

LDCP Finance Workshop June 2022

TSO HQ:

International HQ:

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Dallas 75379

Ella Gauthier, TSO Finance Chair

Nelle Gentry, ASTEF VP Finance

International Web Site: www.dkg.org

Phone: 512-478-5748

Mailing: 12710

2021-23 Finance Committee Reps

Ella Gauthier (Chair): Areas 1, 2, 3

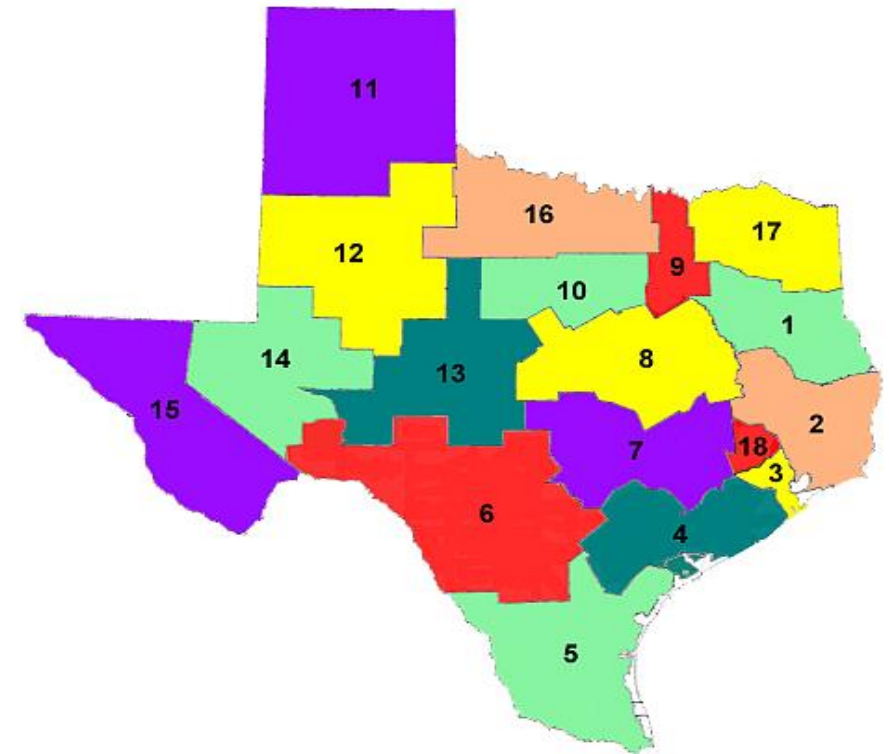
Sallie Frederick: Areas 4, 5, 6

Susan Harmon: Areas 13, 14, 15

Ellen Laughlin: Areas 7, 8, 18

Sharon McDougle: Areas 11, 12, 16

Pam Phillips: Areas 9, 10, 17



WHY: Chapter Roster ~ Links to Forms ~ Access Dues Portal

WHEN: Anytime: Download chapter roster

: Access Dues Portal / Member Management

July: Download & submit Form 15, 18-A

July-Oct: Access IRS 990n filing portal

April-July: Access Dues Portal / Order Management

: Create orders & submit payment to Int'l & TSO for members who paid chapter

: Download & share Dues 1, 2, 3 reminder

HOW: Sign in at www.dkg.org, click **MyDKG** in dark gray ribbon, click Chapter Connect in red ribbon

Refer to the DKG TSO web site, Treasurers' page for support documents.

<https://www.dkgtexas.org/treasurers-page.html>



CHAPTER PRESIDENT & TREASURER ACCESS to CHAPTER CONNECT & Dues Portal



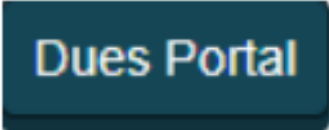
Sign in to My DKG

1. Go to International site: www.dkg.org
2. **Sign In** using the link in the top gray bar
Username: your **DKG Member Number**
****Member number is on your DKG membership card and on the chapter roster**
Password: **d—20—soc----** - change to one of your choice once signed in



Chapter presidents & treasurers have access

- Links to forms with submission deadlines
- Chapter Roster



Chapter presidents & treasurers have access

- **Orders Manage:** Place paid members in an Order and submit payment to Int'l & TSO
Unbilled Members: place in an order to prevent auto-drop, then submit payment

Orders	Members	
Manage	Manage	Add/Transfer

Mark Your Calendar: Dues Deadlines on the 1's and 30's

Refer to the DKG TSO web site, Treasurers' page: *Dues Portal Tip Sheets*

- **May 30**: Chapter dues collection completed
Continue collecting through Sept. as needed
- **June & July 30**: payments submitted to **Int'l in Austin** (dues)
and **TSO in Dallas** (dues + fees)
- **Aug. & Sept. 1**: Int'l emails automated reminders to ***Unbilled Members***
(see Dues Portal / Manage Orders)
- **Aug. & Sept. 30**: Paid members should be in ***Paid Orders***
 - to avoid email reminders and auto-drop
 - payments submitted to Int'l & TSO asap
- **Oct. 1**: Int'l auto drops ***Unbilled Members*** (can be reinstated)

Dues Collection, Reporting & Payment / Member Contact Information Updated

March-May: Collect dues, deposit in chapter bank account.

Goal: 100% returning members' dues collected by end of May.

Refer to: DKG / TSO Dues & Fees Chart 2022-23

April-May: From Chapter Connect:

1. Download chapter roster before submitting payments for the next membership year. This is the official chapter roster for the current membership year.
2. Use this roster to verify and update members' contact information.

~~~ Hint: partner with the chapter membership committee to complete this task ~~~

Who uses the contact info?

- International & TSO use email, postal mail and phone to contact members.
- TSO Lone Star News editor mails 2 issues to members. TSO incurs the cost of return postage.
- Options to update contact info:
  - Members update their own information at My DKG.
  - Chapter presidents or treasurers use the Dues Portal / Member Management to update contact information. Refer to: Update Member Contact Information

2.13.20

**May-June: Using the Dues Portal:**

## TSO FEES FORM

Complete this form for each dues payment  
 Mail it with order form and payment to  
 TSO HQ  
 PO Box 797787  
 Dallas, TX 75379

Keep a copy of this fee calculation and the printed order form for your records.  
 Include order number/s in the memo of the check.

|                                              |                      |                           |                              |
|----------------------------------------------|----------------------|---------------------------|------------------------------|
| Chapter                                      | <input type="text"/> | Area                      | <input type="text"/>         |
| Treasurer                                    | <input type="text"/> | Email                     | <input type="text"/>         |
| Order #                                      | <input type="text"/> | Phone                     | <input type="text"/>         |
| # Paid members on order form                 | <input type="text"/> | Dues amount on order form | \$ <input type="text"/>      |
| <b>Total Amount dues &amp; fees enclosed</b> |                      | \$ <input type="text"/>   | Check # <input type="text"/> |

## DKG / TSO Dues Chart 2022-2023

2/5/22

| DKG / TSO Dues: April 1-December 31, 2022                                                      |                            |          |                                                                             |                                                                          |                            |                                     |                                 | Pay Int'l & TSO separately from online order. |  |
|------------------------------------------------------------------------------------------------|----------------------------|----------|-----------------------------------------------------------------------------|--------------------------------------------------------------------------|----------------------------|-------------------------------------|---------------------------------|-----------------------------------------------|--|
|                                                                                                |                            |          |                                                                             |                                                                          |                            |                                     |                                 | Fees to TSO: Use TSO Fees Form                |  |
| Member Type                                                                                    | International Dues         | TSO Dues | Scholarship fee if chapter <u>doesn't</u> provide a scholarship for members | Scholarship fee if chapter <u>does</u> provide a scholarship for members | New Member (Induction) Fee | Total Dues + Fees to TSO per member | Chapter Determines Chapter Dues |                                               |  |
| Active                                                                                         | \$40.00                    | \$20.00  | \$1.00                                                                      |                                                                          |                            | \$21.00                             |                                 |                                               |  |
|                                                                                                | \$40.00                    | \$20.00  |                                                                             | \$0.20                                                                   |                            | \$20.20                             |                                 |                                               |  |
| Reserve                                                                                        | \$20.00                    | \$7.00   | \$1.00                                                                      |                                                                          |                            | \$8.00                              |                                 |                                               |  |
|                                                                                                | \$20.00                    | \$7.00   |                                                                             | \$0.20                                                                   |                            | \$7.20                              |                                 |                                               |  |
| Collegiate                                                                                     | \$20.00                    | \$7.00   | \$1.00                                                                      |                                                                          | <i>\$2.50 add if new</i>   | \$8.00 (+\$2.50)                    |                                 |                                               |  |
|                                                                                                | \$20.00                    | \$7.00   |                                                                             | \$0.20                                                                   | <i>\$2.50 add if new</i>   | \$7.20 (+\$2.50)                    |                                 |                                               |  |
| Inductee                                                                                       | \$40.00                    | \$20.00  | \$1.00                                                                      |                                                                          | \$2.50                     | \$23.50                             |                                 |                                               |  |
|                                                                                                | \$40.00                    | \$20.00  |                                                                             | \$0.20                                                                   | \$2.50                     | \$22.70                             |                                 |                                               |  |
| Honorary                                                                                       | Int'l one-time fee \$49.50 | \$0.00   | \$0.00                                                                      | \$0.00                                                                   | \$0.00                     | \$0.00                              | \$0.00                          | N/A                                           |  |
| Members being reinstated or transferring into a chapter pay dues according to her member type. |                            |          |                                                                             |                                                                          |                            |                                     |                                 |                                               |  |

## Dues: What to Send Where

Must I do these steps each time I pay for an order? YES!

### International – create orders in the Dues Portal

Access the International dues portal at [www.dkg.org](http://www.dkg.org); sign in, go to Chapter Connect, click Pay Dues button; open Order Management; create an order to pay members' dues.

Send International the following to submit payment for members:

1. A **copy of the order form** printed from the Dues Portal - **print 3** (one for International, one for TSO, and one for chapter treasurer records)
2. A **check to DKG International** for the amount indicated on the order(s). Multiple orders can be paid with one check - include the order numbers in the memo of the check.
3. **Mail order form & check to DKG International** at the Austin address listed on the order form.

Send Form 18A & Form 6 to both entities  
to indicate member deaths or drops.

### TSO – use the International order form and the TSO Fees Form

Access the TSO site at [www.dkatexas.org](http://www.dkatexas.org); open the Treasurer's page, scroll to Dues section; open, download and save the TSO Fees Form.

Send TSO the following to submit payment for members:

1. A **copy of the order form** printed from the International Dues Portal.
2. A **copy of the TSO Fees Form** to calculate total payment: dues, scholarship fee & inductee fee. Fill out completely and make 2 copies (one for TSO and one for chapter treasurer records). Refer to the TSO Dues Chart for dollar amount guidance.
2. A **check to TSO** for dues + fees as calculated on the TSO Fees Form. Multiple orders can be paid with one check - include the order numbers in the memo of the check.
3. **Mail order form, TSO fees form & check to TSO** at the Dallas address listed on the TSO Fees Form.

## **Mark Your Calendar: Annual deadlines on the 1's & 15's**

Refer to the DKG TSO web site, Treasurers' page: *Important Deadlines, 990n, Forms*

- April 1: Contribution recognition at Convention for 3 ASTEF funds and Eula Lee Carter memorial fund
- July 15: Form 15 Treasurer's Report
  - report chapter grants & scholarships for Int'l report
  - update treasurer information as needed
- Nov. 15: 990n ePostcard to IRS
  - retains chapter's income tax exemption
  - IRS site opens July 1 for 990n submissions

### **HELPFUL TIP:**

Submit both in early July when doing the monthly bank reconcile



## Convention Recognition for Contributions: April 1

Contribution forms on the DKG Texas website, Treasurers Page

Separate checks and forms for different funds

Mail contributions to TSO HQ



### **ASTEF: 3 funds – Scholarship, Leadership, Projects**

- Chapter: \$1 or \$2 per member  
Memorials, Honorariums (if not \$1, \$2)
- Individual: Memorials, Honorariums
- Provides funding for TSO Scholarships, TSO Leadership Seminar, ASTEF Aspiring Educator Grants and ASTEF Project Stipend Grants

### **The Eula Lee Carter Memorial Fund - created to honor Dr. Eula Lee Carter**

- Scholarships awarded to members residing in a Latin American country in the Southwest Region who are pursuing educational advancement
- Chapter or Individual  
Memorial or Honorarium



# July 15 – Form 15 Annual Report of Chapter Treasurers

State Treas. report to International relies on your report

- Fillable form available from International site / My DKG / Chapter Connect
- Email to: Deborah Thomas, TSO Treasurer
- Mail to: TSO HQ in Dallas
- Updated form is simplified for reporting: no financial reporting required

| Complete this section if applicable                                                 | Complete this section if applicable                                                |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| <b>CHAPTER GRANTS-IN-AID AWARDED</b><br>(For Non-Members Only)                      | <b>CHAPTER SCHOLARSHIPS AWARDED</b><br>(For Members Only)                          |
| <input type="text"/> @ \$ <input type="text"/> = \$ <input type="text"/>            | <input type="text"/> @ \$ <input type="text"/> = \$ <input type="text"/>           |
| <input type="text"/> @ \$ <input type="text"/> = \$ <input type="text"/>            | <input type="text"/> @ \$ <input type="text"/> = \$ <input type="text"/>           |
| (Use additional pages if necessary)                                                 | (Use additional pages if necessary)                                                |
| TOTAL Disbursements of Grants-In-Aid # <input type="text"/> \$ <input type="text"/> | TOTAL Disbursements of Scholarships # <input type="text"/> \$ <input type="text"/> |
| <input type="checkbox"/> We have a grant-in-aid, but it was not awarded this year.  | <input type="checkbox"/> We have a scholarship, but it was not awarded this year.  |

- I will continue to serve as chapter treasurer for 2020-21
- My chapter will have a new treasurer in 2020-21. Include name, address, phone and email below.

- I filed the Form 990n with the IRS (U.S. only) 2018-2019 between July 1, 2019 and November 15, 2019.
- We have conducted a financial review of our records for the 2019-2020 fiscal year.

## July 1 – November 15 – 990N ePostcard

Recommended: File in July-August

Not recommended: file in November



[www.irs.gov/990N](http://www.irs.gov/990N)

- File yearly to maintain income tax filing exemption
- File directly with the IRS - online only
- Links and resources on the TSO web site / Treasurer's Page and International web site / Chapter Connect
- Keep a copy of the accepted filing in chapter treasurer files
- No need to send a copy to TSO HQ – we can check status online

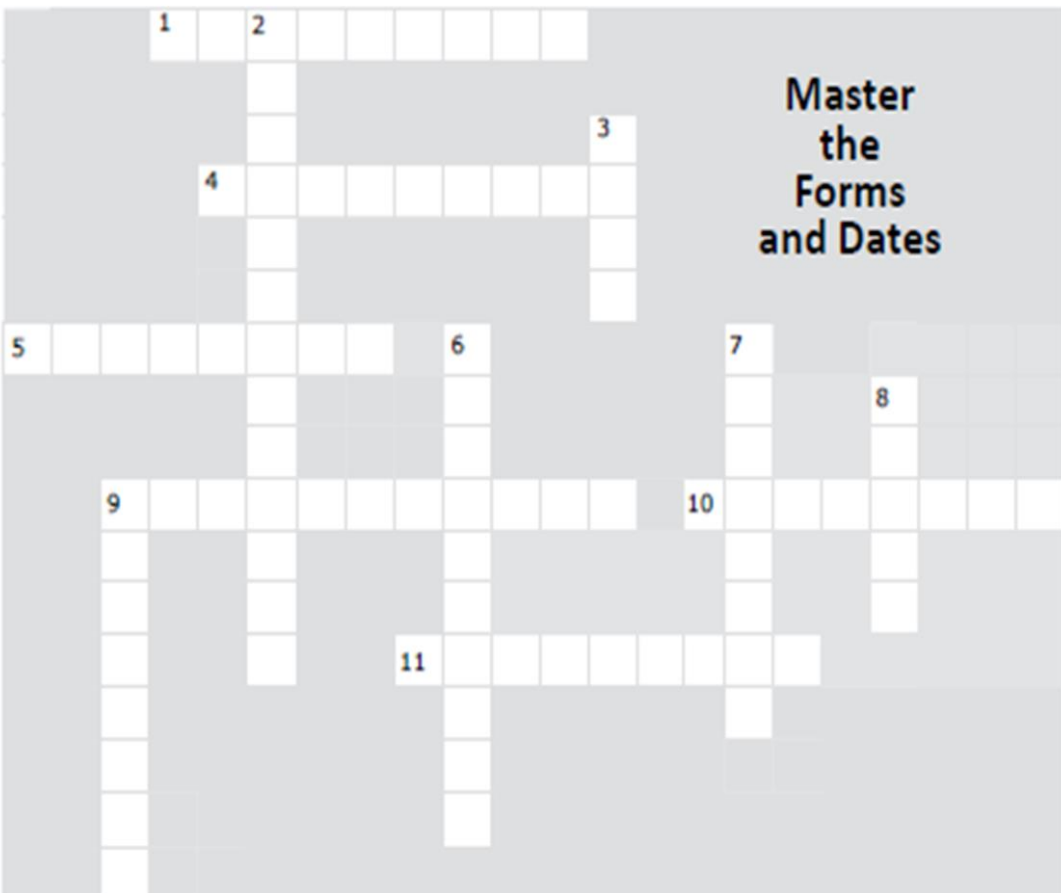
## Ongoing submissions without hard deadlines

Refer to the DKG TSO web site, Treasurers' page: ***Forms What to Send Where***

**TIP** for all: collaborate with chapter membership chair

- Form 18-A Dropped Members: send to Int'l & TSO
  - Int'l changes status in the Dues Portal to *Dropped Member* & removes member from chapter roster **TIP**: Send with dues payments
- Form 6 Report of Death: to Int'l, TSO HQ, TSO Necrology Chair
  - Int'l & TSO Necrology send condolences
  - TSO Necrology includes in convention Ceremony of Remembrance
  - TIP**: Submit as soon as possible after death
- Add members to chapter: new to DKG, Reinstated & Transferred
  - TIP**: Add members ASAP - once receive payment & paperwork
- Update member contact information via Dues Portal, Manage Members
  - TIP**: Do when creating orders for dues payments & before Jan. 30 for LSN mailings

## Master the Forms and Dates



### ACROSS

1. Form 83 reports a \_\_\_\_
4. Form 81 reports a \_\_\_\_
5. All paid members should be in the Dues Portal by the 28th of \_\_\_\_
9. TSO Fees Form reports inductee and \_\_\_\_ fees
10. 990 N is due \_\_\_\_ on Nov 15
11. Form 15 Annual Report of Chapter \_\_\_\_

### DOWN

2. Form 87 reports change of treasurer to state and \_\_\_\_
3. Form 18A reports a \_\_\_\_
6. March 1-31 DKGSI does the \_\_\_\_
7. TR-A reports a \_\_\_\_
8. Form 6 reports a \_\_\_\_
9. March 1 is the membership \_\_\_\_ for convention

## Forms: What to Send Where

Find updated forms @ [www.dkg.org](http://www.dkg.org) (sign in)  
or [www.dkgtexas.org](http://www.dkgtexas.org) as indicated below

Use the table below to locate forms for membership changes and other chapter treasurer duties.

**To remove members:** Only International has access to remove members per the information on these forms.

- ❖ Form 6 to report a death; send as soon as possible
- ❖ Form 18A to report those not renewing membership; send with dues or as needed throughout the year

**To add members:** Chapter treasurer collects filled forms and dues from members then enters information in Dues Portal and submits payments.

- ❖ Form 83 Reinstatement
- ❖ Form 81 New Member
- ❖ TR-A Transfer

### Other forms:

- ❖ TSO Fees Form: submit with each dues payment to TSO (inductee fee / scholarship fee)
- ❖ Form 87 Change of treasurer: to update International, TSO & IRS
- ❖ Form 15 Annual Report of Chapter Treasurer: Due July 15 annually
- ❖ 990N ePostcard: this is a link to submit online filing – only chapter treasurer needs a printed record of the filing: Due Nov. 15 annually

| Form Name        | Location: Where to find the form |                        |                               |                       | Send to            |                                  |                     |
|------------------|----------------------------------|------------------------|-------------------------------|-----------------------|--------------------|----------------------------------|---------------------|
|                  | Int'l Forms: Membership          | Int'l Forms: Treasurer | Int'l My DKG: Chapter Connect | DKG TX Treasurer Page | Int'l: mem@dkg.org | TSO Treasurer tsotreas@gmail.com | Chapter Treas. File |
| 6 Death          | •                                |                        | •                             | •                     | •                  | •                                | •                   |
| 18 A Drop        |                                  | •                      | •                             | •                     | •                  | •                                | •                   |
| 83 Reinstatement | •                                |                        |                               |                       |                    | •                                | •                   |
| 81 New Member    | •                                |                        |                               |                       |                    | •                                | •                   |
| TR-A Transfer    | •                                |                        |                               |                       |                    | •                                | •                   |
| TSO Fees Form    |                                  |                        |                               | •                     |                    | •                                | •                   |
| 87 Change Treas  |                                  | •                      |                               | •                     | •                  | •                                | •                   |
| 15 Annual Report |                                  |                        | •                             | •                     |                    | •                                | •                   |
| 990N ePostcard   |                                  | •                      | •                             | •                     |                    |                                  | •                   |

# Dues Portal - Tip Sheets

[Dues Calendar](#) (updated Feb 5, 2022)

[Dues: What to Send Where](#)

[Forms: What to Send Where](#)

Update Member Contact Information: [Slides](#) / [Document](#)

[Using Chapter Connect](#)

[TSO Dues and Fees Chart](#) (updated Feb 5, 2022)

[TSO Fees Form](#)

## Dues: What to Send Where

**Must I do these steps each time I pay for an order? YES!**

## Forms: What to Send Where

Find updated forms @ [www.dkg.org](http://www.dkg.org) (sign in)  
or [www.dkgtexas.org](http://www.dkgtexas.org) as indicated below

Use the table below to locate forms for membership changes and other chapter treasurer duties.

## TSO FEES FORM

Complete this form for each dues payment  
Mail it with order form and payment to  
TSO HQ  
PO Box 797787  
Dallas, TX 75379

Keep a copy of this fee calculation and the printed order form for your records.  
Include order number/s in the memo of the check.

Chapter Treasurer Dues Calendar

Dues portal closes annually March 1-April 1

Dues Collection, Reporting & Payment / Member Contact Information Updated

### DKG / TSO Dues Chart 2022-2023

2/5/22

|                                           |  |  |                                |                                               |  |
|-------------------------------------------|--|--|--------------------------------|-----------------------------------------------|--|
| DKG / TSO Dues: April 1-December 31, 2022 |  |  |                                | Pay Int'l & TSO separately from online order. |  |
|                                           |  |  | Fees to TSO: Use TSO Fees Form |                                               |  |



# New Member Form

## INSTRUCTIONS:

**New Member:** Please give to Chapter Treasurer with your dues and induction fee.

**Chapter Treasurer:** **Ensure your state organization treasurer receives this form after entering the member in the dues portal.**

Members who join on or after July 1 and before January 1 will pay the induction fee, dues, and scholarship fee. Members who join on or after January 1 and before July 1 shall pay half the dues and the induction fee amount in accordance with the chapter rules.

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Dr.

|                      |                      |                      |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| First Name           | Middle Initial       | Last Name            |

Mailing Address

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| City                 | State/Province       | Zip/Postal Code      | Country              |

|                      |                                        |
|----------------------|----------------------------------------|
| <input type="text"/> | <input type="text"/>                   |
| Chapter (Greek Name) | State Organization (Geographical Name) |

Degrees Held:

|                                   |                                 |                                    |                      |                      |
|-----------------------------------|---------------------------------|------------------------------------|----------------------|----------------------|
| <input type="checkbox"/> Bachelor | <input type="checkbox"/> Master | <input type="checkbox"/> Doctorate | <input type="text"/> | <input type="text"/> |
| Other                             |                                 |                                    |                      | Date of Birth        |

Home Telephone Number:  Cell (optional):

Home E-Mail Address:

Join Date:  Membership Status:  Active  Honorary  Collegiate

|                                                           |                      |
|-----------------------------------------------------------|----------------------|
| Chapter Treasurer's Signature<br>(Treasurer's Member ID): | <input type="text"/> |
|-----------------------------------------------------------|----------------------|

Reinstated Member: Please contact your chapter treasurer to pay your dues upon completion of this form.

Chapter Treasurer: Please reinstate this member in the dues portal and send this form to your state organization treasurer as soon as possible.

Member ID# [redacted]

|                                                                                                                                                            |                                              |                 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|-----------------|
| [redacted]                                                                                                                                                 | [redacted]                                   | [redacted]      |
| First Name                                                                                                                                                 | Middle Name or Initial                       | Last Name       |
| Mailing Address                                                                                                                                            |                                              |                 |
| City                                                                                                                                                       | State/Province                               | Zip/Postal Code |
| Country (e.g., USA, Sweden)                                                                                                                                | Preferred Phone Number                       |                 |
| Date of Birth (mm/dd/yyyy)                                                                                                                                 |                                              |                 |
| Chapter of Reinstatement                                                                                                                                   | State Organization (Geographic Name, please) |                 |
| If former chapter is different, please specify former chapter and state organization                                                                       |                                              |                 |
| Preferred Email: (Institutional emails are often blocked, please use a home email or add "dkg.org" as a trusted site)                                      |                                              |                 |
| Date of Induction (mm/dd/yyyy)                                                                                                                             | Date of Reinstatement (mm/dd/yyyy)           |                 |
| Membership Status <input type="checkbox"/> Active <input type="checkbox"/> Reserve <input type="checkbox"/> Collegiate                                     |                                              |                 |
| Degrees held: <input type="checkbox"/> Bachelor <input type="checkbox"/> Master <input type="checkbox"/> Doctor <input type="checkbox"/> Other: [redacted] |                                              |                 |
| Chapter Treasurer Name (if submitted by treasurer)                                                                                                         |                                              |                 |





## Transfer Request

**The transferring member is responsible for completing this form. Please read carefully the instructions given below before completing the form.**

|                                                                                                                                                                                   |              |                         |               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------------------|---------------|
| Date: _____                                                                                                                                                                       |              | Member ID Number: _____ |               |
| Name: _____                                                                                                                                                                       |              |                         |               |
| Mailing Address: _____                                                                                                                                                            |              |                         |               |
| City: _____                                                                                                                                                                       | State: _____ | Zip: _____              | County: _____ |
| Preferred Email Address: _____                                                                                                                                                    |              |                         |               |
| Telephone Numbers: (Home) _____                                                                                                                                                   |              | (Cell) _____            |               |
| Employment Location: (city and state) _____                                                                                                                                       |              |                         |               |
| Former Mailing Address: _____                                                                                                                                                     |              |                         |               |
| Type of membership: <input type="checkbox"/> Active <input type="checkbox"/> Reserve <input type="checkbox"/> Honorary <input type="checkbox"/> Collegiate                        |              |                         |               |
| Highest degree: <input type="checkbox"/> Bachelor <input type="checkbox"/> Masters <input type="checkbox"/> Doctorate <input type="checkbox"/> NBC <input type="checkbox"/> Other |              |                         |               |
| Date of Birth: _____                                                                                                                                                              |              |                         |               |
| Name of chapter to which dues were last paid: _____                                                                                                                               |              | Date of Payment: _____  |               |

|                                                        |
|--------------------------------------------------------|
| Name of chapter FROM WHICH TRANSFER IS REQUESTED _____ |
| State of _____                                         |
| Name of chapter TO WHICH TRANSFER IS TO BE MADE _____  |
| State of _____                                         |

**Please give this completed form to the treasurer of the chapter you wish to transfer. She will initiate the transfer through the [dues portal](#).**

## Instructions for Transfer

A member in good standing may be transferred from one unit of the Society to another. All transfer requests must be processed by the chapter treasurer receiving the transfer. The process is as follows:

- Fill out and send to the chapter treasurer to which you wish to transfer. Society Headquarters will provide help in locating a suitable chapter should you require.
- Keep dues payment current. Dues are payable to the chapter treasurer by June 30. If a new chapter has not been located and the transfer cannot be processed before July 1, members should pay dues to their current chapter. Upon the member's request, the current chapter may waive *chapter* dues for the next year since the member will not be in attendance at its meetings. The member will then have a full year to visit chapters and complete the transfer before the next dues deadline.



# Report of the Death of a Member

**Instructions:**

This report is to be prepared by the chapter president immediately upon the death of a member. A copy is to be emailed to each of the following:

Membership Services Email: mem@dkg.org

State Organization Treasurer

State Organization Membership Chair (or Necrology Chair, where applicable)

|                                  |                              |                         |        |
|----------------------------------|------------------------------|-------------------------|--------|
| Chapter                          |                              | State (Geographic Name) |        |
| DKG Member Identification Number |                              | Date of Death           |        |
| Name of Deceased Member          | <input type="checkbox"/> Dr. |                         |        |
|                                  | (First)                      | (Middle)                | (Last) |
| Mailing Address                  |                              |                         |        |
|                                  |                              |                         |        |
| City                             | State                        | Zip/Postal Code         |        |
| (Country)                        |                              |                         |        |

## Delta Kappa Gamma Society and Professional Information

Date of induction: \_\_\_\_\_

Contributions to/participation in Delta Kappa Gamma: \_\_\_\_\_

Contributions to education: \_\_\_\_\_

Name and mailing address of closest relative (specify relationship) or friend:  
(Sympathy Card will be mailed on behalf of the Society if reported within 3 months of date of death)



## Report of Members Dropped

DATE OF REPORT: \_\_\_\_\_

CHAPTER: \_\_\_\_\_ STATE ORGANIZATION (Geographical): \_\_\_\_\_

### Instructions:

- Please contact members who have not paid dues before dropping them.
- Use this form to report any member who should be dropped from membership in your chapter after the member has requested a termination of membership and numerous contact efforts have been unsuccessful.
- **Please do not list any members for whom you have received a notice of transfer.**
- Provide the membership identification number.
- Indicate the reason for membership termination in the "payment of dues"
  1. Meeting times/places incompatible with schedule
  2. Other responsibilities (family, work)
  3. Chapter not meeting needs of member
  4. Health
  5. Economic
  6. Transportation
  7. Moved out of area
  8. Death
- Send a copy to your state organization treasurer and retain a copy for your records.

PLEASE PRINT OR TYPE

|     | I.D. Number | Last Name | First Name | Initial | Reason | Deceased (Include Date of Death) |
|-----|-------------|-----------|------------|---------|--------|----------------------------------|
| 1.  |             |           |            |         |        |                                  |
| 2.  |             |           |            |         |        |                                  |
| 3.  |             |           |            |         |        |                                  |
| 4.  |             |           |            |         |        |                                  |
| 5.  |             |           |            |         |        |                                  |
| 6.  |             |           |            |         |        |                                  |
| 7.  |             |           |            |         |        |                                  |
| 8.  |             |           |            |         |        |                                  |
| 9.  |             |           |            |         |        |                                  |
| 10. |             |           |            |         |        |                                  |
| 11. |             |           |            |         |        |                                  |
| 12. |             |           |            |         |        |                                  |

|                         |                                    |
|-------------------------|------------------------------------|
| Chapter Treasurer _____ | State Organization Treasurer _____ |
| Member ID _____         | Member ID _____                    |
| Email Address _____     | Email Address _____                |

Additional slides follow:  
show for further explanation / visuals as needed

[www.dkg.org](http://www.dkg.org)

## ACCESS CHAPTER CONNECT & THE DUES PORTAL (INTERNATIONAL)



Sign In

Member Home

Cart

Events

Keyword Search

Home

Events

Programs/Projects

About Us

Contact Us

**Sign in to the International web site**

**USER NAME:** Your membership number  
**PASSWORD:** Contact Int'l, chapter president, or TSO HQ for generic password for 1<sup>st</sup> access

Members must login with member ID to access members-only resources and forms.

Member login (Username = DKG member ID)

Username

Password

Remember me

Sign In

Website Navigation Guide



**Recommended:**  
Change the password to one of your choice in your My DKG Account.

*Non-members must create a non-member account here to register for events.*

**Open My DKG**  
**Open Chapter Connect**  
**Open Pay Dues**

About Us MyDKG Contact Us

Navigation bar: About Me, My Participation, My Communities, Member Directory, State Connect, **Chapter Connect**

Buttons: **Pay Dues**, **Dues Training Video**


**Chapter Portal**

Treasurer Training Dues Portal (Adobe PDF File)  
Dues Portal Training - Add Transfer and Reinstate (Adobe PDF File)  
The latest Adobe Reader is required to open a usable form.  
[Get it here.](#)

Form 18A: Drop members Report (Microsoft Word Document) | Form 15: Annual Chapter Report (Adobe PDF File) | Form 123: Dues Reminder - 3up (Adobe PDF File)  
Form 6 - Report of Death of a Member (Microsoft Word Document) | IRS Form 990-N Link | Form 123: Dues Reminder - Single (Adobe PDF File)  
Form 87 - Change of treasurer (Adobe PDF File)

# CHAPTER DUES PORTAL

Logged In: **Leesa Cole**

 Home

 Logout

All chapters associated with user: **Leesa Cole**

| Chapter          | State Org    | Orders                 | Members                                             |
|------------------|--------------|------------------------|-----------------------------------------------------|
| TX Delta Omicron | TX STATE ORG | <a href="#">Manage</a> | <a href="#">Manage</a> <a href="#">Add/Transfer</a> |

## Member Management

Edit member information

## Order Management

Mark members paid and submit orders to International

## Add/Transfer

Search for members to add to, reinstate, or transfer into your chapter

**Order Management:** View order status, mark & submit members as paid.

## ORDER MANAGEMENT

[\[Go to Member Management\]](#)

Chapter: **TX Delta Omicron**

State Organization: **TX STATE ORG**

Paid Orders (1)

Orders processed by International

Billed Orders (1)

Orders submitted by you, but not yet processed by International

Unbilled Members (33)

Members not yet submitted as paid in an Order



# Order Management: Create an order to submit

Unbilled Members (33)

Filter Member Names

1.

| <input type="checkbox"/>            | ID  | Last | First | Member Type | State Dues | Org Dues | Active Dues | Reserve Dues | Collegiate Dues |
|-------------------------------------|-----|------|-------|-------------|------------|----------|-------------|--------------|-----------------|
| <input checked="" type="checkbox"/> | 311 | Arr  | Ma    | Active      | \$20.00    | \$40.00  |             |              |                 |
| <input checked="" type="checkbox"/> | 156 | Ba   | De    | Active      | \$20.00    | \$40.00  |             |              |                 |
| <input type="checkbox"/>            | 463 | Be   | Su    | Active      | \$20.00    | \$40.00  |             |              |                 |
| <input checked="" type="checkbox"/> | 406 | Bl   | Le    | Active      | \$20.00    | \$40.00  |             |              |                 |
| <input type="checkbox"/>            | 495 | Br   | Cir   | Active      | \$20.00    | \$40.00  |             |              |                 |

2.

| New Batch Totals                    |                              |
|-------------------------------------|------------------------------|
| Selected Members                    | 20                           |
| TX STATE ORG Dues                   | \$400.00                     |
| Total DKG Intl Dues                 | \$800.00                     |
| <input checked="" type="checkbox"/> | <a href="#">Create Order</a> |

3.

- 1. Select members that have paid dues
- 2. Verify the number of members in the New Batch Totals area
- 3. Click Create Order

*Instructions: Select unpaid members columns from the table to create a new order.*

## Order Management: Review & submit order

4.

TOTALS

\$400.00

\$800.00

5.

I have reviewed this new order for accuracy and acknowledge that any corrections can only be made by DKG International staff.

Submit

CHAPTER DUES PORTAL

4. Select "I have reviewed..."
5. Click Submit
6. See the Order Summary
7. Print the Order Summary

Chapter: **TX Delta Omicron (501153)**

State Organization: **TX STATE ORG**

6.

### Order # 13742

- Please submit a check to **TX STATE ORG** for **\$400.00** along with a copy of this invoice.
- Please submit a check to **DKG International** for **\$800.00** along with a copy of this invoice.

Write the order number in the check memo: **13742**

Mail DKG International checks to:

**DKG International**  
416 West 12th St.  
Austin, TX 78701

Mail State Organization checks to your State Organization Treasurer

7.



# Dues Collection Timeline

- **May 30** – Chapter dues collection deadline. Collect March-May for the next membership year.
- **May-July** – Chapters send dues to International / dues + fees to State Organization (separate checks to each entity for respective portion)
- **August 1** – Automated notices are emailed to members in the Unbilled Section of Dues Portal. Email reminders also sent to treasurers to remind them to reach out to members.
- **September 1** – Second automated notices emailed to members in the Unbilled Section. Email reminders also sent to treasurers. Moving members from the Unbilled section to an Order will prevent being dropped on October 1.
- **October 1** – Members in the Unbilled Section are dropped but can be reinstated.

## **Member Management: Forms Needed**

Numbered forms are found on the International web site under Members.  
The TSO Scholarship form is found on the DKG Texas web site on the Treasurer's page.

### **Chapter treasurer uses to enter data, sends a copy to TSO**

- TSO Scholarship & Inductee Calculation Form
- Form 81, New Member
- Form 83, Reinstated
- Form TR-A, Transfer Request into your chapter


### **Chapter treasurer uses to enter data, sends a copy to TSO & International**

- Form 6, Report of a Death
- Form 18A, Report of Members Dropped

## Member Management: Edit member information

CHAPTER DUES PORTAL

Logged In: **Leesa Cole**

 Home

 Logout

All chapters associated with user: **Leesa Cole**

| Chapter          | State Org    | Orders                 | Members                                             |
|------------------|--------------|------------------------|-----------------------------------------------------|
| TX Delta Omicron | TX STATE ORG | <a href="#">Manage</a> | <a href="#">Manage</a> <a href="#">Add/Transfer</a> |

### Order Management

Mark members paid and submit orders to International

**Member Management**  
Edit member information

### Add/Transfer

Search for members to add to or transfer into your chapter

# Member Management: Edit member information

## CHAPTER DUES PORTAL

### MEMBER MANAGEMENT

Chapter: **TX Delta Omicron**  
State Organization: **TX STATE ORG**

[\[Go to Order Management\]](#)

**Member Type:**  
Active, Reserve,  
Collegiate,  
Honorary, Drop  
Member...

**Member Status:**  
Active, Dropped

Show  entries

| ID | Last | First | Email                | Member Type | Status |                                     |
|----|------|-------|----------------------|-------------|--------|-------------------------------------|
| 31 | A    | M     | @hpsid.org           | Active      | Active | <input type="button" value="Edit"/> |
| 17 | A    | El    | lenora@sbcglobal.net | Active      | Active | <input type="button" value="Edit"/> |
| 48 | B    | M     | J14@tx.rr.com        | Active      | Active | <input type="button" value="Edit"/> |
| 15 | B    | D     | 267@sbcglobal.net    | Active      | Active | <input type="button" value="Edit"/> |
| 46 | B    | Si    | bell@gmail.com       | Active      | Active | <input type="button" value="Edit"/> |
| 40 | B    | Le    |                      | Active      | Active | <input type="button" value="Edit"/> |
| 49 | B    | C     | .75043@yahoo.com     | Active      | Active | <input type="button" value="Edit"/> |
| 41 | B    | Le    |                      | Reserve     | Active | <input type="button" value="Edit"/> |

**Edit member information**

# Edit Member Information: Member Type, Contact Information, Demographic Information

Member Details

Member Type: Active | Membership Status: Active

Email:

Updated emails are a top priority.

First Name: Mary | Middle: Ann | Nickname: Mary

Last Name: Smith | DOB: 04/30/1951

Put a phone number in the home phone field so that a number shows on the roster in Chapter Connect.

Home Phone: (281) 370-0990 | Work Phone:  | Cell Phone:

Fax:  | Join Date: 09/01/1989

Enter mailing address for publications

Main | Alt | Alt 2

Main Address: 416 W 12th St

Crucial for Lone Star News: 2 annual mailings

City: Austin | State: TX

Zip: 78701-1817

Country: United States

Preferred:  Mail  Bill  Ship

Close Save Save & Close

# Member Management: Add - New Members, Transfers, or Reinstates

CHAPTER DUES PORTAL

Logged In: **Leesa Cole**

[Home](#)

[Logout](#)

All chapters associated with user: **Leesa Cole**

| Chapter          | State Org    | Orders                 | Members                                             |
|------------------|--------------|------------------------|-----------------------------------------------------|
| TX Delta Omicron | TX STATE ORG | <a href="#">Manage</a> | <a href="#">Manage</a> <a href="#">Add/Transfer</a> |

## Order Management

Mark members paid and submit orders to International

## Member Management

Edit member information

## Add/Transfer

Search for members to add to or transfer into your chapter



# Member Management: Add New Members

NEW MEMEBER

Chapter: TX Delta Omicron

State Organization: TX STATE ORG

Member Details

**Member Type**      **Membership Status**

Active      Active

Email

First Name      Middle      Nickname

Mary      Ann

Last Name

Smith

Prefix      Title

Master's

Home Phone      Work Phone      Cell Phone

(281) 370-0990

Updated emails are a top priority.

Enter as much information as you can about the new member from the Member Application and the New Member Form or Reinstate Form.

Remember to fill in the home phone field.

Main      Alt      Alt 2

**Main Address**

416 W 12th St

State

TX

Country

United States

Preferred

Mail      Bill      Ship

Close      Save      Save & Close