

GreekBill Creating Charges

Before you start:

- Make sure your GreekBill roster is 100% correct.
 - Work with your vp: communication to make sure roster clean-up is finished BEFORE you create charges.
 - The vp: communication should have submitted the graduate list through eOps+ and should give you a copy.
 - Members who are transferring should have their paperwork sent to EO and you should be cc'd on each form.
 - All graduating seniors and transfers should be move to “non-member/alum” and moved “off system” if their balance is zero.
 - Make sure any pending MAAs have been completed prior to moving a non-member off system.
 - If charges cannot be collected you should do a Bad Debt Write Off or start the Collection process.
 - Work with your RFS if MAAs haven't been completed or if BDWO/Collections need to be submitted.
 - Any member requesting APS for 18-19 must be approved prior to charging a member for APS dues.
 - The roster should be looked at again before final charges are generated at the beginning of July.
- Remember – for anyone who is invoiced, that should not be invoiced, for 18-19, the chapter will be charged \$15 (or \$30 if the account is not cleared by the second term). This also holds for any non-member who has a balance (owes money to the chapter or has a credit). Please work with your RFS to address these issues.
- Your approved budget must be entered into GreekBill and approved by your RFS before you can create charges.
- Have your approved budget handy, you will be referring to the member survey and billing group tab when adding charges.
- Again, APS can only be assigned IF member has been APPROVED for APS, not if she “thinks” she is going be on APS.

Creating Charges:

Once the above issues are completed and resolved, you can begin to create charges for 18-19.

- GreekBill 2.0 > Budgeting > Create Charges > Prepare Charges
- Assign Members to Member Groups
 - Use the Member Survey tab to assign members to groups (but note the APS stipulation).
 - Use the groups already “preassigned” don't make up your own groups (without RFS approval).

- Choose a group using the drop-down arrow, then select members for the group by clicking on the box to the left of their name, once you are finished click “assign and save.”
- Use the drop-down arrow to choose a second group, select members and “assign and save.” Keep doing this until all members are assigned to a group.
- When finished you can click on the “member group” column and it will sort your members by member group.
- A member can only be assigned “live in/live out” IF there is ANOTHER member sharing a Room Agreement and that member is assigned “live out/live in.” Your RFS must approve this addition of this type of group.
- Assign Fees
 - Use the billing group tab on your APPROVED budget excel file.
 - Select a group using the drop-down arrow. Select the charges for each term. Only click on the charges the chapter is actual using.
 - Remember – per capita dues, web fees and GreekBill fees are ONLY charged the first term of the academic year, so do not charge these fees the second term.
 - Click on “assign and save.”
 - Do this for each member billing group, then click on “continue.”
- Additional Charges
 - Only add additional charges if you have discussed this with your RFS. Most chapters WILL NOT add additional charges through the Create Charges module.
 - Click “continue.”
- Review Summary
 - Make sure each the charges are correct for each billing group (divide the total by the number of members being charged).
 - If there are any issues, go back to the Assign Fees step.
- Review Full List and Generate Charges
 - If everyone is charged and charged correctly, check the “I confirm that the vote to approve these charges has been passed” and then click on the “Notify RFS” button.
 - Your RFS will be notified that charges have been created and she will make sure everything is correct.
 - Charges will not be generated until July. We just want chapters to complete this step now in order to give your RFS more time to check over things.

Remember:

- 1) Make sure your roster is 100% correct.
- 2) You must use the APPROVED budget (approved by your RFS and chapter).
- 3) You CANNOT charge members for APS dues until their APS status has been approved by your ATC and the paperwork has been sent to Executive Offices.
- 4) If you have any questions about the actual GreekBill process, please contact your GB rep (Jenni, Camya, Jessica) they are happy to help you navigate this process.