

Organization Transitioning

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

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

We will go over what Transitions are and how to transition your organizations FIRST.
Org leaders, you are free to leave after that or you're welcome to stay!

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

It's the start of the year, organizations are eager to get going—but leadership is unclear, rosters are outdated, and nothing's quite set up for success.

How many of your organizations are actually ready before the year gets started?

6



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

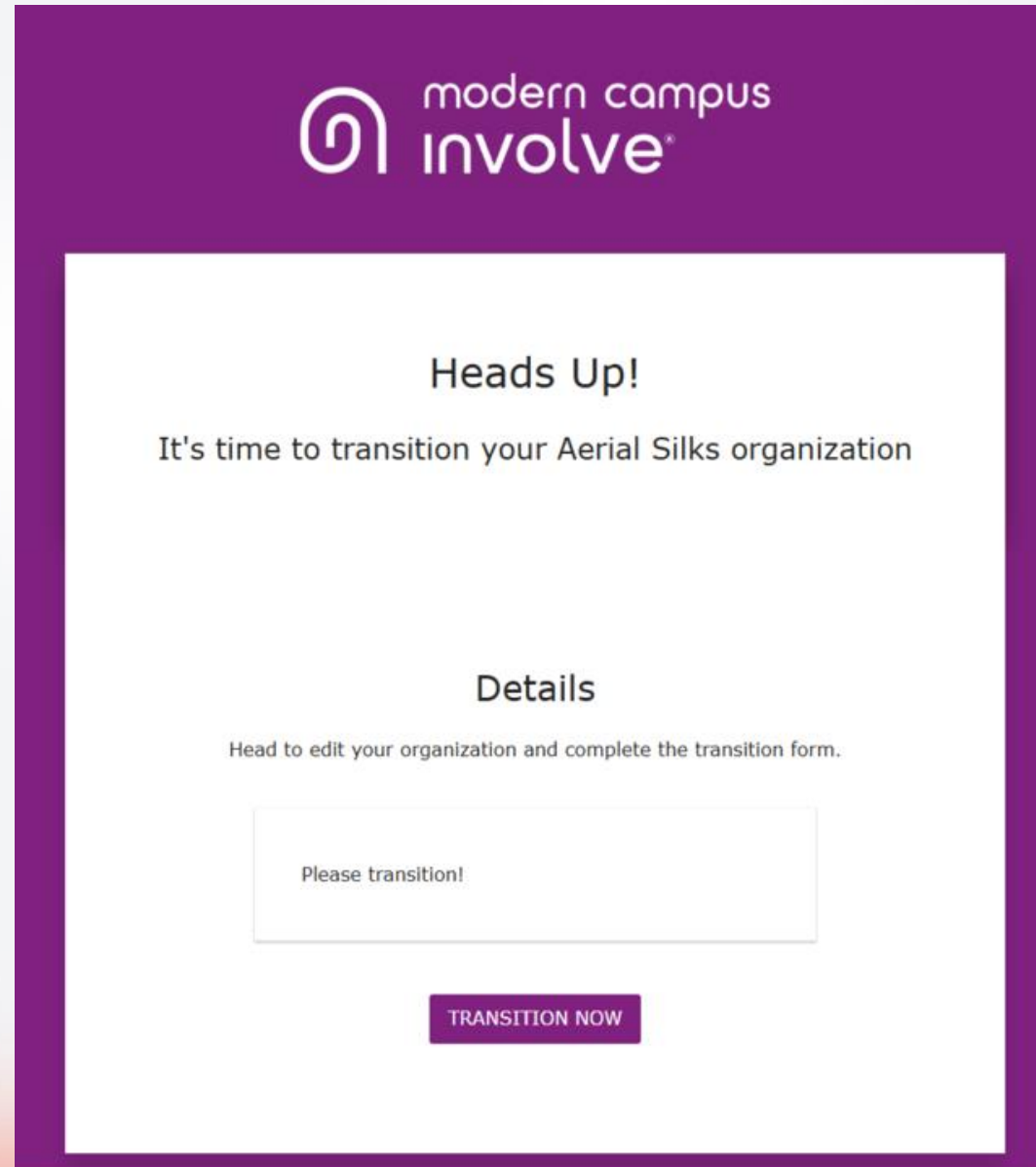
Additional Rights

- 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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Be read to...

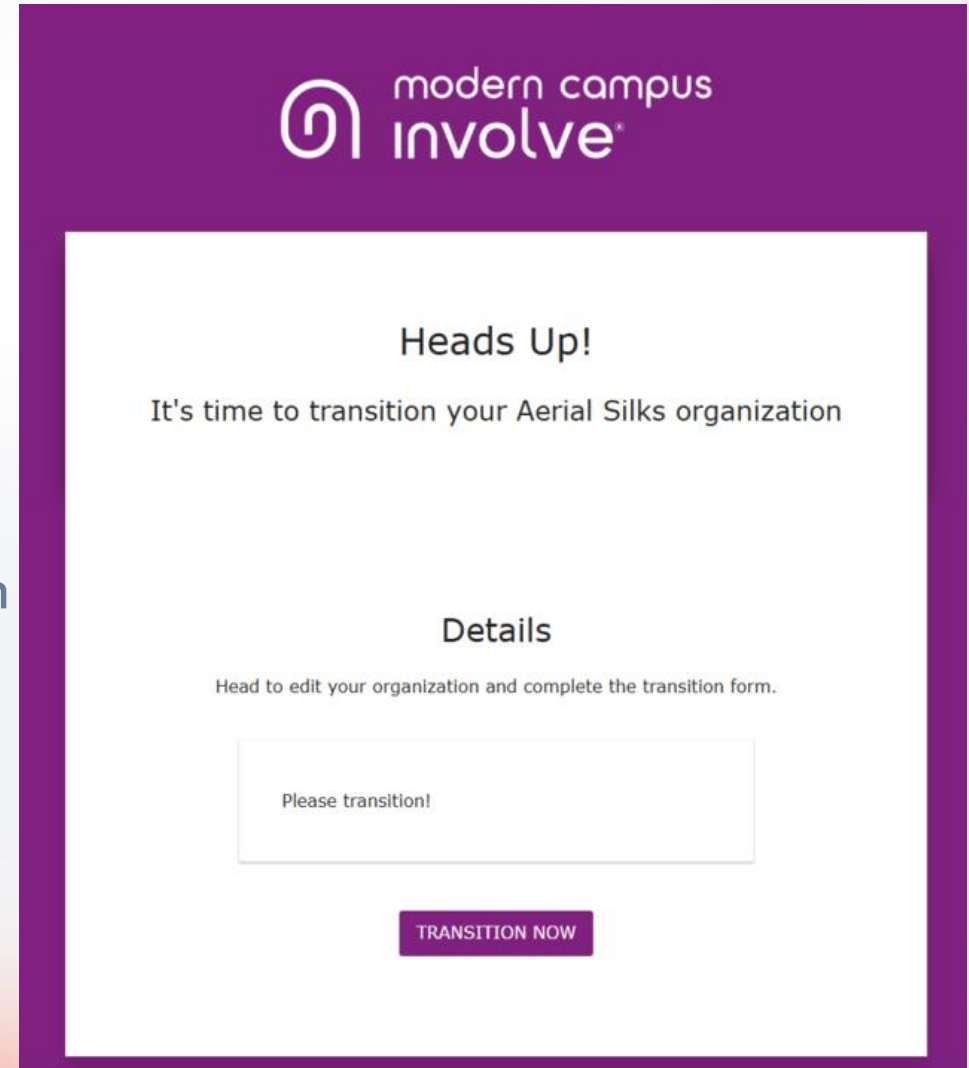
- Update your organization leaders
- Update your roster
- Provide any additional details or feedback required by your administrators.

12



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 navigation tabs for 'ORGANIZATIONS', 'REQUESTS', 'OFFICERS', and 'MANAGE'. Three summary cards show: 25 Active Organizations, 86 Unique Members, and 6.20 Average Members. A search bar is located below the cards. The main table lists organizations with columns for Title, Category, Meeting Time, Meeting Location, Members, and Status. The 'Computer Club' is listed with a status of 'In Transition'. An orange arrow points to this status. A dropdown menu is open for the 'Computer Club' row, with the 'Transition' option 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

15

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”

16

The screenshot displays the 'Organizations' 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 filter options for 'STATUS', 'AND', 'CATEGORY', and 'FILTER'. A table lists organizations, with the first row for 'Computer Club' highlighted. An orange arrow points to the 'In Transition' and 'Past Due' buttons for this organization. A second orange arrow points to the three stacked dots menu icon, which is open, showing options for 'Transition', 'Roster', and 'Documents'. The 'Transition' option is circled in orange.

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 interface for creating an organization. On the left is a vertical sidebar with icons for home, documents, people, calendar, globe, dollar sign, graduation cap, heart, star, bar chart, person, and SMS. The main content area is divided into several sections:

- Transition**: A section with a sub-header "Transition" and a text input field labeled "How was the year?". A red mouse cursor is pointing at the input field.
- Contact Information**: A section with two text input fields labeled "Contact Name" and "Contact Email".
- Social Media**: A section with a sub-header "Social Media" and a text input field.
- Cover Image ***: A section with a sub-header "Cover Image *" and 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 this is a large rectangular image placeholder containing a dog's head and three triangles.

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

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Organization Transition

Organization Name *

Delta Delta Delta

Basic Information

About

H1 H2 H3 H4 H5 H6 P PRE " B I U S ☰ ☷ ☹ ☺ ☻ ☼ ☽ ☾ ☿ ☽ ☾ ☿ ☽ ☾ ☿

</> 📎 🔗 ▶ WORDS: 8 CHARACTERS: 32

Can I help ya, help ya, help ya?

SUBMIT FOR APPROVAL

Involve transition demo

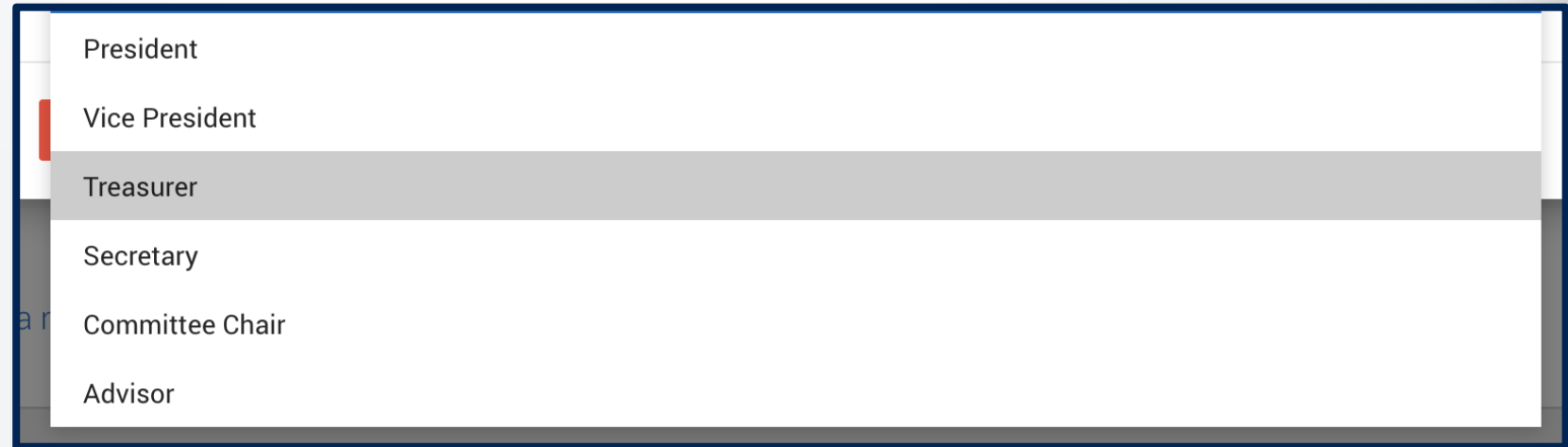
- Complete the transition for an organization
- Show the transition specific questions on the org registration page
- Update roster

Transitioning FAQs

Who will get the transition notification / email?

- ALL Leaders

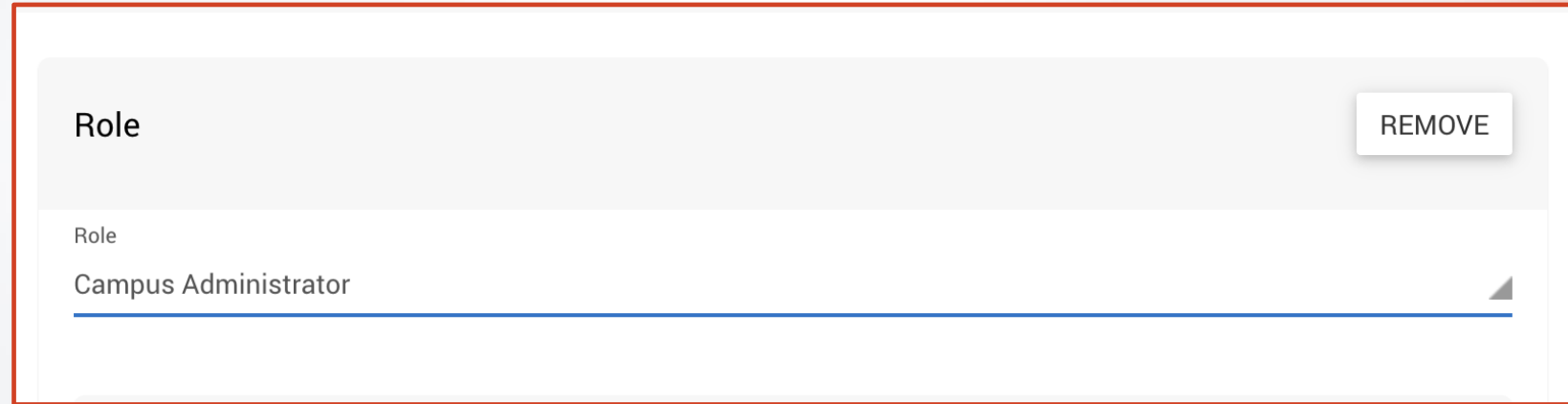
- President
- Vice President
- Secretary
- Treasurer
- Committee Chair
- Advisory



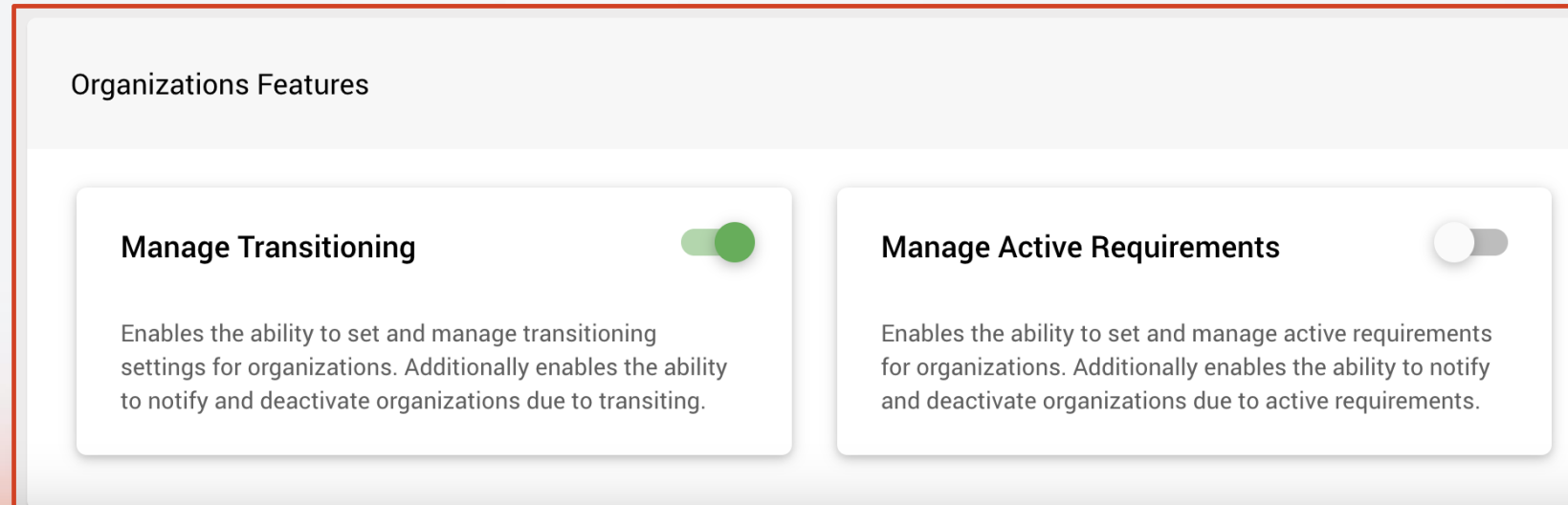
Who can set up transitioning?

- Campus Administrator
- **WITH** Manage Transitioning turned on

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A screenshot of a user interface for selecting a role. At the top, the word "Role" is displayed on the left and a "REMOVE" button is on the right. Below this, a search or selection area shows "Role" as a label and "Campus Administrator" as the selected option, which is underlined with a blue line. A small triangle icon is visible at the end of the selection area.



A screenshot of the "Organizations Features" settings page. The title "Organizations Features" is at the top. Below it, there are two feature cards. The first card, "Manage Transitioning", has a green toggle switch turned on and a description: "Enables the ability to set and manage transitioning settings for organizations. Additionally enables the ability to notify and deactivate organizations due to transiting." The second card, "Manage Active Requirements", has a grey toggle switch turned off and a description: "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 category transition!*

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

24

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!

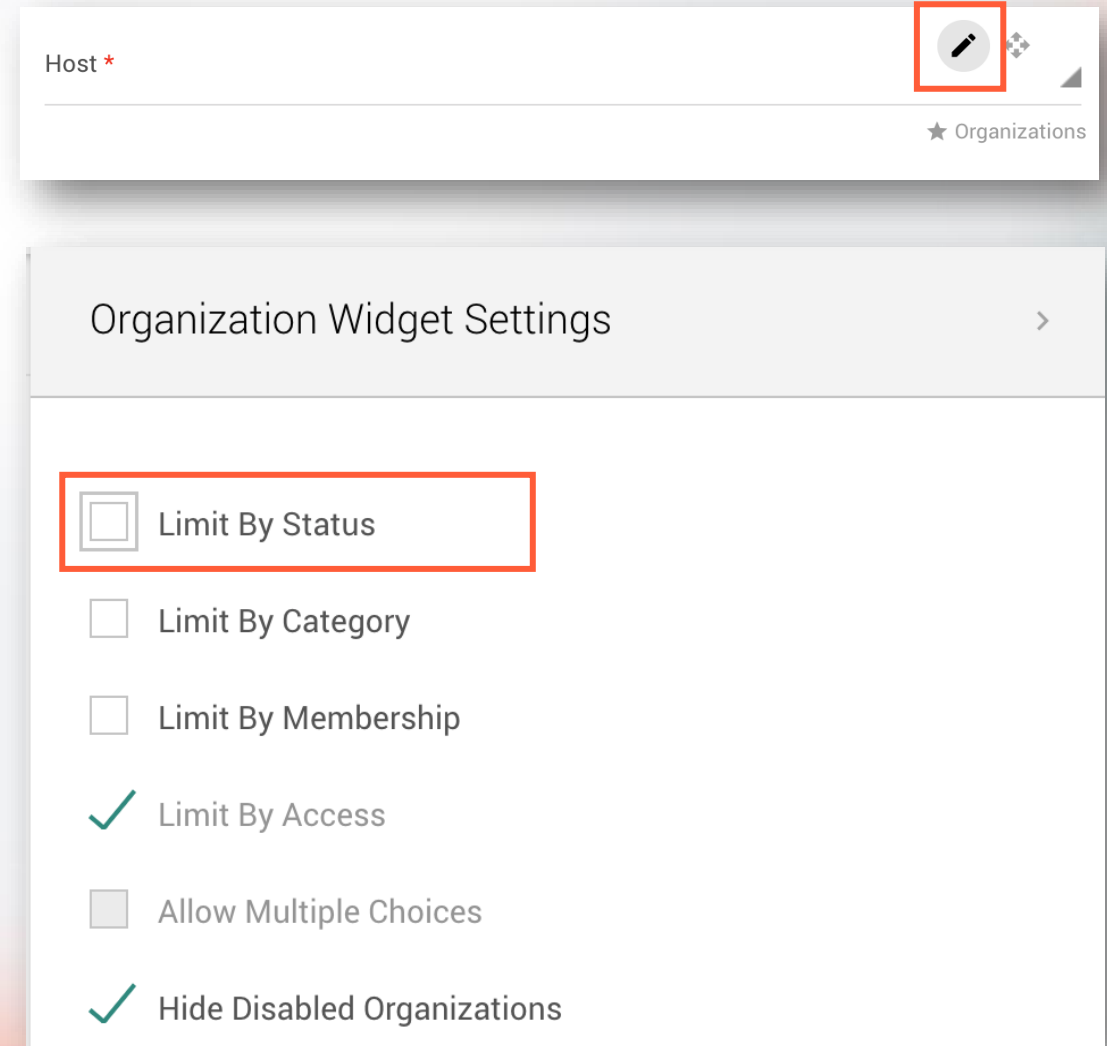
Limit Event Hosting

During transition

Limiting Organization Event Hosting

- You can choose to limit organization's ability to host events during transition.
- Head to your event registration form.
- Edit Host widget
 - Limit By Status
Orgs **can** host during transition
 - Limit By Status – Select **Active**
Orgs **cannot** host during transition

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1. Edit the Event Registration Form




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The screenshot shows the 'Forms' management interface. At the top, there are navigation tabs: 'RESPONSES', 'MY FORMS' (which is selected), 'CAMPUS FORMS', 'FORM CATEGORIES', and 'BASE FORMS'. Below the tabs is a search bar containing 'event re' and two buttons: 'STATUS' and 'FILTER'. A table lists the forms with columns: 'Title', 'Created by', 'Content Type', 'Responses', 'Views', and 'Status'. The first row is 'Event Registration' by 'Mike Janofsky', with 'Event' as the content type, 47 responses, 109 views, and an 'Active' status. A three-dot menu icon is visible to the right of the 'Active' status, with a red arrow pointing to it. A dropdown menu is open from this icon, showing options: 'Edit', 'View Responses', 'View Response Summary', 'Respond From Portal', and 'Deactivate'. The 'Edit' option is highlighted with a red box. An 'EXPORT' button is visible at the bottom left of the table area.

Title	Created by	Content Type	Responses	Views	Status
Event Registration	Mike Janofsky	Event	47	109	Active

2. Edit the **Host** field.

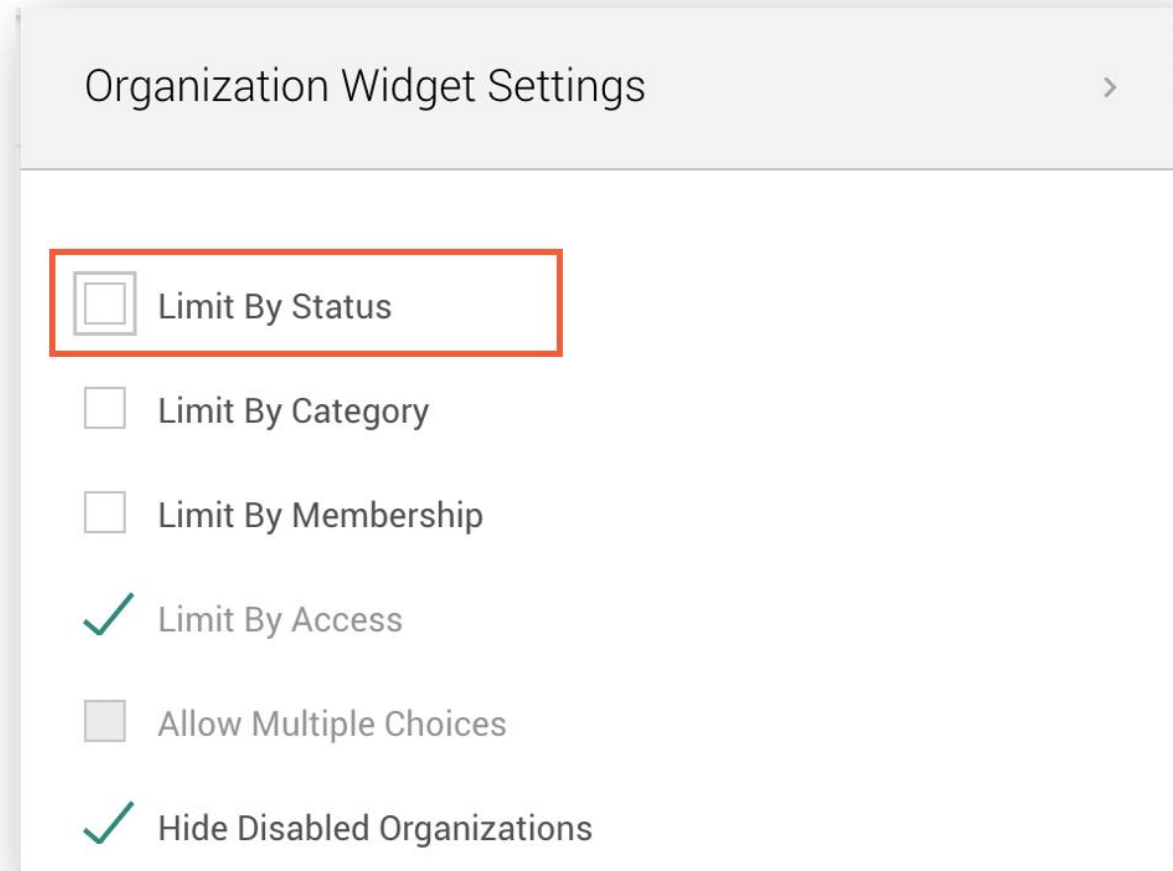
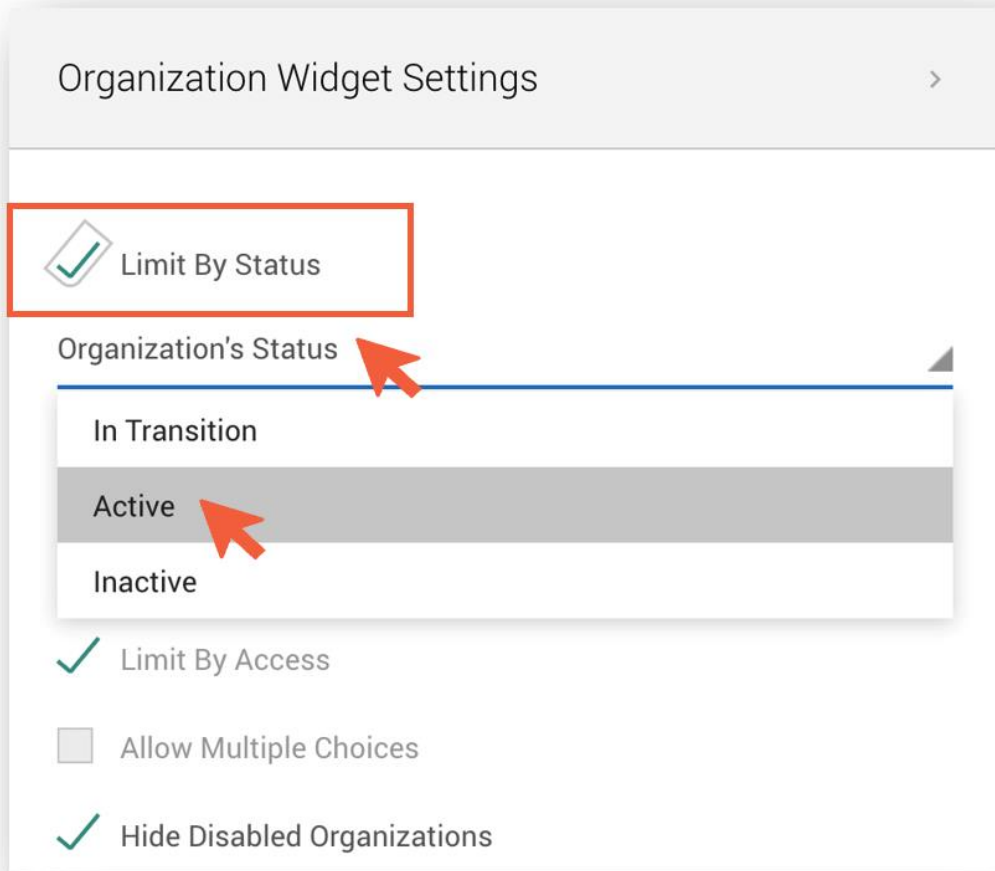
Host *

★ Organizations

3. Check or uncheck **Limit By Status**

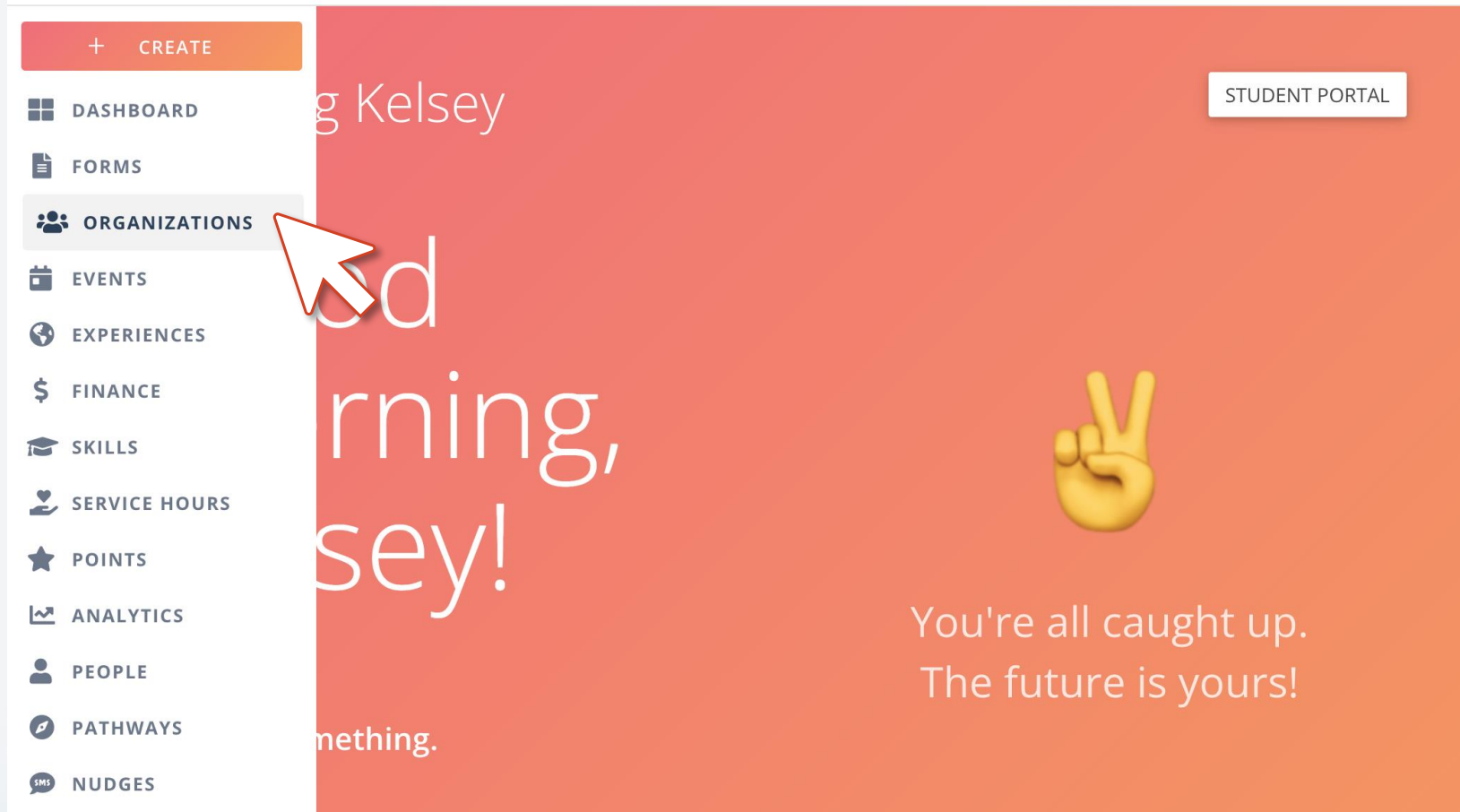
30



Enable Transitions

(as an administrator)

1. Select “Organizations” from the admin portal



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2. Select “manage”

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The screenshot displays the 'Organizations' management page in the Modern Campus system. The page features a navigation menu with tabs for ORGANIZATIONS, REQUESTS, OFFICERS, MEMBERSHIP, DRAFTS, and MANAGE. The 'MANAGE' tab is currently selected, indicated by a red mouse cursor. Below the navigation, there are three summary cards: 'Active Organizations' with a count of 20, 'Unique Members' with a count of 16, and 'Average Members' with a count of 2.30. A search bar is located below the summary cards, with filters for STATUS, AND, CATEGORY, and FILTER. Below the search bar is a table of organization records.

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"/> Holley Derby Past Due	Never	3	Intramural Sports	8/31/2023, 1:41:33 PM

6. OR select by organization category!

36

Organizations Failing The Transition Required Requirement

NEXT STEP

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

✓

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

Club ✓

Greek Life

Intramural Sports

Service

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

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Transition Setup

ORGANIZATIONS > DATE & MESSAGE > PREVIEW

Transition Deadline NEXT STEP

Choose the date to use as the transition deadline for the selected organizations. You will be able to update this at a later time.

Transition Deadline
04/18/2024 - 3:27 PM

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 S | | C ↶ ↷

</> WORDS: 46 CHARACTERS: 251

Transitioning period is about to begin! You will have 2 weeks to complete the process. Answer a few questions to let us now how this year went and how we can support you in the coming semester. Make sure to update your roster and leadership positions!

Help

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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Explain transitions.

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

Provide incentive.

Thanks for your leadership,
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

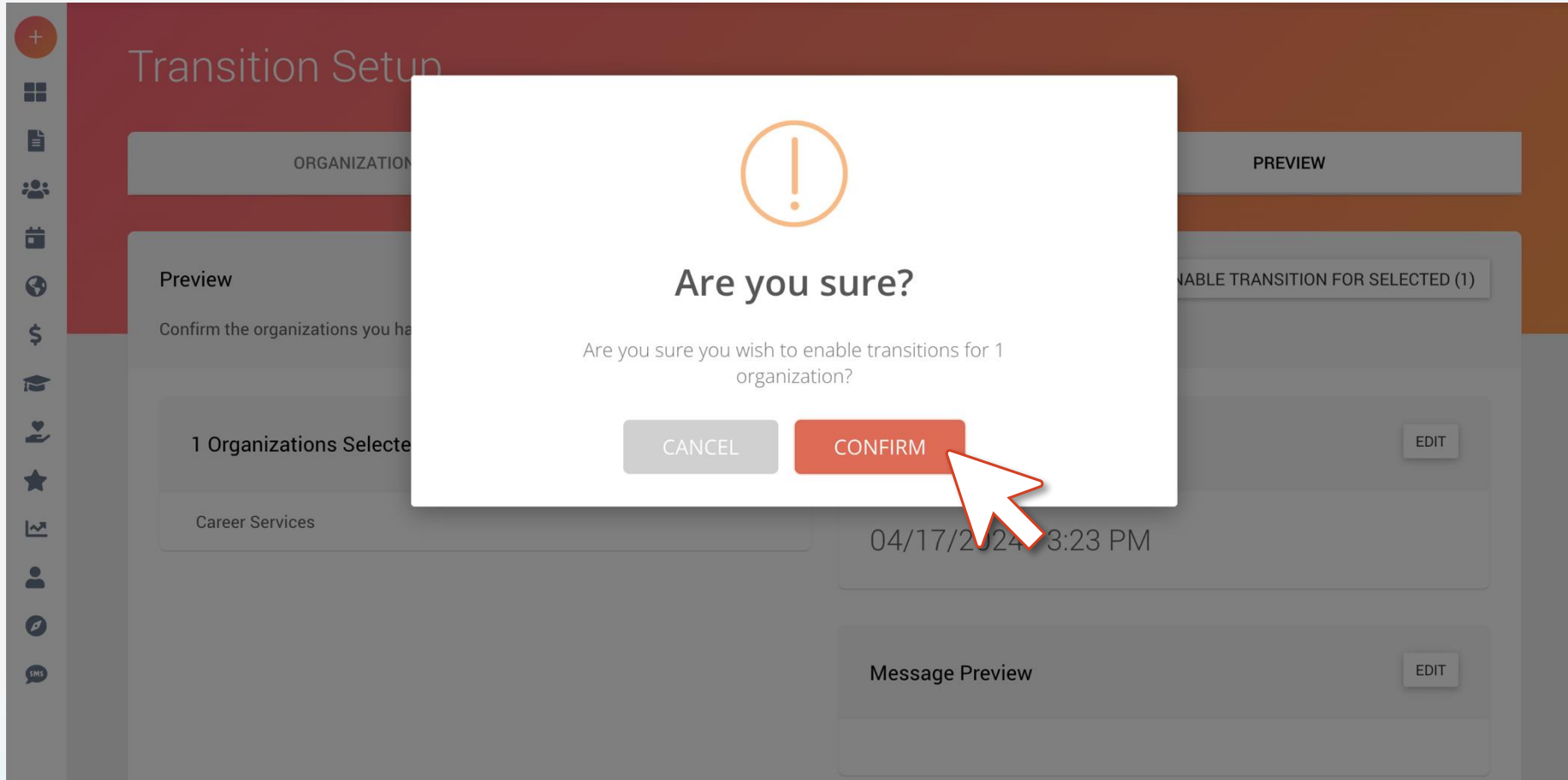
Transition Deadline EDIT

04/17/2024 - 3:23 PM

Message Preview EDIT

10. Confirm and you are all done!

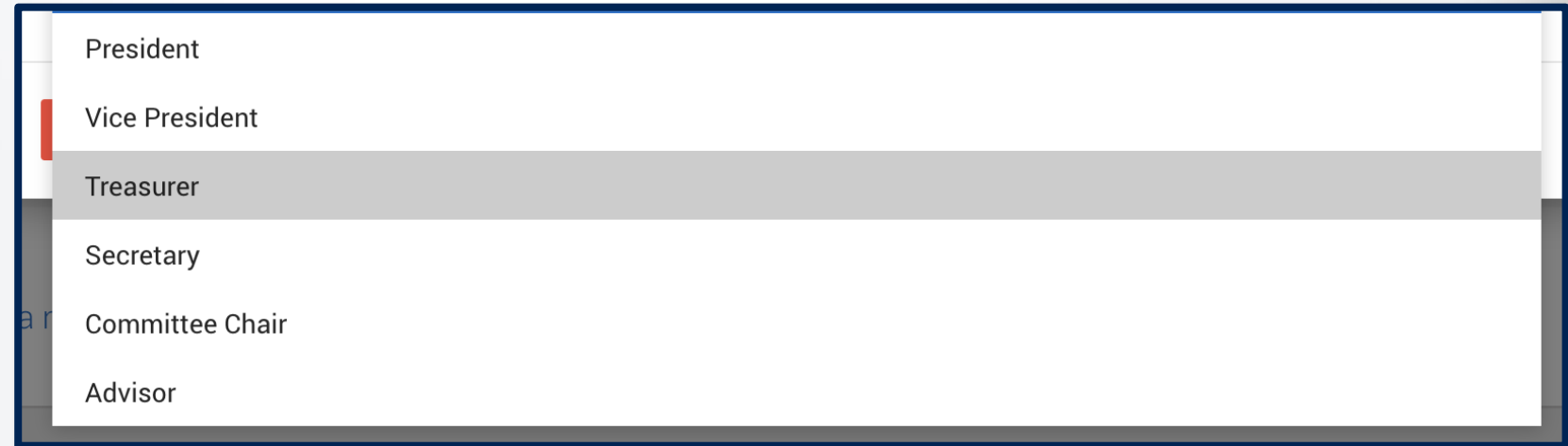
42



Reminder: Notification goes to...

- ALL Leaders

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



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?

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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?

?

48

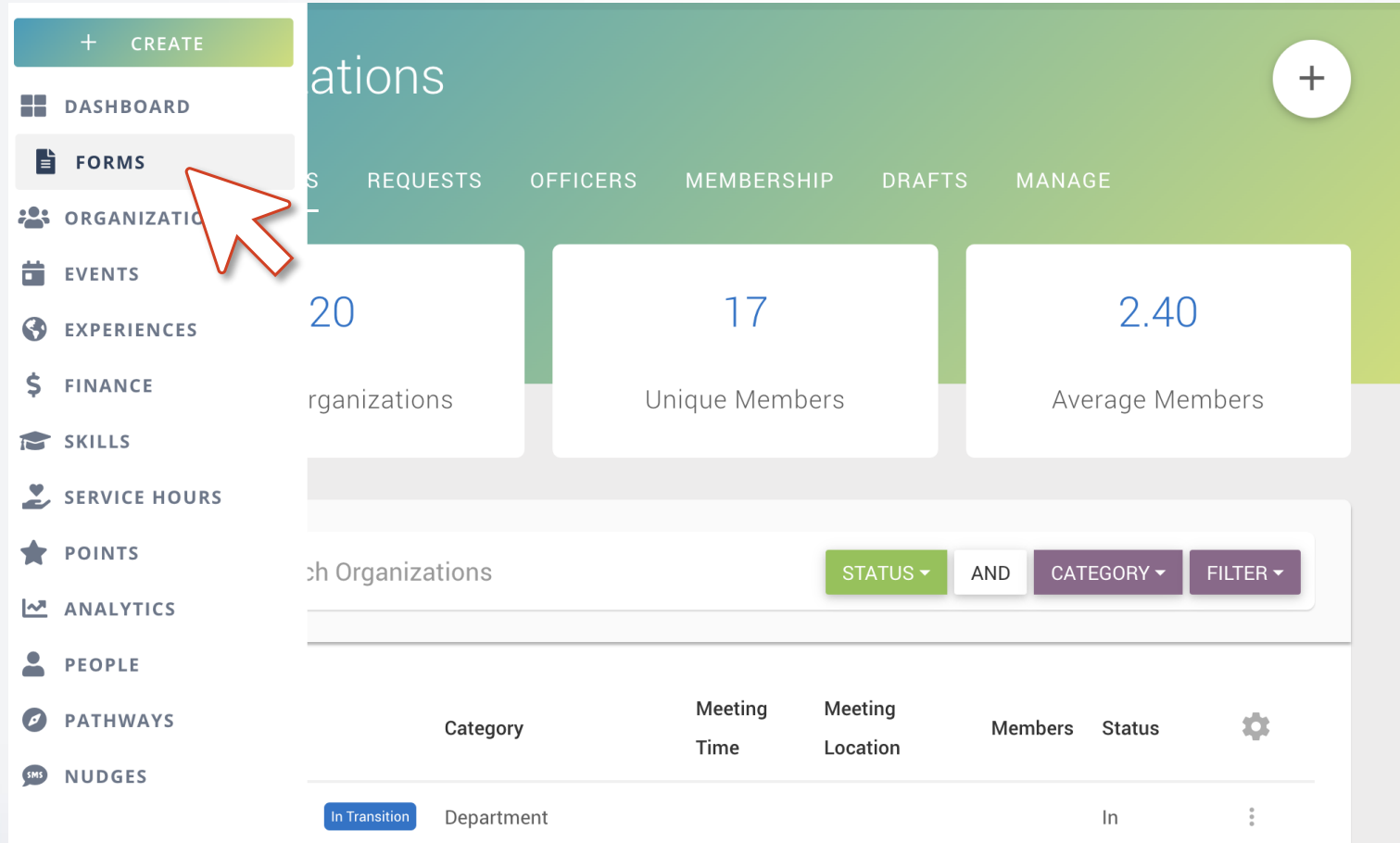
What are you hoping
to LEARN?

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 for next year
- What success they had this year
- What challenges they had this year
- How can your office offer support to their organization this year...
- *Suggestions? Put it in the chat!*

Customize your organization registration form

1. Navigate to the forms page on your admin portal



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2. Select “Edit” on your Organization Registration Form

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

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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 displayed. It includes a sub-header "Register your campus group." and several input fields: "Categories", "Meeting Time", "Meeting Location", "How was the year?", and "Contact Name". A red rounded rectangle highlights a new field group named "Transition" that has been added to the form. On the right, the "Form Builder" control panel is visible. It has two tabs: "FIELDS" (selected) and "FORM SETTINGS". Under the "FIELDS" tab, there are two sections: "Layout" and "Widgets". The "Layout" section contains buttons for "Content", "Field Group", and "Header". A red mouse cursor is pointing at the "Field Group" button. The "Widgets" section is partially visible below.

4. Add your custom transition questions and information.

The image shows a split-screen view of the Modern Campus interface. On the left is a form titled "Organization Registration" with the subtitle "Register your campus group." The form has several sections: "Categories *" with a text input field, "Meeting Time" and "Meeting Location" with text input fields, a "Transition" section with a paragraph of text and a link, and two text input fields for "What are your goals for next year? *" and "How was the year?". At the bottom, there is a question "How do you rate support from the Student Affairs office?" with a 5-point rating scale (1-5). On the right is the "Form Builder" sidebar, which has a back arrow and the title "Form Builder". It has two tabs: "FIELDS" (selected) and "FORM SETTINGS". Under "FIELDS", there are three categories: "Basic" with "Text", "Number", and "Choice" options; "Advanced" with "Date/Time", "DateTime", "Email", "File Upload", "Signature", and "Image Search" options; and "Layout" with "Content", "Field Group", "Header", and "Image" options. A red mouse cursor is pointing at the "How was the year?" text input field in the form.

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 text input fields: "What are your goals for next year?*" and "How was the year?". Below these is a rating scale for "How do you rate support from the Student Affairs office?" with options 1 through 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, showing "Field Description", "Field Size" (with "MEDIUM" selected), and checkboxes for "Hide Response From Admin" and "Hide Response From Portal". At the bottom of the settings panel, "Field Group Settings" and "Conditionals" are listed with right-pointing chevrons. A red mouse cursor is pointing at the "Conditionals" option.

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!

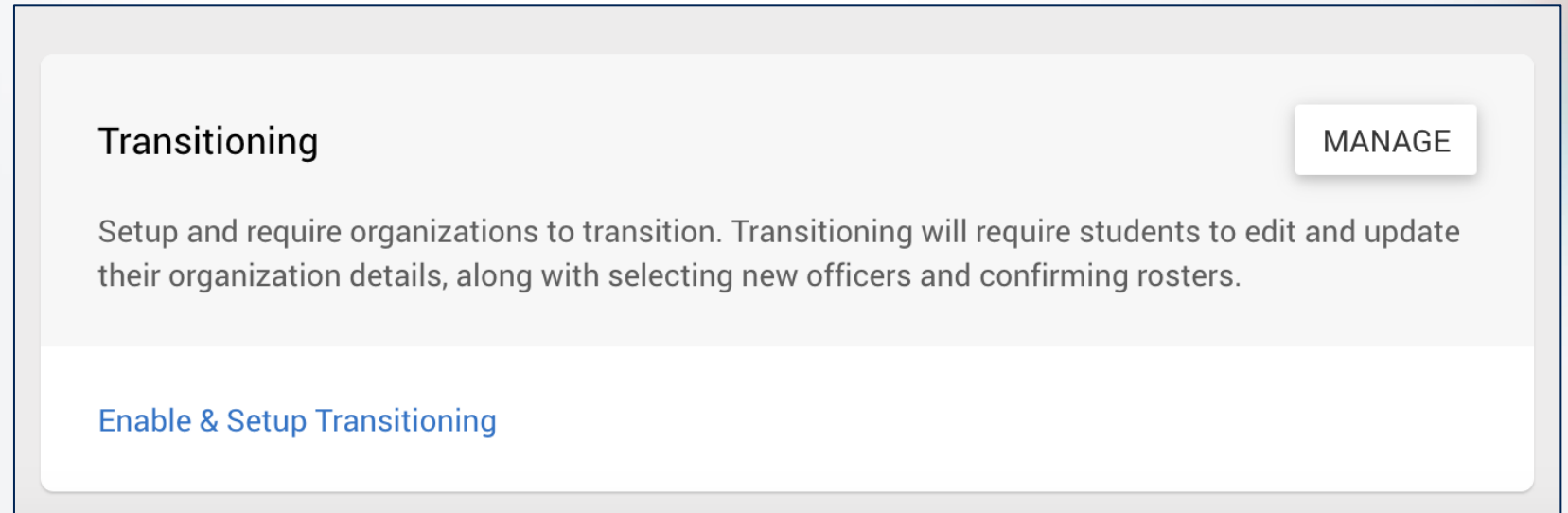


Check in on transitions

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.

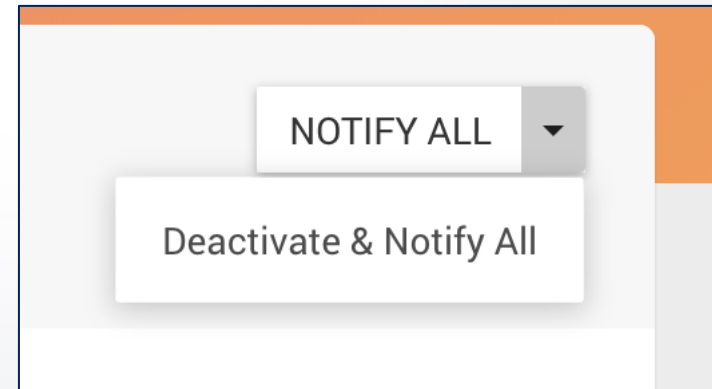
NEXT STEP

✓
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?

Post-Webinar Survey

- 2 minutes
- We love knowing what you like or would like improved!

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* 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.



Scan for a two minute
feedback survey

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!