



Chi Sigma Iota Counseling Academic and Professional Honor Society International

CFA Quick Guide

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CFA Quick Guide Purpose

Chi Sigma Iota Counseling Academic and Professional Honor Society International (CSI) is pleased that your chapter joins hundreds of other chapters across the world in furthering our mission to *promote excellence in the Counseling profession*. Thank you for your service as a Chapter Faculty Advisor!

This *CFA Quick Guide* has been created specifically for Chapter Faculty Advisors (CFAs) to quickly access key resources. It is intended to complement comprehensive information within the [CSI Chapter Leadership Manual](#) about the Society, policies, chapter resources, etc.

We look forward to corresponding directly with you as the approved CFA for your chapter. When CSI Headquarters responds to chapter officers and members, we follow CSI's policy to communicate directly with and/or to include approved CFAs on chapter communications to facilitate CFA awareness of correspondence from/to chapter members, information related to the chapter, etc.

CSI Member Profile Access

Every CSI member has a personal [CSI Member Profile](#). Please log into your [CSI Member Profile](#) (if needed, you may reset your password [here](#)) and check two things:

1. Ensure current contact information so you get CSI communications.
2. Note your membership expiration date. CFA active CSI membership is a requirement to [Maintain an Active CSI Chapter](#) and for your chapter to receive [Earned Chapter Rebates](#).

Chapter Username & Password

Every CSI chapter has a unique chapter username and password that CFAs use to [log into the chapter profile](#) (*Chapter Login for CFAs & Group Admins*) and access CSI's Member Management System (MMS). Your chapter's username and password are emailed to CFAs within the official welcome letter when a chapter is newly chartered/reactivated and in the official approval notice of CFA changes for the chapter.

The chapter username and password should only be kept and used by current, approved CFAs - it should not be shared with students, administrative assistants, or anyone else. Improper use of chapter usernames and passwords is a policy violation and may result in sanction as determined by the CSI Executive Council. Chapter usernames and passwords cannot be changed by CFAs or chapter leadership.

Chapter Profile & Member Management System (MMS) Access Using Chapter Username & Password

Member Management System (MMS) Access

Within the Member Management System (MMS), CFAs approve new members, submit initiation dates, and access chapter member lists.

CFAs access the MMS in three steps:

1. [Log into the chapter profile](#) (*Chapter Login for CFAs & Group Admins*) with the chapter username and password.
2. Hover over the "Chapters" menu; click "CFA MMS System."
3. Access these areas within the "CFA MMS System":
 - Member Processing
The Application Status box is a dropdown menu (Pending Approval, Pending Initiation Date, Completed, Declined). Navigate through each option to approve/decline (Pending Approval) new member applications and submit initiation dates (Pending Initiation Date).
 - New Member Processing Instructions
Use [New Member Processing Instructions](#) to navigate the MMS.
 - View/Export Member List
Obtain a full list of every CFA-approved and initiated member of the chapter anytime.

Approving New Members & Submitting Initiation Dates in the MMS

At least 3 weeks prior to your chapter's yearly initiation, CFAs must:

1. Approve/decline all applicants who apply for CSI membership through your chapter in the MMS.
2. Assign an initiation date in the MMS to all newly approved applicants.
3. Reply to the email from CSI Headquarters (sent after an initiation date is submitted in the MMS) to confirm accuracy of the final list of CFA-approved applicants and the submitted initiation date.

[CSI's Membership Processing Checklist](#) contains a thorough outline of member approval and initiation processes, policies, and expectations.

Maintain an Active CSI Chapter & Receive Earned Chapter Rebates

To [Maintain an Active CSI Chapter](#) and to receive [Earned Chapter Rebates](#), chapters must meet these requirements during the year (May 1 – April 30).

1. Every year, submit a Fall Annual Plan between August 1st and September 30th (incoming officers).
2. Every year, submit a Spring Annual Report between March 1st and April 30th (present officers).
3. Every year, invite and initiate new members consistent with [CSI's procedures](#) for CFA-approval (or CFA-decline) of new members and submission of initiation dates at least three weeks prior to an initiation.
4. At least once every three years, have a chapter delegate's attendance recorded at the [CSI Day's Annual Delegate Business Meeting](#).
5. Comply with CSI policies as determined by the Executive Council (e.g., only authorized uses of the CSI registered logo; required number of approved CFAs serving who are active CSI members).

Your official chapter website in the [CSI Chapters Directory](#) lists the requirements that your chapter must meet, and when requirements are met, to [Maintain an Active CSI Chapter](#) and to receive [Earned Chapter Rebates](#). Your chapter website also provides access to your chapter's official, approved copy of your chapter bylaws.

Chapter Fiscal Responsibilities

Your chapter leadership needs a solid understanding of [CSI Chapter Fiscal Responsibilities](#). CSI International is a 501(c)3, but that status does not automatically include chapters, and CSI chapters are not able to use CSI International's Federal Tax ID. As indicated in the "[Tax Status of Chapters Within CSI](#)" document, chapters should obtain a Federal Tax ID number through the [IRS website](#) before setting up a checking account, and [file the appropriate IRS returns annually](#).

CFA Changes

Chapters must submit the [online CFA Change Form](#) to have new CFAs approved, updated, etc. CSI cannot make CFA changes from information submitted in other ways (e.g., on the Fall Annual Plan or Spring Annual Report).

CSI must approve all CFAs. CFAs must be Counselor Educators who have completed at least one year as an active member (at any time) and maintain active membership during service.

Deadlines, Updates & Opportunities

CSI E-News

CSI emails the [E-News](#) to CFAs monthly during the fall and spring semesters. Quickly reviewing the E-News will keep your chapter up to date on all CSI events, including grant and award submission due dates (in fall), as well as all upcoming deadlines and requirements. [E-News issues are archived on the CSI website.](#)

CSI Social Media

Everything CSI is posted on the Society's social media platforms.

[Facebook](#)

[Instagram](#)

[LinkedIn](#)

[X](#)

CFA Resources & Support

CSI maintains many online resources that can help reduce your direct involvement if your officers and committee chairs use them. CSI Headquarters will do all we can to minimize your workload as well.

CSI's Chapter Faculty Advisor Committee and Chapter Development Committee regularly develop and update [CFA](#) and [Chapter Resources](#) online. CFAs also can participate in the CFA Connect Mentorship Program (contact admin@csi-net.org for information).

This list includes just some of the practical resources available to support you and your chapter leaders in establishing a strong and effective chapter with practical chapter organization, management, etc.

Video Welcome Messages for Chapter Officers and Members

[CSI's Executive Council President's Welcome Video Message to Chapters/Initiates](#)

[Welcome and Orientation Video for Chapter Leaders](#)

Orientation for CFAs and Chapter Leaders

[Chapter Leadership Manual](#)

CSI's [Principles and Practices of Leadership Excellence \(PPLEs\)](#)

[Orientation for New Chapter Faculty Advisors](#)

[Chapter Leader Webinars](#)

[CSI International Bylaws*](#)

[CSI Approved Policies*](#)

**To ensure your chapter is successful, encourage your chapter leadership to be familiar with CSI's Bylaws and Approved Policies.*

Initiation Best Practice Guides

[Best Practices Guide for Chapter Initiations and Ceremonies](#)

[Best Practices Guide for CFAs in Online/Hybrid Programs](#)

CSI Publications

We encourage your chapter – and your counselor education program – to use the information within CSI's [publications](#): the *Exemplar*, *Journal of Counselor Leadership & Advocacy*, CSI Counselors' Bookshelf, and the CSI E-News. These publications also offer opportunities for you and your active chapter members to submit content for publication consideration.

CSI Webinars

CSI provides CFA Trainings and Chapter Leader Trainings in person (during CSI Days and as announced during the year) and via [upcoming live webinars as well as recorded webinars](#). All CSI webinars are free for active CSI members and most offer free CE credit.

CSI Days' Events

CSI Days' events are hosted annually in fall virtually (in even years) and/or in person at the ACES Conference (in odd years). These always include CFA Training and Chapter Leaders (officers) Training sessions, the CSI Awards and Recognition Ceremony, and the annual Delegate Business Meeting (attendance at this meeting is a requirement for annual chapter rebate checks)

Chapter & Member Resources

CSI offers numerous funding opportunities for members and chapters, and CSI chapters provide many different benefits to both members and counselor education programs.

Member Benefits

Review the [benefits of CSI membership online](#) and within [this brochure that outlines CSI Member Benefits](#) (feel free to print it or link to it).

Professional Development & Leadership Training

CSI offers various [professional development resources](#). [CSI Webinars](#) cover various topics including clinical practice, professional issues, and leadership training (specifically for CFAs and chapter leaders) and active members can earn NBCC-approved CE for attending live webinars and/or viewing recorded webinars. Members also receive free access to [CSI publications](#) including the [Counselors' Bookshelf](#), [Exemplar](#) and the [Journal of Counselor Leadership and Advocacy \(JCLA\)](#).

Earned Chapter Rebates

When chapters meet the requirements to [Maintain an Active CSI Chapter](#), they are eligible to receive [Earned Chapter Rebates](#) that are mailed each fall.

Grants

Numerous [grant](#) funding opportunities are available to members and chapters through CSI's Excellence in Counseling Research Grants, Chapter Development Grants, and Statewide/Regional Networking Grants.

Awards & Recognitions

Consider nominations for [CSI Awards](#) (Individual and Chapter levels) and Chapter Awards, including the [Chapter Highlight Recognition](#) (applications open in fall). Student members may apply for CSI's [Leadership Fellow and Intern program](#) (applications open in September) to develop leadership skills by being mentored by, and working closely, with leaders in the Counseling profession while serving on committees, review panels, and contributing to publications.

Professional Counselor Liability Insurance

Through CSI's partnership with the National Board for Certified Counselors (NBCC) and the Association for Counselor Education and Supervision (ACES), members can access discounted [professional counselor liability insurance](#) with coverage specifically for students and practitioners, as well as counselor educators and researchers.

NBCC ACEP Benefits

One of the [Benefits of CSI Chapters to Counselor Education Programs](#) is that counselor education programs with an active CSI chapter may apply, at no cost, to become and serve as a National Board for Certified Counselors (NBCC) Approved Continuing Education Provider (ACEP).

Taylor & Francis Member Discount

Members can access a discount code for Taylor & Francis publications through their [CSI Member Profile](#).

CSI Store

All CSI logo merchandise must be purchased through the CSI Store accessed through their [CSI Member Profile](#). CSI members can access the CSI Store to purchase graduation regalia, chapter supplies, etc.

As a new CSI chapter, you will receive a CSI Banner, which displays the CSI logo and is a wonderful item to prominently display at your chapter initiation and other chapter-sponsored events. Your chapter also might consider purchasing the CSI Table Cover to use as another professional display at venues where your chapter hosts initiations and activities.