

QUICK REFERENCE GUIDE



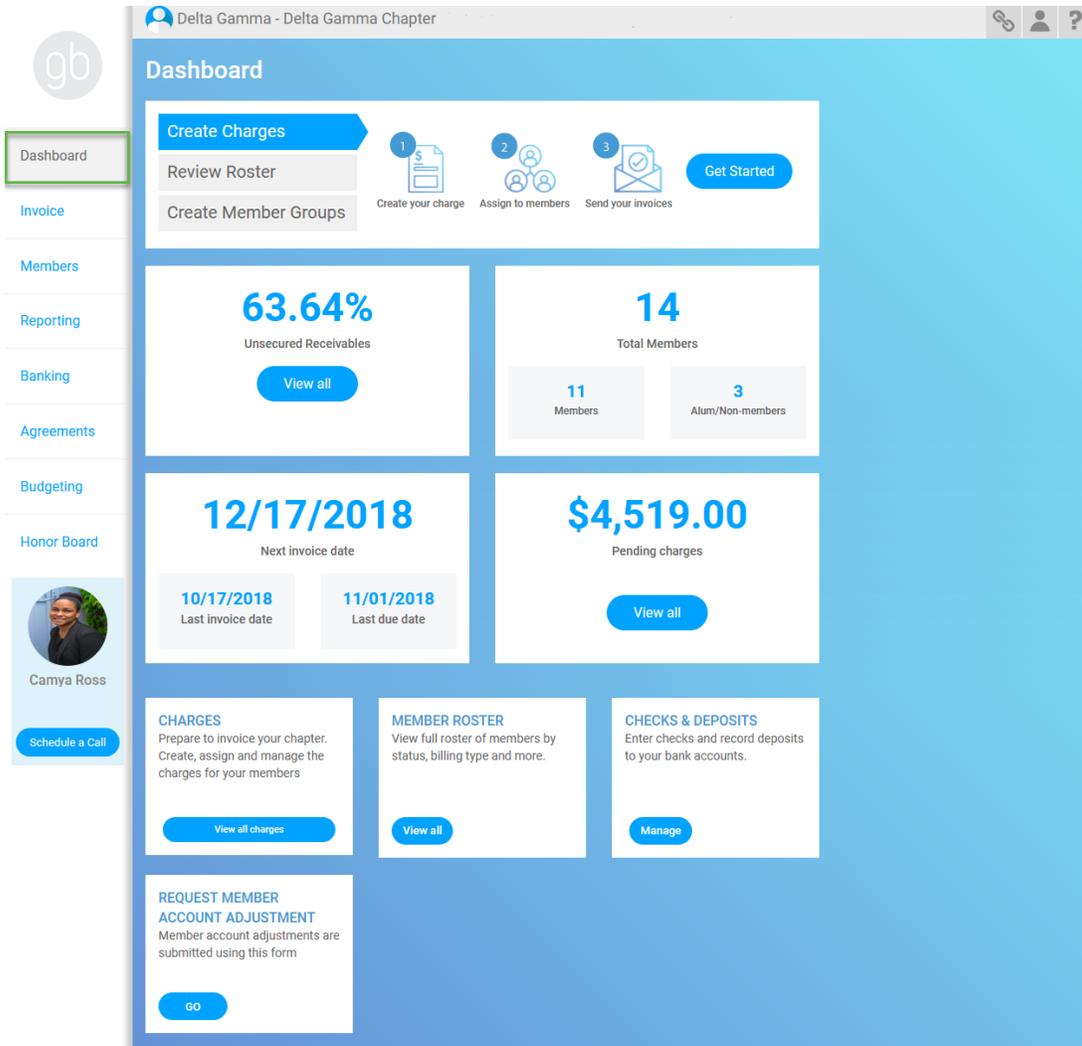
GREEKBILL CHAPTER DASHBOARD

Greekbill Chapter Dashboard

Upon login to your greekbill Admin account, you will first be directed to the chapter's Dashboard. The chapter Dashboard is a snapshot of the chapter's finances, displaying a series of statistics including, but not limited to:

- Unsecured receivables – percentage of unsecured receivables to date, for the current fiscal year
- Member count – a tally of members on system, both Active and Alum
- Next invoice date – date of the next scheduled invoice
- Pending charges – total amount of charges pending the next scheduled invoice

At the top of the chapter Dashboard are quick links to the most frequently used modules, i.e. Create Charges. Clicking on the Get Started button for any of the action items will take you directly to the page to begin your desired task. Towards the bottom of the chapter dashboard are additional pages for quick and easy access.

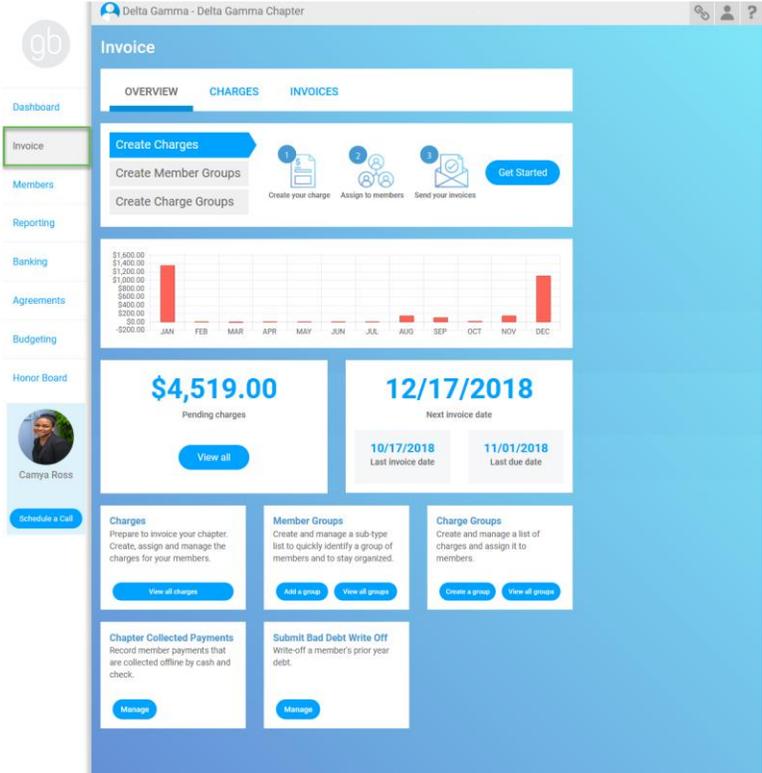


The screenshot displays the Greekbill Chapter Dashboard for Delta Gamma - Delta Gamma Chapter. The dashboard is organized into several sections:

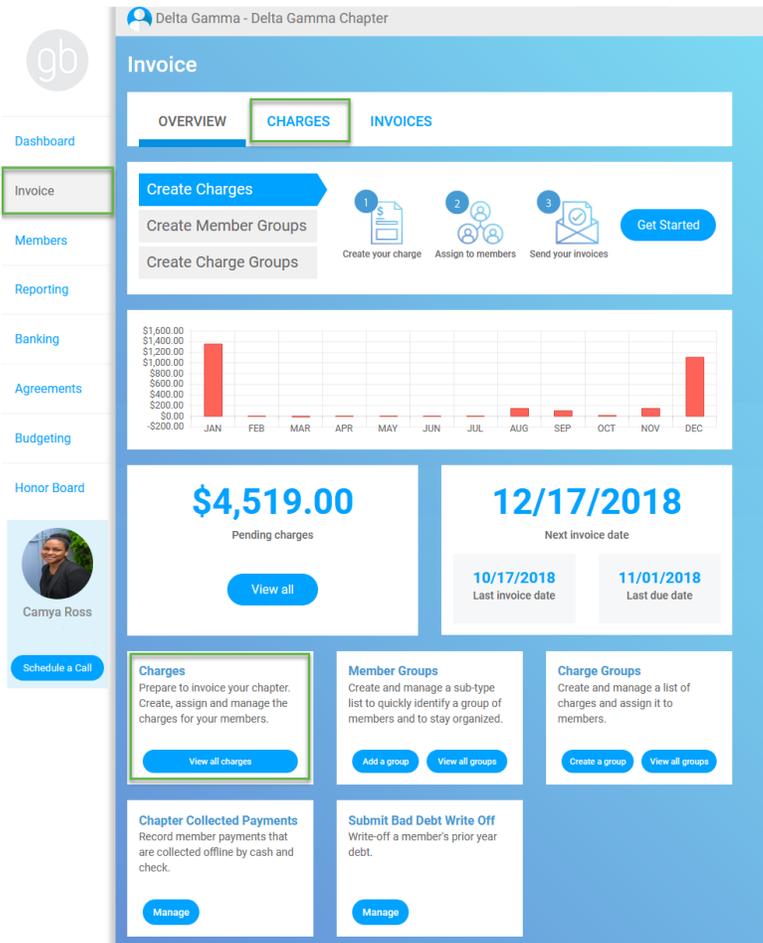
- Navigation Menu:** Includes Dashboard (highlighted), Invoice, Members, Reporting, Banking, Agreements, Budgeting, and Honor Board.
- Quick Actions:** A 'Create Charges' button is prominently displayed, followed by 'Review Roster' and 'Create Member Groups'. A 'Get Started' button is also present.
- Key Metrics:**
 - Unsecured Receivables:** 63.64% (with a 'View all' button).
 - Total Members:** 14 (broken down into 11 Members and 3 Alum/Non-members).
 - Next Invoice Date:** 12/17/2018 (with 'Last invoice date' 10/17/2018 and 'Last due date' 11/01/2018).
 - Pending Charges:** \$4,519.00 (with a 'View all' button).
- Module Cards:**
 - CHARGES:** Prepare to invoice your chapter. Create, assign and manage the charges for your members. (View all charges)
 - MEMBER ROSTER:** View full roster of members by status, billing type and more. (View all)
 - CHECKS & DEPOSITS:** Enter checks and record deposits to your bank accounts. (Manage)
- Profile Section:** Features a profile picture of Camya Ross and a 'Schedule a Call' button.
- Request Member Account Adjustment:** Member account adjustments are submitted using this form. (GO)

INVOICE

The Invoice dashboard houses all tasks related to billing your members, as well as a graph to indicate the chapter's income patterns for the year. Some key tasks from the Invoice module include adding and/or removing miscellaneous charges, viewing invoices, recording offline payments, and submitting bad debt.



The screenshot shows the 'Invoice' dashboard for 'Delta Gamma - Delta Gamma Chapter'. The 'OVERVIEW' tab is selected. At the top, there are three main action items: 'Create Charges' (with a 'Get Started' button), 'Create Member Groups', and 'Create Charge Groups'. Below these is a bar chart showing income patterns for each month from January to December. The chart shows a significant peak in January and December. Below the chart, there are two large summary cards: one for 'Pending charges' showing '\$4,519.00' with a 'View all' button, and another for 'Next invoice date' showing '12/17/2018'. Below these are three smaller cards: 'Charges', 'Member Groups', and 'Charge Groups', each with a 'View all' button. At the bottom, there are two more cards: 'Chapter Collected Payments' and 'Submit Bad Debt Write Off', each with a 'Manage' button. A sidebar on the left contains navigation links for Dashboard, Invoice, Members, Reporting, Banking, Agreements, Budgeting, and Honor Board. A user profile for 'Camya Ross' is visible at the bottom of the sidebar.

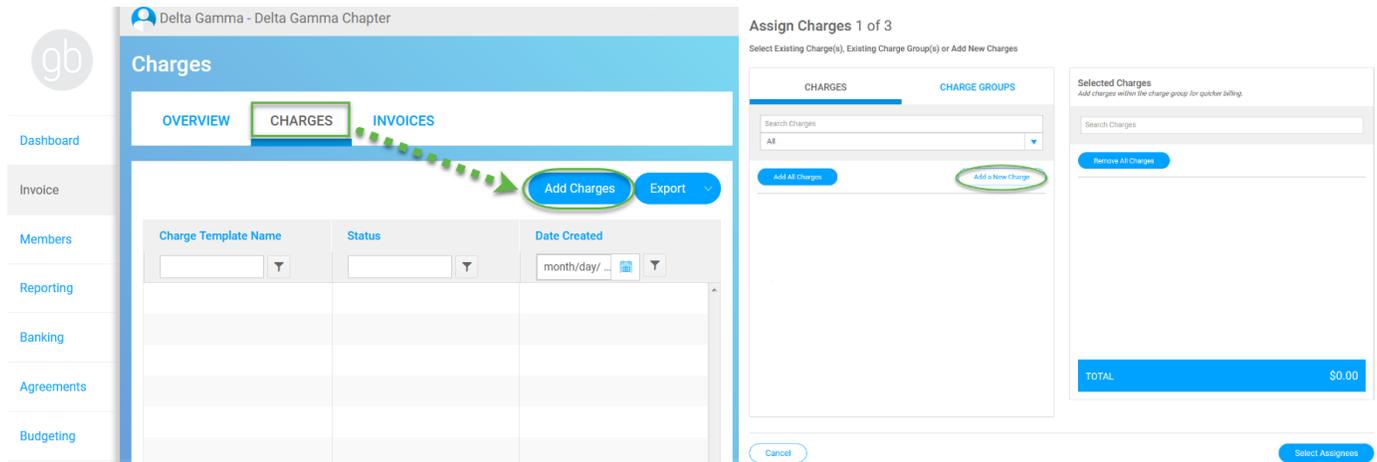


This screenshot shows the 'Invoice' dashboard with the 'CHARGES' tab selected. The 'Create Charges' button is highlighted with a green box. Below the navigation bar, there are three numbered steps: 1. Create your charge, 2. Assign to members, and 3. Send your invoices. The bar chart and summary cards are the same as in the overview view. The 'Charges' card at the bottom is highlighted with a green box and contains the text: 'Prepare to invoice your chapter. Create, assign and manage the charges for your members.' The 'Member Groups' card contains: 'Create and manage a sub-type list to quickly identify a group of members and to stay organized.' The 'Charge Groups' card contains: 'Create and manage a list of charges and assign it to members.'

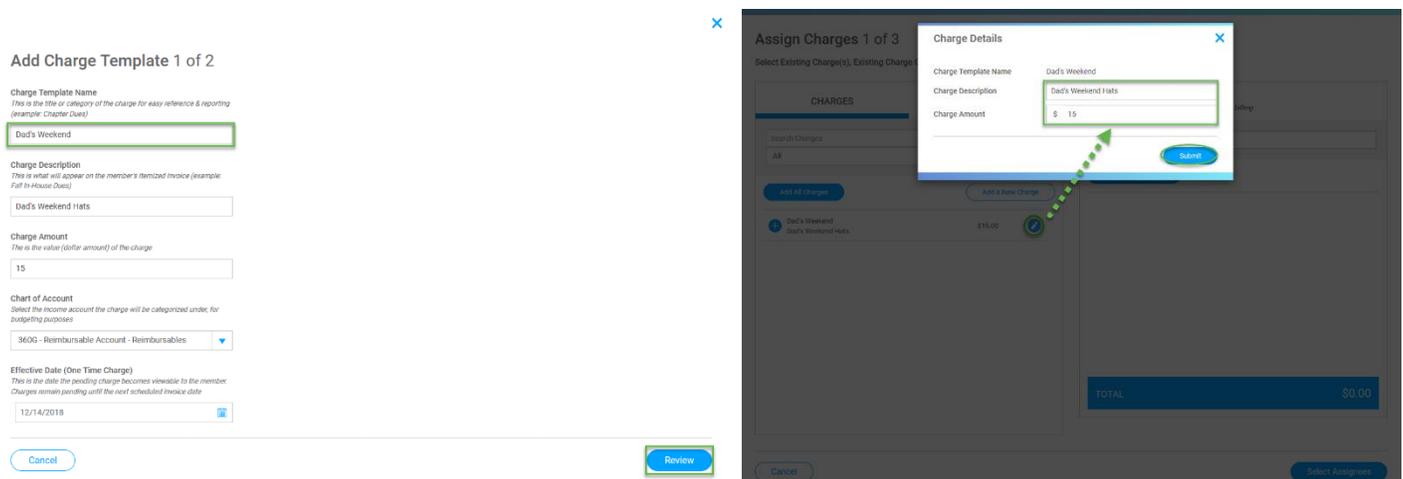
Invoice: Charges

The charges module allows you to add and assign miscellaneous charges for your members. You may access the module on the Invoice dashboard via the Charges tab, the Charges tile at the bottom of the page, or by clicking Get Started from the action item prompt at the top of the page.

Greekbill has designed an easy to use charge process, that will allow your chapter to create a reusable charge template. To create a charge template, click on Add Charges, then Add a New Charge.



You will only have to create a charge template once, and it will always be available to you for use thereafter. Charge templates save you time from having to create the same exact charge twice and assigning it to members multiple times throughout the year. It also provides you with enhanced charge analytics to see which members have been invoiced for a charge.



If you need to assign a new member an existing charge, with an updated amount or description, you can always edit those two fields and re-assign the charge.

Assign Charges 1 of 3

Select Existing Charge(s), Existing Charge Group(s) or Add New Charges

CHARGES | CHARGE GROUPS

Search Charges

ALL

[Add All Charges](#) | [Add a New Charge](#)

Selected Charges
Add charges within the charge group for quicker billing.

Search Charges

[Remove All Charges](#)

| | |
|--------------------|---------|
| Dad's Weekend | \$15.00 |
| Dad's Weekend Hats | |

TOTAL \$15.00

[Cancel](#)

[Select Assignees](#)

After creating a charge, you can immediately assign that charge to your members. If you have multiple charges that you wish to assign, you may group these charges together to form a charge group.

Assign Charges 2 of 3

Select Assignees
Select the members to be assigned the charge(s)

MEMBERS | MEMBER GROUPS

Search Members

Status: Member

[Add All Members](#)

- Alexis
- Andrea
- Arya
- Brandy
- Ceresi
- Ione
- Jessica
- Kat
- Krishna

Selected Members
Members to edit

Search Members

[Remove All Members](#)

TOTAL 0

[Cancel](#) | [Back](#)

[Review](#)

Choose the members to be assigned the charge.

Assign Charges 3 of 3

Review Assigned Charges and Assigned Members
Review the charges that will be assigned to members before submitting.

1 Charges totaling to \$15.00 [Edit](#) | [Close](#)

| Charge Template Name | Charge Description | Charge Amount | Chart of Account | Date |
|----------------------|--------------------|----------------|---|------------|
| Dad's Weekend | Dad's Weekend Hats | \$15.00 | 360G - Reimbursable Account - Reimbursables | 12/14/2018 |
| TOTAL | | \$15.00 | | |

11 Members will be assigned these charges [Edit](#) | [Close](#)

- Alexis
- Andrea
- Arya
- Brandy
- Ceresi
- Ione
- Jessica
- Kat
- Krishna
- Rumi
- Stefania

[Cancel](#)

[Finish](#)

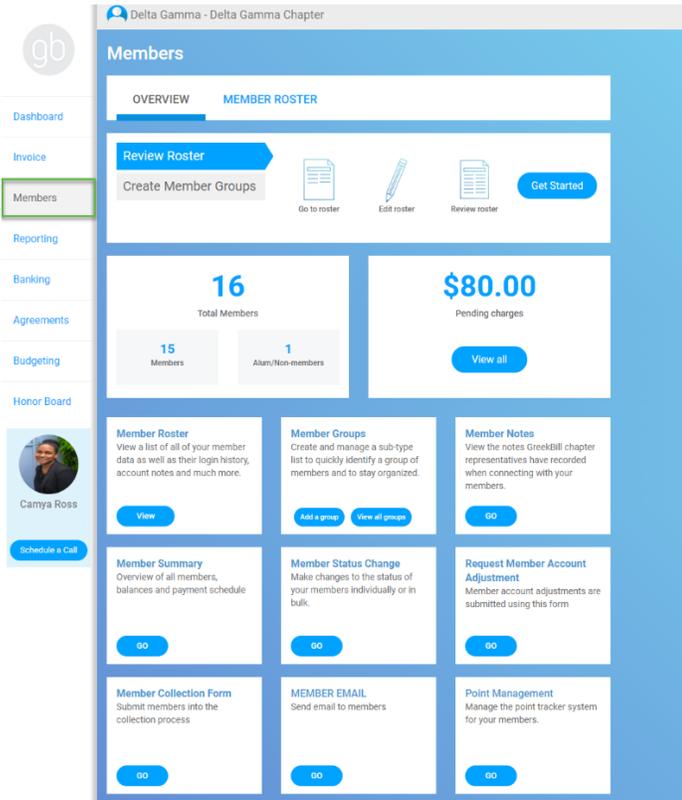
Review your work and click finish.

MEMBERS

Members Dashboard

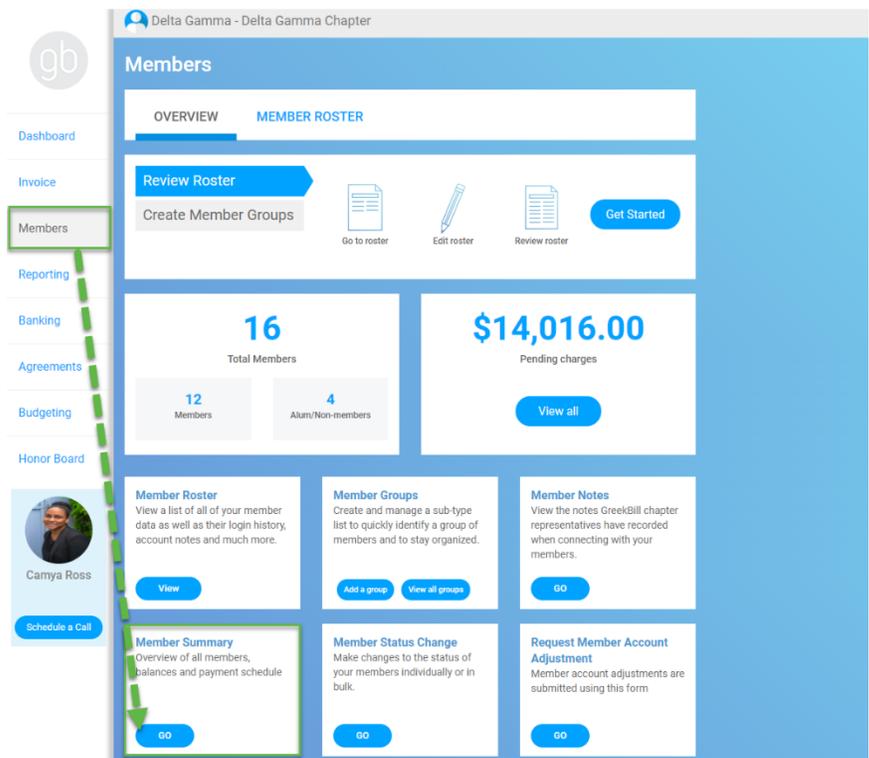
The Members dashboard houses all tasks related to your member roster, as well as important data points for your reference. Some key tasks from the Members module include reviewing the chapter's roster, updating member account statuses, requesting a member account adjustment and submitting a collection form for past due members.

Please note: New members will automatically populate in greekbill once submitted through Anchorbase.



Members: Member Summary

The Member Summary report displays each chapter member's information including their member number, first and last name, payment schedule option, current balance and auto pay setting.



Each of the column headers are clickable to sort the report in alpha numerical order.

Member Summary Report - Delta Gamma Chapter

Member

| Last Name ↑ | First Name ↑ | Member# | Status | Pending Charge | Payment Schedule | Current Monthly B... | Current Year Balan... | Total Year Balance | Parent Account | Auto Payment |
|---------------|--------------|---------|--------|--------------------|------------------|----------------------|-----------------------|--------------------|----------------|--------------|
| BECKETT | AMANDA | 902771 | Member | \$8,000.00 | | \$14,027.83 | \$14,027.83 | \$22,027.83 | 2 | No |
| CARTER | RUMI | 1991001 | Member | (\$100.00) | Monthly | \$0.00 | \$640.00 | \$540.00 | 2 | Yes |
| CLARK | JESSICA | 902769 | Member | \$0.00 | Monthly | \$5,652.53 | \$6,381.29 | \$6,381.29 | 1 | No |
| HOLLAND | BARB | 2023557 | Member | \$0.00 | | \$937.50 | \$937.50 | \$937.50 | 0 | No |
| HOROWITZ | CHER | 902768 | Member | \$0.00 | | \$0.00 | \$0.00 | \$0.00 | 1 | No |
| LANNISTER | CERSEI | 2123754 | Member | \$45.00 | | \$0.00 | \$0.00 | \$45.00 | 0 | No |
| LEWIS | BRANDY | 647399 | Member | \$1,500.00 | | (\$311.50) | (\$311.50) | \$1,188.50 | 0 | No |
| OHANIAN JR. | ALEXIS | 1991002 | Member | \$45.00 | | (\$66.01) | (\$66.01) | (\$21.01) | 1 | No |
| SIMMONS | ANDREA | 654869 | Member | \$0.00 | Monthly | \$3,527.61 | \$3,527.61 | \$3,527.61 | 5 | No |
| SKYE | IONE | 902772 | Member | \$77.00 | Monthly | \$6,904.08 | \$7,632.84 | \$7,709.84 | 3 | No |
| STARK | ARYA | 2123753 | Member | \$4,417.00 | | (\$97.86) | (\$97.86) | \$4,319.14 | 1 | No |
| STRATFORD | KAT | 902770 | Member | \$0.00 | | \$5,066.75 | \$5,066.75 | \$5,066.75 | 1 | No |
| TOTAL: | | | | \$13,984.00 | | \$35,640.93 | \$37,738.45 | \$61,722.45 | | |

1 - 12 of 12 items 400 items per page

You may also click on the hyperlinked member number to see additional details for the member's account. The additional account details will display the member's full account history, contact information and signed agreements on file.

Member Profile

CARTER, RUMI | 1991001

Basic Details Account History Agreements

CONTACT modify

| | | | |
|---------------|--------------------------|---------------------------|------------------------|
| Home Address | New York, NY, 10018 | School Address | Los Angeles, CA, 90051 |
| Mobile Phone | 310 | Other Phone | 8004573816 |
| Primary Email | rumicarter@greekbill.com | Communication Preferences | Email |

FINANCES

| | |
|---------------|--|
| Bill Type | E Bill Only |
| Member Groups | New Member Group, Seniors Live In Group, Spring 18 New Members |

MEMBERSHIP modify

| | | | |
|-------------|------------|---------------|--------|
| Member Type | | Member Status | Member |
| Birthday | 06/17/2017 | System Status | ON |

SECONDARY USERS

| | | | |
|-------------------------|-----|------------|------------------------------------|
| Shawn, Carter | 310 | @gmail.com | Receives E-bill notifications: Yes |
| Beyonce, Knowles-Carter | 310 | @aol.com | Receives E-bill notifications: Yes |

ADDITIONAL DETAILS modify

| | | | |
|----------------|------------|--------------|----|
| Last Login | 02/05/2019 | Notes | 15 |
| Year Graduated | | Year Crossed | |

EMERGENCY CONTACT INFORMATION modify

| | | | |
|---------------|--|---------------|--|
| Contact Name | | Contact Phone | |
| Contact Email | | Relation | |

Members: Member Collection Form

The Member Collection Form report will list all members/alum with a 60+ days past due balance on greekbill. From that list, you can view whether a collection form is pending, in progress or already submitted by the chapter.

To create a new member collection form, click Create next to the member's total balance.

Member Collection Form Report - Delta Gamma Chapter Export

| Last Name | First Name | Member # | Chapter Name | Region | Status | Payment Schedule | Pending Charges | Current Balance | 60+ Days Past Due | Total Balance W/Pending | Create |
|---------------|------------|----------|---------------------|--------|-----------------|------------------|-------------------|-----------------|--------------------|-------------------------|-------------------------|
| Beckett | Amanda | 902771 | Delta Gamma Chapter | | Member | | \$8,000.00 | \$0.00 | \$14,027.83 | \$22,027.83 | Submitted by Chapter |
| Bilstein | Sasha | 1885998 | Delta Gamma Chapter | | Alum/Non-Member | Monthly | \$0.00 | \$0.00 | \$481.59 | \$1,172.25 | Create |
| Blondehair | Stefania | 2098380 | Delta Gamma Chapter | | Alum/Non-Member | Pay in Full | \$0.00 | \$0.00 | \$2,372.47 | \$2,387.47 | Submitted by Chapter |
| Clark | Jessica | 902769 | Delta Gamma Chapter | | Member | Monthly | \$0.00 | \$0.00 | \$5,156.55 | \$6,381.29 | Submitted by Chapter |
| Holland | Barb | 2023557 | Delta Gamma Chapter | | Member | | \$0.00 | \$0.00 | \$937.50 | \$937.50 | Edit by Chapter (Saved) |
| Simmons | Andrea | 654869 | Delta Gamma Chapter | | Alum/Non-Member | Monthly | \$0.00 | \$0.00 | \$3,452.61 | \$3,527.61 | Submitted by Chapter |
| Skye | Ione | 902772 | Delta Gamma Chapter | | Member | Monthly | \$77.00 | \$0.00 | \$2,117.10 | \$7,709.84 | Submitted by Chapter |
| Stratford | Kat | 902770 | Delta Gamma Chapter | | Alum/Non-Member | | \$0.00 | \$0.00 | \$5,051.75 | \$5,066.75 | Create |
| Vamsi | Krishna | 2007698 | Delta Gamma Chapter | | Alum/Non-Member | | \$0.00 | \$0.00 | \$802.00 | \$867.00 | Submitted by Chapter |
| Total: | | | | | | | \$8,077.00 | \$0.00 | \$34,399.40 | \$50,077.54 | |

1 - 9 of 9 items 50 items per page

REPORTING

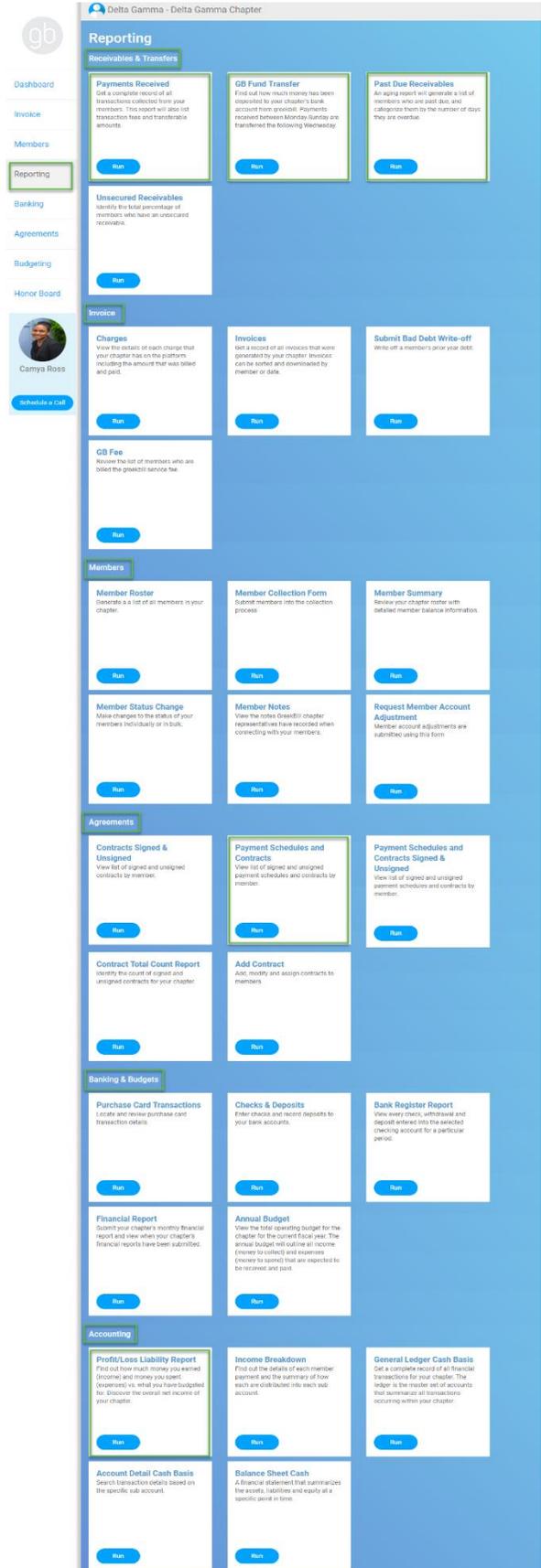
Reporting Dashboard

The Reporting dashboard houses most of your chapter's reports, which are categorized as follows:

- Receivables & Transfers
- Invoice
- Members
- Agreements
- Banking & Budgets
- Accounting

Some key reports to accompany the best practices on greekbill are Payments Received, GB Fund Transfer, Past Due Receivables, Profit/Loss vs Budget – Liability and Payment Schedules and Contracts.

Note: You may find certain reports within other modules of your admin account, carefully placed for maximum convenience. For example, the Request Member Account Adjustment tile is located on the home dashboard, Members dashboard and Reporting dashboard; all directing back to the same form.



The screenshot displays the Reporting Dashboard for a Delta Gamma chapter. The interface is organized into several categories, each with a 'Run' button to generate a report:

- Receivables & Transfers**
 - Payments Received**: Get a complete record of all transactions collected from your members. This report will also list transaction fees and transferable amounts.
 - GB Fund Transfer**: Find out how much money has been deposited to your chapter's bank account from general payments received between Monday/Sunday are transferred the following Wednesday.
 - Past Due Receivables**: An aging report will generate a list of members who are past due, and categorize them by the number of days they are overdue.
 - Unsecured Receivables**: Identify the total percentage of members who have an unsecured receivable.
- Invoice**
 - Charges**: View the details of each charge that your chapter has on its platform including the amount that was billed and paid.
 - Invoices**: Get a record of all invoices that were generated by your chapter. Invoices can be sorted and downloaded by member or date.
 - Submit Bad Debt Write-off**: Write off a member's prior year debt.
 - GB Fee**: Review the list of members who are owed the greatest amount fee.
- Members**
 - Member Roster**: Generate a list of all members in your chapter.
 - Member Collection Form**: Submit members into the collection process.
 - Member Summary**: Review your chapter roster with detailed member balance information.
 - Member Status Change**: Make changes to the status of your members individually or in bulk.
 - Member Notes**: View the notes GreekBill chapter representatives have recorded when connecting with your members.
 - Request Member Account Adjustment**: Member account adjustments are submitted using this form.
- Agreements**
 - Contracts Signed & Unsigned**: View list of signed and unsigned contracts by member.
 - Payment Schedules and Contracts**: View list of signed and assigned payment schedules and contracts by member.
 - Payment Schedules and Contracts Signed & Unsigned**: View list of signed and unsigned payment schedules and contracts by member.
 - Contract Total Count Report**: Inventory the count of signed and unsigned contracts for your chapter.
 - Add Contract**: Add, modify and assign contracts to members.
- Banking & Budgets**
 - Purchase Card Transactions**: Locate and review purchase card transaction details.
 - Checks & Deposits**: Make checks and review deposits to your bank accounts.
 - Bank Register Report**: View every check, withdrawal and deposit entered into the selected checking account for a particular period.
 - Financial Report**: Support your chapter's monthly financial report and view when your chapter's financial reports have been submitted.
 - Annual Budget**: View the total operating budget for the chapter for the current fiscal year. The annual budget will outline all income (money to collect) and expenses (money to spend) that are expected to be received and paid.
- Accounting**
 - Profit/Loss Liability Report**: Find out how much money you earned (income) and money you spent (expenses) vs. what you have budgeted for. Discover the overall net income of your chapter.
 - Income Breakdown**: Find out the details of each member payment and the entirety of how each are distributed into each bill account.
 - General Ledger Cash Basis**: Get a complete record of all financial transactions for your chapter. The ledger is the master set of accounts that summarizes all transactions occurring within your chapter.
 - Account Detail Cash Basis**: Search transaction details based on the specific sub account.
 - Balance Sheet Cash**: A financial statement that summarizes the assets, liabilities and equity at a specific point in time.

Reporting: Payments Received

The payments received report lists all member payments received within a specified date range. The report defaults to the 1st of the current month-to-date, which you can modify at your discretion. The details of each payment include the member name, date of payment, amount received, transferrable amount, payment type and approval number for electronic transactions.

← back to Reports

Payments Received Report - Delta Gamma Chapter

01/30/2019 1/31/2019 Run Report Export

| Member ID | Last Name | First Name | Effective Date | Payment Amount | Transaction Fees | Transferrable Amount | Payment Type | Approval Number | Check Number |
|-----------|-------------|------------|----------------|----------------|------------------|----------------------|-------------------|--------------------|--------------|
| 654869 | Simmons | Andrea | 01/31/2019 | \$20.00 | \$0.00 | \$0.00 | Chapter Collected | | |
| 1991002 | Ohanian Jr. | Alexis | 01/31/2019 | \$10.00 | \$0.00 | \$0.00 | Chapter Collected | | |
| 980772 | Skye | Ione | 01/31/2019 | \$20.00 | \$0.00 | \$0.00 | Chapter Collected | | |
| 2123753 | Stark | Arya | 01/31/2019 | \$10.00 | \$0.00 | \$0.00 | Chapter Collected | | |
| 654869 | Simmons | Andrea | 01/31/2019 | \$20.00 | \$0.00 | \$0.00 | Chapter Collected | | |
| 1991002 | Ohanian Jr. | Alexis | 01/31/2019 | \$10.00 | \$0.00 | \$0.00 | Chapter Collected | | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.03 | \$0.00 | \$0.03 | By Echeck | 827466108714025994 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | Credit Card | 870133 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | Credit Card | 639842 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | By Echeck | 825618929172149675 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | Credit Card | 570035 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | By Echeck | 825882810295174796 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | By Echeck | 825794851038168973 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | Credit Card | 634814 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | Credit Card | 294458 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | By Echeck | 827378147774795649 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | By Echeck | 825882811962573823 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.02 | \$0.00 | \$0.02 | By Echeck | 825794849385022108 | |
| 2123753 | Stark | Arya | 01/30/2019 | \$0.01 | \$0.00 | \$0.01 | Credit Card | 249590 | |
| Total: | | | | \$90.16 | \$0.00 | \$0.16 | | | |

1 - 10 of 19 items

Payments received outside of greekbill will list as Chapter Collected. Additional transactions found on the payments received report include returned payments, chargebacks and refunds. Greekbill issues weekly direct deposits to your chapter's bank account, for payments received during the previous Monday-Sunday. To preview an incoming deposit for your chapter, simply modify the report date range, click Run, and identify the Total transferrable amount at the bottom of the report.

Reporting: GB Fund Transfer

The Fund Transfer report displays all deposits issued to the chapter, from greekbill, for a specified time frame. Transfers are processed weekly, for payments received during the previous Monday-Sunday. The Fund Transfer report will indicate the date of the initiated deposit, which bank account the funds were sent to and the total amount transferred.

← back to Reports

Funds Transfer Report - Delta Gamma Chapter

02/01/2000 2/6/2019 Run Report Export

| Transfer Date | Description | Bank Name | Amount |
|---------------|----------------|-----------------------|--------|
| 07/05/2018 | Direct Deposit | Bank-Checking Account | \$0.97 |
| Total: | | | \$0.97 |

1 - 1 of 1 items

Reporting: Past Due Receivables

The screenshot shows the Greekbill Reporting dashboard. The 'Reporting' menu is selected in the left sidebar. The main area displays several report cards under 'Receivables & Transfers' and 'Invoice'. The 'Past Due Receivables' report is highlighted with a green border, and a dashed green arrow points from its 'Run' button to the 'Run' button of the 'Unsecured Receivables' report.

The Past Due Receivables (PDR) report will generate a list of members who are past due and categorize them by the number of days they are overdue. The PDR data is also directly linked to the Honor Board module and will trigger the associated notifications accordingly. Account balances begin aging 10 days after the due date and correspond with the following Honor Board categories:

- APN: 11-30 days past due
- SOR: 31-45 days past due
- 45 Day Letter: 46-60 days past due
- Collections: 61-90 days past due
- 90+ Days Past Due

[← back to Reports](#)

Past Due Receivable Report - Delta Gamma Chapter

[Export](#)

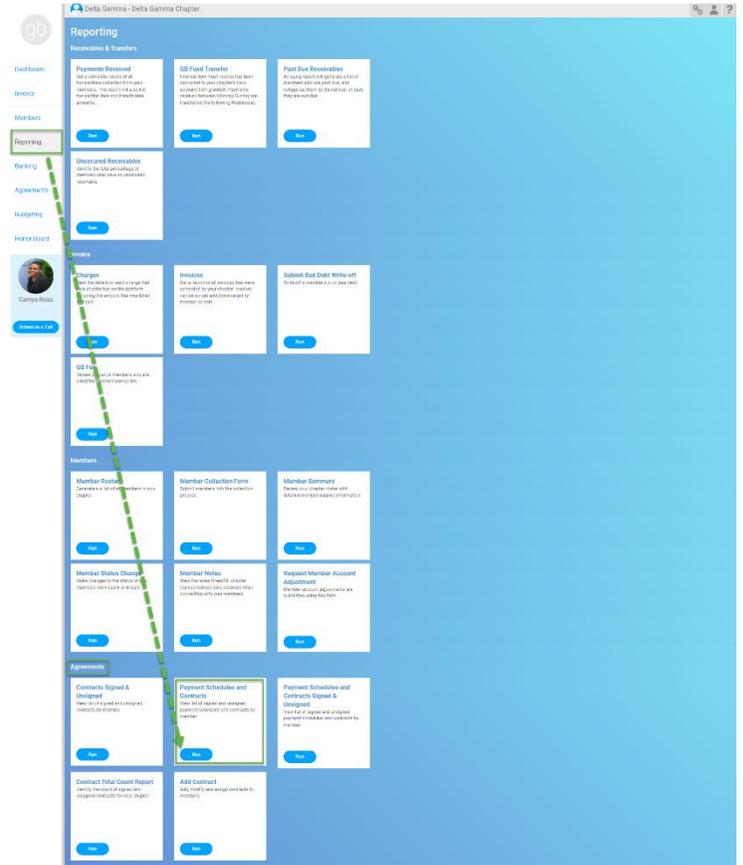
02/18/2019 [Run Report](#) Member

| Last Name ↑ | First Name ↑ | Member ID | Status | Payment Schedule | Current Payment Option Due | Pending Charges | APN | SOR | 45 Day Letter | Collecti... | 90+ Days Past Due | Total Past Due |
|---------------|--------------|-----------|--------|------------------|----------------------------|-----------------|-----------------|---------------|-------------------|-----------------|--------------------|--------------------|
| Beckett | Amanda | 902771 | Member | | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$5.00 | \$14,022.83 | \$14,027.83 |
| Clark | Jessica | 902769 | Member | Monthly | \$247.78 | \$0.00 | \$240.49 | \$0.00 | \$255.49 | \$252.78 | \$4,903.77 | \$5,652.53 |
| Holland | Barb | 2023557 | Member | | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$937.50 | \$937.50 |
| Skye | Ione | 902772 | Member | Monthly | \$247.78 | \$0.00 | \$262.49 | \$0.00 | \$4,524.49 | \$256.78 | \$1,860.32 | \$6,904.08 |
| TOTAL: | | | | | \$495.56 | \$0.00 | \$502.98 | \$0.00 | \$4,779.98 | \$514.56 | \$21,724.42 | \$27,521.94 |

Members will appear on the PDR report if they are past due on their payment schedule amount and/or they have an unsigned dues & fees contract. Once a past due balance is paid, the record is removed from the PDR report. *Note: A member account adjustment (MAA) will not produce immediate removal from the PDR report.*

Reporting: Payment Schedules and Contracts

The dues & fees (d&f) contracts are assigned to your members when they are invoiced for their annual charges. To view who has signed their d&f contract and when, select the Payment Schedules and Contracts tile.



The first tab of the report will prompt you to select the current d&f contract and click Run Report to populate a list of all members assigned, and the date stamp of their signature. You may also sort this report by Signed members, Unsigned members or both and download any signed agreement via the last column on the report.

[back to Reports](#)
Payment Schedules & Contracts Report - Delta Gamma Chapter

PS&C [RESETS](#) [Export](#)

Delta Gamma 2018-2019 New DG Demo Dues and Fees [Run Report](#) Signed & Unsigned

| Payment Schedule & Contract Name | Member ID ↑ | First Name | Last Name | Payment Schedule | Signed On | ReSigned On | Report |
|---|-------------|------------|-------------|------------------|------------|-------------|--------------------------|
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 647399 | Brandy | Lewis | | | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 654869 | Andrea | Simmons | Monthly | 07/27/2018 | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 902768 | Cher | Horowitz | | | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 902769 | Jessica | Clark | Monthly | 08/09/2018 | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 902770 | Kat | Stratford | | | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 902771 | Amanda | Beckett | | | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 902772 | Ione | Skye | Monthly | 07/10/2018 | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 1885998 | Sasha | Bilstein | Monthly | 12/04/2018 | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 1991001 | Rumil | Carter | Monthly | 02/18/2019 | | Download |
| Delta Gamma 2018-2019 New DG Demo Dues and Fees | 1991002 | Alexis | Ohanian Jr. | | | | Download |

1 - 10 of 16 items [10](#) items per page

The second tab of the report will pull all those members who have had their d&f contract reset. The d&f contract is typically only reset at the member's request (with VPF approval) or, when a Member Account Adjustment (MAA) is processed. When a change in dues occurs, the member is prompted to re-sign their d&f contract for the updated balance.

[back to Reports](#)
Payment Schedule & Contract Reset Report - Delta Gamma Chapter
[Export](#)

PS&C RESETS

Delta Gamma 2017-2018 New DG Demo Dues and Fees [Run Report](#)

| Payment Schedule & Contract Name | Member ID | First Name | Last Name | Payment Schedule | Signed On ↑ | Reset Date | Download |
|---|-----------|------------|-------------|------------------|-------------|------------|--------------------------|
| Delta Gamma 2017-2018 New DG Demo Dues and Fees | 902768 | Cher | Horowitz | Monthly | 05/17/2017 | 05/17/2017 | Download |
| Delta Gamma 2017-2018 New DG Demo Dues and Fees | 902769 | Jessica | Clark | Pay in Full | 05/17/2017 | 05/17/2017 | Download |
| Delta Gamma 2017-2018 New DG Demo Dues and Fees | 902768 | Cher | Horowitz | Pay in Full | 05/17/2017 | 10/18/2017 | Download |
| Delta Gamma 2017-2018 New DG Demo Dues and Fees | 902771 | Amanda | Beckett | Pay in Full | 05/18/2017 | 07/12/2017 | Download |
| Delta Gamma 2017-2018 New DG Demo Dues and Fees | 902769 | Jessica | Clark | Monthly | 09/11/2017 | 06/22/2018 | Download |
| Delta Gamma 2017-2018 New DG Demo Dues and Fees | 1991002 | Alexis | Ohanian Jr. | NM Monthly | 09/18/2017 | 10/18/2017 | Download |
| Delta Gamma 2017-2018 New DG Demo Dues and Fees | 1991001 | Rumi | Carter | NM Pay In Full | 09/19/2017 | 09/19/2017 | Download |

To view the list of members who have been reset, click on the second tab of the report, select the current d&f contract and click Run Report. Members with reset d&f contracts will appear with the original signature date and the reset date.

Reporting: Profit/Loss vs. Budget - Liability Report

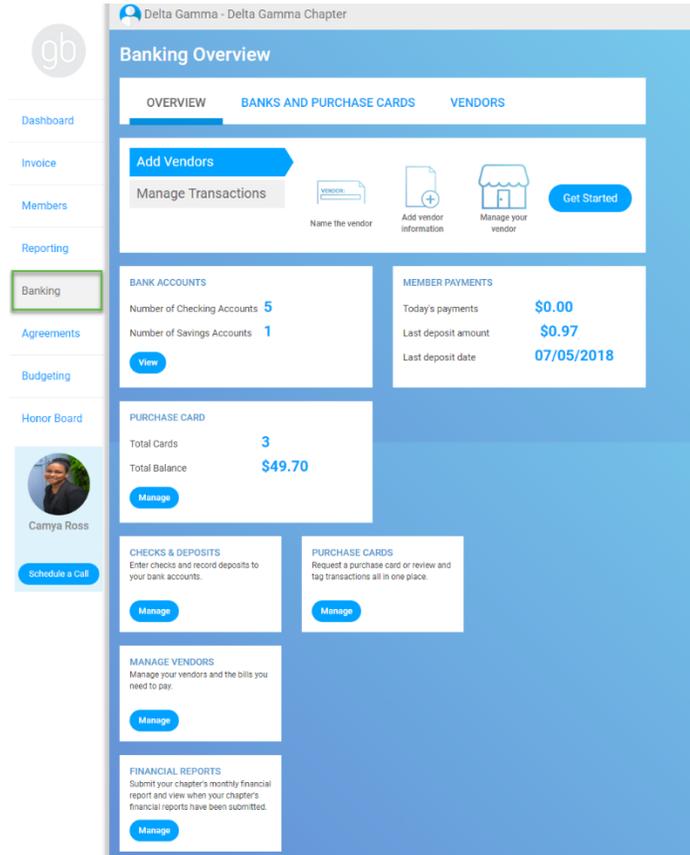
The Profit/Loss Liability Report will show how the total in each account compared to what is budgeted for the chapter.

[back to Reports](#)
Profit/Loss vs Budget - Liability Report - Delta Gamma Chapter
[Export](#)

07/01/2020 12/15/2020 [Run Report](#)

| Account# | Account | Sub Account | Total | Budget | Difference |
|-----------------------------|--------------------|--------------------|------------------------------|-------------|--------------|
| INCOME | | | | | |
| 260 | Chapter Dues | Chapter Dues | \$3,537.35 | \$1,800.00 | (\$1,737.35) |
| 270A | New Member Fees | New Member Fees | \$0.00 | \$900.00 | \$900.00 |
| 280B | Initiation Fees | Initiation Fees | \$133.00 | \$150.00 | \$17.00 |
| 290C | Parlor Fees | Parlor Fees | \$0.00 | \$0.00 | \$0.00 |
| 300D | House Corp Fees | House Corp Fees | \$50.00 | \$900.00 | \$850.00 |
| 310H | Board | Board | \$1,787.01 | \$0.00 | (\$1,787.01) |
| 315 | Extra Meals | Extra Meals | \$20.23 | \$0.00 | (\$20.23) |
| 320 | Chapter Obligation | Chapter Obligation | \$560.94 | \$2,160.00 | \$1,599.06 |
| | | | Total Income: | \$17,338.47 | |
| | | | Total Expenses: | (\$25.70) | |
| | | | Net Operating Income: | \$17,364.17 | |
| | | | Net Surplus: | \$17,364.17 | |
| Liability Account | | | | | |
| | | | Account Balance | | |
| 332 - Anchor Splash | | | | \$798.28 | |
| 360G - Reimbursable Account | | | | \$1,389.31 | |

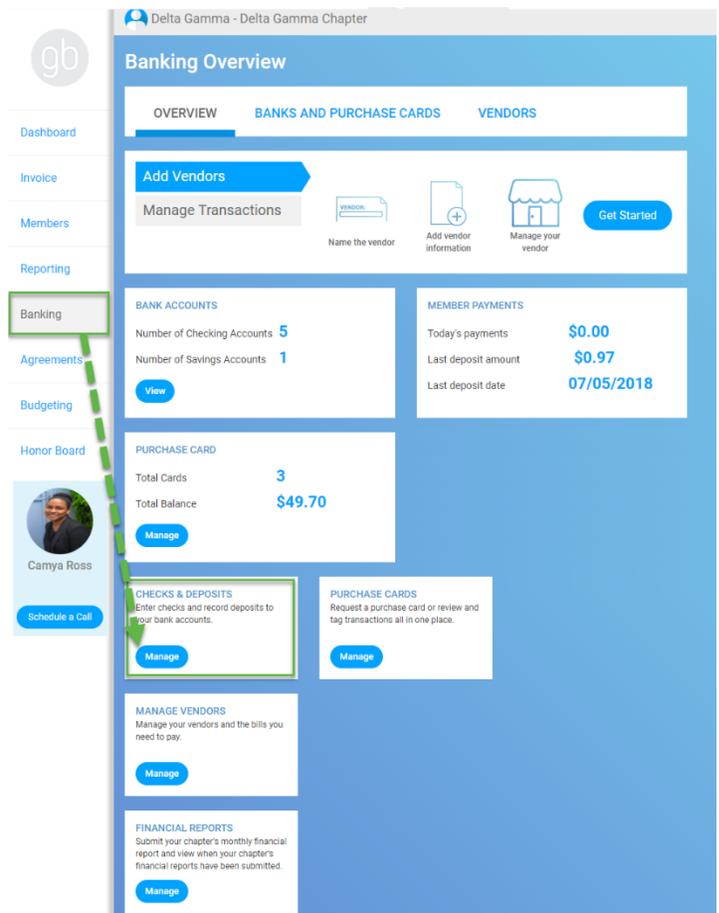
BANKING



The Banking module is home to your chapter's transactions, purchase cards and vendors. Within this module you may also view/record checks and deposits related to the chapter's bank account(s), manage the vendors associated with those transactions and submit your monthly financial report to the Delta Gamma Executive Offices.

Banking: Checks & Deposits

To view a check or transaction processed by the chapter, first select the Checks & Deposits tile. The report will display checks and deposits entered for the current fiscal year however, the date range may be modified at your discretion. You may also sort each report by any of the data columns including date, check # or sub account.



To record a check or transaction, select the Create Check button on the report to pull up a blank check form.

Tip: When recording an electronic payment, inputting 'EFT' in the Check Number field will indicate a purchase via electronic funds transfer (i.e. debit card or ACH withdrawal).

[Back to overview](#)

Checks and Deposits

CHECKS DEPOSITS

Effective Date: 07/01/2018 - 02/26/2019 Search [Create Check](#) [Export](#)

| Post Date | Check # | Vendor | Memo | Total Amount | Account | Bank Account | Check Voided |
|------------|---------|--------------------|-------------------------------|--------------|---|------------------|--------------|
| 02/20/2019 | 123123 | JAV- Z | | \$6.00 | SPLIT | Checking Account | No |
| 02/20/2019 | 456 | GreekBill Inc | Memo only | \$10,000.00 | 708-Programming Scholarship | Checking Account | No |
| 01/02/2019 | | Amin's Business | Tacos at Joey's | \$10.00 | 605-Finance Utilities | Checking Account | No |
| 01/01/2019 | 55555 | Amin's Business | 234 | \$100.00 | 675A-Chapter Expenses GreekBill Fee | Checking Account | No |
| 12/14/2018 | 123 | Christmas Tree Lot | | \$15.00 | 605-Finance Utilities | Checking Account | No |
| 12/06/2018 | 123456 | Arya Stark | 15 meals - CPK | \$50.00 | 735-Programming Ritual/Initiation | Checking Account | No |
| 11/30/2018 | 320 | AMIN | 32001 | \$1.00 | 212-Room Deposit Room Deposit | Checking Account | No |
| 10/29/2018 | 1234 | Hannah Closet | | \$51.00 | 615H-Finance Food & Kitchen | Checking Account | No |
| 08/28/2018 | 12125 | AMIN | | \$10.00 | 602-Paid to House Corp Chapter Obligation | Checking 6 | No |
| 08/09/2018 | 1234 | 123 | | \$10.00 | 605-Finance Utilities | Checking Account | No |
| 08/01/2018 | 12124 | ANDREWS ANCHOVIES | last reconcile was 08/29/2018 | \$10.00 | 212-Room Deposit Room Deposit | Checking Account | No |

1 - 11 of 11 Items

[Back to Checks and Deposits](#)

Create Check

Enter all information below that is needed to insert the transaction into your chapter

Bank Account:

Balance:

Date:

Check Number:

Type:

Vendor: [+ Add Vendor](#)

Check Total: \$0.00

Vendor Address:

Print Check: [Purchase GreekBill Compatible Checks](#)

Checks

Update check details to log transaction

Account:

Description:

Amount:

Memo:

[Back to Checks and Deposits](#)

Create Deposit

Enter all information below that is needed to insert the transaction into your chapter

Bank Account:

Balance:

Date:

Deposit Total: \$0.00

Received From:

Account:

Description:

Payment Method:

ReferenceNo:

Deposit Amount:

Memo:

On this form you are prompted to enter all transaction details including vendor, description, memo and check number. Once the check details are completed, click Submit to post the check to the report. If a vendor does not already exist in the system, you may add/save new vendor information by clicking the +Add Vendor link on the form.

The process for recording chapter deposits is like that of recording checks. By switching tabs on the report and selecting Create Deposit, you are prompted to fill out the deposit form for funds received to the chapter via cash, check or EFT.

Banking: Financial Reports

Financial reports should be submitted monthly to the DG Executive Offices. Before submitting the financial report, be sure you have entered all deposits and checks processed for the month.

Note: Once you submit the financial report, you will not be able to enter/modify any additional deposits or checks for the month. If you need to make an adjustment to a transaction that has already been submitted and/or reconciled, please contact your Collegiate Finance Consultant at EO for assistance.

To submit your chapter's financial report, first select the Financial Reports tile. You will be directed to review the previously submitted reports and verify that the chapter is up to date on the reporting. Select the Submit Report tab and choose the month to submit the next eligible financial report.

Reports Submitted

FINANCIAL REPORTS **SUBMIT REPORT**

Once you have entered all of your entire chapter's financial data for the month please follow these steps to submit your report.

- Step 1 - Click Choose Month
- Step 2 - Choose the month and year you are submitting your report for.
- Step 3 - Verify that the last day of the month you have selected is correct in the text box
- Step 4 - Click Submit

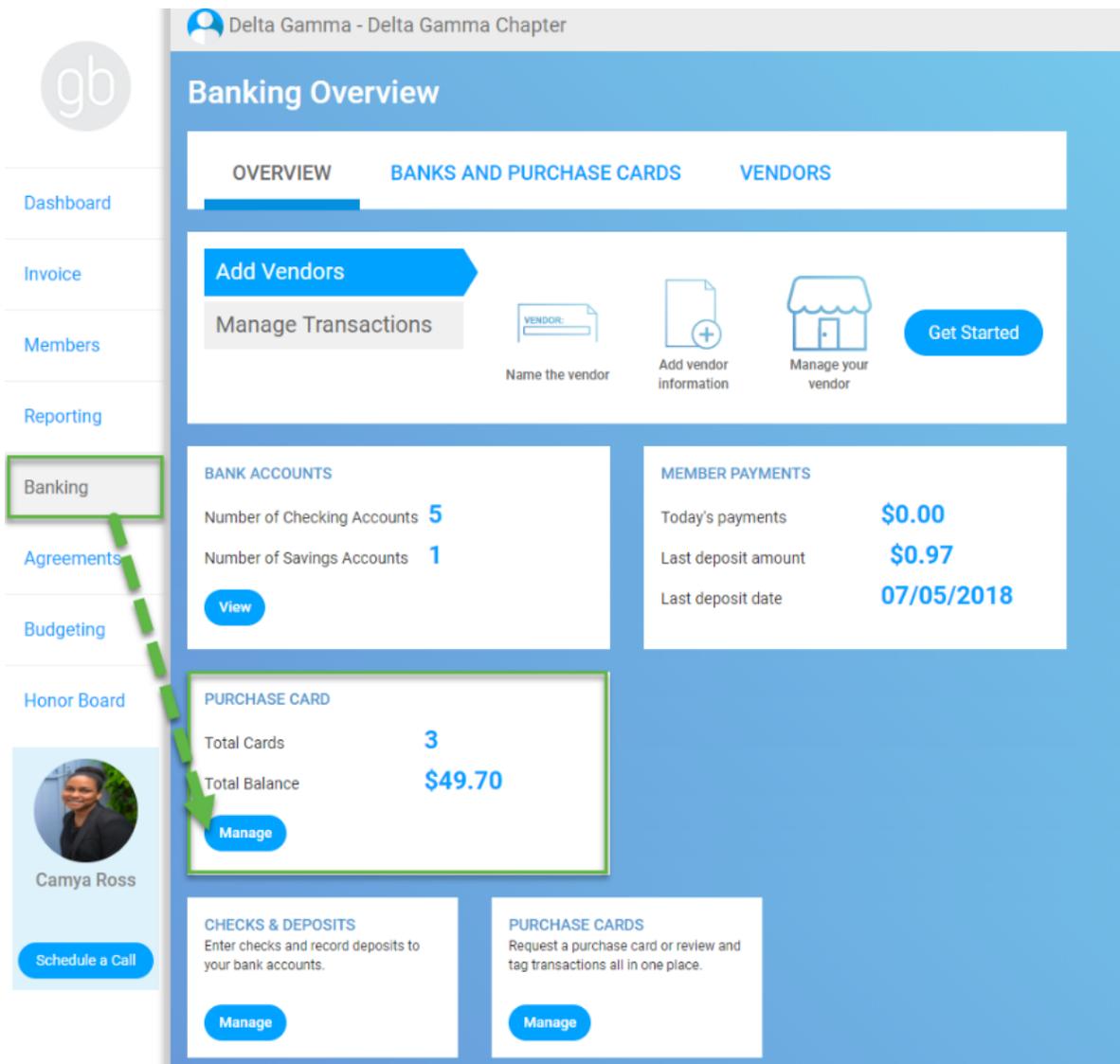
Financial reports are ready through the following date

Choose Month

Banking: Purchase Cards

Delta Gamma Purchase Cards are now available for chapter officers. This reloadable debit card can be used for purchases such as supplies for social events, venue security deposits, snacks for study sessions, recruitment shirts and so much more! Also, any purchases made with the purchase card do not require a W9 form from the vendor. If your chapter's vp:finance has ordered a card, please see the Purchase Card FAQ document.

[Purchase Card FAQs](#)



Delta Gamma - Delta Gamma Chapter

Banking Overview

OVERVIEW **BANKS AND PURCHASE CARDS** VENDORS

Add Vendors
Manage Transactions

Name the vendor | Add vendor information | Manage your vendor | **Get Started**

BANK ACCOUNTS
Number of Checking Accounts: **5**
Number of Savings Accounts: **1**
View

MEMBER PAYMENTS
Today's payments: **\$0.00**
Last deposit amount: **\$0.97**
Last deposit date: **07/05/2018**

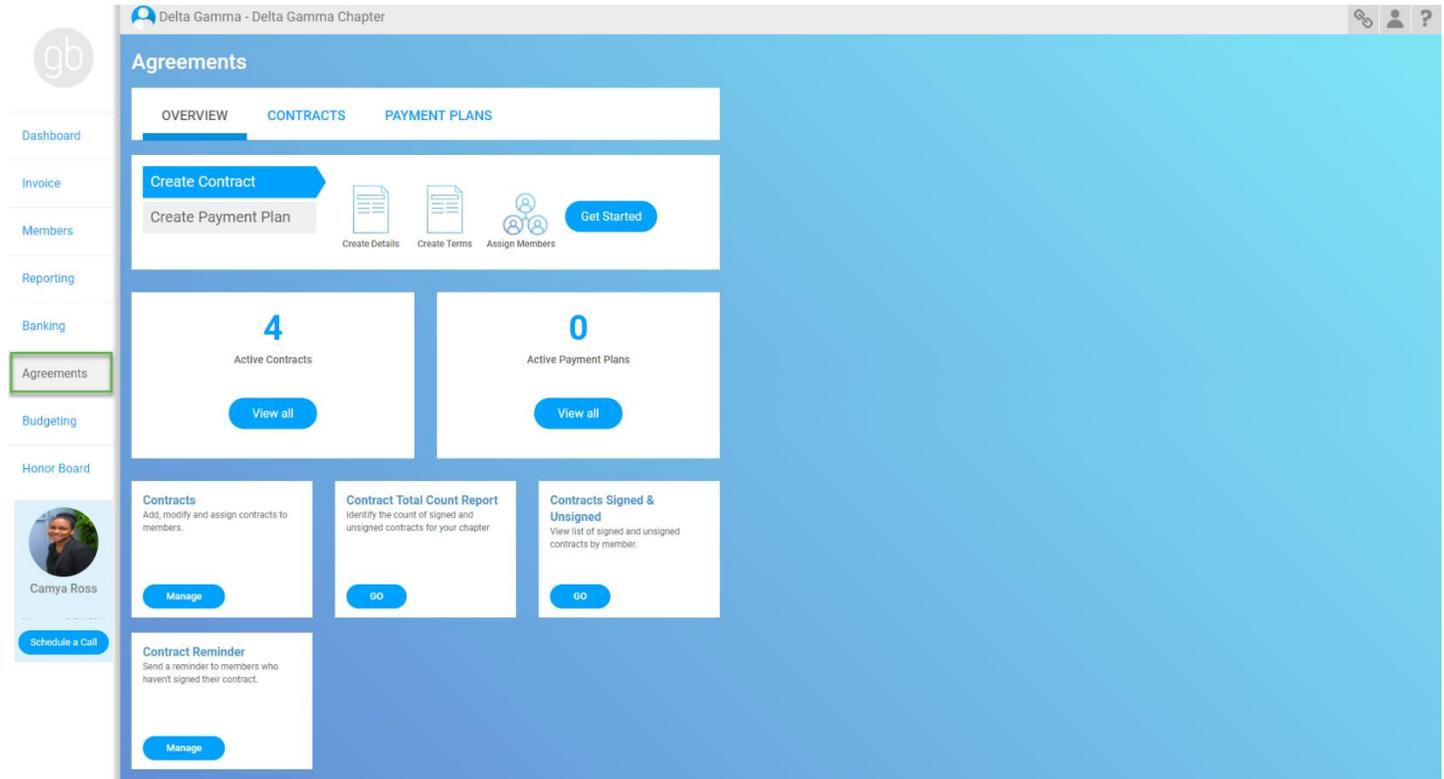
PURCHASE CARD
Total Cards: **3**
Total Balance: **\$49.70**
Manage

CHECKS & DEPOSITS
Enter checks and record deposits to your bank accounts.
Manage

PURCHASE CARDS
Request a purchase card or review and tag transactions all in one place.
Manage

AGREEMENTS

The Agreements dashboard offers a snapshot of the agreements added or promissory notes created for your members.



The screenshot shows the 'Agreements' dashboard for the Delta Gamma - Delta Gamma Chapter. The dashboard is divided into several sections:

- OVERVIEW**: Shows 4 Active Contracts and 0 Active Payment Plans, each with a 'View all' button.
- CONTRACTS**: Includes a 'Create Contract' button and a 'Create Payment Plan' button. Below these are icons for 'Create Details', 'Create Terms', and 'Assign Members', along with a 'Get Started' button.
- Contracts**: A section with a 'Manage' button and a description: 'Add, modify and assign contracts to members.'
- Contract Total Count Report**: A section with a 'GO' button and a description: 'Identify the count of signed and unsigned contracts for your chapter.'
- Contracts Signed & Unsigned**: A section with a 'GO' button and a description: 'View list of signed and unsigned contracts by member.'
- Contract Reminder**: A section with a 'Manage' button and a description: 'Send a reminder to members who haven't signed their contract.'

Although most agreements are uploaded on the chapter's behalf, you will need to utilize this module to assign various agreements for your members to electronically sign. These agreements include the Chapter Bylaws and Standing Rules, Room Agreement, Officer Budget Contract and more.

[Back to overview](#)

Contracts - Delta Gamma Chapter

[Add Contract](#) [Export](#)

| Name | Created On | Created By | Status | Signed Count | Unsigned Count | Total Assigned |
|-----------------------------------|------------|------------|--------|--------------|----------------|----------------|
| 2019-2020 Room Agreement | 12/04/2018 | greekbill | Active | 3 | 2 | 5 |
| 2018-2019 Officer Budget Contract | 11/08/2018 | greekbill | Active | 0 | 0 | 0 |
| 2018 - 2019 BLSR | 09/17/2018 | greekbill | Active | 12 | 4 | 16 |
| 2018-2019 Room Agreement | 09/15/2017 | | Active | 1 | 0 | 1 |

1 - 4 of 4 items

50 Items per page

Agreements: Contracts

Once an agreement has been uploaded, you will need to assign the eligible members to the agreements. From the Contracts report, select the agreement to assign and then click on the Assign/Unassign button.



2018 - 2019 BLSR

Archive Assign/Unassign Download

Details view

| | | | |
|------------------|------------------|--|-----|
| Contract Status | New | Mandatory Contract | Yes |
| Name of Contract | 2018 - 2019 BLSR | Mandatory Member Date of Birth Entry at Signing | No |
| Contract Date | 09/17/2018 | Mandatory Member City and State Entry at Signing | No |
| Contract Type | Bylaws | Mandatory Co-Signer Signature | No |

Terms view

Chapter Bylaws and Standing Rules

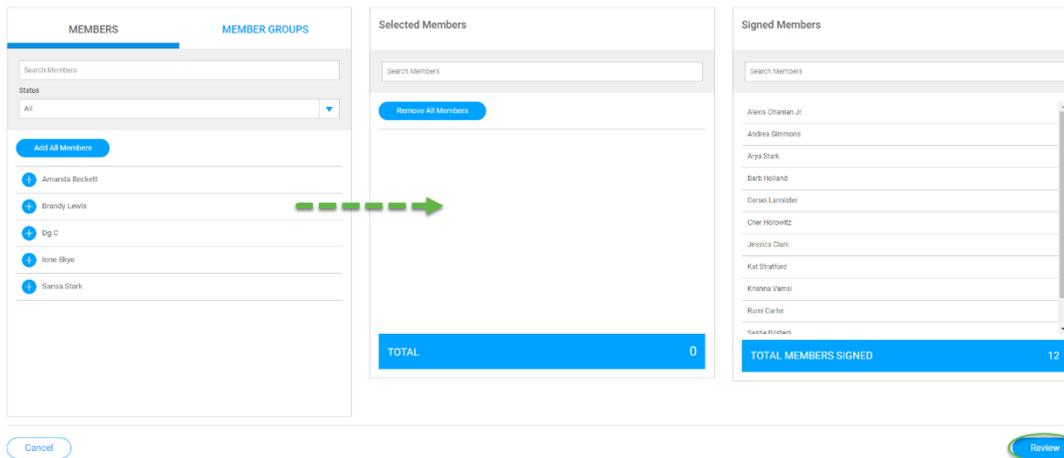
Each collegiate chapter shall be governed by the Constitution, policies and procedures of Delta Gamma Fraternity and shall adopt bylaws and standing rules in accordance with Model Bylaws and Standing Rules for Collegiate Chapters. Bylaws and amendments thereto must be approved by the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator as provided in the Fraternity Constitution **before the chapter vote can be taken**. Refer to Section 4: *Delta Gamma Fraternity Constitution*, Article XVI, Section 4. Refer to Section 6: *Bylaws and Standing Rules*.

ATTENTION CHAPTER PRESIDENT and VICE-PRESIDENT: COMMUNICATIONS:

- The following document is required by the Delta Gamma Fraternity Constitution and Fraternity policies and procedures.
- The gray fields should be filled according to the needs of the chapter. Only sections that may be modified (i.e., where verbatim language is not required) are accessible for change. Additional fields are available following each area and at the conclusion of the Standing Rules to include chapter-specific issues not covered in the model. Several fields, including chapter name, school name, fines and specific GPA requirements, will be entered once and will be auto-filled for the rest of the document.
- After approval by the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator, bylaws and standing rules must be adopted or amended by a two-thirds vote of the chapter, provided notice has been given at a previous chapter meeting. 2018-2019 BL/SR must be approved **prior to end of spring 2019 term**.**
- Bylaws and standing rules and amendments should be dated and a copy should be uploaded to e-Open. A copy of the approved chapter bylaws and standing rules shall be sent to the Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator.
- The approved bylaws and standing rules shall be posted on the Fraternity-approved accounting system for member online access.

Edit Contract 1 of 2

Select Assignees



MEMBERS MEMBER GROUPS

Search Members

Status: All

Add All Members

- Amanda Beckett
- Brandy Lewis
- Dg C
- Ione Skye
- Sansa Stark

Selected Members

Search Members

Remove All Members

TOTAL 0

Signed Members

Search Members

- Alexis Ohanian Jr.
- Andrea Simmons
- Anya Stark
- Barb Holland
- Carsel Lammister
- Cher Horowitz
- Jessica Clark
- Kat Stratford
- Kristina Vamsi
- Rumi Carter
- Saana Birstein

TOTAL MEMBERS SIGNED 12

Cancel Review

Select the members you wish to assign by clicking the plus sign (+) next to their name or assign all members via the Add All Members button and click Review.

Once you have reviewed your member assignments at the bottom of the agreement terms, click Save.

Section 8: NEW MEMBER SCHOLARSHIP REQUIREMENTS: The scholarship requirement for a new member of this chapter shall be as follows: (based on chapter membership selection goals)

- A 2.25 GPA unweighted, cumulative for incoming freshmen
- A 2.25 GPA cumulative for those women with established college grades.

(Note: Minimum may be higher. When significant college grades are available, the minimum requirement must be equal to or higher than the requirement for good standing. It is also recommended that the minimum requirement should equal or exceed the all freshman women's average.)

Section 9: MEMBER/NEW MEMBER SCHOLARSHIP ENRICHMENT PROGRAM: All members/new members below 2.75 must follow the same scholarship enrichment program developed by the director of scholarship and/or the scholarship committee and approved by the chapter. If new members do not have established college grades, they must use their high school unweighted, cumulative GPAs to determine where they are on the scholarship enrichment scale. (State requirements of the chapter study program: ___)

Section 10: SCHOLASTIC POOR STANDING: The director of scholarship, with assistance from the vice-president: social standards, will inform the president and vice-president: communications of members and new members in scholastic poor standing for voting and participation purposes.

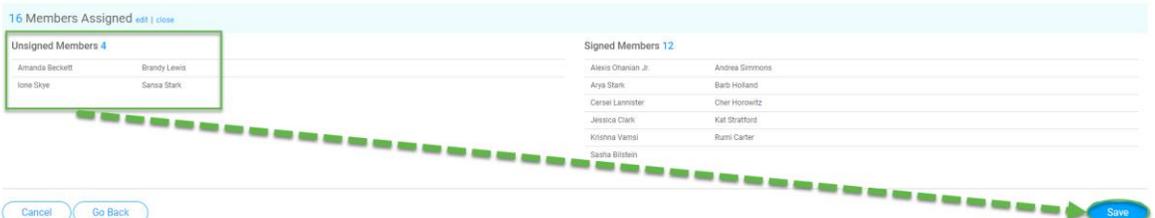
Section 11: CHAPTER SPECIFIC STANDING RULES: House Corporation will determine any of the fines for room damages

If any changes in the Fraternity Constitution, Fraternity handbooks or policies and procedures shall at any time necessitate amending these Standing Rules, such amendments shall take place automatically without being voted upon by the chapter. Notice of the said change or amendment shall take place at the next regular meeting.

May 1, 2018 Date approved by Regional Collegiate Specialist/Council Appointed Coordinator/New Chapter Coordinator

___ Date approved by chapter

___ President (electronic signature) Please post approved BL/SRs on Fraternity-approved accounting system



16 Members Assigned edit | close

Unsigned Members 4

- Amanda Beckett
- Brandy Lewis
- Ione Skye
- Sansa Stark

Signed Members 12

- Alexis Ohanian Jr.
- Andrea Simmons
- Anya Stark
- Barb Holland
- Carsel Lammister
- Cher Horowitz
- Jessica Clark
- Kat Stratford
- Kristina Vamsi
- Rumi Carter
- Saana Birstein

Cancel Go Back Save

Members will then be prompted to sign their electronic agreement upon login to their greekbill member account.

Welcome to GreekBill

Name: Ione Skye
Account#: 902772
Organization:
University: GB University
Chapter: Delta Gamma Chapter

2018 - 2019 BLSR (Mandatory)
Status: Not Signed
 Contract

[Sign Now](#) >

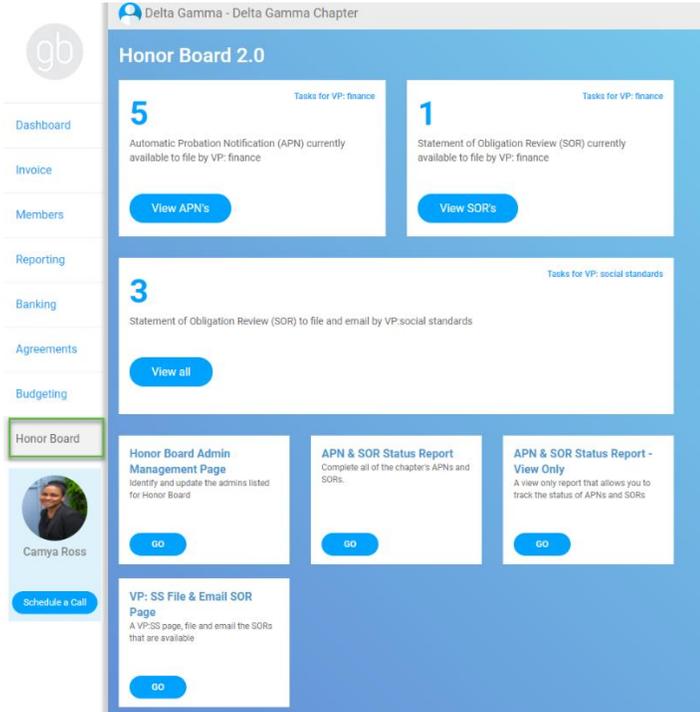
Cancel

Done

Dues & Fees Contracts and Payment Schedules

Dues & Fees contracts are added by your greekbill representative. To view a report of who has signed their D&F contract and when, please see the Payment Schedules and Contracts tile on the Reporting tab. *For additional information on this report, please reference the Quick Reference: Reporting mini-guide.*

HONOR BOARD



Honor Board is responsible for holding members/new members accountable to the Delta Gamma Constitution and Statement of Obligation. In the event of a member's violation, the Honor Board (HB) may issue one or both penalty notifications on greekbill:

- APN – Automatic Probation Notification
- SOR – Statement of Obligation Review

The HB dashboard includes a snapshot of tasks for both the vp: finance and vp: social standards, including a tally of members currently eligible for an APN and/or SOR notification.

Honor Board: APN & SOR Status Report

The APN & SOR Status Report is the primary report used by the VPF to review and file APNs and SORs for past due members. The report will pull a list of members who did not meet their financial obligation and generate an APN document for each, outlining their violation(s).

[Back to overview](#)

APN & SOR Status Report - Delta Gamma Chapter
[Click Here For Help](#)

[Show All Active APNs & SORs](#) [Export](#)

| Name | Member ID | Member Status | Date APN Generated | Date APN Sent | SOR Status | VP:SS SOR Status Action | Document Stored | Notes |
|----------------------|-----------|---------------|--------------------|--------------------------|--------------------------|-------------------------|--------------------------|--------------------------|
| Beckett, Amanda | 902771 | Member | 09/12/2018 | 10/03/2018 | Filed | Completed | VIEW (4) | VIEW (4) |
| Bilstein, Sasha | 1885998 | Member | 03/11/2019 | SEND NOW | | | VIEW (1) | VIEW (0) |
| Blondehair, Stefania | 2098380 | Member | 08/11/2018 | 10/29/2018 | Filed | Completed | VIEW (4) | VIEW (2) |
| Clark, Jessica | 902769 | Member | 12/11/2018 | 12/19/2018 | Filed | Pending action of VP:SS | VIEW (4) | VIEW (0) |
| G | 2219368 | Member | 03/11/2019 | SEND NOW | | | VIEW (1) | VIEW (0) |
| Holland, Barb | 2023557 | Member | 06/11/2018 | 10/04/2018 | Filed | Pending action of VP:SS | VIEW (3) | VIEW (3) |
| Lannister, Cersel | 2123754 | Member | 03/11/2019 | SEND NOW | | | VIEW (1) | VIEW (0) |
| Lewis, Brandy | 647399 | Member | 03/11/2019 | SEND NOW | | | VIEW (1) | VIEW (0) |
| Simmons, Andrea | 654869 | Member | 01/11/2018 | 01/11/2018 | Filed | Completed | VIEW (4) | VIEW (0) |
| Skye, Ione | 902772 | Member | 08/11/2018 | 11/06/2018 | Filed | Completed | VIEW (4) | VIEW (0) |
| Stark, Arya | 2123753 | Member | 03/11/2019 | SEND NOW | | | VIEW (1) | VIEW (0) |
| Stratford, Kat | 902770 | Member | 06/11/2018 | 10/04/2018 | FILE NOW | | VIEW (1) | VIEW (1) |
| Vamsi, Krishna | 2007698 | Member | 09/18/2018 | 09/20/2018 | Filed | Pending action of VP:SS | VIEW (4) | VIEW (0) |

1 - 13 of 13 items

50 items per page



On the APN & SOR Status Report, the VPF will first review the list of APN records and click the Send Now button for each eligible member. A pop-up window will appear with a preview of the email notification text to be delivered the member.

Note: The member does not receive a notification until the VPF clicks the Email Member APN button.

Email the member the APN document

Member's Email: @savitr.com
Document link: [Sasha Bilstein](#)

Email text/content that will be delivered.

Hello Sasha Bilstein,

There has been an APN (Automatic Probation Notification) created on 03/11/2019 for you.

[Sasha Bilstein](#)

An APN was created as your balance is past due and you did not meet your financial obligations to the chapter and Fraternity. You may click on the hyperlink in your name above to view & download the APN document that was created.

Should you wish to appeal this automatic probation, you must submit a letter of appeal

Email Member APN

Cancel

Please fill out the document below and submit the SOR by clicking the File SOR button

File SOR



Name of Woman Subject to Review: Kat Stratford
Date of Incident/Violation: 02/01/2018

Chapter: Delta Gamma Chapter 08 University

STATEMENT OF OBLIGATION REVIEW

The Statement of Obligation is a contract signed by all members before initiation signifying acceptance of responsibilities of lifelong membership. Honor Board has the responsibility to take action in the event a new member/member commits an infraction (or repeated infractions) of Delta Gamma Fraternity's Constitution, policies and procedures, chapter bylaws and standing rules, university/college rules and regulations or local, state, provincial and federal laws. A hearing is scheduled if there is reasonable cause to believe an infraction may have occurred. A member is given the opportunity to be heard at the hearing.

Directions: In order to file a Statement of Obligation Review (SOR), you must have a reasonable, good faith belief that the new member/member has violated her Statement of Obligation. You must have witnessed the incident or be able to provide the names of the witnesses of the incident. It is a violation of your Statement of Obligation to file a review in bad faith. Please mark "Yes" or "No" for all items below. Any item marked "No" should be further documented with specific facts concerning the allegations being made (e.g., date, time, location; the specific bylaw or standing rule violated); outstanding debt amount; etc.). If necessary, additional facts may be listed on the next page.

| | | Facts Which Support a 'No' Response |
|--|---|-------------------------------------|
| Acts in accordance with Delta Gamma's Constitution, policies and procedures | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Upholds chapter's bylaws and standing rules (BSR) | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Serves to live by the high standards and ideals of sisterhood | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Achieves scholastic potential | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Abides by housing policies | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Abides by attendance policies | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Meets financial obligations | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Meets Foundation service hour requirements | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Holds in confidence the business and rituals of Delta Gamma Fraternity and chapter | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Upholds university rules and regulations | <input checked="" type="radio"/> Yes <input type="radio"/> No | |
| Upholds all local, state, provincial and federal laws | <input checked="" type="radio"/> Yes <input type="radio"/> No | |

ADDITIONAL FACTS REGARDING ALLEGATIONS BEING MADE

DO NOT COPY OR SEND ANYTHING BELOW THIS LINE TO THE WOMAN SUBJECT TO REVIEW

Similarly, the VPF may also review the eligible SORs and click on File Now to complete the SOR document to be filed for the member.

Note: In the Additional Facts Regarding the Allegations box, the vp: finance should put in the amount past due and the due date for the payments past due. And then she should click the File SOR button at the top to submit it.

Honor Board: VP: SS File & Email SOR

[← Back to overview](#)

VP:SS - File & Email SOR Page 🔗 - Delta Gamma Chapter

[Click Here For Help](#)

Show Active Records ⌵

Export ⌵

| Name | Member ID | Member Status | APN Status | Date APN Gene... | Date APN Sent | SOR Status | SOR Doc Without Signature | File SOR | Email Member |
|----------------------|-----------|---------------|------------|------------------|---------------|------------|-------------------------------|-----------|----------------------------|
| Beckett, Amanda | 902771 | Member | Generated | 09/12/2018 | 10/03/2018 | Generated | View Document | Completed | Email Sent |
| Blondehair, Stefania | 2098380 | Member | Generated | 08/11/2018 | 10/29/2018 | Generated | View Document | Completed | Email Sent |
| Clark, Jessica | 902769 | Member | Generated | 12/11/2018 | 12/19/2018 | Generated | View Document | Completed | Send Email |
| Holland, Barb | 2023557 | Member | Generated | 06/11/2018 | 10/04/2018 | Generated | View Document | Completed | Send Email |
| Simmons, Andrea | 654869 | Member | Generated | 01/11/2018 | 01/11/2018 | Generated | View Document | Completed | Email Sent |
| Skye, Ione | 902772 | Member | Generated | 08/11/2018 | 11/06/2018 | Generated | View Document | Completed | Email Sent |
| Vamsi, Krishna | 2007698 | Member | Generated | 09/18/2018 | 09/20/2018 | Generated | View Document | Completed | Send Email |

1 - 7 of 7 items 50 items per page

Once the SOR is filed by the VPF, it is then the responsibility of the VP: SS to prepare and email the SOR Hearing Letter to the member. All filed SORs will appear on the VP: SS File & Email SOR Page, and the VP: SS may click the Send Email link to generate a Hearing Letter to the member via email. A pop-up window will appear with a preview of the email notification text to be delivered the member.

Note: The member does not receive a notification until the VP: SS clicks the Email Member SOR button.

✕

Email the member the SOR document

Member's Email: @yahoo.com
 Document link: Jessica Clark

Email text/content that will be delivered.

Hello Jessica Clark,

There has been an SOR (Statement of Obligation Review) created on 12/11/2018 for you.

[Jessica Clark - SOR Document & Jessica Clark- Formal Hearing Letter](#)

An SOR was created as your balance is past due and you did not meet your financial obligations to the chapter and Fraternity. You may click on the hyperlink in your name above to view & download the SOR document that was created.

If you have any questions, please contact your chapter's VPF.

Email Member SOR

Cancel

Honor Board: Admin Management

Within the HB module, there are several officers who receive or are copied on the various email notifications generated in relation to APNs and SORs:

- APN Notification To Admins: VPF and CFA
 - A list of members who did not meet their financial obligation and have an APN generated
- APN Notification To Members: VP: SS and HBA
 - Copied on the APN email sent to members by VPF
- SOR Notification To Admins: VPF and CFA
 - A list of members who are eligible to have a SOR filed
- VP: SS SOR Notification: VP: SS, President and HBA
 - Action request once SOR documentation is completed by VPF
- SOR Notification To Members: President and HBA
 - Copied on SOR email sent to members by VP: SS

[Back to overview](#)

Honor Board Admin Management ⊙

| Admin Title | Admin Name | Admin Email | APN Notification To Admins | APN Notification To Members | SOR Notification To Admins | VP-SS SOR Notification | SOR Notification To Members |
|----------------------------------|----------------------|---------------------------|----------------------------|-----------------------------|----------------------------|------------------------|-----------------------------|
| Vice-President: Social Standards | Byers, Joyce | jbyersdgdemo@gb.com | | ✓ | | ✓ | |
| President | Gerard, Kelsey | kgerard@greekbill.com | | | | ✓ | ✓ |
| Junior Member | Blondehair, Stefania | steveblonde@greekbill.com | | | | | |
| Sophomore Member | Lannister, Cersel | cersai@deltagamm.org | | | | | |
| Member-at-Large | Lewis, Brandy | blewis@greekbill.com | | | | | |
| Advisory Team Chairman | Heelson, Karmen | kheelson@greekbill.com | | | | | |
| Vice-President: Finance | Carter, Rumi | rumicarter@greekbill.com | ✓ | | ✓ | | |
| Director: Scholarship | Stratford, Kat | kstratford@gb.com | | | | | |
| Director: House Management | Jill, Kelly | kjill@greekbill.com | | | | | |
| Vice-President: Foundation | Jinkens, Kimberly | kjinkens@greekbill.com | | | | | |
| Vice-President: Communication | Brandt, Ashley | abrandt@greekbill.com | | | | | |
| Honor Board Advisor | Skye, Ione | iskye@gb.com | | ✓ | | ✓ | ✓ |
| Chapter Finance Advisor | Stark, Sansa | sansa@deltagamma.org | ✓ | | ✓ | | |

Updated by Rumi Carter on 12/15/2020

Cancel

Save

The Honor Board Admin Management page allows the VPF to assign the appropriate officers to their associated notifications. It is important that this page is updated by the VPF each time an officer transition occurs, as the HB process is to remain confidential to only those officers specified on the listing. *Note: Only the VPF and Honor Board Adviser have access to update the admin management page.*

Greekbill Quick-Reference Guide:

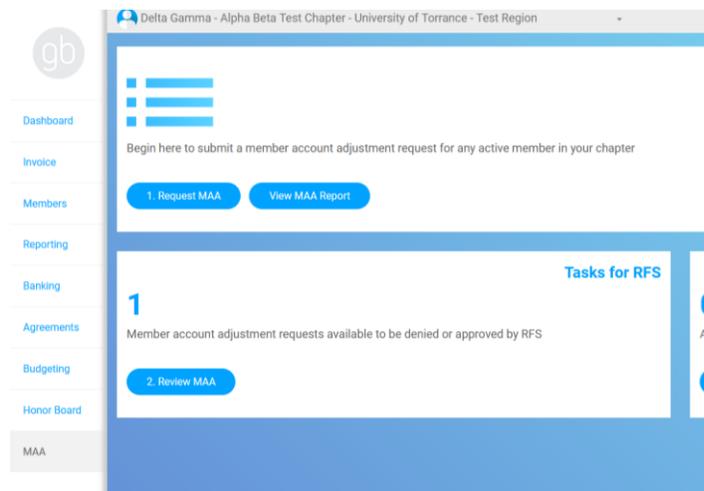
MAA

Greekbill Quick-Reference Guide: MAA

MAA

STEP 1: Select and submit members (vp: finance)

To adjust a member's account, select the MAA tab from the Dashboard. Then select 1. Request MAA from the top box



To request an MAA for a member, select whichever member(s) need a MAA request submitted and click Continue to begin. Once you begin, members are updated to locked. To unlock them, unselect them on this page.

[Back to Adjustments Dashboard](#)

Request Member Account Adjustment - Select Members

[Export](#)

Here, you are able to fill out and submit MAA requests for members. Select whichever members need a MAA request submitted and click Continue to begin. Once you begin, members selected will be locked. To unlock them, unselect them on this page.

REQUEST MAA MAA REPORT

Current Status: [Filter Members](#)

| | Last Name ↑ | First Name ↑ | Member ID | Current Status | Date Last MAA Request Submitted | Last MAA Request Submitted By | Current MAA Status |
|-----------------------|-------------|--------------|-----------|--|---------------------------------|-------------------------------|--------------------|
| <input type="radio"/> | Benjamin | Char | 2429189 | Fall Member Live Out/Winter Member Live Out/Spring Member Live Out | | | |
| <input type="radio"/> | Cody | Callie | 2429187 | Fall Member Live Out/Winter Member Live Out/Spring Member Live Out | | | |
| <input type="radio"/> | Elijah | Mia | 2429190 | Fall Member Live Out/Winter Member Live Out/Spring Member Live Out | | | |
| <input type="radio"/> | James | Isabella | 2429186 | Fall Member Live Out/Winter Member Live Out/Spring Member Live Out | | | |
| <input type="radio"/> | Liams | Emma | 2429183 | Fall Member Live Out/Winter Member Live Out/Spring Member Live Out | | | |
| <input type="radio"/> | Logan | Eve | 2429193 | Fall Member Live Out/Winter Member Live Out/Spring Member | 12/18/2020 | greekbill, greekbill | In Request |

[Go Back](#) 0 of 8 Members Selected | 1 Requests Pending [Continue](#)

Enter all information into each form for all members you selected on the previous page. When you are complete, select Review Information to review and submit your MAA requests. Selecting Remove & Unlock will remove a member from this request session, and other users will be able to submit an MAA for them.

Request Member Account Adjustment - Complete MAA Forms

Please enter all information into each form for all members you selected on the previous page. When you are complete, select Review Information to review and submit your MAA requests. Selecting Remove & Unlock will remove a member from this request session, and other users will be able to submit an MAA for them.

Status: Fall Member Live Out/Winter Member Live Out/Spring Member Live Out 1 Members Selected

| | | | | | | |
|------------------|---------------------|---|--|---|----------------|--------------------------------------|
| Member Name | Benjamin Char | Current Status | Fall Member Live Out/Winter Member Live Out/Spring Member Live Out | New Status* | Select One | Create Billing Group |
| Member ID | 2429189 | Reason for Change * | Select One | Date of Resignation/Transfer | month/day/year | |
| Requester Name | greekbill greekbill | Room Agreement Signed * | Select One | Name of Replacement | | |
| Requester Email* | dgg@greekbill.com | Resignation form submitted to ED by VPSS? | Select One | Change status to Alum/Non-member and Off-System | Select One | Remove & Unlock |

STEP 2: RFS will deny/approve submitted adjustments. (Nothing needed from vp: finance on this step)

STEP 3: Approved member account adjustments to be processed by vp: finance

Last step is to review and process the MAAs that are approved by your RFS. Charges are bound to current and new statuses, so you can only process one group at a time.

[back to Adjustments Dashboard](#)

Process Member Account Adjustment - Select Members

Here, you are can review and process the MAAs that have been approved by your RFS. Charges are tied to current and new statuses, so you can only process one group at a time. You can prorate a member's charges on this page by selecting Review for any member checked.

Current Status: All | New Status: All | [Filter Members](#)

| | Last Name ↑ | First Name ↑ | Member ID | Current Balance | Current Status | New Balance | Requested New Status |
|-----------------------|-------------|--------------|-----------|-----------------|--|-------------|--|
| <input type="radio"/> | Benjamin | Char | 2429189 | \$1,165.84 | Fall Member Live Out/Winter Member Live Out/Spring Member Live Out | \$1,165.84 | Fall Member Live Out/Winter Member Live Out/Spring Member Live Out |

1 - 1 of 1 Items 400 Items per page

[Go Back](#) 0 of 1 MAA Request(s) Selected [Begin Processing](#)