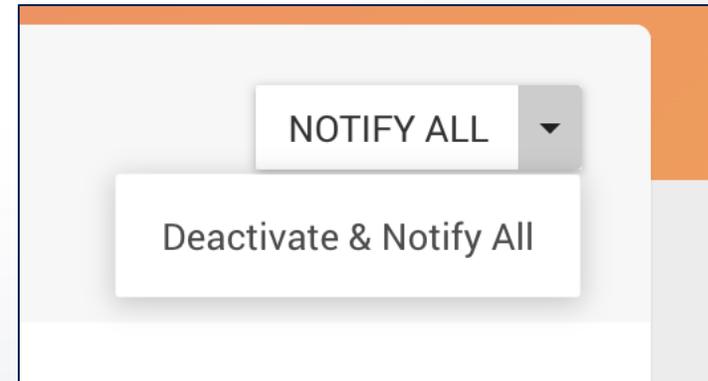
NEXT STEP

✓
TRANSITION STATUS ▾
CATEGORY ▾

Name	Last Notified	Members	Categories	Transition Date
Career Services	Never	0	Department	4/17/2024, 3:23:31 PM
Cooking Club	Never	2		4/12/2024, 2:01:46 PM
Delta Delta Delta	Past Due Never	3	Greek Life	8/31/2023, 1:41:33 PM
Roller Derby	Past Due Never	3	Intramural Sports	8/31/2023, 1:41:33 PM
The Creme de Bananas	Past Due 4/10/2024, 11:28:45 AM	3	Club	8/31/2023, 1:41:33 PM
Trashy Cricketinis	Past Due Never	0	Club, Service	8/31/2023, 1:41:33 PM
Walking Around	Past Due Never	4	Club	8/31/2023, 1:41:33 PM

Check on Transitions

- When you select organizations with “Past Due” you have two options
 - Deactivate: Will deactivate their organization
 - “Come see us if you think this was an error.”
 - Notify All: Send a follow up or reminder



What can you put into
practice TODAY?

Survey Time!

2 minutes! Thank you so much!

* 3. Overall, were you satisfied with your training?

Yes

No

* 4. On the following scale, how **helpful** and **informative** was the training webinar?

1 - Not Helpful

2

3 - Neutral

4

5 - Helpful

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

Q&A

Please put your questions in the Q&A box.
I'll get to as many as possible and follow up via
email if more research is needed!

Thank You

See you next month!