



**KAPPA ALPHA ORDER**  
National Administrative Office  
at Mulberry Hill

To: Active Chapters  
Advisory Council  
Alumni Advisory Committees

From: Anthony Graziani, Assistant Executive Director for Chapter Services

Date: May 9, 2019

Subject: OmegaFi **goKA**, Online Reporting Instructions

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The OmegaFi based “Vault” provides a one log-in online system for chapters to manage member billing, financials, collections, and national reporting submissions.

Below are headings and pages to instruct you on the procedures to make a payment, and complete online National Reports 1, 2, 3, 4, 6, and 10. Steps 1-4 also describe how each individual member may log in to access his account and pay his chapter dues.

**HOW TO ACCESS YOUR CHAPTER’S “VAULT” THROUGH goKA**

We recommend you use the following instructions to access your “Vault.” Please provide these to all officers and encourage them to explore **goKA** as well.

- 1) Go to [www.kappaalphaorder.org](http://www.kappaalphaorder.org)
- 2) Click “SIGN IN” in the upper right-hand corner of the homepage
- 3) Log into “**goKA**” with your current log-in information.
- 4) Click on “Vault” in the grid on the top right-hand corner

If you do not have a username or password, please click "register for access" and follow the instructions. If you do NOT see “Vault” in the grid on the top right-hand corner, you have not been given access to this by the administrators of your account (likely Number I or Number VI). All chapter officers are granted access under the “Vault” system.

## HOW TO MAKE A NATIONAL ACCOUNT PAYMENT

The following are step-by-step instructions on how to **make a payment to the National Administrative Office** for your account balance.

- 1) Go to [www.kappaalphalpaorder.org](http://www.kappaalphalpaorder.org)
- 2) Click “SIGN IN” in the upper right hand corner of the homepage
- 3) Log into “goKA” with your current log-in information
- 4) Click on “Vault” in the grid on the top right-hand corner
- 5) Click the “KA” tab across the top bar (far right)
- 6) Click “KA Billing”
  - a. Your balance will then be present on the screen
- 7) Click “Pay Now”
  - a. Fill out appropriate fields to submit payment
  - b. Please note that only e-checks will be accepted



### KA Billing

Kappa Alpha Order - Alpha  
Balance Due: \$0.00

SUMMARY	PAYMENTS	STATEMENT HISTORY	STATEMENT OF ACCOUNT	SCHEDULED INVOICES
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#### BALANCE DUE

\$0.00

Pay Now

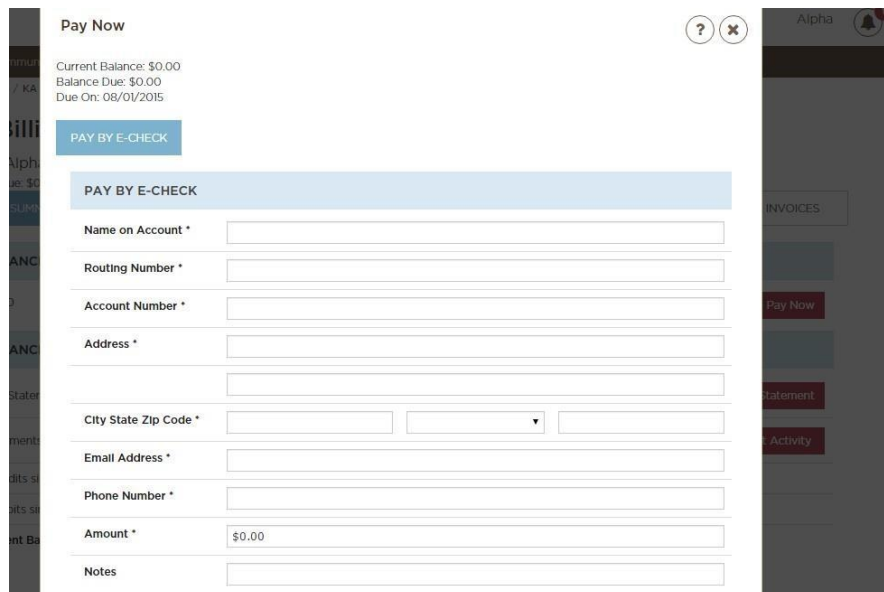
#### BALANCE DETAIL

Last Statement Balance (07/31/2015)	\$0.00	View Statement
- Payments since last statement	\$0.00	Recent Activity
- Credits since last statement	\$0.00	
+ Debits since last statement	\$0.00	
<b>Current Balance</b>	<b>\$0.00</b>	

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Pay Now

Current Balance: \$0.00  
Balance Due: \$0.00  
Due On: 08/01/2015

PAY BY E-CHECK

PAY BY E-CHECK

Name on Account \*

Routing Number \*

Account Number \*

Address \*

City State Zip Code \*

Email Address \*

Phone Number \*

Amount \*

Notes

## **FUNDS OF THE ORDER BILL PAY ACCOUNT**

In accordance with Article 9 Section 224 of the Order's bylaws, all funds of the Order shall be held in trust by the chapter and paid to the Order by the corresponding due date. All Active Chapters are required to establish a Funds of the Order Bill Pay Account with OmegaFi to pay all national dues and fees to the Order. Chapters are restricted from withdrawing money from the Funds of the Order Bill Pay Account. All national dues and fees billed to members must be itemized in a category split and prioritized first.

If a chapter accumulates debt that is more than 60 days past due, the chapter must establish a National Debt Reduction fund with their OmegaFi Chapter Services Representative, with a percentage split of at least 25% on all monies collected by the chapter until the past due balance is satisfied in full.

If a chapter accumulates debt that is more than 60 days past due and exceeds \$5,000, the chapter must establish a National Debt Reduction fund with their OmegaFi Chapter Services Representative with a percentage split of at least 40% on all monies collected by the chapter until the past due balance is satisfied in full.

### **How it works:**

- 1) OmegaFi sends itemized statements to each member.
- 2) Member payments to chapters are processed by OmegaFi for disbursement.
  - a. Chapter dues are sent to your local bank based on your current settings.
  - b. National dues and fees are sent to a restricted Funds of the Order Bill Pay Account to be held in trust for payment to the Order.
- 3) Kappa Alpha Order sends chapter statements to OmegaFi which can be viewed in Vault.
- 4) Chapters will use the monies held in the Funds of the Order Bill Pay Account to satisfy their national dues and fees.
- 5) OmegaFi will process the payments directly to Kappa Alpha Order on your behalf.

## HOW TO SUBMIT REPORT 1

### \*\*\*REPORT 1 (ROSTER UPDATE FOR FALL DUES AND RISK MANAGEMENT ASSESSMENT FEE) - DUE AUGUST 25<sup>TH</sup>\*\*\*

- 1) Go to [www.kappaalphaorder.org](http://www.kappaalphaorder.org)
- 2) Click “SIGN IN” in the upper right hand corner of the homepage
- 3) Log into “goKA” with your current “Vault” log-in information.
- 4) Click on “Vault” in the grid on the top right-hand corner
- 5) Click the “Chapter” tab across the top bar
  - a. Select “Update Member Statuses”
  - b. Set “Filter Status” to “Active”
  - c. Set “Change to” to “Alumnus”
  - d. Then check a box next the appropriate members’ names
  - e. Select the appropriate “Member Status Reason”
- 6) Click “Update Member Statuses”
- 7) Repeat as necessary for as many “Member Status Reasons” as necessary
- 8) Click the “Billing” tab
  - a. Select “Update Billing Roster”
  - b. Select “Update Billing Statuses”
  - c. Update accordingly

**\*\*\*\*\*PLEASE NOTE THE DEADLINE FOR THIS REPORT. ALL CHAPTERS WILL BE CHARGED \$355 PER MAN BASED ON THE UPDATED CHAPTER ROSTER, \$150 FOR DUES AND \$205 FOR RISK MANAGEMENT FEE. ROSTERS SHOULD BE UPDATED BY AUGUST 25<sup>TH</sup> AND THE PERIOD FOR DISPUTING CHARGES WILL END SEPTEMBER 10<sup>TH</sup>. ALL ROSTERS ARE FINAL ON SEPTEMBER 10<sup>TH</sup>. IF THERE ARE ANY QUESTIONS REGARDING THIS PROCESS, PLEASE CONTACT YOUR ASSOCIATE DIRECTOR FOR CHAPTER SERVICES\*\*\*\*\***

**\*\*\*\*\*REMEMBER THERE IS NO “INACTIVE” MEMBER STATUS WITHIN THE ORDER. IF A MEMBER IS STILL ENROLLED IN SCHOOL, HE MUST REMAIN ON THE ACTIVE ROSTER, OR BE EXPELLED - UNLESS ABROAD, TRANSFERRED OR SERVED SEVEN ACTIVE SEMESTERS (See Kappa Alpha Laws 8-212)\*\*\*\*\***

Home / Chapter / Membership / Update Member Statuses

### Update Member Statuses

Filter By: Active      Change To \*: Alumnus      Member Status Reason

<input type="checkbox"/>	Name	Member Status	Date of Graduation	Initiation Date
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## HOW TO COMPLETE REPORT TO ADD NEW MEMBERS (REPORT 2)

- 1) Log into “goKA” with your current “Vault” log-in information.
- 2) Click on “Vault” in the grid on the top right-hand corner
- 3) Click the “Chapter” tab across the top bar
- 4) Click “Add New Members” on the left hand column
  - a. Select “Add Member”
- 5) Enter all information marked with an asterisk (\*)
  - a. First Name, Last Name, E-Mail Address
  - b. Set Member Status to “Member Awaiting”
- 6) Click “Save & Continue”
- 7) Repeat Process for as many Members-Awaiting-Initiation

After a period of approximately 24 hours, Members-Awaiting-Initiation will receive an e-mail notification giving them access to their own individual goKA account and access. Once the new member is logged into goKA ([www.kappaalphaorder.org](http://www.kappaalphaorder.org))

Members-Awaiting-Initiation will receive up to two additional emails advising them that it is necessary they complete registration if they have not done so. These will be sent 4 days after they are added, and again after 8 days. Individual records will not be processed by Kappa Alpha Order until all registration steps are complete. This means they will not be covered by insurance, be eligible for initiation and your Number I and Number VI will have violated the *Kappa Alpha Laws*.

**\*\*\*THIS MUST BE COMPLETED IN ITS ENTIRETY BY ALL NEW MEMBERS. FAILURE TO COMPLETE WITHIN 48 HOURS WILL RESULT IN A \$10 FINE PER MAN, PER WEEK THAT THE REPORT IS OUTSTANDING. \*\*\***

Home / Chapter / Membership / Add New Members

### Members Added last 7 days

Member Awaiting Form Add Member

Last Name	First Name	Informal First Name	Account #	Created On	Created By
No records to display					

3 & 4

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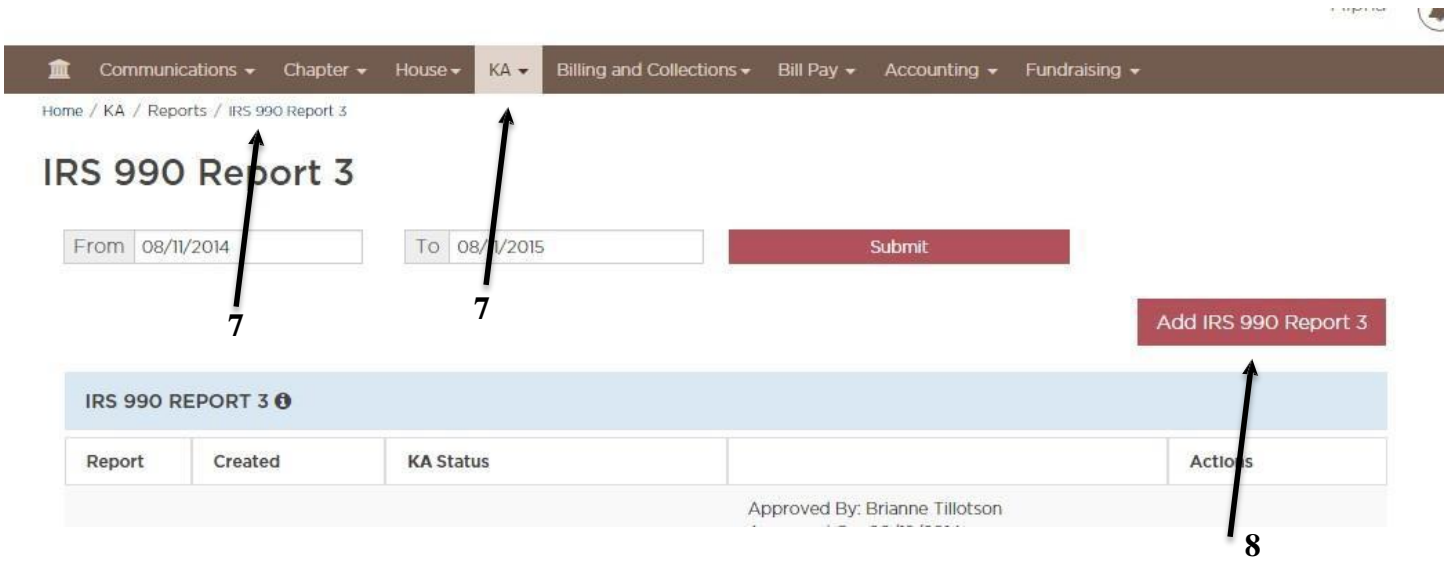
**\*\*\*INDUCTION FEES ARE \$125 PER NEW MEMBER. NEW MEMBER PACKETS ARE NOT INCLUDED IN THIS PRICE. THESE CAN BE ORDERED AT [KAONLINESTORE.COM](http://KAONLINESTORE.COM). PLEASE CONTACT YOUR ADCS/D WITH ANY QUESTIONS\*\*\***

## HOW TO COMPLETE REPORT 3

### IRS 990/REPORT 3 \*\*\*SUBMITTED AND APPROVED BY SEPTEMBER 15\*\*\*

- 1) Download and fill out the Report 3 spreadsheet (Sent by ADCS and on kappalaphaorder.org and the Resource Center)
- 2) Go to [www.kappaalphaorder.org](http://www.kappaalphaorder.org)
- 3) Click “SIGN IN” in the upper right hand corner of the homepage
- 4) Log into “goKA” with your current “Vault” log-in information.
- 5) Click on “Vault” in the grid on the top right-hand corner
- 6) Select the “KA” tab
- 7) Under “Reports” select “IRS 990 Report 3”
- 8) Click “Add IRS 990 Report 3”
  - a. Name the document “Report 3” and select the fiscal year (7/1/18 – 6/30/19)
- 9) Click the “Click for Attachments” icon and upload the spreadsheet. List “Report 3” as description
  - a. *You can also upload your Bank Statements this way in .doc or .pdf form*
- 10) Click the “Submit Report” button

**\*\*\*\*PLEASE ATTACH BANK STATEMENTS FOR 7/1/2018 AND 6/30/2019 WITH REPORT 3. THEY CAN BE UPLOADED THROUGH VAULT BY FOLLOWING THE ABOVE DIRECTIONS, BUT UPLOAD STATEMENTS INSTEAD OF REPORT 3 SPREADSHEET. IF STATEMENTS ARE NOT AVAILABLE DIGITALLY, THEY CAN BE FAXED TO (540) 463-2140. PLEASE MAKE SURE TO WRITE YOUR CHAPTER DESIGNATION ON THE STATEMENT.**



**\*\*\*BELOW IS THE IRS 990 & REPORT 3 FILING STRUCTURE FOR THE FISCAL YEAR OF JULY 1<sup>ST</sup>, 2018 TO JUNE 30<sup>TH</sup>, 2019. IT IS IMPERATIVE THAT YOUR REPORT 3 IS FILED & APPROVED BY SEPTEMBER 15<sup>TH</sup> TO AVOID ANY EXTRA FILING CHARGES\*\*\***

IRS 990 & Report 3 Filing Fee Structure									
	Sept. 15			Oct. 1			Dec. 1		
	Filing Fee	Late Fee	Total	Filing Fee	Late Fee	Total	Filing Fee	Late Fee	Total
990N (<\$50,000)	\$25.00	\$ -	<b>\$25.00</b>	\$25.00	\$500.00	<b>\$525.00</b>	\$25.00	\$500.00	<b>\$525.00</b>
990EZ (\$50,000-\$199,999)	\$350.00	\$ -	<b>\$350.00</b>	\$525.00	\$500.00	<b>\$1,025.00</b>	\$700.00	\$500.00	<b>\$1,200.00</b>
990 (\$200,000+)	\$680.00	\$ -	<b>\$680.00</b>	\$1,020.00	\$500.00	<b>\$1,520.00</b>	\$1,360.00	\$500.00	<b>\$1,860.00</b>
990T (Taxable Income)*	\$100.00	\$ -	<b>\$100.00</b>	\$150.00	\$ -	<b>\$150.00</b>	\$200.00	\$ -	<b>\$200.00</b>
State Filings*	\$100.00	\$ -	<b>\$100.00</b>	\$150.00	\$ -	<b>\$150.00</b>	\$200.00	\$ -	<b>\$200.00</b>

\*Not applicable to all chapters. Will be in addition to 990N, 990EZ, or 990 total fee above.

## HOW TO COMPLETE INITIATION REPORT (REPORT 4)

### \*\*\*REPORT 4/INITIATION REPORT AND FEES DUE 2 WEEKS PRIOR TO INITIATION\*\*\*

- 1) Go to [www.kappaalphaorder.org](http://www.kappaalphaorder.org)
- 2) Click “SIGN IN” in the upper right hand corner of the homepage
- 3) Log into “goKA” with your current “Vault” log-in information.
- 4) Click on “Vault” in the grid on the top right-hand corner
- 5) Select the “KA” Tab
  - a. Click “Member Initiation Reporting”
- 6) Click “Add Initiation Application” towards the bottom right corner
- 7) A list of individuals processed by Kappa Alpha Order as Members-Awaiting-Initiation and eligible for initiation will be presented. You should indicate all members to be initiated by checking the box next to their name
- 8) Select the appropriate Term, Year, and Initiation Date
- 9) Leave the box, next to their name, blank for members who have depledged
- 10) Click “Save and Continue”
- 11) Detail appropriate reason for individuals who have depledged (status reason, date, and notes)
- 12) Click “Send Report”
- 13) Upon completion, you then submit the report to Kappa Alpha Order for electronic review. When approved, Badge #'s will be assigned. You will be able to see that the report has been approved via your “Vault”

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Communications ▾ Chapter ▾ House ▾ KA ▾ Billing and Collections ▾ Bill Pay ▾ Accounting ▾ Fundraising ▾

Home / KA / Reports / Member Initiation Reporting

## Member Initiation Reporting 6

From 08/11/2014 To 08/11/2015 Submit

View Member Initiation Reporting 14

**\*\*\*INITIATION FEES ARE \$300 PER INITIATE. THESE WILL BE CHARGED TO THE CHAPTER UPON THE SUBMISSION OF REPORT 4.\*\*\***

**\*\*\*BADGES AND SHINGLES WILL NOT BE SENT UNTIL REPORT 4 IS SUBMITTED AND ACCEPTED\*\*\***

**\*\*\*IF A REPORT 4 IS SUBMITTED LESS THAN 2 WEEKS BEFORE INITIATION, OR AFTER INITIATION, THEN THE CHAPTER WILL AUTOMATICALLY BE FINED \$25 PER MAN BEING INITIATED AND WILL BE CHARGED OVERNIGHT SHIPPING SO THE BADGES CAN ARRIVE TO YOU ON TIME\*\*\***

## HOW TO COMPLETE REPORT 6

### \*\*\*REPORT 6 - ROSTER UPDATE FOR SPRING DUES AND RISK MANAGEMENT ASSESSMENT FEE – DUE January 26<sup>th</sup>\*\*\*

- 1) Go to [www.kappaalphaorder.org](http://www.kappaalphaorder.org)
- 2) Click “SIGN IN” in the upper right hand corner of the homepage
- 3) Log into “goKA” with your current “Vault” log-in information.
- 4) Click on “Vault” in the grid on the top right-hand corner
- 5) Click the “Chapter” tab across the top bar
  - a. Select “Update Member Statuses”
  - b. Set “Filter Status” to “Member Awaiting”
  - c. Set “Change to” to “Active”
  - d. Then check a box next the appropriate members’ names
  - e. Select the appropriate “Member Status Reason”
- 6) Click “Update Member Statuses”
- 7) Repeat as necessary for different as many “Member Status Reasons” as necessary

**\*\*\*\*\*PLEASE NOTE THE DEADLINE FOR THIS REPORT. AS OF JANUARY 26<sup>TH</sup>, ALL CHAPTERS WILL BE CHARGED \$177.50 PER MAN BASED ON THE UPDATED CHAPTER ROSTER, \$75 FOR DUES AND \$102.50 FOR THE RISK MANAGEMENT ASSESSMENT FEE. ROSTERS SHOULD BE UPDATED BY JANUARY 26<sup>TH</sup> AND THE PERIOD FOR DISPUTING CHARGES WILL END FEBRUARY 10<sup>TH</sup>. ALL ROSTERS ARE FINAL ON FEBRUARY 10<sup>TH</sup>. IF THERE ARE ANY QUESTIONS REGARDING THIS PROCESS, PLEASE CONTACT YOUR ASSOCIATE DIRECTOR FOR CHAPTER SERVICES\*\*\*\*\***

**\*\*\*\*\*REMEMBER THERE IS NO “INACTIVE” MEMBER STATUS WITHIN THE ORDER. IF A MEMBER IS STILL ENROLLED IN SCHOOL, HE MUST REMAIN ON THE ACTIVE ROSTER, OR BE EXPELLED - UNLESS ABROAD, TRANSFERRED OR SERVED SEVEN ACTIVE SEMESTERS (See Kappa Alpha Laws 8-212)\*\*\*\*\***

Communications ▾ Chapter ▾ House ▾ KA ▾ Billing and Collections ▾ Bill Pay ▾ Accounting ▾ Fundraising ▾

Home / Chapter / Membership / Update Member Statuses

### Update Member Statuses

Filter By: Member Awaiting ▾ Change To: Depledge ▾ Member Status Reason: ▾

<input type="checkbox"/>	Name	Member Status	Date of Graduation	Initiation Date
No members match the filter criteria.				

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## HOW TO COMPLETE REPORT 10

\*\*\*REPORT 10 (DUE DECEMBER 5TH, OR ANYTIME NEW OFFICERS ARE APPOINTED/ELECTED) \*\*\*

Anytime new officers are elected and/or appointed, it is pertinent to log in and update their contact information within your “Vault.” This will automatically populate with the National Administrative Office’s database. The following are instructions on how to update chapter officers:

- 1) Go to [www.kappaalphaorder.org](http://www.kappaalphaorder.org)
- 2) Click “SIGN IN” in the upper right hand corner of the homepage
- 3) Log into “goKA”
- 4) Click on “Vault” in the grid on the top right-hand corner
- 5) Click on the “Chapter” tab across the top bar
  - a. Click “Officers” in the right hand column
- 6) Click “Edit Officers”
  - a. Update officer list accordingly. Include date of officer election,

