
FREQUENTLY ASKED QUESTIONS

Q | There are some members who don't need to be billed anymore. How do I update this?

Update billing statuses by clicking on the Billing tab > Administration column > Update Billing Roster > Update Billing Statuses. Members can be moved from active billing to inactive billing, or vice versa. If charges have been billed and need to be removed, contact your Chapter Services Representative.

Q | How do I update billing groups? (In House to Out of House, New Member to Active member, etc.)

To update billing groups, click on the Billing tab > Administration column > Update Billing Roster > Update Billing Groups.

TIP: You can filter by billing groups to ensure members are listed in the correct group. If a member was billed incorrectly and their account needs to be adjusted, contact your Chapter Services Representative.

Q | The new officer needs to be listed on members' statements. How do I remove my information?

Update the statement contact by clicking on the Billing tab > Statement Details column > Statement Settings.

Q | How can I adjust a member's account on my own?

Select the Billing tab > Administration column > Enter Transactions.

- "Add Group Transactions" will allow you to add a charge or a credit to an entire billing group.
- "Add Multiple Transactions" will allow you to add a charge or credit to member accounts miscellaneously.
- "Enter Payments" will allow you to record a payment that was received locally.

If National Dues are billed to members, per requirements by your Headquarters, please contact your Chapter Services Representative to have the charges removed from the member's account

Q | Some members are on a payment plan with the chapter. Can we stop charging them late fees?

You can hold future late fees by selecting the member name from the billing roster. Click the Billing tab > Billing Roster > Select the member name from the list > Billing Profile. Select the pencil icon to edit and switch late fees to OFF. You can add a reason for turning off late fees, as well as an expiration date to automatically have late fees turned back on at a certain time.

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Q | How do I order a Swipe device?

Go to the Billing tab > Order OmegaFi Swipe Device. The first device your chapter orders is free. Additional devices are \$30 each.

Q | A member got a bill stating that they were being turned over to collections. Why are they being turned over to collections?

The chapter requests members be sent to collections. Members are not sent to collections by OmegaFi. The member likely received a statement alerting them that their debt is old enough to be turned over to collections, should the chapter choose to do so. If you have not sent the member to collections through Vault, you can reassure the member that they are not in collections.

Q | Can I send a member to collections through OmegaFi?

You may send a member to collections by going to the Billing tab > OmegaFi Recommendations > Charge Off Accounts.

1. If the member is under the section titled “Members in Charge Off (late fees off)”, first visit the Billing tab > OmegaFi Recommendations > Late Fee Management to turn late fees back on and continue with the collections process.
2. Once this is complete, return to Charge Off Accounts. Click “Review” under Actions on the member’s name line and scroll down through their statement of account to view the eligible collections amount.
3. At this point, you may either adjust the balance by clicking “Add Transactions” or click Continue.
4. This process will ask you a few questions, including whether or not you would like to send a pre-collect letter. If you choose to send a pre-collect letter and there is no action on the account within three weeks, the member will automatically be sent to collections.
5. Complete the process with your authorization.

You are not required to send the pre-collect letter. Pre-collect letters cost \$10 each and will be applied to the chapter’s OmegaFi account upon sending.