



Chapter Reporting Instructions

Last revised: 9/1/2015

The chapter report consists of the chapter's Personnel Matrix and supporting worksheets. Please read the instructions on each page carefully to complete the required sections. Upon submission of the chapter report information, the report will automatically be submitted to the chapter's Faculty Advisor(s) for approval via a direct email link.

Your Faculty Advisor may elect to not approve your report as submitted for any number of reasons. If your report is Not Approved, you will be notified and required to Edit your submitted report.

Once approved by your Faculty Advisor, you will be notified via email that the report has been approved and cleared for payment pending. At this time you may obtain a check, with the appropriate signatures, from your Chapter Treasurer for the amount listed in the "Total Amount Selected to be Paid" box of the approved report.

Once you have a check, you may use the Make Payment link provided under the Report Number to electronically submit an eCheck payment at no fee. Following successful clearing of your payment, your report will be processed and all changes updated on the chapter's and individual members' profiles. You may elect, or be required by your institution, to physically mail your payment to the National Headquarters. Physical checks should be attached with a printed copy of the chapter report and mailed to the National Headquarters. It is imperative that you send any physical payments or other print documentation in a traceable format (Priority Mail, UPS Ground, etc.) to ensure its safe arrival. You may forward all physical payments to:

Att. Chapter Reports
Phi Mu Alpha Sinfonia Fraternity
National Headquarters
10600 Old State Road
Evansville, IN 47711

DO NOT SEND ANY CASH WITH YOUR REPORT.

Phi Mu Alpha does not assume any responsibility for loose cash that is lost in the mail.

A Note About Dates on the Report

Please be sure to change the date effective for each member depending on when the selected status went into effect:

1. For members who have graduated or left the institution, this date would reflect their date of departure.
2. For members with statuses of chapter discipline, the date that the decision was rendered against them. Chapter minutes must be attached in the mailing.
3. For reactivating or members transferring in, the date of the chapter vote to allow them to join the chapter. Chapter minutes must be attached in the mailing.

The online chapter reporting system uses the latest in HTML5 development. While all browsers should be compatible, we recommend Google Chrome for the best experience.

Chapter reports are due to be electronically completed, including the required Faculty Advisor review and payment, No Later than March 15 (Spring Reports) October 15 (Fall Reports)

How do I fill out the Personnel Matrix?

Graduating this Semester: Check this box if this member is scheduled to graduate in the semester that you are filing this report. The Fraternity uses this information to provide transition resources and materials to newly graduating brothers. Please note that as this report announces what has already transpired, no members should be marked as Graduating this Semester as well as Transfer to Alumni.

Class: Confer with each member to select the most appropriate current student classification for each member.

Balance Due: This box shows how much total national dues are owed in balance for each member. This amount represents any current and all back dues owed. (Note: Current national dues are comprised of \$70.00 of per capita tax and a \$12.00 liability insurance fee. Individual member back per capita tax can be viewed on each member's online profile at <http://legacy.sinfonia.org>.)

Paid: Select whether a member made a payment to the chapter for the total amount listed for him, or if he elected to pay an Other amount. Please note that some members may have prepaid their national obligation prior to the report being submitted. Any payments that are made ahead of time would be reflected for that individual member:

1. **Full:** If Full is selected, member agrees to pay complete Balance Due shown to the chapter.
2. **Other:** If Other is selected, enter the amount the member has already given to the chapter to forward to Lyrecrest.

(Note: Members paying any amount less than their Full Balance Due will be placed on automatic financial suspension per Title III, Article IX, Section Two of the National Constitution and Bylaws.)

A payment amount must be entered for all members before being able to continue to the next step. For members who did not pay, select Other and enter \$0.

IMPORTANT!

When entering the amount Paid by a member, it is vitally important that you only enter the amount of money that the individual member has already paid to the chapter. Making assumptions on what a member has said to have paid online, will pay online, or will pay the chapter later may end with either the chapter or that member paying twice. Once your report is complete, you will need to make a payment on behalf of the chapter that includes everything listed in the Paid column!

Status

Select the current status of each member at the time the report is completed. The listed financial status of each member will determine what constitutionally defined member status options are available to be selected from the following:

1. **Good Standing:** Select this status only for those members whose Paid amount matches their Balance Due amount.
2. **Suspended – Chapter:** Select this status for members who have been suspended by the chapter. Documentation demonstrating that the chapter followed the prescribed procedure for chapter discipline in the National Constitution and Bylaws must be uploaded and attached to the report in a further step for every member listed as Suspended – Chapter.
3. **Suspended – Automatic:** Select this status for any member who's Paid box is less than his Balance Due box.
4. **Expelled – Chapter:** Select this status for members who have been expelled by the chapter. Documentation demonstrating that the chapter followed the prescribed procedure for chapter discipline in the National Constitution and Bylaws must be uploaded and attached to the report in a further step for every member listed as Expelled – Chapter. Members marked as Expelled – Chapter will be marked as expelled and do not owe dues for the current semester.
5. **Expelled – Automatic:** Select this status only for members who have graduated or departed from the institution while still owing a Balance Due (previously on Suspension – Automatic status) or were on Chapter Suspension (Suspended – Chapter). Members marked as Expelled – Automatic will be marked as expelled and will owe dues for the current semester.
6. **Professional Semester:** Select this status only for members who are not enrolled in an on-campus course and are involved in student teaching, an internship, or a study abroad semester program. No other members are eligible for the Professional Semester status. Members marked as being on a Professional Semester do not owe dues for the current semester, are temporarily transferred to Alumnus Status, but will return to Good Standing following this semester.
7. **Reactivating:** Select this status for any alumnus Sinfonian who has reactivated into your chapter. To add a reactivating member, simply enter their member number in an empty row at the bottom of the Matrix and their information will be added. (Note: members that have reactivated with the chapter will be assessed full per capita tax once added.)
8. **Transfer to Alumni Status:** Select this status for members who has already graduated or departed from the institution in Good Standing with no Balance Due or has paid at least (8) eight semesters of national per capita tax prior to the current semester. (Note: The

probationary semester does not count towards the (8) eight paid semesters of per capita tax required to transfer to alumni status.)

IMPORTANT!

Do not ever allow members to pay the chapter more than what is shown as “Balance Due” for them.

Discrepancy: See What do I do about incorrect information? below.

Date Effective: Select the date that the selected status went into effect. For most instances, this is the current date. For Reactivations or Transfers to Alumni status as a result of graduation, please enter the date the transfer was effective (i.e. date of graduation). For chapter discipline, enter the date of the chapter vote for discipline.

For members who have reactivated from alumni status, you can manually add their member numbers to the Member # box to have them appear on the report. All members who have transferred or reactivated into the chapter must pay full national per capita tax.

What do I do about incorrect information?

If there is a discrepancy with any listed information for a member, check the Discrepancy box next to that name and they will be added to a Discrepancy Worksheet for clarification.

Typical discrepancies may include:

1. A member has a misspelled name.
2. A member is listed on the Personnel Matrix who was never initiated.
3. A member believes his listed Balance Due may be incorrect.

If a member believes his Balance Due is incorrect, you should advise him to pay what he believes to be correct, select Suspended – Automatic, mark the Discrepancy Box, and have him call the National Headquarters to resolve the issue. If he is correct, he will not be penalized and the automatic suspension will immediately be removed.

If a member has an incorrect or missing office position title next to their name, please use the Online Chapter Election Report Form to submit your chapter's latest election results.

What's next?

Once you have verified all information on each page is correct, you must personally certify the information before being able to continue. You can do so by clicking the button below Confirm Accuracy at the bottom of the page. The additional worksheet pages (i.e. Discrepancy, Professional Semester, Discipline Review, Transfer to Alumni, Reactivation) will only appear if necessary based on your selections on the Personnel Matrix. Once you personally certify the information, you can click Next to continue to the first worksheet.

At any time, you can click Save for Later at the bottom to save your progress and return at a later date to finish.