



BETA THETA PI
— MEN OF PRINCIPLE —

2015 CHAPTER PRESIDENT
OPERATING MANUAL

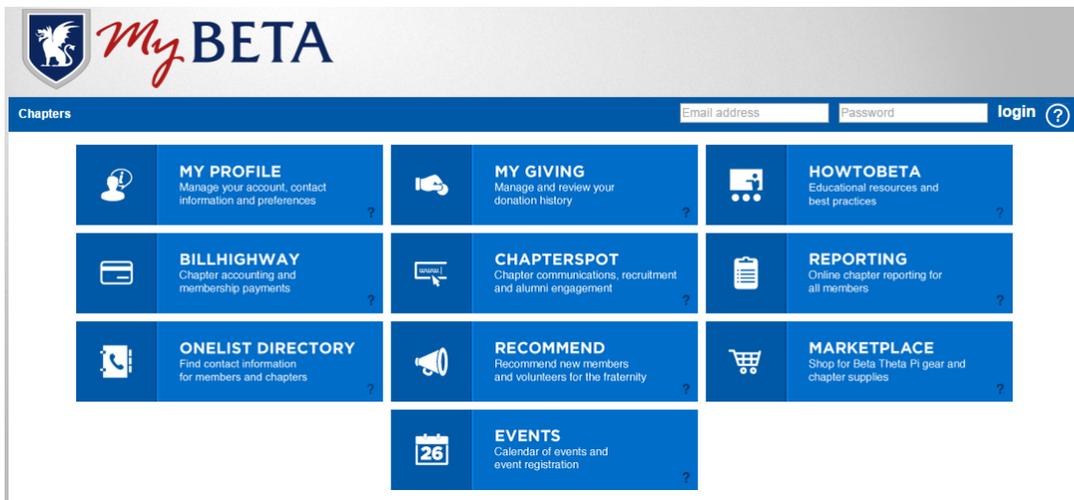
OVERVIEW

Congratulations on your election to the role of Chapter President! This is an incredibly important position. This resource is designed to help you navigate and understand some of the more administrative tasks asked of all presidents across Beta so that you can get to work promoting positive change in your chapter.

MYBETA 101

You will need to familiarize yourself with MyBeta during your term as president. You can access it at my.beta.org. Many tasks outlined in this manual originate from MyBeta, so being familiar with this tool is critical. Once you log in, you'll have access to click on each tile seen below. A few helpful ones include:

- **BillHighway:** provides access to BillHighway, a chapter financial management tool used by 80% of our chapters to ensure 100% compliance with the IRS
- **ChapterSpot:** provides access to ChapterSpot, a platform built to assist chapters with chapter communication, recruitment, and alumni engagement
- **HowToBeta:** provides access to a wiki with education and resources for chapter operations, recruitment, communication, alumni engagement, and helpful Chapterspot information
- **Reporting:** provides a timeline for all online reporting you are responsible for and quick links to complete the report



PLEDGE REPORTING

All pledge reporting must be done within **72 hours** of induction. Completing your pledge reporting begins the process of having each copy of Son of the Stars and song books mailed to your chapter. Here is the screen you will see in MyBeta under "Reporting > Membership > Pledge Reporting." It is a two-step process:

- You will log in to MyBeta and go to Pledge Reporting and enter the Pledge Date, First Name, Last Name and Email Address for each pledge.
- From there, each pledge will receive an email with how to complete the rest of the process.

Phase 1: Report a new pledge

To begin the pledge registration process for each pledge that has formally accepted a bid from the chapter, enter his information below.

IMPORTANT NOTES! Read this first:

Pledge Date is whichever of these two dates *occurs (or occurred) first*.

- Date he moves into chapter housing -OR-
- Date of his first pledge function (meeting, ceremony, orientation)

Re-pledging: DO NOT use this form to report anyone that has previously pledged Beta (even at another chapter). Send the pledge's full name and NEW pledge date to membership@beta.org.

Reporting Errors: You can change a previously reported pledge's email address in Phase 2 below (he will be emailed a new password). DO NOT submit this form again if an error has been made in reporting a pledge's name or pledge date. Send the correction to membership@beta.org. Note: the chapter may be billed admin fees for corrections - *double-check every entry carefully*.

Pledge Date	First (Formal) Name	Last Name	Email Address	Action
<input type="text" value="Pledge Date"/>	<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Email Address"/>	<input type="button" value="Add"/>

Keep pledge date for next pledge

Upon initiation of your pledges, you must report the initiation within **72 hours**. This kick starts the process by which shingles and badges are ordered. Please note that this process will not occur until everyone has completed this process. You can go to Reporting > Membership > Initiation and follow the instructions there.

ROSTER MAINTENANCE

Keeping your roster current on MyBeta is crucial so you get appropriately billed for your members. There is a grace period in the first two months of each semester where you can make roster updates with no consequence – refer to the Year in the Life Document for the deadline. It is crucial to have rosters updated prior to the billing deadlines: 7/31 (semester school), 8/31 (quarter school), and 12/31 (all schools).

To make updates to your roster, log in to MyBeta and follow “Reporting > Membership > Roster Maintenance.” Choose “Action” and pick one the drop-down menu options:

Status	Effective Date	Action
Active	<input type="text"/>	<div style="border: 1px solid gray; padding: 5px;"><p>No Action</p><p>No Action</p><p>Graduate</p><p>Trial-by-Chapter: Expulsion</p><p>Trial-by-Chapter: Non-Expulsion</p><p>Left School/Transferred</p><p>Resigned From Beta</p><p>Temporarily Inactive</p></div>
Active	<input type="text"/>	
Active	<input type="text"/>	
Active	<input type="text"/>	

TEMPORARILY INACTIVE STATUS

During your presidency, active chapter members may request to change their status and go Temporarily Inactive. There are only a few approved reasons for temporary inactivity, which include:

- Study abroad/internship/co-op located outside the area of the institution
- Missionary work required by the institution
- Financial hardship (limited to three per chapter/colony)
- Withdrawal from institution that is not considered permanent

For more information on membership statuses, click here:
my.beta.org/documents/membership/membership_statuses.pdf

UPDATING CHAPTER OFFICERS

You are responsible for keeping an updated list of chapter officers. Please note that each term is a maximum of one year and you can access it via MyBeta: "Reporting > Officers/Advisors > Update Officers."

- **Helpful Tip!** Make sure you appoint your new officers PRIOR to the end date of your term. You still need to be listed as President to appoint your successors.
- Officers appointed in MyBeta will be able to access ChapterSpot and Billhighway (Treasurer/VP Finance only) through MyBeta using the same credentials.

RISK MANAGEMENT/INCIDENT REPORTING

Incident reports should be filled out whenever local authorities are involved or any member/guest has been injured (of any severity). Reports should be completed within 24 hours and can be accessed under "Reporting > Chapter Reporting > Incident Report." If you have any questions while completing an incident report, you can contact your Leadership Consultant.

ADVISORS, GENERAL FRATERNITY OFFICERS AND ADMINISTRATIVE OFFICE STAFF

On your chapter's profile page, you can access contact information for your chapter's advisory team, General Fraternity Officers (District Chief and Regional Chief), as well as your Leadership Consultant from the Administrative Office. Simply click on each person's name to pull up their profile.

- District Chiefs recruit, appoint and develop advisory team members, support the implementation of fraternity, standards and policies, and serve as General Fraternity ambassadors for 3-4 chapters.
- Regional Chiefs supervise and support the District Chiefs in their region.

If you know of any changes to your chapter's advisory team, let your Leadership Consultant and District Chief know. Per "The Code of Beta Theta Pi," the District Chief is the only person with authorization to update advisor rosters.

MEN OF PRINCIPLE GRANT PROGRAM

Information about the grant (formerly Men of Principle Scholarship) is all found on the Beta Theta Pi website (not MyBeta) at: www.beta.org/foundation/mp_grant_program

There, you can find more information on how the grant works, the link to apply for the grant, the link to submit the information of your grant recipient(s) and the amounts (i.e. one \$500 grant, two \$250 grants, etc.) and the manual on how to administer the scholarship with templates for each step of the process.

Here is a brief summary of the grant timeline for 2015-16:

February 1, 2015	Applications open to apply for 2015-16 grant
April 1, 2015	Deadline to apply for 2015-16 grant
April 15, 2015	Chapter and colonies receiving 2015-16 grant are notified
May 31, 2016	Deadline to submit recipient information and checks mailed directly to recipients' institutions

FINANCES (BILLHIGHWAY)

When making purchases with the Billhighway prepaid card, it is important to regularly code those transactions to the proper budget item. This is important information to ensure accurate tax-reporting at the end of the year. We recommend that BH administrators (president/treasurer) clear this queue at least monthly.

To code Prepaid Card transactions, navigate to “Cash Out > Prepaid Card > Code Card Transactions.”

100% of financial transactions within Billhighway

For chapters utilizing Billhighway, it is vital that all financial transactions occur within Billhighway. If there are transactions occurring outside of Billhighway, this effects the accuracy of our tax filings and would be problematic in the event of an audit.

Billing

When billing, itemizing line items is better than non-itemizing (see examples below). This provides more transparency to members and their parents so that they have a better idea of what their dues are going towards.

- Itemized:

Invoice Type: Regular Invoice		Batch #: 11515763		
Description: Fall 2014 Dues		Due Date: 9/20/2014		
Invoice Category Description	Account #	Subsidiary	COA Description	Amount
Active Dues	4000		Chapter: Active Dues	\$308.00
General Fraternity: Delegate Fee	4010		Chapter: General Fraternity: Dues	\$34.00
General Fraternity: Dues	4010		Chapter: General Fraternity: Dues	\$70.50
General Fraternity: Keystone Fee	4010		Chapter: General Fraternity: Dues	\$34.00
General Fraternity: Heritage Fund	4020		Chapter: General Fraternity: Heritage Fund	\$10.00
General Fraternity: Initiation Fee	4300		Chapter: General Fraternity: Initiation Fee	\$16.50
General Fraternity: Active Insurance	4030		Chapter: General Fraternity: Active Insurance	\$69.00
Misc/Other Income/Fines	4220		Chapter: Misc/Other Income/Fines	\$8.00
Total				\$550.00

- Non-Itemized:

Invoice Type: Regular Invoice		Batch #: 11675393		
Description: Dues: Base Amount		Due Date: 10/24/2014		
Invoice Category Description	Account #	Subsidiary	COA Description	Amount
Active Dues	4000		Chapter: Active Dues	\$580.00
Total				\$580.00

If you have Billhighway related questions, please contact betasupport@billhighway.com or Dan Fogle at dan.fogle@beta.org.

A Year in the Life of a Beta Chapter (2014-15)

Event Information

January 8-11	<i>The Wooden Institute, Winter Session</i>	Oxford, OH
January 16-18	<i>The Presidents Academy (CPLA)</i>	Oxford, OH
February 6 - 8	<i>Northeast Keystone Conference</i>	Cherry Hill, NJ
February 6 - 8	<i>Southeast Keystone Conference</i>	Jacksonville, FL
February 20 - 22	<i>North Central Keystone Conference</i>	Itasca, IL
February 20 - 22	<i>Northwest Keystone Conference</i>	Seattle, WA
Feb 27 – Mar 1	<i>South Central Keystone Conference</i>	Tulsa, OK
Feb 27 – Mar 1	<i>Southwest Keystone Conference</i>	Woodland Hills, CA
June 6-10	<i>The Wooden Institute, Session One</i>	Oxford, OH
June 20-24	<i>The Wooden Institute, Session Two</i>	Oxford, OH
July 8 - 12	<i>The Wooden Institute, Session Three</i>	Oxford, OH
July 18 - 22	<i>The Wooden Institute, Session Four</i>	Oxford, OH
August 6-9	176 th General Convention	Oxford, OH

Registration Deadlines

<i>Wooden, Winter</i>	Nov. 15
<i>CPLA</i>	Dec. 15
<i>Keystone</i>	Jan. 20
<i>Wooden, Summer</i>	April 1
<i>UIFI</i>	April 1
<i>Convention*</i>	July 5

** Early bird rate expires, but registration will remain open with higher rates until mid-July*

Financial Dates

July 31 st	Semester Schools Billed for Insurance, Fall Dues & Heritage Fees
August 31 st	Quarter Schools Billed for Insurance, Fall Dues & Heritage Fees
October 1 st	Semester Schools Roster Adjustments Deadline for Refunding Fees
October 15 th	Quarter Schools Roster Adjustments Deadline for Refunding Fees
December 31 st	All Schools Billed for Insurance, Spring Dues & Heritage Fees
February 28 th	All Schools Billed for Convention Delegate
March 1 st	All Schools Roster Adjustments Deadline for Refunding Fees
April 15 th	CAS Election Deadline
May 1 st	Report Graduating Seniors on Roster Maintenance
July 31 st	All Fees and Assessments Must be paid

- If payment in full is not received within 30 days of the billing date a delinquent chapter will incur the standard finance charge of 1.5% per month [Chapter X, Section 2 of *The Code*]. Exception: Dues, heritage fees and insurance fees are billed early on July 31 (August 31 for quarter schools) or December 31 to allow for adequate chapter planning, but are not due for 60 days.
- Keystone Fees are billed in \$199 installments from Aug. 31 to Mar. 31 for eight officer registrations
- File 990 form with the IRS by the 15th day of the fifth month following your fiscal year end

Online Reporting Dates

October 1 st	Spring Grade Report Due
December 10 th	Constitution & Bylaws Due
December 10 th	Update University/Chapter/Housing Profiles
December 10 th	Update Chapter Officers List
December 10 th	End of Fall Term Report Due
October 15 th	Winter Issue Magazine Report Due
March 1 st	Fall Grade Report Due
March 15 th	Quarter Schools End of Winter Term Report Due
April 1 st	<i>Men of Principle Scholarship</i> Grant Application Due
April 1 st	Foundation Merit Scholarship Application Deadline
April 15 th	Summer Issue Magazine Report Due
May 1 st	Positive Pledge Education Assessment Due
May 1 st	Select Chapter Accounting Standards Reporting Optior
May 1 st	All General Fraternity Awards Application Deadline
June 1 st	Quarter Schools Winter Grade Report Due
June 1 st	Semester Schools End of Spring Term Report Due
June 1 st	Quarter Schools End of Spring Term Report Due
June 1 st	Update Chapter Officers List
June 1 st	Chapter Dates & Academic Calendar Due
June 1 st	All Other Reporting Needs for SCOE (i.e. Alumni Events) Due

Reporting Reminders

Maintain up-to-date membership and officer rosters, as changes occur.

Register all pledges within 72 hours of joining – either the first pledge function (ceremony, meeting, orientation, etc.) or moving into the chapter house.

Report all initiations online within 72 hours of the ceremony.

Report all potential risk management incidents within 24 hours.

Authorized chapter officers for online reporting include president, vice-president, treasurer, secretary, pledge educator and recruitment chairman.