



## Annual Checklist Department and Officer Checklist

Fall 2023 – Spring 2024

*\*May apply to Associate Chapter(s)*

*\*\*Additional information*

FALL 2023	DEADLINE	COMMENTS	RESPONSIBLE OFFICER
*Fall pledge pin and Norman Shield order	<b>21 days before formal pledging ceremony</b>	Request pledge pins and <i>Norman Shields</i> via <b>Chapter System &gt; Pledging &gt; Order Pledge Supplies</b>	<b>Magister</b>
*Fall pledge forms	<b>Before formal pledging ceremony</b>	Complete forms online via <b>Chapter System &gt; Pledging &gt; Add New Pledges</b>	<b>Magister</b>
*Fall pledge fees	<b>Upon submitting formal pledge forms</b>	Review chapter invoice via <b>Chapter System &gt; Finances &gt; Invoices</b> Submit check payment to: <b>Sigma Chi Headquarters</b> <b>Attn: Accounts Receivable</b> <b>1714 Hinman Ave. Evanston, IL 60201</b> Submit electronic payment via ACH: <b>Chapter system &gt; Finances &gt; Finances Dashboard &gt; Submit</b>	<b>Quaestor</b>
*Fall initiation forms	<b>14 days before initiation</b>	Chapter system will submit forms automatically <i>14 days</i> prior to recorded initiation date. Ensure all forms are up to date through <b>Chapter System &gt; Pledging &gt; Manage Pledges</b>	<b>Magister</b>
*Contact Ritual Peer	<b>As soon as initiation is scheduled</b>	Contact your ritual peer to certify your initiation if not yet done for the academic year.	<b>Magister/Kustos/Ritual Chair/Consul</b>



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<p><b>*Fall Initiation Fees</b></p>	<p><b>Upon submitting fall initiation forms</b></p>	<p>Review chapter invoice via <b>Chapter System &gt; Finances &gt; Invoices</b></p> <p>Submit check payment to: <b>Sigma Chi Headquarters</b> <b>Attn: Accounts Receivable</b> <b>1714 Hinman Ave. Evanston, IL 60201</b></p> <p>Submit electronic payment via ACH: <b>Chapter System &gt; Finances &gt; Finances Dashboard &gt; Submit Payment</b></p>	<p><b>Quaestor</b></p>
<p><b>*Fall initiation confirmation</b></p>	<p><b>Immediately after initiation</b></p>	<p>Confirm pledges who initiated via <b>Chapter System &gt; Pledging &gt; Manage Pledges</b></p>	<p><b>Magister</b></p>
<p><b>*Final date to return fall initiation materials</b></p>	<p><b>30 days after initiation</b></p>	<p>Return initiation materials for any depledged members for a full reimbursement. Send to: <b>Sigma Chi Headquarters</b> <b>Attn: Reception</b> <b>1714 Hinman Ave. Evanston, IL 60201</b></p> <p><i>**Email <a href="mailto:headquarters@sigmachi.org">headquarters@sigmachi.org</a> and your RCSC with a list of the items you are returning, which pledge(s) are depledged, and the tracking information.</i></p>	<p><b>Magister</b></p>
<p><b>Order of Constantine Nominations Open</b></p>	<p><b>September 1</b></p>	<p>Submit nominations for Order of Constantine awards online via <a href="https://sigmachi.secure-platform.com/">https://sigmachi.secure-platform.com/</a></p> <p><i>**November 31st Deadline</i></p>	<p><b>Any active member</b></p>
<p><b>*Campus Chronicle submission for Winter Issue of <i>The Magazine</i> due</b></p>	<p><b>September 15</b></p> <p><i>**Date subject to change. See <a href="http://chaptersystem.sigmachi.org">chaptersystem.sigmachi.org</a> for up-to-date deadline information.</i></p>	<p>Complete submission form online via <b>Chapter System &gt; Operations &gt; Campus Chronicles &gt; Submit Campus Chronicle</b></p>	<p><b>Chapter Editor</b></p>



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*Submit chapter Spring grade report	<b>September 16</b>	Submit chapter grade report info for Spring 2023 in <b>Chapter System &gt; Operations &gt; Submit Grade Report</b>	Scholarship Chair
*Update chapter bylaws	<b>September 16</b>	Submit a copy in <b>Chapter System &gt; Operations &gt; Submit Bylaws</b>	Pro Consul
*Update chapter budget	<b>September 16</b>	Submit a copy in <b>Chapter System &gt; Finances &gt; Submit Budget</b>	Quaestor
*Submit Chapter Risk Management Plan	<b>September 30</b>	Submit a copy in <b>Chapter System &gt; Operations &gt; Submit RMF Plan</b>	Risk Manager
*First half-year invoice of RMF Membership fees due	<b>September 30</b>	Submit check payment to: <b>Risk Management Foundation P.O. Box 13421, Pensacola, FL 32591</b>  Submit electronic payment via ACH at: <a href="https://bit.ly/RMFPayOnline">bit.ly/RMFPayOnline</a>	Quaestor
Significant Sig nominations open	<b>October 1</b>	Submit nominations for Significant Sig awards online via <a href="https://sigmachi.secure-platform.com/">https://sigmachi.secure-platform.com/</a>  <b>**November 31<sup>st</sup> Deadline.</b>	Any active member
*Update chapter roster	<b>October 8</b>	Update your chapter roster via <b>Chapter System &gt; Members &gt; Manage Members</b>  <i>**All semi-annual bills will be based on your roster.</i>	Annotator / Pro Consul



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<p><b>*Initiation fees billed to chapter</b></p>	<p><b>30 Days After Initiation</b></p>	<p>Review chapter invoice via Chapter System &gt; Finances &gt; Invoices</p> <p>Submit check payment to: Sigma Chi Headquarters Attn: Accounts Receivable 1714 Hinman Ave. Evanston, IL 60201</p> <p>Submit electronic payment via ACH: Chapter System &gt; Finances &gt; Finances Dashboard &gt; Submit Payment</p>	<p><b>Quaestor</b></p>
<p><b>*Fall Semi-Annual Billing Fees</b></p>	<p><b>October 15</b></p>	<p>Review chapter invoice via Chapter System &gt; Finances &gt; Invoices</p> <p>Submit check payment to: Sigma Chi Headquarters Attn: Accounts Receivable 1714 Hinman Ave. Evanston, IL 60201</p> <p>Submit electronic payment via ACH: Chapter System &gt; Finances &gt; Finances Dashboard &gt; Submit Payment</p>	<p><b>Quaestor</b></p>
<p><b>Significant Sig &amp; Order of Constantine nominations close</b></p>	<p><b>November 30</b></p>	<p>Submit nominations for Significant Sig &amp; OOC awards online via <a href="https://sigmachi.secure-platform.com/">https://sigmachi.secure-platform.com/</a></p>	<p><b>Any active chapter member</b></p>
<p><b>*List of graduating seniors</b></p>	<p><b>December 9</b></p>	<p>Submit list via <b>Chapter System &gt; Membership &gt; Manage Members</b></p>	<p><b>Annotator / Tribune</b></p>
<p><b>*Update chapter officers</b></p>	<p><b>December 9 or directly after elections</b></p>	<p>Update each new officer accordingly via <b>Chapter System &gt; Leadership &gt; Update Officers</b></p>	<p><b>Annotator / Pro Consul</b></p>
<p><b>*Fall Alumni newsletter deadline</b></p>	<p><b>December 10</b></p>	<p>Send a copy to Headquarters via email to <a href="mailto:alumni@sigmachi.org">alumni@sigmachi.org</a>.</p>	<p><b>Tribune / Chapter Editor</b></p>
<p><b>*Campus Chronicle submission for Spring Issue of <i>The Magazine</i> due</b></p>	<p><b>December 15</b></p>	<p>Complete submission form online via <b>Chapter System &gt; Operations &gt; Campus Chronicles &gt; Submit Campus Chronicle</b></p> <p><i>**Due date subject to change.</i></p>	<p><b>Chapter Editor</b></p>



**Sigma Chi**  
 EXPECT MORE.

**Annual Checklist**  
**Department and Officer Checklist**

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<p><b>Apply for Horizons          Huntsman          Leadership Summit</b></p>	<p><b>Early winter</b></p>	<p>Apply at <a href="http://sigmachi.org/horizons">sigmachi.org/horizons</a> or          inquire via email to  <a href="mailto:horizons@sigmachi.org">horizons@sigmachi.org</a>.</p>	<p><b>Any Sigma Chi with <i>at least</i> one year of          school remaining</b></p>
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SPRING 2024	DEADLINE	COMMENTS	RESPONSIBLE OFFICER
<b>*Sigma Chi Foundation Chapter Sweetheart Donor-Scholar Award</b>	<b>January 1</b>	Chapters that currently have a sweetheart(s) can submit the sweetheart(s) name, email address, phone number and chapter name via email to <a href="mailto:heidi.holley@sigmachi.org">heidi.holley@sigmachi.org</a> .  The Foundation provides a \$1,000 undergraduate and a \$1,000 graduate chapter sweetheart donor-scholar awards to eligible chapter sweethearts.	<b>Scholarship Chairman</b>
<b>*Sigma Chi Foundation Scholarship Applications open</b>	<b>January 22</b>	Scholarship applications for the 2023-2024 academic year are available via the Sigma Chi Foundation website at <a href="https://sigmachi.secure-platform.com/a">https://sigmachi.secure-platform.com/a</a> . Application deadline is April 3 <sup>rd</sup> . Winners will be notified via e-mail in mid-August 2024.  <i>*Email <a href="mailto:heidi.holley@sigmachi.org">heidi.holley@sigmachi.org</a> with questions.</i>	<b>All brothers / Scholarship Chairman</b>
<b>*Officer OTA Assignments</b>	<b>Early January</b>	Officers will be enrolled in OTA courses at the start of January 3, 2023. Visit <a href="http://academy.sigmachi.org">academy.sigmachi.org</a> for registration and general event information.	<b>Consul</b>
<b>*RMF distributes invoices for adjusted membership for second half of year</b>	<b>Early January</b>	Review invoices <i>via email</i> for updates made to membership roster located in Chapter System.	<b>Quaestor / Consul</b>
<b>*Spring pledge pin and Norman Shield order</b>	<b>21 days before formal pledging ceremony</b>	Request pledge pins and <i>Norman Shields</i> via <b>Chapter System &gt; Pledging &gt; Order Pledge Supplies.</b>	<b>Magister</b>
<b>Contact Ritual Peer</b>	<b>As soon as initiation is scheduled</b>	Contact your ritual peer to certify your initiation if not yet done this academic year.	<b>Magister/Kustos/Ritual Chair/Consul</b>



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*Spring pledge forms	After formal pledging ceremony	Complete forms online via <b>Chapter System &gt; Pledging &gt; Add New Pledges.</b>	Magister
*Spring pledge fees	Upon submitting formal pledge forms	Review chapter invoice via <b>Chapter System &gt; Finances &gt; Invoices</b> Submit check payment to: <b>Sigma Chi Headquarters</b> <b>Attn: Accounts Receivable</b> <b>1714 Hinman Ave. Evanston, IL 60201</b> Submit electronic payment via ACH: <b>Chapter System &gt; Finances &gt; Finances Dashboard &gt; Submit Payment</b>	Quaestor
*Spring initiation forms	14 days before initiation	Chapter System will submit forms automatically 14 days prior to recorded initiation date. Ensure all forms are up to date through <b>Chapter System &gt; Pledging &gt; Manage Pledges</b>	Magister
*Spring initiation fees	Upon submitting spring initiation forms	Review chapter invoice via <b>Chapter System &gt; Finances &gt; Invoices</b> Submit check payment to: <b>Sigma Chi Headquarters</b> <b>Attn: Accounts Receivable</b> <b>1714 Hinman Ave. Evanston, IL 60201</b> Submit electronic payment via ACH: <b>Chapter System &gt; Finances &gt; Finances Dashboard &gt; Submit Payment</b>	Quaestor
*Spring initiation confirmation	Immediately after initiation	Confirm pledges who initiated via <b>Chapter System &gt; Pledging &gt; Manage Pledges</b>	Magister
*Annual Report / Peterson application opens	February 1	Annual Report / Peterson application opens online at <a href="http://sigmachio.org/annual-report">sigmachio.org/annual-report</a> .	Consul



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Horizons Huntsman Leadership Summit applications deadline	<b>Open as of December, 2023. Closes on February 11, 2024</b>	Apply at <a href="http://sigmachi.org/horizons">sigmachi.org/horizons</a> or inquire via email to <a href="mailto:horizons@sigmachi.org">horizons@sigmachi.org</a> .	Any active member with <i>at least one</i> year of school remaining
Chapter Balfour Award recipient due	<b>February 15</b>	Submit via <b>Chapter System &gt; Membership &gt; Select Chapter Balfour Award</b>	Consul
*Submit chapter Fall grade report	<b>February 17</b>	Submit chapter grade report info for Fall 2023 in <b>Chapter System &gt; Operations &gt; Submit Grade Report</b>	Scholarship Chair
*Second half-year Invoice of RMF Membership fees due	<b>February 28</b>	Submit check payment to: <b>Risk Management Foundation P.O. Box 13421, Pensacola, FL 32591</b>	Quaestor
*Awards applications and letters of	<b>March 1</b>	Seven Lights Alumni Award and awards for best chapter advisor, alumni chapter officer, houseparent, house corporation officer and parents club.	Any member
*Update chapter roster	<b>March 8</b>	Update your chapter roster via <b>Chapter System &gt; Membership &gt; Manage Members</b> <i>**All semi-annual bills will be based on your roster.</i>	Annotator / Pro Consul
* Initiation fees billed to chapter	<b>30 Days After Initiation</b>	Review chapter invoice via <b>Chapter System &gt; Finances &gt; Invoices</b> Submit check payment to: <b>Sigma Chi Headquarters Attn: Accounts Receivable 1714 Hinman Ave. Evanston, IL 60201</b>	Quaestor





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<p><b>*Spring Semi-Annual Billing Fees</b></p>	<p><b>March 15</b></p>	<p>Review chapter invoice via <b>Chapter System &gt; Finances &gt; Invoices</b></p> <p>Submit check payment to: <b>Sigma Chi Headquarters</b> <b>Attn: Accounts Receivable</b> <b>1714 Hinman Ave. Evanston, IL 60201</b></p> <p>Submit electronic payment via ACH: <b>Chapter System &gt; Finances &gt; Finances Dashboard &gt; Submit Payment</b></p> <p><i>**Only applicable for chapters with members that were pledged prior to 07/01/2023</i></p>	<p><b>Quaestor</b></p>
<p><b>*Campus Chronicle submission for Summer Issue of <i>The Magazine</i> due</b></p>	<p><b>March 15</b></p>	<p>Complete submission form online via <b>Chapter System &gt; Operations &gt; Campus Chronicles &gt; Submit Campus Chronicle</b></p> <p><i>**Due date subject to change.</i></p>	<p><b>Chapter Editor</b></p>
<p><b>*Excess pledge pins and <i>Norman Shields</i> notice</b></p>	<p><b>March 15</b></p>	<p>Notice of chapter's inventory of excess pledge pins and <i>Norman Shields</i> will be emailed to chapter leadership. You can also view your outstanding inventory on the Finance dashboard in Chapter System.</p>	<p><b>Consul / Pro Consul / Quaestor / Magister</b></p>
<p><b>Province Balfour Award recipient due</b></p>	<p><b>March 15</b></p>	<p>Submit via <b>Chapter System &gt; Membership &gt; Submit Province Balfour Award</b></p>	<p><b>Grand Praetor</b></p>



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<p><b>*Sigma Chi Foundation Scholarship Applications Deadline</b></p>	<p><b>Early April – exact date TBD</b></p>	<p>Scholarship applications for the 2023-2024 academic year are available via the Sigma Chi Foundation website at <a href="https://sigmachi.secure-platform.com/a">https://sigmachi.secure-platform.com/a</a>. Winners will be notified via e-mail mid-August 2024. <i>**Email <a href="mailto:heidi.holley@sigmachi.org">heidi.holley@sigmachi.org</a> with questions.</i></p>	<p><b>All brothers / Scholarship Chairman</b></p>
<p><b>International Balfour Award applications due</b></p>	<p><b>April 15</b></p>	<p>Submit applications online via <a href="https://sigmachi.org/awards/">https://sigmachi.org/awards/</a></p>	<p><b>IBA applicant</b></p>
<p><b>*Chapter Annual Report / Peterson application submission due</b></p>	<p><b>April 15</b></p>	<p>Complete report online at <a href="https://sigmachi.org/annual-report">sigmachi.org/annual-report</a> <i>**This section of the report is to be completed and submitted by the Consul.</i></p>	<p><b>Consul</b></p>
<p><b>*Chapter Advisor Annual Report / Peterson application</b></p>	<p><b>May 6</b></p>	<p>Complete report online at <a href="https://sigmachi.org/annual-report">sigmachi.org/annual-report</a> <i>**This section of the report is to be completed and submitted by the Chapter Advisor.</i></p>	<p><b>Chapter Advisor</b></p>
<p><b>*Grand Praetor Annual Report / Peterson application submission due</b></p>	<p><b>May 6</b></p>	<p>Complete report online at <a href="https://sigmachi.org/annual-report">sigmachi.org/annual-report</a> <i>**This section of the report is to be completed and submitted by the Grand Praetor.</i></p>	<p><b>Grand Praetor</b></p>
<p><b>*Ensure filing of chapter's Form 990</b></p>	<p><b>May 1</b></p>	<p>The Form 990 must be filed with IRS to maintain chapter's non-profit status. <i>**This must be filed within five months after the end of a chapter's fiscal year.</i></p>	<p><b>Quaestor / Consul</b></p>



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<p><b>Submit chapter newsletters for award</b></p>	<p><b>May 1</b></p>	<p>Submissions due for Charles G. Ross Undergraduate Chapter Publications Program Award. Email copies of newsletters to <a href="mailto:awards@sigmachi.org">awards@sigmachi.org</a> or mail to:  <b>Sigma Chi Headquarters</b> <b>Attn: Ross Award</b> <b>1714 Hinman Ave. Evanston, IL 60201</b></p>	<p><b>Chapter Editor</b></p>
<p><b>*Update chapter officers</b></p>	<p><b>May 12 or directly after elections</b></p>	<p>Update each new officer accordingly in <b>Chapter System &gt; Leadership &gt; Update Officers</b></p>	<p><b>Annotator / Pro Consul</b></p>
<p><b>*Submit Philanthropic Donation Report and service hours</b></p>	<p><b>May 12 or at the end of the semester</b></p>	<p>Submit chapters philanthropic donation report and service hours from the entire academic year via <b>Chapter System &gt; Submit Donation Report &gt; AlumSubmit Service Hours</b></p>	<p><b>Philanthropy Chair / Derby Days Chair</b></p>
<p><b>Spring Alumni newsletter deadline</b></p>	<p><b>May 13</b></p>	<p>Submit a copy to Headquarters via email to <a href="mailto:alumni@sigmachi.org">alumni@sigmachi.org</a></p>	<p><b>Tribune / Chapter Editor</b></p>
<p><b>*List of graduating seniors</b></p>	<p><b>May 13</b></p>	<p>Submit list via <b>Chapter System &gt; Membership &gt; Manage Members</b></p>	<p><b>Tribune / Annotator</b></p>



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<p><b>*Last day to return excess pledge pins and Norman Shields</b></p>	<p><b>May 15</b></p>	<p>Return any extra pledge materials for full reimbursement. Send to:  <b>Sigma Chi Headquarters</b>  <b>Attn: Reception</b>  <b>1714 Hinman Ave. Evanston, IL 60201</b></p> <p><i>**Email <a href="mailto:headquarters@sigmachi.org">headquarters@sigmachi.org</a> and your RCSC with a list of the items you are returning, which pledge(s) are depledged, and the tracking information.</i></p>	<p><b>Magister</b></p>
<p><b>*Campus Chronicle submission for Fall Issue of <i>The Magazine</i> due</b></p>	<p><b>June 1</b></p>	<p>Complete submission form online via <b>Chapter System &gt; Operations &gt; Campus Chronicles &gt; Submit Campus Chronicle</b></p> <p><i>**Due date subject to change.</i></p>	<p><b>Chapter Editor</b></p>
<p><b>*KTLW registration opens</b></p>	<p><b>Early May</b></p>	<p>Visit <a href="http://workshop.sigmachi.org">workshop.sigmachi.org</a> for registration and general event information.</p> <p><i>**Workshop dates TBD</i></p>	<p><b>Consul / Required officers</b></p>