

# 5 Tips to Close Out Your Semester

Congratulations! The end of the semester is right around the corner. Before you cut loose for break, be sure to wrap up these best practices for your chapter.



## 01 Notify Members of Outstanding Balance

Review outstanding balances for all members, active and inactive. Touch base with anyone who has an outstanding balance, and based on your conversation, decide on the appropriate next step. This could be establishing a payment plan, writing the balance off as bad debt, collecting internally, or sending the member to collections.



## 02 Send Past Due Balances to Collections

Any inactive member with a balance of \$100 or more and more than 30 days past due qualifies for collections. Use the Send Members to Collections module to get started.



## 03 Take Officer Transition Seriously

After your chapter's election for new officers, get them set up for success. Remember that you were new to the job at one time! Set them up on all the systems they may need to access and walk them through your responsibilities and processes.



## 04 Make Sure Your Roster is Current

Review your chapter roster and make any necessary updates to member information. Have you updated the graduated, transferred, not returning, and/or resigned members? This will ensure no one is charged incorrectly for dues.



## 05 Unload Purchase Cards (if applicable)

Unload the remaining funds on your purchase cards back to the chapter's bank account. Incoming officers may order their cards to be available for the next term.

Contact the greekbill Client Support Team for additional assistance at [officersupport@greekbill.com](mailto:officersupport@greekbill.com) or 800.457.3816.