



BETA THETA PI
— MEN OF PRINCIPLE —

2017 CHAPTER PRESIDENT
OPERATING MANUAL

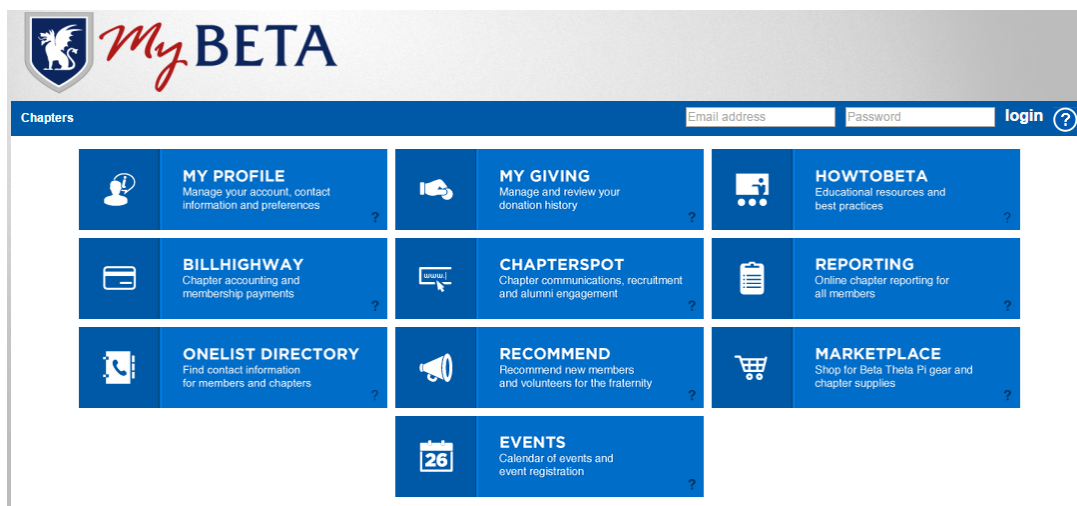
OVERVIEW

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"/>	No Action
Active	<input type="text"/>	No Action
Active	<input type="text"/>	Graduate
Active	<input type="text"/>	Trial-by-Chapter: Expulsion
Active	<input type="text"/>	Trial-by-Chapter: Non-Expulsion
Active	<input type="text"/>	Left School/Transferred
Active	<input type="text"/>	Resigned From Beta
Active	<input type="text"/>	Temporarily Inactive

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:

February 1	Applications open to apply for grant
April 1	Deadline to apply for grant
April 15	Chapter and colonies receiving grant are notified
May 31	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		
<u>Invoice Category</u> <u>Description</u>	<u>Account #</u>	<u>Subsidiary</u>	<u>COA Description</u>	<u>Amount</u>
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		
<u>Invoice Category</u> <u>Description</u>	<u>Account #</u>	<u>Subsidiary</u>	<u>COA Description</u>	<u>Amount</u>
Active Dues	4000		Chapter: Active Dues	\$580.00
Total				\$580.00

If you have Billhighway related questions, please contact betasupport@billhighway.com or John Underhill at john.underhill@beta.org.