

Quaestor 101 - A Guide To The Chapter System

The Chapter System is where you will find information on charges from Sigma Chi HQ, make payments on those charges, see unpaid charges, recent payments, upload budgets and your Tax ID Number.

Here is a quick guide on how to read the information and where it is located.

Image 1 - Chapter Front Dashboard

A - This will show you what your total amount due to Sigma Chi HQ. Notice below the amount is the date that it should be paid by.

B - This is your Finances Drop Down Menu

C - This is your chapter finances at a glance section

D - These are quick links to submitting payments and to the Finances Dashboard if you don't want to use the selections in the drop down menu

The screenshot shows the Chapter Front Dashboard with the following elements and annotations:

- Navigation Bar:** Dashboard, Province, Advisory Board, House Corp., Operations, Membership, Leadership, Finances, Pledging, Requests, and a hamburger menu icon.
- Header:** Chapter Name, Host Institution.
- Finances Drop Down Menu (B):** A dropdown menu is open under the 'Finances' tab, listing: Finances Dashboard, Submit Payments, Account Detail, Account Statements, Invoices, and Submit Budget.
- To Do (A):** A section with two items: 'Submit payment on your \$3,444 balance due. on 8/6/23' (circled in red) and 'Submit your COVID-19 reopening plan. Immediately'.
- Finances (C):** A section titled 'Account Balance' showing '\$ 3,444.00'. Below it are two links: 'Submit payment' and 'Financial dashboard', both pointed to by red arrows labeled 'D'.
- Officers:** A section titled 'Officers' with a search bar and a list of officers: Consul and Pro Consul.
- Page Number:** A large red '1' is located in the bottom right corner.

Image 2 - Finance Dashboard

A - The Chapter's current balance owed to Sigma Chi HQ

B - This is a quick link to submit payments if you don't want to use the selection in the drop down menu.

C - This section shows you the age of your balance (balances should be paid within 30 days)

D - This section shows you any fees that are going to be charged to the chapter in the future and the date it will be added. If you click on the drop down arrow next to the date, you can see details as well as who the Member Fees are for. **E** - This section shows you any recent payments that have been made

F - This section shows any Unpaid Charges that need to be paid.

G - This section shows you the most recent budgets that have been submitted and when and who submitted them.

H - This section shows your Tax Information. The EIN is needed for submitted the Chapters W9.

I - This will tell you if your EIN is valid or not.

Finances > Finances Dashboard

Chapter Name
Host Institution

Account Balance

Account Balance
\$ 3,444.00

SUBMIT PAYMENT

Balance Breakdown

90+ Days Past Due	61-90 Days Past Due
\$ 0.00	\$ 0.00
31-60 Days Past Due	1-30 Days Past Due
\$ 0.00	\$ 3,444.00

Recent Payments

April 6, 2023
Payment - Document:
\$ 100.00

April 6, 2023
Payment - Document: W_MC
\$ 6,800.00

March 31, 2023
Payment - Document: W_MC
\$ 725.00

March 27, 2023
Payment - Document: W_MC
\$ 2,300.00

Feb. 6, 2023
Payment - Document: W_MC
\$ 725.00

Budgets

Budget 2022-2023 Version 1
Submitted 11/17/22 by Mitchell
\$ 0.00 Total Budget

Download Upload

Budget 2021-2022 Version 1
Submitted 8/30/21 by Zach
\$ 53,000.00 Total Budget

Download Upload

Budget 2018-2019 Version 1
Submitted 10/14/18 by Ryan
\$ 28,600.00 Total Budget

Download Upload

Scheduled Fees

Member Fees on 10/15/23
\$2,700.00

Member Fees on 3/15/24
\$1,900.00

Unpaid Charges

July 7, 2023
Chapter Assessment Charge
Invoice: 486897 Reference: 796072 Transaction: 889760
\$ 3,444.00

Tax Information

U.S. IRS Employer Identification Number (EIN)
Valid
363385965

UPDATE

2

In order to ensure that the chapter is being charged correctly for things like Leadership Program Fees and RMF, the Quaestor needs to keep an eye on the Chapter Roster to ensure it is accurate.

Image 3 - Membership Tab

A - Select the Membership Dashboard

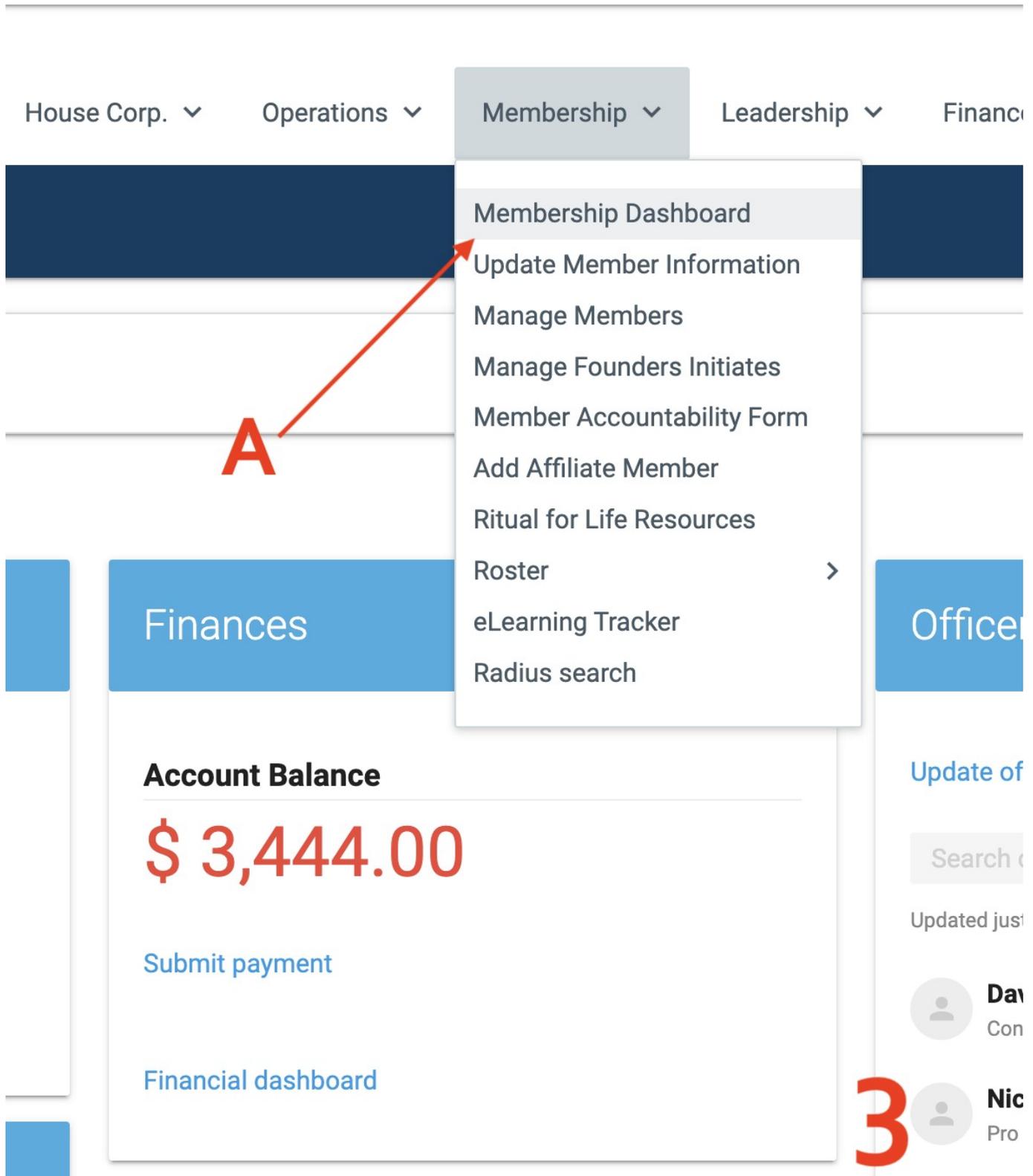


Image 4 - Membership Dashboard

A - Under the Left column titled Members, you will see each brother that is currently shown as active in the chapter. You need to make sure that any brother who has graduated or left school is not listed here. Work with your Consul or Pro Consul to ensure anyone who should not be listed is removed so that the chapter is not overcharged.

Dashboard Province ▾ Advisory Board ▾ House Corp. ▾ Operations ▾ Membership ▾ Leadership ▾

Membership > Membership Dashboard

Chapter Name
Host Institution

Members **A**

[Manage members](#)

Updated one minute ago

-  **Brother's Name** (2023) Active
-  **Brother's Name** (2024) Active
-  **Brother's Name** (2023) Active
-  **Brother's Name** (2024) Active
-  **Brother's Name** (2024) Active
-  **Brother's Name** (2025) Active
-  **Brother's Name** (2026) Active
-  **Brother's Name** (2026) Active
-  **Brother's Name** (2026) Active

Off-Campus (Active) Members

[About off-campus members](#)

You do not have any members currently off-campus.

Suspended Members

[About suspended members](#)

You do not have any suspended members.

Founders Initiates

[About the Founders initiation](#)

You do not have any Founders initiates awaiting full initiation.

[Confirm Full Initiation](#)

4

Member Accountability Form - Financially Delinquent

In the case that a brother does not choose to meet his financial obligation to the chapter, the Member Accountability Form **MUST** be completed.

Image 5 - Membership Tab

A - Under the Membership Tab, click on Member Accountability Form

The image shows a screenshot of a web application interface. At the top, there are navigation tabs: "House Corp. ▾", "Operations ▾", "Membership ▾", and "Leadership ▾". The "Membership" tab is selected and highlighted in grey. A dropdown menu is open under the "Membership" tab, listing several options: "Membership Dashboard", "Update Member Information", "Manage Members", "Manage Founders Initiates", "Member Accountability Form", "Add Affiliate Member", "Ritual for Life Resources", "Roster", "eLearning Tracker", and "Radius search". A red arrow labeled "A" points to the "Member Accountability Form" option, which is highlighted in grey. Below the navigation tabs, there is a "Recent Payments" section with a blue header. Under this header, there is a payment record for "April 6, 2023" with the text "Payment - Document:" and a blue link "\$ 100.00". A large red number "5" is visible in the bottom right corner of the page.

Image 6 - Sigma Chi Website

A - Under Forms, Click Member Accountability Form



Sigma Chi
EXPECT MORE.

FORMS

Member Accountability Form

Recruitment Recommendation Form

Visit Request



A

6

Image 7 - Member Accountability Form

A - Select your member type (active Quaestor would be undergraduate chapter)

B - Select Financial

C - Enter the dollar amount owed for the delinquent brother

D - Enter today's date

E - Enter that the delinquent brother is not paying his dues, how many months or semesters behind that he is and the amount owed.

F - Select if the delinquent brother is an active or alumnus

G - Delinquent brother's last name

H - Select the School (chapter) of the delinquent brother

I - Click on Look Up Member, click the name and it will appear in the blank below

J - Enter the delinquent brother's email address

K - Click Submit

Once you have clicked submit, the form will then be sent to the Annotator, you should alert him so that he checks his email inbox. He will need to click that he approves the document. It will then go to your Grand Praetor (it would be a good idea to make him aware you have submitted it) for approval and from there it will go to the Grand EC for approval. Please keep in mind that this process can take a while as there are several parties that it must be presented to. It is incumbent upon you to make sure this is initiated in a timely manner.

Member Accountability Form - Request for Disciplinary Action

This form and its confidential statement of charges must be completed by an undergraduate chapter or five (5) alumni in accordance with Statute 7, Section 7.01 of the Governing Laws. If the actions are being initiated by an undergraduate chapter, they must have been endorsed by not less than a two-thirds vote of the members in attendance at a duly authorized meeting of that chapter. Upon receipt of this completed form, it will be referred to the Executive Committee for disciplinary action.
If the actions are being initiated by an alumnus member, four additional alumni will need to add their signatures and comments after submission of this form using a link sent to the initiating alumnus. The form will only be referred to the Executive Committee upon the receipt of five alumni signatures.

Who is submitting this request:*

Undergraduate chapter **A**

Alumnus member

What type of matter is this involving:*

Conduct **B**

Financial

How much does the brother owe in USD: (Example: 100.00)* **C**

0

When did this occur (mm/dd/yyyy):*

D

Please add a statement of charges:*

E

Additional Comments:

The accused member is an:*

Undergraduate Member **F**

Alumnus Member

Look Up Member **I**

Select member accused:*

Accused member email address:*

J

This is the email address on file. Correct if necessary.

Last name of the accused:*

G

School (Chapter) of the accused:*

Please select... **H**

Submit **K**

By clicking the submit button below, I understand that I am affixing my signature to this document, certifying its accuracy and electronically submitting it to the appropriate Grand Praetor for approval. Furthermore, upon Grand Praetor approval, this form will be submitted to the Sigma Chi International Fraternity Headquarters for processing and will be brought before the General Fraternity's Executive Committee for a vote and disposition. I understand that my signature does not imply support and that I may elect to include my own statement of support or disagreement above, or you may leave that area blank.