



## Using the Recommendation Forms Reports in Anchorbase

When members complete an online recommendation form in [Anchorbase](#), their submissions can be seen immediately in Anchorbase via two reports.

These reports can be found by navigating to:

- Recruitment & Panhellenic > Reports > Recommendation Forms OR
- Recruitment & Panhellenic > Reports > Recommendation Forms Spreadsheet.

It is the responsibility of the director of recruitment records to develop a dependable strategy for organizing and utilizing recommendation forms.

### CHOOSING THE RIGHT REPORT

We recommend using these two reports in the ways listed below.

- Recruitment & Panhellenic > Reports > Recommendation Forms
  - To upload recommendation forms to the [Manage New Members task](#)
  - To download a specific PNM's recommendation form
- Recruitment & Panhellenic > Reports > Recommendation Forms Spreadsheet
  - To assist Evaluating Committee (EVC) with giving an AnchorScore
  - To see all forms that have been submitted online
  - To scan for information to assist with matching PNMs to members

Each EVC may adopt their own record keeping process.

### USING THE REPORTS

1. Choose the appropriate academic year from the dropdown.
2. Select a date range that begins with your first notification of receiving recommendations and ends with today's date.
3. Press the View Report button at the right of the screen. You may need to scroll to the right to see this button. This will display all recommendations received to date.

If you will be viewing or downloading the recommendation reports periodically throughout the months leading up to recruitment, it will be important to come up with a schedule. It's recommended you pick the same day to review recommendation reports each week, so you can easily keep track of which date ranges you have already processed. For example, you may want to review recommendations each Monday for the previous week. In that case, you would pull a report of recommendations each Monday for the previous Monday through Sunday time period. It's important to choose an end date that has already passed to ensure you don't miss any submissions (for example, if you pull recommendations on Sunday





through Sunday, and someone submits a recommendation later that day) or you will have to deal with duplicates by pulling the same date twice (for example, if you pull recommendations submitted Monday through Monday each week, you will be pulling Monday's submissions twice).

If your chapter receives many recommendations, plan to review the submissions more than once per week, for example every Monday, Wednesday, and Friday (for date ranges Friday through Sunday, Monday through Tuesday, and Wednesday through Thursday, respectively).

If your chapter doesn't receive many recommendations, you can pull a recommendation report less often, but you will need to keep track of the date you last downloaded the forms and use that as your start date the next time you run the reports. You can store these dates in your phone or with your Delta Gamma paperwork.

### **SAVING THE REPORTS**

All reports can be downloaded and saved using the save icon and named appropriately. The Recommendation Forms Spreadsheet report should be downloaded as an Excel file. The Recommendation Forms report can be downloaded as a PDF or Word file.

### **DOWNLOADING INDIVIDUAL PNM RECOMMENDATION FORMS**

1. Select the appropriate academic year and date range that is wide enough to contain most of the recommendations submitted for your chapter's recruitment period.
2. Enter the new member's first and last name in the appropriate fields.
3. Press the View Report button at the right of the screen. You may need to scroll to the right to see this button. This will show all recommendations submitted via the online recommendation form for PNMs with that name.

### **MANAGING MAILED AND EMAILED FORMS**

In a downloaded spreadsheet, consider typing the contents of any mailed paper forms or emailed forms into the spreadsheet. This will allow EVC to have the contents of all recommendation forms in one location. Keep copies of these paper forms until after recruitment in case you need it for the new member task or for Continuous Open Bidding (COB) purposes.

