

# TREASURER: YOU COUNT!

**S** *Seek new members and opportunities*

**O** *Open your heart, mind, and attitude*

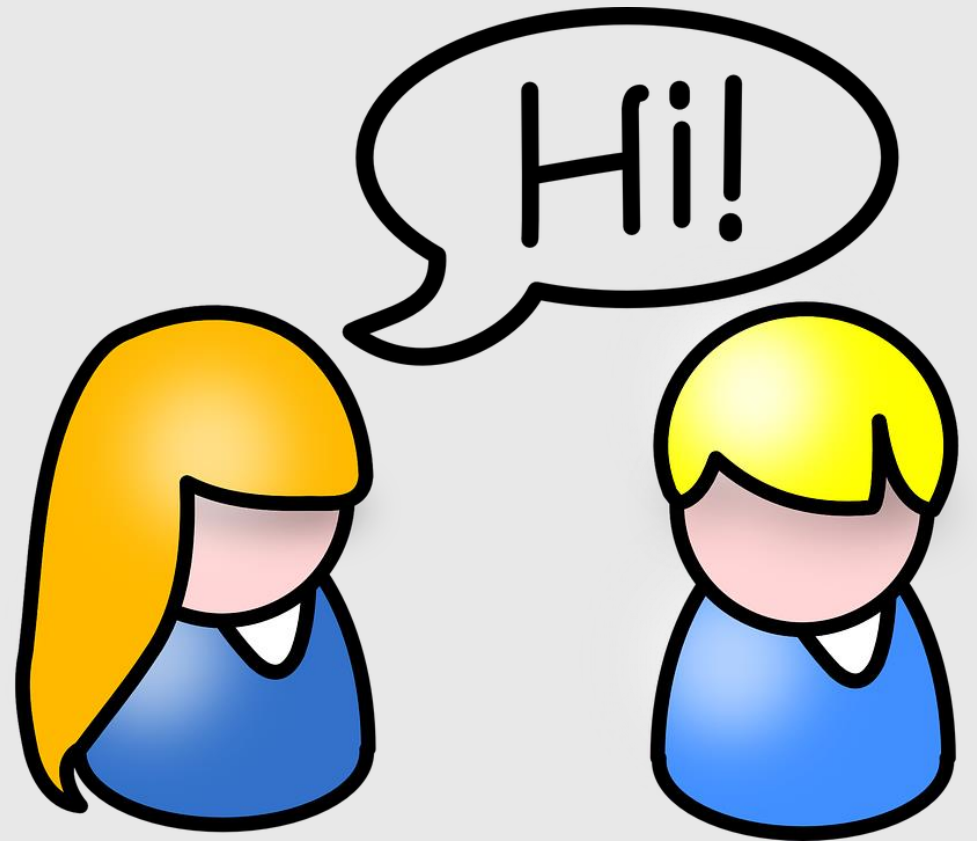
**A** *Act to serve and share*

**R** *Reach to renew, respond, and relate*



# Let's get to know each other.

- Take a few minutes to find someone you don't know.
- Introduce yourself
- Find a second couple and engage and introduce





TSO Exec.Sec. / State Treasurer  
Leesa Cole  
TSOsecretary29@gmail.com

## TSO FINANCE COMMITTEE

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Ellen Laughlin (Chair): Areas 3, 7, 18

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Susan Duke : Areas 4, 5, 6

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Natalie Eustace: Areas 13, 14, 15

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Libby Horton: Areas 1, 2, 8

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Sharon McDougale: Areas 11, 12, 16

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Pam Phillips: Areas 9, 10, 17

# What's your experience as a Treasurer?





# Agenda for today.

- A contact sheet is circulating
  - \* check off that you are in attendance or are a sub for the 2024-26 treasurer
  - \* correct contact information as needed
- Examine the timeline for TSO/DKG Treasurers
  - \* Use the checklist on DKG TX Treasurers' Page
  - \* Refer to the dynamic State Calendar in the President's Kit
    - SOAR23&25
- Engage in the process of dues and fees
- Using Chapter Connect and the Dues Portal
- Discuss Budgets and Audits
- Check up on checking accounts
- Venmo or other ways to collect dues
- Other Treasurer issues (getting them to pay on time)

# Treasurer's Timeline

Fiscal year: July 1-June 30



## June 30

All dues paid through  
the [dkg.org](http://dkg.org) Dues Portal  
found at Chapter  
Connect

Treasurers & Presidents  
have access



**WHY:** Chapter Roster ~ Links to Forms ~ Access Dues Portal

**WHEN:** Anytime except month of March

: Download chapter roster

: Access Dues Portal / Member Management

April-July: Access Dues Portal / Order Management

: Create orders & submit payment to Int'l & TSO



**HOW:** Sign in at [www.dkg.org](http://www.dkg.org), click My DKG then Chapter Connect

Refer to the DKG TSO web site, Treasurers' page for support documents.

<https://www.dkgtexas.org/treasurers-page.html>



MyDKG

## CHAPTER PRESIDENT & TREASURER ACCESS to CHAPTER CONNECT & Dues Portal

DKG Profile

### Sign in to My DKG

1. Go to International site: [www.dkg.org](http://www.dkg.org)
2. **Sign In** using the link in the top gray bar  
**Username:** your **DKG Member Number**  
**\*\*Member number is on your DKG membership card and on the chapter roster**  
**Password:** d—20—soc---- - change to one of your choice once signed in

## Chapter Connect

### Chapter presidents & treasurers have access

- Links to forms with submission deadlines
- Chapter Roster

[Click below for roster](#)

## Dues Portal

Orders

Members

Manage

Manage

Add/Transfer

### Chapter presidents & treasurers have access

- **Orders Manage:** Place paid members in an Order and submit payment to Int'l & TSO  
Unbilled Members: place in an order to prevent auto-drop, then submit payment





## **Mark Your Calendar: Dues Deadlines on the 1's and 30's**

Refer to the DKG TSO web site, Treasurers' page: *Dues Portal Tip Sheets*

- **May 30**: Chapter dues collection completed  
Continue collecting through Sept. as needed
- **June & July 30**: payments submitted to **Int'l in Austin** (dues)  
and **TSO in Dallas** (dues + scholarship fee)
- **Aug. & Sept. 1**: Int'l emails automated reminders to ***Unbilled Members***  
(see Dues Portal / Manage Orders)
- **Aug. & Sept. 30**: Paid members should be in ***Paid Orders***
  - to avoid email reminders and auto-drop
  - payments submitted to Int'l & TSO asap
- **Oct. 1**: Int'l auto drops ***Unbilled Members*** (can be reinstated)

# Possible Changes on the horizon!

International Convention votes decide.



- To eliminate ½ dues ( in January & February)
- Change the auto-drop date from October 1 to August 1
- Pending the vote at International Convention in Maryland  
-- Week of July 8th

## Dues Collection, Reporting & Payment / Member Contact Information Updated

### March-May: Collect dues, deposit in chapter bank account.

Goal: 100% returning members' dues collected by end of May.

[Refer to: DKG / TSO Dues & Fees Chart](#)

### April-May: From Chapter Connect:

1. **Download chapter roster** before submitting payments for the next membership year.  
This is the official chapter roster for the current membership year.

2. Use this roster to **verify and update members' contact information.**

~~ Hint: partner with the chapter membership committee to complete this task ~~

Who uses the contact info?

- International & TSO use email, postal mail and phone to contact members.
- TSO *Lone Star News* editor mails 2 issues to members. TSO incurs the cost of return postage.
- **Options to update contact info:**
  - Members update their own information at My DKG.
  - Chapter presidents or treasurers use the Dues Portal / Member Management to update contact information. [Refer to: Update Member Contact Information](#)

### May-June: Using the Dues Portal:

Use your phone's camera to scan the QR code for the DKG Texas Treasurer's Page

Go to the Dues Portal Tip Sheets



3.16.24

## TSO FEE FORM

Complete this form for each dues payment

**Make payment to TSO DKG**

Mail order form, fee form & payment to:

TSO HQ

PO Box 797787

Dallas, TX 75379

DKG / TSO Dues Chart 2024-2025

3/5/2024

DKG / TSO Dues: April 1-December 31, 2024 <span style="float: right;">Pay Int'l &amp; TSO separately using portal order.</span>						
Fees to TSO: Use TSO Fees Form						
Member Type	International Dues	TSO Dues	Scholarship fee if chapter <u>doesn't</u> provide a scholarship for members	Scholarship fee if chapter <u>does</u> provide a scholarship for members	Total Dues + Fees to TSO per member	Chapter Determines Chapter Dues
Active	\$40.00	\$20.00	\$1.00		\$21.00	
	\$40.00	\$20.00		\$0.20	\$20.20	
Reserve	\$20.00	\$7.00	\$1.00		\$8.00	
	\$20.00	\$7.00		\$0.20	\$7.20	
Collegiate	\$20.00	\$7.00	\$1.00		\$8.00	
	\$20.00	\$7.00		\$0.20	\$7.20	
Inductee	\$40.00	\$20.00	\$1.00		\$21.00	
	\$40.00	\$20.00		\$0.20	\$20.20	
Honorary	Int'l one-time fee \$49.50	\$0.00	\$0.00	\$0.00	\$0.00	N/A
<p>Members being reinstated or transferring, at any time, pay full dues according to her member type.                      Induction fee is no longer collected per International amendment July 2022.</p>						
<p><b>DKG / TSO Dues: Jan. 1 - Feb. 28, 2025:</b>  <b>NEW MEMBERS ONLY</b>                      Half dues from chart above + TSO scholarship fee <span style="float: right;">Pay Int'l &amp; TSO separately using portal order.</span></p>						
<p>Refer to DKG Texas Treasurer's page for support documents: dues chart, calendar, fees form, other "how-to"</p>						

## Dues: What to Send Where

**Must I do these steps each time I pay for an order? YES!**

### International – create orders in the Dues Portal

Access the International dues portal at [www.dkg.org](http://www.dkg.org); sign in, go to Chapter Connect, click Pay Dues button; open Order Management; create an order to pay members' dues.

#### Send International the following to submit payment for members:

1. A **copy of the order form** printed from the Dues Portal - **print 3** (one for International, one for TSO, and one for chapter treasurer records)
2. A **check to DKG International** for the amount indicated on the order(s). Multiple orders can be paid with one check - include the order numbers in the memo of the check.
3. **Mail order form & check to DKG International** at the Austin address listed on the order form.

**Send Form 18A & Form 6 to both entities to indicate member deaths or drops.**



### TSO – use the International order form and the TSO Fee Form

Access the TSO site at [www.dkgtexas.org](http://www.dkgtexas.org); open the Treasurer's page, scroll to Dues section; open, download and save the TSO Fees Form.

#### Send TSO the following to submit payment for members:

1. A **copy of the order form** printed from the International Dues Portal.
2. A **copy of the TSO Fee** Form to calculate total payment: dues & scholarship fee. Fill out completely and make 2 copies (one for TSO and one for chapter treasurer records). Refer to the TSO Dues Chart for dollar amount guidance.
2. A **check to TSO** for dues + fees as calculated on the TSO Fee Form. Multiple orders can be paid with one check - include the order numbers in the memo of the check.
3. **Mail order form, TSO fee form & check to TSO** at the Dallas address listed on the TSO Fee Form.

# July 31 – Form 15 Annual Report of Chapter Treasurers

State Treasurer’s report to International relies on data from your report

- Fillable form available from International site / My DKG / Chapter Connect
- Email to: TSO Treasurer; tsotreas@gmail.com
- Mail to: TSO HQ in Dallas
- Updated form with a new due date

Number of Active Members on March 31, 2024..... = \_\_\_\_\_

Number of Reserve Members on March 31, 2024..... = \_\_\_\_\_

Number of Collegial Members on March 31, 2024 ..... = \_\_\_\_\_

Total Number of Members on March 31, 2024 ..... = \_\_\_\_\_

Name of Fund	Ending Balance June 30, 2023	Ending Balance June 30, 2024
<b>Available Fund</b> (Checking Account Balance)		
<b>Available Savings</b>		
<b>Permanent Fund/Operating Reserve</b>		
<b>Scholarship Fund</b>		
<b>Other Funds</b> (Use separate page if necessary)		

**Chapter Awards\***

Monetary Awards to Members ..... Number \_\_\_\_\_ Total Amount \$ \_\_\_\_\_

Monetary Awards to Non-Members ..... Number \_\_\_\_\_ Total Amount \$ \_\_\_\_\_

\*Awards= Scholarship, Grants-in-Aid, Classroom, or any other Financial Assistance.

2023-24  
form is  
available at  
Chapter  
Connect





July 1-15  
While you're at the  
computer  
990N for the IRS

TSO Finance Committee &  
TSO State President deadline is  
SEPTEMBER 15 of EACH YEAR



## July 1 – November 15 – 990N ePostcard

**Recommended: File in July-August**

Not recommended: file in November



[www.irs.gov/990N](http://www.irs.gov/990N)

- File yearly to maintain income tax filing exemption
- File directly with the IRS - online only
- Links and resources on the TSO web site / Treasurer's Page and International web site / Chapter Connect
- Keep a copy of the accepted filing in chapter treasurer files
- No need to send a copy to TSO HQ – they check status online

# IRS 990N

- IRS 990N ePostcard
- [Creating IRS ID](#) (*Updated July 6, 2023*)
- [Filing Instructions for 2022 Fiscal Year](#) (*posted July 10, 2023*)
- [www.irs.gov/990N](http://www.irs.gov/990N)

Documents to help available at: [dkgtexas.org](http://dkgtexas.org), Treasurers' page

# Remembering in July!



# FOCUS ON FINANCE: BUDGETS, REPORTS & REVIEWS

- Budget worksheet: Excel – or – something else?
- Budget committee – or – treasurer does it all?
- Monthly treasurer report in newsletter – or – verbal at meeting?
- Financial reports with minutes – or – in treasurer file?
- Annual financial review – or – “my chapter trusts me”?
- Where are you keeping all.the.papers?

# Dkg.org “The Handbook...” Finance Points



- Dues and Fees
- What records to keep and where
- Managing Bank Accounts
- Treasurer Responsibilities
- Contributions
- IRS rules and filings
- Coordinating Council guidelines
- Sample Budget worksheet



# More July Hints...



- **Signature Cards at your bank**

- With the change of the President, and possibly the treasurer, it is time to update check signers – follow your bank’s requirements.
- **It is highly recommended that there is a two-signature requirement for your checks.**
- You should consider possibly three signers in the event one person is unable to sign.
- **Make dues checks payable to: TSO DKG**

## Ongoing submissions without hard deadlines

Refer to the DKG TSO web site, Treasurers' page: *Forms What to Send Where*

**TIP** for all: collaborate with chapter membership chair

- Form 18-A Dropped Members: send to Int'l & TSO
  - Int'l changes status in the Dues Portal to *Dropped Member* & removes member from chapter roster **TIP**: Send with dues payments
- Form 6 Report of Death: to Int'l, TSO HQ, TSO Necrology Chair
  - Int'l & TSO Necrology send condolences
  - TSO Necrology includes in convention Ceremony of Remembrance
  - TIP**: Submit as soon as possible after death
- Add members to chapter: new to DKG, Reinstated & Transferred
  - TIP**: Add members ASAP - once receive payment & paperwork
- Update member contact information via Dues Portal, Manage Members
  - TIP**: Do when creating orders for dues payments & before Jan. 30 for LSN mailings

## Forms: What to Send Where

Find updated forms @ [www.dkg.org](http://www.dkg.org) (sign in)  
or [www.dkgtexas.org](http://www.dkgtexas.org) as indicated below

**Use the table below to locate forms for membership changes and other chapter treasurer duties.**

**To remove members:** Only International has access to remove members per the information on these forms.

- ❖ **Form 6** to report a death; send as soon as possible
- ❖ **Form 18A** to report those not renewing membership; send with dues or as needed throughout the year

**To add members:** Chapter treasurer collects filled forms and dues from members then enters information in Dues Portal and submits payments.

- ❖ **Form 83** Reinstate
- ❖ **Form 81** New Member
- ❖ **TR-A** Transfer

**Other forms:**

- ❖ **TSO Fee Form:** submit with each dues payment to TSO for the scholarship fee per member
- ❖ **Form 87** Change of treasurer: to update International, TSO & IRS
- ❖ **Form 15** Annual Report of Chapter Treasurer: Due July 15 annually
- ❖ **990N ePostcard:** this is a link to submit online filing – only chapter treasurer needs a printed record of the filing: Due Nov. 15 annually

Form Name	Location: Where to find the form				Send to		
	Int'l/MyDKG/ Forms: Membership	Int'l/MyDKG /Forms: Treasurer	Int'l/My DKG: Chapter Connect	DKG TX Treasurer Page	Int'l: mem@dkg.org	TSO Exec.Sec / Treasurer tsotreas@gmail.com	Chapter Treas. File
6 Death	•		•		•	•	•
18 A Drop		•	•		•	•	•
83 Reinstate	•					•	•
81 New Member	•					•	•
TR-A Transfer	•					•	•
TSO Fee Form				•		•	•
87 Change Treas		•	•		•	•	•
15 Annual Report			•			•	•
990N ePostcard		•	•	•			•

# September 15

- Verify that your 990N is filed and accepted.  
Help sheet available at DKG Texas / Treasurers' Page  
last 2 pages of Filing Instructions...

(This may get updated by Int'l for 2024)

[IRS 990 N ePostcard](#)

[Creating IRS ID](#) (Updated July 6, 2023)

[Filing Instructions for 2022 Fiscal Year](#) (posted July 10, 2023)

Keep the printed acceptance in your  
chapter treasurer's files.

# September 2024 (July 2025 with constitution change)

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Check for any unpaid dues.

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Contact members who haven't paid

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It is preferable that all dues are paid by June 30

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However, continue to collect and pay dues through the dues portal.

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International will send emails by August 1 and then September 1 to members who haven't paid

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October 1-International will drop unpaid members

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After October 1-Members can pay but you'll need to do a reinstatement.

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\*Updated for 2025-26 by International for Drop Date

# BREATHE!!!

- Catch your breath if...
  - All members' dues are paid
  - Chapter budget and financial audit are done
  - 990N is completed
  - All forms were submitted





Let's take a break!







Hope your Holiday was Great!  
January Thoughts...

## **ASTEF Contributions**

## **Eula Lee Carter Contributions**

These contributions occur at the time you're thinking about collecting dues again.

Maybe it's time to pay them and know it's done by April 1<sup>st</sup>.



## Convention Recognition for Contributions: April 1

Contribution forms on the DKG Texas website, Treasurers Page

Separate checks and forms for different funds

Mail contributions to TSO HQ



### **ASTEF: 3 funds – Scholarship, Leadership, Projects**

- Chapter: \$1 or \$2 per member  
Memorials, Honorariums (if not \$1, \$2)
- Individual: Memorials, Honorariums
- Provides funding for TSO Scholarships, TSO Leadership Seminar, ASTEF Aspiring Educator Grants and ASTEF Project Stipend Grants

### **The Eula Lee Carter Memorial Fund - created to honor Dr. Eula Lee Carter**

- Scholarships awarded to members residing in a Latin American country in the Southwest Region who are pursuing educational advancement
- Chapter or Individual  
Memorial or Honorarium





March 1 – April 1

Dues Portal closes  
annually March 1 – April 1



# April 1

- ASTEF Contributions
- Eula Lee Carter Contribution

Both for recognition at  
Convention or Regional



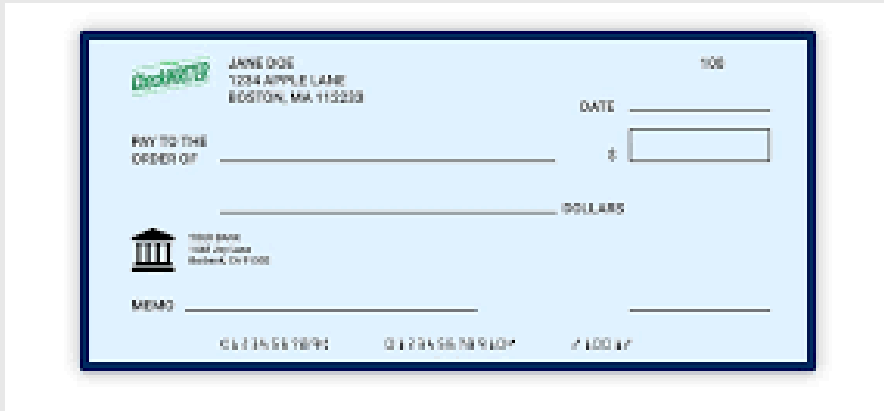


# April - May

- Most Chapter Treasurers have a due date for the collection of dues

What's yours?





# How do you collect your dues?



## Dues Portal Tip Sheet

[TSO Dues and Fees Chart](#)

[TSO Fees Form](#) updated March 2024

[Dues Calendar](#)

[Dues: What to Send Where](#)

 [Quick Tips: Dues Portal MemberManagement](#)

[Forms: What to Send Where](#) (updated Apr 16, 2023)

Update Member Contact Information: [Slides](#) / [Document](#)

Using Chapter Connect: [Slides](#) / [Document](#)

**Chapter Treasurer Dues Calendar**

Dues portal closes annually March 1-April 1

**Dues Collection, Reporting & Payment / Member Contact Information Updated**

## Dues: What to Send Where

**Must I do these steps each time I pay for an order? YES!**

### Forms: What to Send Where

Find updated forms @ [www.dkg.org](http://www.dkg.org) (sign in)  
or [www.dkgtexas.org](http://www.dkgtexas.org) as indicated below

Use the table below to locate forms for membership changes and other chapter treasurer duties.

## TSO FEE FORM

Complete this form for each dues payment

**Make payment to TSO DKG**

Mail order form, fee form & payment to:

TSO HQ

PO Box 797787

Dallas, TX 75379

DKG / TSO Dues Chart 2024-2025

3/5/2024

DKG / TSO Dues: April 1-December 31, 2024

**Pay Int'l & TSO separately using portal order.**

Fees to TSO: Use TSO Fees Form



# New Member Form

## INSTRUCTIONS:

**New Member:** Please give to Chapter Treasurer with your dues and induction fee.

**Chapter Treasurer:** **Ensure your state organization treasurer receives this form after entering the member in the dues portal.**

Members who join on or after July 1 and before January 1 will pay the induction fee, dues, and scholarship fee. Members who join on or after January 1 and before July 1 shall pay half the dues and the induction fee amount in accordance with the chapter rules.

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Dr.

First Name Middle Initial Last Name

Mailing Address

City State/Province Zip/Postal Code Country

Chapter (Greek Name) State Organization (Geographical Name)

Degrees Held:

Bachelor  Master  Doctorate    
 Other Date of Birth

Home Telephone Number:        
 Cell (optional):

Home E-Mail Address:

Join Date:      
 Membership Status:  Active  Honorary  Collegiate

Chapter Treasurer's Signature   
 (Treasurer's Member ID):



## Transfer Request

**The transferring member is responsible for completing this form. Please read carefully the instructions given below before completing the form.**

Date: _____		Member ID Number: _____	
Name: _____			
Mailing Address: _____			
City: _____	State: _____	Zip: _____	County: _____
Preferred Email Address: _____			
Telephone Numbers: (Home) _____		(Cell) _____	
Employment Location: (city and state) _____			
Former Mailing Address: _____			
Type of membership: <input type="checkbox"/> Active <input type="checkbox"/> Reserve <input type="checkbox"/> Honorary <input type="checkbox"/> Collegiate			
Highest degree: <input type="checkbox"/> Bachelor <input type="checkbox"/> Masters <input type="checkbox"/> Doctorate <input type="checkbox"/> NBC <input type="checkbox"/> Other			
Date of Birth: _____			
Name of chapter to which dues were last paid: _____		Date of Payment: _____	

Name of chapter FROM WHICH TRANSFER IS REQUESTED _____
State of _____
Name of chapter TO WHICH TRANSFER IS TO BE MADE _____
State of _____

**Please give this completed form to the treasurer of the chapter you wish to transfer. She will initiate the transfer through the dues portal.**

## Instructions for Transfer

A member in good standing may be transferred from one unit of the Society to another. All transfer requests must be processed by the chapter treasurer receiving the transfer. The process is as follows:

- Fill out and send to the chapter treasurer to which you wish to transfer. Society Headquarters will provide help in locating a suitable chapter should you require.
- Keep dues payment current. Dues are payable to the chapter treasurer by June 30. If a new chapter has not been located and the transfer cannot be processed before July 1, members should pay dues to their current chapter. Upon the member's request, the current chapter may waive *chapter* dues for the next year since the member will not be in attendance at its meetings. The member will then have a full year to visit chapters and complete the transfer before the next dues deadline.



# Report of the Death of a Member

**Instructions:**

This report is to be prepared by the chapter president immediately upon the death of a member. A copy is to be emailed to each of the following:

- Membership Services Email: mem@dkg.org
- State Organization Treasurer
- State Organization Membership Chair (or Necrology Chair, where applicable)



Chapter		State (Geographic Name)	
DKG Member Identification Number		Date of Death	
Name of Deceased Member	<input type="checkbox"/> Dr.		
	(First)	(Middle)	(Last)
Mailing Address			
City	State	Zip/Postal Code	
(Country)			

## Delta Kappa Gamma Society and Professional Information

Date of induction:

Contributions to/participation in Delta Kappa Gamma:

Contributions to education:

Name and mailing address of closest relative (specify relationship) or friend:  
(Sympathy Card will be mailed on behalf of the Society if reported within 3 months of date of death)





# Report of Members Dropped

DATE OF REPORT: \_\_\_\_\_

CHAPTER: \_\_\_\_\_ STATE ORGANIZATION (Geographical): \_\_\_\_\_

**Instructions:**

- Please contact members who have not paid dues before dropping them.
- Use this form to report any member who should be dropped from membership in your chapter after the member has requested a termination of membership and numerous contact efforts have been unsuccessful.
- **Please do not list any members for whom you have received a notice of transfer.**
- Provide the membership identification number.
- Indicate the reason for membership termination in the "payment of dues"
  1. Meeting times/places incompatible with schedule
  2. Other responsibilities (family, work)
  3. Chapter not meeting needs of member
  4. Health
  5. Economic
  6. Transportation
  7. Moved out of area
  8. Death
- Send a copy to your state organization treasurer and retain a copy for your records.

PLEASE PRINT OR TYPE

	I.D. Number	Last Name	First Name	Initial	Reason	Deceased (Include Date of Death)
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						

Chapter Treasurer _____	State Organization Treasurer _____
Member ID _____	Member ID _____
Email Address _____	Email Address _____



## Reinstated Member Form

Form 83

Reinstated Member: Please contact your chapter treasurer to pay your dues upon completion of this form.

Chapter Treasurer: Please reinstate this member in the dues portal and send this form to your state organization treasurer as soon as possible.

Member ID#

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First Name	Middle Name or Initial	Last Name
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Mailing Address

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City	State/Province	Zip/Postal Code
------	----------------	-----------------

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Country (e.g., USA, Sweden)	Preferred Phone Number
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/ /

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Date of Birth (mm/dd/yyyy)

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Chapter of Reinstatement	State Organization (Geographic Name, please)
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## **Handbook of The DKG Society International 2023**

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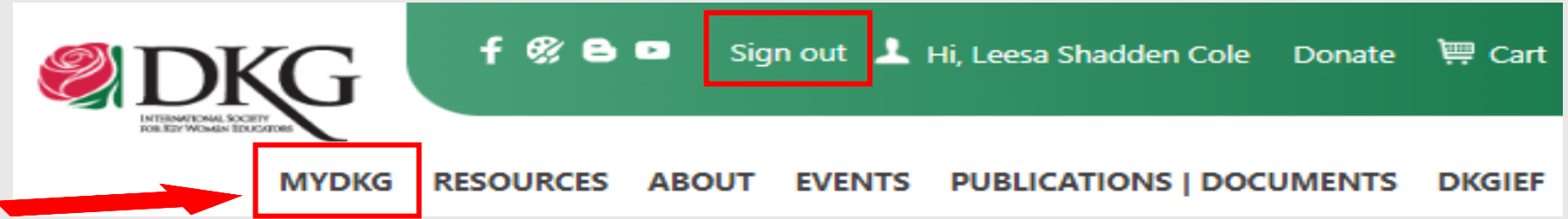
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[www.dkg.org](http://www.dkg.org)

## ACCESS CHAPTER CONNECT & THE DUES PORTAL (INTERNATIONAL)



**Sign into the International web site**

**USER NAME:** Your membership number  
**PASSWORD:** Contact Int'l, chapter president, or TSO HQ for generic password for 1<sup>st</sup> access

Members must login with member ID to access members-only resources and forms.

Member login (Username = DKG member ID)

Username

Password

Remember me

Website Navigation Guide



**Recommended:**  
Change the password to one of your choice in your My DKG Account.

*Non-members must create a non-member account here to register for events.*

**Open My DKG**  
**Open Chapter Connect**  
**Open Dues Portal**

About Us MyDKG Contact Us

Navigation bar: About Me, My Participation, My Communities, Member Directory, State Connect, **Chapter Connect**

Membership Card

[Click below for roster](#)  
[Texas Delta Omicron](#)

[Click below for EIN No.](#)  
[Texas Delta Omicron](#)

**Dues Training Video**

**Chapter Portal**

**Dues Portal**

[Treasurer Training Dues Portal](#)  
(Adobe PDF File)

[Dues Portal Training - Add Transfer and Reinstate](#)  
(Adobe PDF File)

The latest Adobe Reader is required to open a usable form.  
[Get it here.](#)

[Form 18A: Drop members Report](#)  
(Microsoft Word Document)

[Form 15: Annual Chapter Report](#)  
(Adobe PDF File)

[Form 123: Dues Reminder - 3up](#)  
(Adobe PDF File)

[Form 6 - Report of Death of a Member](#)  
(Microsoft Word Document)


[IRS Form 990-N Link](#)

[Form 123: Dues Reminder - Single](#)  
(Adobe PDF File)

[Form 87 - Change of treasurer](#)  
(Adobe PDF File)

# CHAPTER DUES PORTAL

Logged In: **Leesa Cole**

 Home

 Logout

All chapters associated with user: **Leesa Cole**

Chapter	State Org	Orders	Members
TX Delta Omicron	TX STATE ORG	<a href="#">Manage</a>	<a href="#">Manage</a> <a href="#">Add/Transfer</a>



**Member Management**  
Edit member information

**Order Management**  
Mark members paid and submit orders to International

**Add/Transfer**  
Search for members to add to, reinstate, or transfer into your chapter

**Order Management:** View order status, mark & submit members as paid.

## ORDER MANAGEMENT

[\[Go to Member Management\]](#)

Chapter: **TX Delta Omicron**

State Organization: **TX STATE ORG**

Paid Orders (1)

Orders processed by International -

Billed Orders (1)

Orders submitted by you, but not yet processed by International

Unbilled Members (33)

Members not yet submitted as paid in an Order



# Order Management: Create an order to submit

Unbilled Members (33)

Filter Member Names

1.

<input type="checkbox"/>	ID	Last	First	Member Type	State Dues	Org Dues	Active Dues	Reserve Dues	Collegiate Dues
<input checked="" type="checkbox"/>	311	Arr	Ma	Active	\$20.00	\$40.00			
<input checked="" type="checkbox"/>	156	Ba	De	Active	\$20.00	\$40.00			
<input type="checkbox"/>	463	Be	Su	Active	\$20.00	\$40.00			
<input checked="" type="checkbox"/>	406	Bla	Le	Active	\$20.00	\$40.00			
<input type="checkbox"/>	495	Bra	Cir	Active	\$20.00	\$40.00			

2.

New Batch Totals	
Selected Members	20
TX STATE ORG Dues	\$400.00
Total DKG Intl Dues	\$800.00
<input checked="" type="checkbox"/>	<a href="#">Create Order</a>

3.

- 1. Select members that have paid dues
- 2. Verify the number of members in New Batch Totals
- 3. Click Create Order

*Instructions: Select unpaid members columns from the table to create a new order.*

# Order Management: Review & submit order

4.

	TOTALS	\$400.00	\$800.00
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5.

I have reviewed this new order for accuracy and acknowledge that any corrections can only be made by DKG International staff.

Submit

- 4. Select "I have reviewed..."
- 5. Click Submit
- 6. See the Order Summary
- 7. Print the Order Summary

## CHAPTER DUES PORTAL

6.

Chapter: **TX Delta Omicron (501153)**  
State Organization: **TX STATE ORG**

### Order # 13742

- Please submit a check to **TX STATE ORG** for **\$400.00** along with a copy of this invoice.
- Please submit a check to **DKG International** for **\$800.00** along with a copy of this invoice.

Write the order number in the check memo: **13742**

Mail DKG International checks to:

**DKG International**  
**416 West 12th St.**  
**Austin, TX 78701**

Mail State Organization checks to your State Organization Treasurer

7.

 Print

## **Member Management: Forms Needed**

Numbered forms are found on the International web site under Members.  
The TSO Scholarship form is found on the DKG Texas web site on the Treasurer's page.

### **Chapter treasurer uses to enter data, sends a copy to TSO**

- TSO Scholarship Calculation Form
- Form 81, New Member
- Form 83, Reinstated
- Form TR-A, Transfer Request into your chapter


### **Chapter treasurer uses to enter data, sends a copy to TSO & International**

- Form 6, Report of a Death
- Form 18A, Report of Members Dropped

## Member Management: Edit member information

CHAPTER DUES PORTAL

Logged In: **Leesa Cole**

 Home

 Logout

All chapters associated with user: **Leesa Cole**

Chapter	State Org	Orders	Members
TX Delta Omicron	TX STATE ORG	<a href="#">Manage</a>	<a href="#">Manage</a> <a href="#">Add/Transfer</a>

### Order Management

Mark members paid and submit orders to International

**Member Management**  
Edit member information

### Add/Transfer

Search for members to add to or transfer into your chapter

# Member Management: Edit member information

## CHAPTER DUES PORTAL

### MEMBER MANAGEMENT

Chapter: **TX Delta Omicron**  
State Organization: **TX STATE ORG**

[\[Go to Order Management\]](#)

**Member Type:**  
Active, Reserve,  
Collegiate, Honorary,  
Drop Member...

**Member Status:**  
Active, Dropped

Show  entries

ID	Last	First	Email	Member Type	Status	
31	A	M	@hpsid.org	Active	Active	<input type="button" value="Edit"/>
17	A	El	lenora@sbcglobal.net	Active	Active	<input type="button" value="Edit"/>
48	B	M	J14@tx.rr.com	Active	Active	<input type="button" value="Edit"/>
15	B	D	267@sbcglobal.net	Active	Active	<input type="button" value="Edit"/>
46	B	Si	bell@gmail.com	Active	Active	<input type="button" value="Edit"/>
40	B	Le		Active	Active	<input type="button" value="Edit"/>
49	B	Cl	.75043@yahoo.com	Active	Active	<input type="button" value="Edit"/>
41	B	Lc		Reserve	Active	<input type="button" value="Edit"/>

**Edit member information**

# Edit Member Information: Member Type, Contact Information, Demographic Information

Member Details

**Member Type**  
Active

**Membership Status**  
Active [Reinstate](#)

Email **Updated emails are a top priority.**

First Name: Mary Middle: Ann Nickname: Mary

Last Name: Smith DOB: 04/30/1951

Prefix: Title: Degree: Master's

Home Phone: (281) 370-0990 Work Phone: Cell Phone:

Fax: Join Date: 09/01/1989

Receive DKG News by mail **Indicate mailing preferences**

Receive DKG Collegial Exchange Magazine by mail

**Enter mailing address for publications**

Main Alt Alt

**Crucial for Lone Star News: 2 annual mailings**

Main Address  
416 W 12th St

City: Austin State: TX

Zip: 78701-1817

Country: United States

Preferred  
 Mail  Bill  Ship

[Close](#) [Save](#) [Save & Close](#)



# Member Management: Add - New Members, Transfers, or Reinstates

## CHAPTER DUES PORTAL

Logged In: **Leesa Cole**

[Home](#)

[Logout](#)

All chapters associated with user: **Leesa Cole**

Chapter	State Org	Orders	Members
TX Delta Omicron	TX STATE ORG	<a href="#">Manage</a>	<a href="#">Manage</a> <a href="#">Add/Transfer</a>

### Order Management

Mark members paid and submit orders to International

### Member Management

Edit member information

### Add/Transfer

Search for members to add to or transfer into your chapter

# Member Management: Add New Members

## NEW MEMEBER

Chapter: TX Delta Omicron

State Organization: TX STATE ORG

### Member Details

#### Member Type

Active

#### Membership Status

Active

Email

Updated emails are a top priority.

First Name

Mary

Middle

Ann

Nickname

Mary

Last Name

Smith

Prefix

Title

Home Phone

(281) 370-0990

Work Phone

Cell Phone

Fax

Home & Cell phone fields will show on roster.

Main

Alt

Alt 2

#### Main Address

416 W 12th St

State

TX

Country

United States

Preferred

Mail  Bill  Ship

Close

Save

Save & Close

# Check out the Ohio Tip Sheet

On [dkgtexas.org](http://dkgtexas.org)

Treasurers' Page

Dues Portal Tip Sheet Management



# Check out our new Check List

Fiscal Year. July 1- June 30 Treasurer's Check List

- June 30-All dues paid through the dkg.org Dues Portal
- July 1-15 Form 15 due (see “What to Send Where” from Treasurer’s Page at dkgtexas.org)
- July 1 – September 15 990N-Yes we know the deadline is November 15<sup>th</sup>. This allows for problem solving if needed. This aides the TSO State Secretary and TSO Finance Committee in ensuring all chapters have filed. It gives us time to help and intervene as needed.
- July 1-by this date, a chapter budget should be in the works for adoption by the chapter. Dues will be set for the coming year. Each chapter should check their rules for the proper way to establish and approve a budget.
- July-check who is able to sign checks and update the signature card at your bank if needed.
- September 15-double check that you have submitted the 990N and have the IRS confirmation.
- March-May-Collect dues, deposit in chapter bank account

Refer: DKG/TSO Dues and Fees Chart ***Dues Portal closes annually March 1-April 1***

- April 1-Contributions to ASTEF and Eula Lee Carter due

## **Handbook of The DKG Society International 2023**

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Use your phone's camera to scan the QR code for quick access to the DKG Texas Treasurers' Page.

Go to the Dues Portal Tip Sheets



Soar to the Treasurers' page!

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