



OMEGAFI®

August 9, 2023



Vault

Hi there!

We know 990 Filing may be intimidating, but it doesn't have to be! We have outlined **FOUR steps below to set your chapter up for success!**

1. Check Your Fiscal Year

[Home](#) / [Chapter](#) / [Chapter information](#) / [Chapter Detail](#)

Chapter Detail

CONTACT INFORMATION

Mailing Address 21 Jump Str
Columbus, GA 31907
USA

Chapter Website

Primary Email Address

TAX INFORMATION

Fiscal Year 06/01 - 05/31

Federal Tax Identification (EIN) 00-0000000

State Tax ID

Unemployment Identification (SUI)

Workers Compensation State Identification

Local Tax Identification

OTHER INFORMATION

Year Founded

Last Day of Classes

Return to Campus

Chapter Required GPA

Go to the [Chapter Detail](#) section of the [Chapter Tab](#) to make sure the fiscal year and EIN are listed and correct.



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2. Update Your Officers

Go to the **Officers** section of the **Chapter Tab** to make sure the officers listed are current.

Home / Chapter / Chapter Information / Officers

Officers

Undergraduate officers automatically have access to 'Manage' Communications. Officers have the ability to send mass emails, as well as, the ability to add chapter calendar items, polls, announcements and resource center documents.

UNDERGRADUATE OFFICERS Edit Officers Add Office

Officer Election Months:

Showing 1 to 5 of 5 entries Search... Export

Office Name	Officer	Office From	Office To	Type	Action
Treasurer	Ballard, Peter	12/01/2022		Chapter	
President	Wheeler, Nancy	08/10/2022		Chapter	
Vice President	Byers, Will	08/10/2022		Chapter	
Secretary	Bauman, Murray	12/01/2022		Chapter	
New Member Educator	Evans, Ann	01/09/2023		Chapter	

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[f](#) [t](#) [i](#) [l](#) [i](#) [n](#) [r](#)

3. Use Your Officer Purchasing Card

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REGISTER PROFILE

BALANCE INFORMATION

Current Balance	Pending Deposits	Pending Payments	Pending Transfers	Available Balance
\$105.55	\$0.00	\$0.00	\$0.00	\$105.55

From: 01/01/2023 To: 08/09/2023 Display: Detail Format: HTML Submit

Date	Income/Expense Account	Description	Details	Status	Amount	Balance
01/01/2023		Previous Balance				\$324.00
01/05/2023	6410 - Storage		Card Purchase Receipt Attached	Processed	(\$76.00)	\$248.00
01/14/2023		Transfer from Fund	Effective Date: 01/14/2023		\$100.00	\$348.00
01/17/2023	6000 - Recruitment	OMGFI OmegaFi	Card Purchase Receipt Attached	Processed	(\$75.00)	\$273.00
01/24/2023		Transfer from Func	Effective Date: 01/24/2023		\$1,700.00	\$1,973.00
		Etsv.com	Card Purchase			



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Making purchases with your card allows you to easily assign expense accounts and keeps your chapter's income statement up-to-date!

4. Update Your Checking Account Register

Add transactions from any External Bank accounts under the **Quick Entry** or **Register Tab** section of the **Checking Account Register**.

Home / Accounting / Chapter / Account Registers / Account Register Detail

Bank Account: [Search Bank/Bill Pay Registers](#)

REGISTER | QUICK ENTRY | UNCLEARED TRANSACTIONS | VOIDED TRANSACTIONS

From: 02/01/2023 To: 02/28/2023 Display: Detail Format: HTML Submit

[Add Transaction](#)

Transaction Date	Income/Expense Account	Account Code	Description	Status	Amount	Running Balance	Actions
			Previous Balance		\$49,154.21	\$49,154.21	
02/01/2023			OmegaFi Deposit	Cleared	\$746.43	\$49,900.64	
02/01/2023	Programs & Activities	5009	Ck	Cleared	(\$31.00)	\$49,869.64	
02/01/2023	Chapter Savings	5005	Automatic Transfer	Cleared	(\$10.00)	\$49,859.64	
02/02/2023			OmegaFi Deposit	Cleared	\$1,527.69	\$51,387.33	
02/03/2023			OmegaFi Deposit	Cleared	\$166.03	\$51,553.36	
02/08/2023	Chapter Savings	5005	Automatic Transfer	Cleared	(\$10.00)	\$51,543.36	
02/10/2023	Desk / Office	5006	Ck #:	Cleared	(\$19.87)	\$51,423.49	

Want to know more? Read our articles on [How to Use Vault to Make 990 Filing Easier](#) and [How Do I Order a New Officer Purchasing Card](#). You can also email your OmegaFi Support Team to ask any questions you have specific to your chapter!

operationssupport@omegafi.com | Text: 706.256.8521 | [Vault Help Center](#)

OmegaFi, 1300 6th Ave, Columbus, GA 31901

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