

4/16/19

ONLINE DUES REPORTING TIPS #2

Portal is available now to use for reporting members paid

Vocabulary for the online system (portal)

- Order Management - replaces Form 18 to report dues paid
- Member Management - edit member information, add, transfer & reinstate members
- Paid orders - official list of paid members - members that are current on your roster
- Billed orders – list of members submitted online as paid but not yet processed by International
 - print 3 copies of this order: send with payments to TSO, to International, keep a copy for your records
 - will move to Paid Orders once payment is processed by International
- Unbilled members – members that have not been submitted to International as paid
 - they can be marked & submitted in another batch
- TSO Dues & Scholarship Fee Payment Report - TSO specific form for calculating state scholarship fee

New timeline as of 4/16/19:

- April-June: collect 2019-20 dues & deposit into chapter bank account
- May-July: send dues & orders to Int'l & TSO separately
 - follow every step in the training materials
 - use the *TSO Dues & Scholarship Fee Payment Report* for scholarship fee calculations
- May-July: update member contact information (especially email addresses) using the online portal Member Management section
- Aug.1 & Sept.1: unpaid members will receive a reminder email from the International system
 - chapter treasurer receives a copy
- Sept.10: payment for members must be at International before this date with online order previously submitted (last accommodation for members who pay late)
- Oct.1: International drops unpaid members from 2019-20 membership - they can be reinstated

GENERAL TIPS - USING ONLINE PORTAL & TRAINING SITE

- Be patient, the dues portal and the training web site are slow - click and wait, look at the entire screen for an indication that it is processing (spinning wheel or messages like "loading" or "waiting for portal")
- Use all 3 training documents and the training web site before using the online portal to submit dues and add new members.
- The training web site will not affect your chapter's membership status - it is a practice site only & may not reflect membership accurately as the data was loaded a year ago.
It is not found at Chapter Connect, it has its own web address - see the training materials.
- The official online dues portal is available in Chapter Connect at the treasurer's account and is ready to use for 2019-20 dues reporting.
- Forms to use for reporting membership changes: Form 18A (dropped) and Form 6 (deceased).
Use only those listed at Chapter Connect as International is updating multiple forms very soon.
- TSO will develop forms for chapters to use for new members, transfers, & reinstates (unless International provides generic forms) for states to use. -- Stay tuned.
- If you are having issues accessing the training materials, see the last section of this document.

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MEMBERSHIP INFORMATION & TIPS

- New Members:
Chapter treasurers enter new members using the online portal.
Training materials have specific instructions to add, transfer and reinstate.
Hint: To avoid duplicate members, search carefully by member name and then again by birthdate to ensure they are not in the database. The system automatically assigns a membership number once a person is added. Searching by name only is not always adequate.
- Returning Members:
Enter members as paid and submit orders online when you have a good batch of dues collected. Multiple batches can be paid with one check (see payment section for details).
- Spring Inductees (general guidelines):
Join date will be after April 1, 2019 for the 2019-20 roster & they pay full dues + TSO fees
 - if you inducted in Jan.-March but didn't mail the forms & payment before March 15
. . . collect full dues for 2019-20 membership. Join date will be after April 1, 2019.
- Member Management list may show members that are dropped or deceased with a "Reinstate" button. International is aware and is working to correct that issue.

PAYMENT INFORMATION & TIPS

- Send payments to International & TSO separately. International to Austin, TSO to Dallas.
- Mail the Billed Members Order Form with payment.
Attach the TSO Dues & Scholarship Fee Payment Report for the TSO portion.
- Record the order number(s) on payment check(s).
- Several orders can be combined into one payment -or- each order can be paid individually.
Example, Members pay dues in March, April and May
 - Option 1: Mark, submit and pay each month individually.
 - Option 2: Mark March/April batch & submit online as paid (wait to send payment)
 - List will show in Billed Orders
 - Collect additional dues in May, mark & submit online as paid
 - List will show in Billed Orders with a different order number than March/April
 - Print both Billed Order forms and send payments to International & to TSO
- Currently, the inductee fee on the portal is not calculating properly so until it does, the TSO Dues & Scholarship Fee Payment Report includes an area to calculate those fees.

FOR ASSISTANCE CONTACT

- International has a chat feature on their web site which provides timely assistance during their office hours. If they are offline, you can submit your question and they will follow up the next day.
Office hours: Mon.-Fri. 7:30a-6:30p
Phone: 512-478-5748
- TSO HQ office staff is available via phone Mon.-Thur. 10a-5p, or via email.
Phone: 972-930-9945
Email: tsotreas@sbcglobal.net Leesa Cole
txexecasst@sbcglobal.net Deborah Thomas
alphasttx@sbcglobal.net Cheryl Crawford

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ISSUES & SOLUTIONS FOR TRAINING (a sampling):

Where are the training materials?

- Sign in to Chapter Connect on the International web site to download the 3 presentations.
- See the tutorial: *Using Chapter Connect* located on the DKG Texas web site, Treasurer's Page.
- Training web site: http://ref.dkg.org/dkg_staging_Q4/training is for practice only.

No Microsoft PowerPoint on your computer?

- Get with a friend who has PPT and view/learn together
- Notify TSO HQ to receive either: scanned copies of the PPT with notes, or access to the documents via your Google account (you provide the preferred email for Google sharing)

Need more information than that shown on the PowerPoint image?

- View the notes below each slide for important additional information and explanations.
- They can also be printed at the print options screen - select <Print Notes Pages>.

Chapter Connect is prompting me to change my password.

- Follow the instructions on the DKG International login page for password requirements.
- Best practice is to change the password from the generic one to one of your choice.

Is there training available other than the materials from International?

- The TSO Convention in Arlington will offer a workshop - *Building Confidence with the New Dues Processing Procedure*.
- Plan to attend on June 20 from 3:00-4:45 for an informative and collaborative session with International President Cathy Daugherty, the TSO HQ staff, and the TSO Finance Committee.
- Bring questions, ideas and discoveries to share but don't wait until then to learn and practice.
- Additional training materials and tips will be provided by TSO as needed.