



Guide to Officer Portal Financial Agreements

Overview

- All Alpha Phi chapters now have the option to distribute and collect Membership/Financial Agreements through an Officer Portal (OP) report.
- Chapters are not required to use this platform, but it is available and free of charge.
- At this time, the platform can only support Membership/Financial Agreements, not Housing Agreements or other chapter contracts.

Instructions

- **Complete the OP Membership/Financial Agreement template**
 - o Prior to submitting the OP report, please complete the provided template, which includes chapter dues/fees and billing information.
 - o Templates can be found on alphaphi.org under Finance Department Resources.
 - *NOTE: there is a different template for Canadian chapters, U.S. chapters, New Members and Returning Members.*
 - o The template for the OP Membership/Financial Agreement includes only dues/fees and billing information. **Please do not submit an attachment with the full Membership/Financial Agreement, as the other components of the agreement (letter, Delinquency Policy, member information page, membership/financial agreement) will be generated automatically!**
 - o The template can be edited as needed. You may add or remove the table rows/columns to remove optional fees, add fees, or update the number of installments offered by your chapter.
 - o In addition to the chapter-specific fees, please update or remove all highlighted areas:
 - Chapter name
 - Instructions (i.e. "if your chapter charges these," "delete if your chapter is unhoused," etc.)
 - Update semester/quarter to your campus academic format
 - If your chapter does not defer chapter/house bond, delete the last page
 - If you are unhoused, delete all "Live In" payment plan tables
 - Due dates on billing schedule
 - o Members and parents will see this attachment as a part of their full Membership/Financial Agreement, so it is important to remove any notes and double check for math and spelling errors.
 - o Save as a .docx file

- Create Membership/Financial Agreement via Officer Portal Reports
 - o The Membership/Financial Agreement will be generated following completion of the Officer Portal report, “Electronic Financial Agreement for Returning Members” or “Electronic Financial Agreement for New Members.”
 - o Report content:
 - Select all billing options listed on your Financial Agreement
 - If you are a housed chapter with both live in and live out payment options, select both options. *For example, you would select “Annually” for live out members and “Annually – Live In” for live in members.*
 - Unhoused chapters will only select the non-live in options.
 - “Semester or Quarter” will display on your contract based on your campus academic calendar. *For example, if you are on a quarter system, you will select “Semester or Quarter,” and “Quarter” will appear on your chapter Financial Agreement.*
 - Upload your completed OP Membership/Financial Agreement template.
 - Once complete, click “Save this Form and Submit.”
 - This report requires secondary approval from the Finance Advisor. If there is no Finance Advisor, it will be approved by the Chapter Advisor. Agreements will not be available to sign until secondary approval is complete.
 - o OP report deadlines:
 - Returning Members: May 1st
 - New Members: August 1st (Fall New Members), January 1st (Winter/Spring New Members)

20-21 Initiated Member Financial Contract Collection

This form will be used to generate your chapter Membership/Financial Agreements for Fall 2020 returning members. Chapter-specific data will import to your final Membership/Financial Agreement and Billing Letter.

Please use the provided OP Financial Agreement Template for Returning Members ([United States](#) and [Canadian](#) versions) and update with your chapter dues/fees and billing schedule. Once complete, please upload the document as a .docx file and select all bill types listed in your agreement.

For more information and detailed instruction on the template agreements, OP report and signing process, please see the Guide to Officer Portal Financial Agreement.

Alpha Lambda - Alumna Initiate

Select all payment options listed under the Billing Schedule:

- Annually
- Semester or Quarter
- Semester or Quarter Financial Aid
- Installments
- Annually – Live In
- Semester or Quarter – Live In
- Semester or Quarter Financial Aid – Live In
- Installments – Live In

If you are a housed chapter with both live in and live out payment options, select both options. *For example, you would select “Annual” for live out annual payers and “Annual – Live In” for live in annual payers.*

Unhoused chapters will only select the non-live in options.

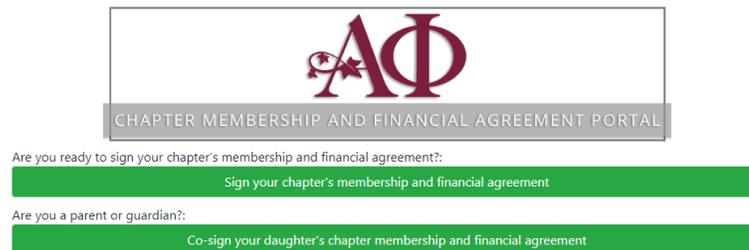
“Semester or Quarter” will display on your contract based on your campus academic calendar. *For example, if you are on a quarter system, you will select “Semester or Quarter,” and “Quarter” will appear on your chapter Financial Agreement.*

Attach a copy of the *Explanation of Dues and Fees and Billing Schedule* for initiated members. The file must be attached as a word document with a .docx file extension. No file chosen

If you have issues with this form please contact officerportal@alphaphi.org.

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- Signing Membership/Financial Agreements
 - o Members will not receive an automated email with the link to sign their agreement! The chapter must distribute the link to the Membership and Financial Agreement Portal.
 - o Once the OP report is complete and approved, please distribute the link through your preferred communication method (OurHouse, email distribution, etc). It is recommended that members bookmark this link for future use.
 - o Chapter Membership and Financial Agreement Portal: <https://op.alphaphi.org/apdocumentsigning/>
 - o Users can access the portal and sign their agreements via computer, tablet or mobile device.
- Members and parents/guardians co-signing will access their contract by selecting “Sign your chapter’s membership and financial agreement” or “Co-sign your daughter’s chapter membership and financial agreement”



- Two-step verification
 - o The user will be required to enter a phone number to access the agreement.
 - o If the number entered is associated with a member account, the user will receive a text message with an access code.
 - o Please see the last section of this guide, “FAQ & Troubleshooting” for issues accessing an agreement.
- The Membership and Financial Agreement Portal will prompt the user to review and/or complete the following information:
 - o Instructions
 - If under the age of majority*, the member will see an alert under the instructions indicating her contract requires a co-signer.
 - o Member Information and Agreement Terms
 - Information previously provided by the chapter or member will auto-populate in the form.
 - The member will be prompted to confirm the information previously collected and can make updates to this information as needed.
 - o Permanent Address
 - o Parent or Legal Guardian’s Address
 - o Bill type selection
 - User can click the link titled, “bill type options.”

FAQ & Troubleshooting

- *What is the age of majority?
 - o The age individuals can enter legally binding contracts without a co-signature.
 - o In all states but Alabama, Mississippi and Nebraska, the age of majority is 18.
 - o In Alabama and Nebraska, the age of majority is 19. In Mississippi, the age of majority is 21.
 - o If a member is under the age in the state where the chapter is located, the agreement will not be complete until co-signed.
- If we made a mistake on the OP report, how do we resubmit a new OP report with updated information?
 - o Email officerportal@alphaphi.org to reset your OP report.
- How do I know if we submitted the OP report?
 - o To confirm if your report was submitted, log into OP and click on "chapter reports". If complete, the report will show under "completed reports". If it has not been uploaded it will appear in the "my reports" section as a form to be completed.
- When a member or parent/guardian searches for an agreement, what causes the error message, "no agreement found?"
 - o If the system cannot find a contract associated with the number entered, the user will be prompted to reach out to the chapter officers for assistance.
 - o This error would be due to an incorrect number listed on Officer Portal or if the member has already signed a contract. The chapter officers should confirm the number provided or if the member already signed.
- If a member would like to change her bill type, does she need to sign a new Membership/Financial Agreement?
 - o Members do not need to re-sign agreements in the same academic year to request a bill type change. Requests can be sent to the VP Finance.
 - o Members must sign a Membership/Financial Agreements every year (unless your chapter uses a four-year agreement) and can update their bill type for the upcoming year at this time.
- How can a member update the information provided on the Membership/Financial Agreement?
 - o To make contact information updates, members can contact the chapter officers or advisors. Updates can be made in Officer Portal.
- How do we access a prior year OP Membership/Financial Agreement?
 - o Officer Portal will only display the most recent Membership/Financial Agreements signed by the member. If the chapter needs a copy of the OP Membership/Financial Agreement from a prior year, email officerportal@alphaphi.org.
- Our chapter offers pro-rated dues/fees for COBs. How can we incorporate the pro-ration into the OP Membership/Financial Agreement?
 - o Two options. Please work with your Advisory Board to confirm which option is best for the chapter:
 - Do not include pro-ration schedule: In this scenario, the COB New Member would sign and complete the full year New Member Membership/Financial Agreement without a pro-ration schedule. The COB New Member would receive a separate pro-ration schedule at a COB date or when accepting her bid. On the Membership/Financial Agreement, she would select the payment frequency of the pro-rated amount. This option is beneficial your chapter is concerned New Members will delay bid acceptance when reviewing the lower cost of joining later in the year.
 - Include pro-ration schedule in New Member OP report attachment: for this option, the officer/advisor completing the OP report will simply add a page to the template, including the pro-ration schedule.