

Chartering via OrgSync How to Charter On-Line

Please refer to the Office of Student Engagement website www.csusb.edu/student-engagement for detailed information on what is required to charter.

If you are chartering a ***new organization***, complete the following steps:

1. In order to charter a club or organization, you will need five members, three of which are financially responsible - President, Vice President, and Treasurer. In addition, you will need the names, Coyote ID numbers, mailing addresses, contact email, and phone numbers of the financially responsible members. For the two additional members, you will need their names and Coyote ID numbers. You will also need an on-campus advisor, and provide their name, on-campus mailing address, email address, and on-campus phone number.
2. You will need to submit a copy of your organization's constitution, and a current roster of all your members. Please include their names, Coyote ID numbers, and academic year (freshman, sophomore, junior, senior, graduate). A sample constitution and roster template are located on the OSE website at www.csusb.edu/student-engagement/resources.
3. Go to orgsync.com
4. At the top right, click on the "**Login**" icon. (If this is your first time using Org Sync, you will need to "**Choose Your Community**"). Locate "**California State University, San Bernardino**"
5. Click on the green "**Sign in with your campus ID**" icon. Sign in using your Coyote ID and password.
6. Locate the "**Organizations**" icon to the left under the CSU San Bernardino picture.
7. At the top right, click the green "**Register New Organization**" icon
8. Under "**Where Do You Want to Create This Organization**", click the "**Office of Student Engagement**" icon.
9. **Fill out form completely.** If you need to go back, click the back button on your web browser, not the back icon on Org Sync. Then click on the forward button on your web browser to resume.
10. Once everything is filled out completely, click the green "**Finish**" icon.
11. Once complete, you will receive a message in green at the top of the screen that says, "**Your organization registration request has been successfully submitted**".
12. You will be contacted by the Office of Student Engagement (OSE) for any pending requirements.
13. Once all requirements have been received, you will be contacted by OSE to schedule your charter appointment. A financially responsible individual (President, VP, or Treasurer) must be in attendance at the charter appointment.
14. At your charter appointment, you will discuss strategies to be successful in your organization, and complete the updated Trust Fund Fact Sheet with Financial Management Specialist.
15. Once the Trust Fund Fact Sheet is returned signed to the OSE, your organization's charter is complete.

Please note: If you do not complete the form, you must log in again. Click on your name in the top right corner, click "**Activity**", "**Registrations and Renewals**" on the left side of the screen, then click the wrench icon to edit or delete.

Once everything is complete, and you are chartered with the Office of Student Engagement, your organization will appear under "**Browse Organizations**".

If you have any questions, please contact the Office of Student Engagement via email at SLDEVENTS@csusb.edu, or by phone at 909-537-5234.

If you are ***re-chartering*** an existing organization, complete the following steps:

16. In order to re-charter a club or organization, you will need five members, three of which are financially responsible - President, Vice President, and Treasurer. In addition, you will need Coyote ID numbers, mailing addresses, contact email, and phone numbers for all financially responsible members. For the two additional members, you will need their names and Coyote ID numbers. You will also need an on-campus advisor, and provide their name, on-campus mailing address, email address, and on-campus phone number.
17. Go to orgsync.com
18. Click on the green "***Sign in with your campus ID***" icon
19. Locate the "***Organizations***" icon to the left under the CSU San Bernardino picture
20. Once you have located your organization, go to "***Settings***" at the top right of the page
21. Once at the "***Organization Settings***", click "***Profile***", then click "***Update and Renew Profile***". If you cannot access the settings on your organization's profile, contact the Office of Student Engagement at (909) 537-5234.
22. Update form accordingly and click finish.
23. Once complete, you will receive a message in green at the top of the screen that says, "***Your organization registration request has been successfully submitted***".
24. You will be contacted by the Office of Student Engagement (OSE) for any pending requirements.
25. Once all requirements have been received, you will be contacted by OSE to schedule your charter appointment. A financially responsible individual (President, VP, or Treasurer) must be in attendance at the charter appointment.
26. At your charter appointment, you will discuss strategies to be successful in your organization, and complete the updated Trust Fund Fact Sheet with Financial Management Specialist.
27. Once the Trust Fund Fact Sheet is returned signed to the OSE, your organization's charter is complete.

You can check the status of your charter, and locate any pending items at "***My Tools***", "***Requests***".

Once everything is complete, your organization will appear under "***Browse Organizations***".

If you have any questions, please contact the Office of Student Engagement via email at SLDEVENTS@csusb.edu, or by phone at 909-537-5234.