

Beta Theta Pi and Billhighway Partnership

How do I inform the General Fraternity of my CAS selection?

Selecting your chapter's Chapter Accounting Standards Compliance option is an easy two-step process, depicted by a stoplight.

The steps can be completed at <http://my.betathetapi.org>

First, following *Keystone*, each chapter must select their option on my.betathetapi.org for the upcoming/next academic/fiscal year. Making this selection will move your chapter's CAS stoplight from Red to Yellow.

Second, the chapter must submit the required documentation. To complete this step for all three options chapters should:

- Billhighway
 - o Transfer all chapter cash into Billhighway and actively use the system (100% of financial transactions occur within Billhighway)
- Accounting Professional
 - o Submit the certification letter to the General Fraternity. A scanned copy can be emailed directly to dan.fogle@betathetapi.org
- Self-Reporting**
 - o Submit financial statements, Form 990, 990T, and forms 1099 – upon completion of the fiscal year. These reports are due prior to November following the close of the fiscal year.

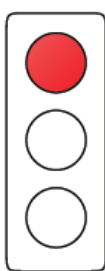
Completing this second step will let the General Treasurer know your chapter is ready for approval. Following confirmation of your submitted information, your information will be reviewed. Upon approval, your CAS status will change to Green.

*See the following pages for screenshots of the process in my.betathetapi.org

**Self-Reporting is only available for chapters operating as Self-Reporting prior to Fiscal Year 2013. Chapter still eligible to self-report must contact the Administrative Office to have their selection input manually.

Step One

Chapter Accounting Standards (CAS) for <current/next FY>



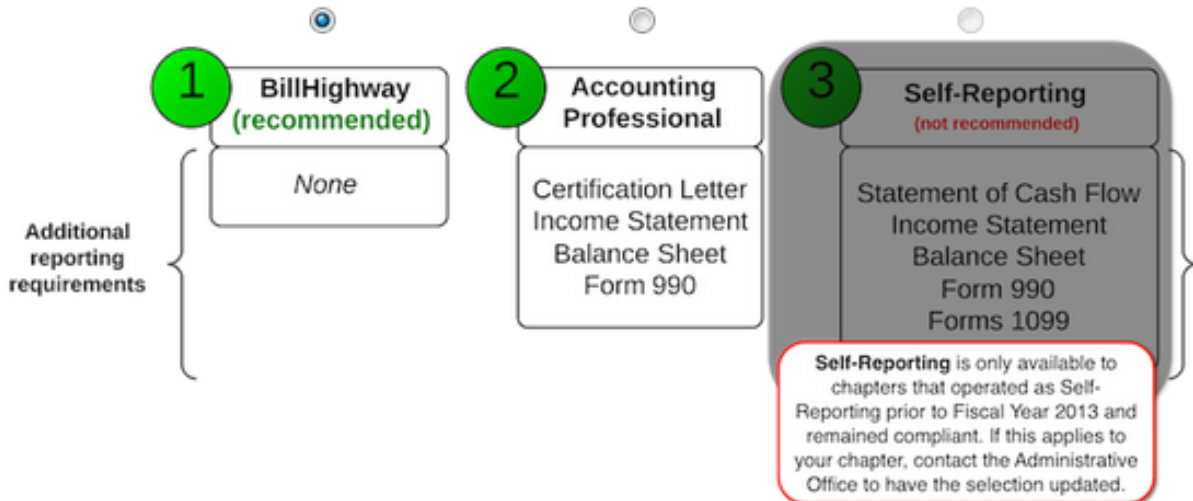
Non-compliant

Current CAS Status: <school name>

- CAS Reporting Option Selected: NONE SELECTED**
- All Additional Reporting Requirements Fulfilled: (FIRST SELECT REPORTING OPTION)**

Starting in 2011, each chapter must select a financial reporting option to maintain compliance. You must select a reporting option below by 4/15/<year>.

Select your CAS Option for FY 2013-2014 below:



1 BillHighway (recommended)
None

2 Accounting Professional
Certification Letter
Income Statement
Balance Sheet
Form 990

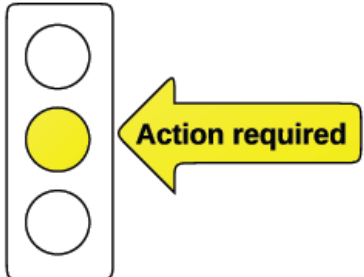
3 Self-Reporting (not recommended)
Statement of Cash Flow
Income Statement
Balance Sheet
Form 990
Forms 1099

Additional reporting requirements

Self-Reporting is only available to chapters that operated as Self-Reporting prior to Fiscal Year 2013 and remained compliant. If this applies to your chapter, contact the Administrative Office to have the selection updated.

Step Two

Chapter Accounting Standards (CAS) for <current/next FY>



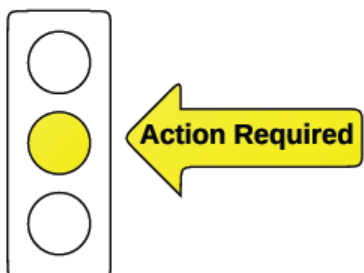
Current CAS Status: <school name>

- CAS Reporting Option Selected: BillHighway**
- All Additional Reporting Requirements Fulfilled:**
Contact Billhighway
TRANSITION DEADLINE 6/1/<year>

The <School> chapter is not yet compliant with the Chapter Accounting Standards. You MUST contact Billhighway (1-866-BillHWY (1-866-245-5499), www.billhighway.com, or betasupport@billhighway.com) and complete all transition steps to become compliant before <6/1/<year>. Please allow plenty of time to complete paperwork, prepare for account transfers, etc. Your status will not change to compliant until the administrative office has received notice from Billhighway that you are actively using their system. If you are having issues signing up with Billhighway contact the Business Operations team at the Administrative Office (beta@betathetapi.org, 1-800-800-BETA (2382)).

-OR-

Chapter Accounting Standards (CAS) for <current/next FY>



Current CAS Status: <school name>

- CAS Reporting Option Selected: AP Certification**
- All Additional Reporting Requirements Fulfilled:**
SUBMIT BELOW
DUE: 6/1/<year>

The <school name> chapter has selected the <reporting option> CAS Reporting Option for <FY>. You must submit the additional reporting requirements below by 6/1/<year>.

NOTE ON APPROVAL: The Chapter's CAS Status will not be updated to Compliant until the documents submitted have been reviewed and approved.

Compliance Achieved: Stoplight will turn to Green.