

2/24/19

ONLINE DUES TRAINING TIP SHEET #1

Preliminary information to get started with training materials

1. Overview PPT - do this one first -- it gives you the “lay of the land”, introduces new processes, vocabulary and dates.

New vocabulary:

- Order Management - replaces Form 18 to report dues paid
- Paid orders - shows official status of members as paid through a certain date
- Billed orders – shows members submitted online as paid – not official until International receives and processes money
- Unbilled members – shows members that have not been submitted to International as paid

New timeline as of 2/22/19:

- March 15, 2019 – dues for 2018-19 membership must be at Int'l or members are dropped (can be reinstated in 2019-20)
- March-June 2019 - chapter treasurers collect 2019-20 dues & deposit into chapter account
- April 1, 2019 – online dues site becomes operational (need to verify with International)
- July 1, 2019 – begin sending money & orders/invoices to Int'l & TSO separately
- Aug. 1 & Sept. 1 – International system emails individual members a reminder to pay dues -- chapter treasurer also receive a reminder email about these members
- Sept. 30, 2019 – money must be at International before this date with online order already submitted
- Oct. 1, 2019 – unpaid members are dropped from 2019-20 membership

2. New Dues Processing Test Site PPT - try out the online system

- Click this link to enter the test site http://ref.dkg.org/dkg_staging_Q4/training
OR -- type the entire web address in your Internet browser as printed on slide 2
- **The training site is slow** - be patient - click once and wait (see a small white message in lower left of screen that lets you know it is working)
- This is a test site only and won't affect any chapter data.
- The member data will not be current as the test site was created almost a year ago.
- Try all actions including printing and sorting data differently.
- **NOTE:** on the slides that show dollar amounts to pay to International & to TSO, the TSO scholarship fee is not included (nor is an induction fee) -- TSO process is to be determined but the scholarship fee of \$1.00 or \$.20 per member will need to be included as will the \$2.50 induction fee as needed.
- There is no online option for paying dues at this time - 2 checks will be written and mailed (1 to International, 1 to TSO). There will be discussions and research on this topic.
- TSO dues mailed to: TSO HQ, PO Box 797787, Dallas 75379

3. Use the following pages to record notes, ideas & questions as you go through the training materials.

