

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

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.

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.

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

Image 6 - Sigma Chi Website

A - Under Forms, Click Member Accountability Form

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 brothers last name

H - Select the School (chapter0 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 brothers 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 of to the Grand EC for approval. Please keep in mind that this process can take a while as there are several parties that is must be presented to. It is incumbent upon you to make sure this is initiated in a timely manner.

Dashboard

Chapter Name
Host Institution

- Finances Dashboard
- Submit Payments
- Account Detail
- Account Statements
- Invoices
- Submit Budget

A

B

To Do

Updated 13 seconds ago

Submit payment on your \$3,444 balance due.

on 8/6/23

Submit your COVID-19 reopening plan.

Immediately

Finances

C

Account Balance

\$ 3,444.00

[Submit payment](#)

[Financial dashboard](#)

D

Officers

[Update officers](#)

Updated just now

 Consul

 Pro Consul

1

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

Membership Dashboard

Update Member Information

Manage Members

Manage Founders Initiates

Member Accountability Form

Add Affiliate Member

Ritual for Life Resources

Roster >

eLearning Tracker

Radius search

A



Finances

Account Balance

\$ 3,444.00


[Submit payment](#)

[Financial dashboard](#)

Officers

[Update of](#)

Updated just

 **Dav**
Con

 **Nic**
Pro

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