



# End-of-Year Reporting Guide

[Reporting Intranet](#)

*Beta Alpha Psi*



# Reporting Intranet

## Table of Contents, Main Topic Links

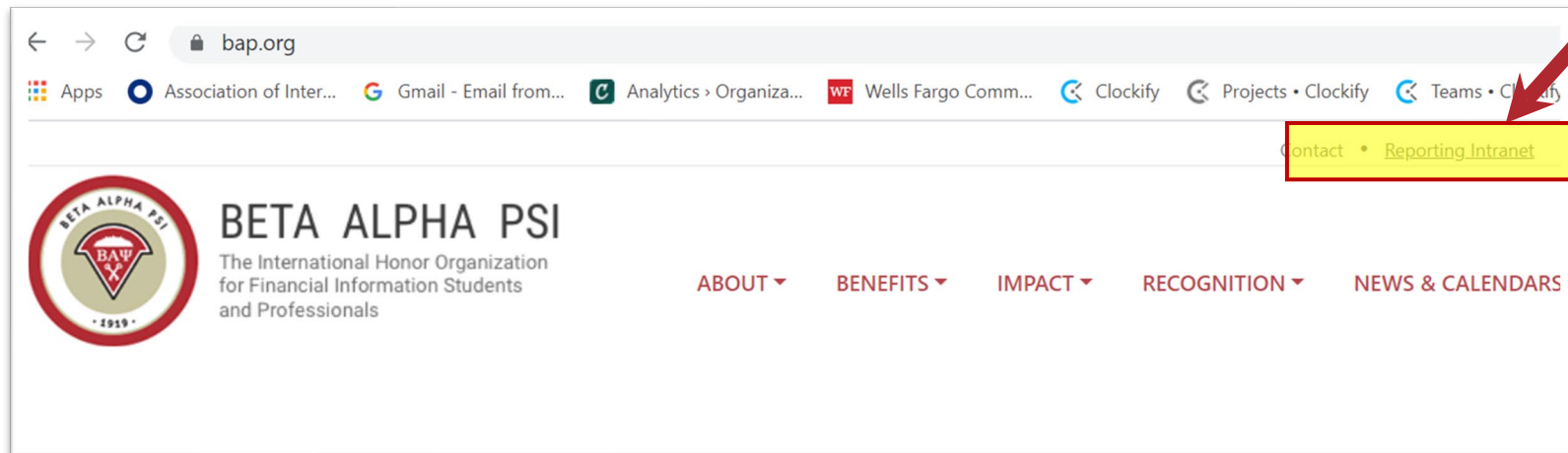
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# Where Do I Login?

[Reporting Intranet](#) – top right corner on BAP.org home page.



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# Clarification of Roles

## **Faculty Advisors**

- *Create and manage officer login accounts*
- *Review all chapter reports:*
  - *Beginning of Year – Due October 15 (U.S.), June 15 (Oceania)*
  - *Mid-Year Report – Due December 15 (U.S. award-seeking chapters), August 15 (Oceania)*
  - *Student Participation Report*
  - *Complete 990-N e-Postcard filing by June 1*
  - *Sign off on End-of-Year Report – Due June 1 (U.S.), December 15 (Oceania)*
  - *Meet with Chapter Reporter each semester to review reporting*
  - *Meet with Chapter Treasurer to confirm membership dues and chapter maintenance fee are paid on time*

## **Chapter Officers**

- *All Chapter Reporting*
- *Entering new candidates into the system*
- *Beginning of Year Report*
- *Entering Professional & Service Activities, Reaching Out Activities and Initiations*
- *Mid-Year Report (award-seeking, petitioning, and probation chapters)*
- *End-of-Year Report*
- *Coordinate with the faculty advisor to process membership dues and confirm that the chapter maintenance fee is paid on time.*

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# End-of-Year Report Checklist

Report Items	Our Chapter's Status
Update Chapter Profile	✓ Submitted
Attach Financial Statements	✓ Submitted
Confirm that all chapter activity reporting is complete (Professional, Service, ROAs, and Initiations)	✓ Submitted
Enter Faculty Advisor Sign-off (Financial, Tax and Non-BAP Hours)	Faculty Advisor Must Complete ✓ Submitted
<b>Overall Report Status</b>	<b>Credited</b>

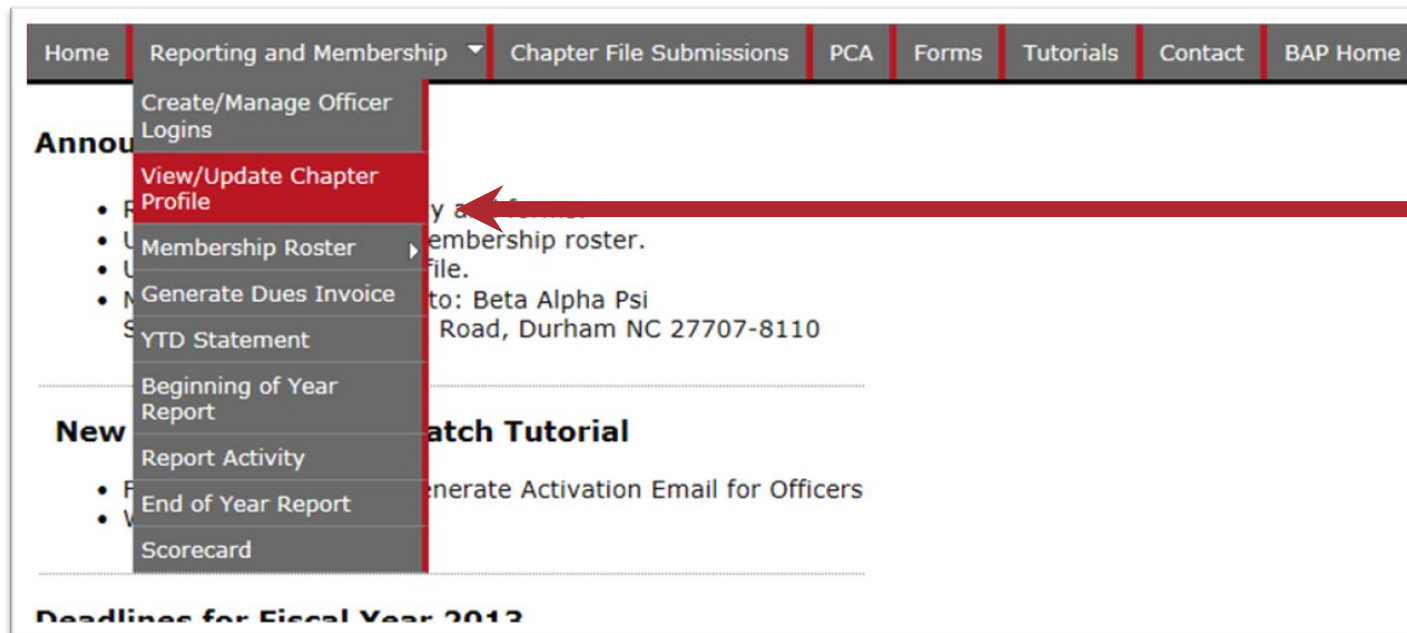
- ✓ Update Chapter Profile
- ✓ Upload Chapter Financials
- ✓ Confirm all activities are marked complete
- ✓ Ensure Faculty Advisor completes the FA sign-off
- ✓ Complete Tax Information:
  - If annual revenue is under \$50,000 – file IRS e-Postcard
  - If annual revenue is over \$50,000 – submit Over \$50K spreadsheet

*Submissions are due June 1 for U.S. chapters (no exceptions) and December 15 for Oceania chapters; late submissions will incur a \$100 fine.*



# Update Chapter Profile

*Once logged in, the officer should navigate to “Reporting and Membership” and select “View/Update Chapter Profile” to access the Update Chapter Profile screen.*



# Update Chapter Profile

*The Chapter Profile screen appears in a tabbed format.*

*Under the “School” tab, Faculty Advisors and officers can update school-related information such as the chapter website link, achievement level, and school mailing address.*

*Fields marked with a red asterisk (\*) are required.*

**Chapter Profile**  
\* indicates a required field

Save Chapter

Admin Only Fields | **School** | Chapter Officers | Chapter Contacts

Chapter Website:

School Year:

Achievement Type:

Grad Students in Accounting?:

School: \*

Country: \*

Address 1: \*

Address 2:

City: \*

State/Province/Region:

*The tab labeled “Admin Only Fields” is for the Executive Office use only.*



# Update Chapter Profile

Home Reporting and Membership Chapter File Submissions PCA Forms Tutorials Contact BAP Home

**Chapter Profile**  
\* indicates a required field

Save Chapter

Admin Only Fields School Chapter Officers Chapter Contacts

**President**

Name:\* Chambers, Cindy

E-mail:\* cchambers@bap.org

Phone: 222-222-2222

Note: Phone not required, but must be valid for your Chapter's country if supplied.

**Reporter**

Name:\* Baum, Hadassah

E-mail:\* hhbaum@bap.org

Phone: 222-222-2222

Note: Phone not required, but must be valid for your Chapter's country if supplied.

*The "Chapter Officers" tab is where officer information is updated—this is separate from officer user accounts.*

*To assign a role, select the officer's name from the dropdown list; their name, email, and phone number will automatically populate the appropriate fields.*

*Note: The dropdown list pulls from the "Submit for Initiation" and "Active Members" folders. Fields marked with a red star are required, and officers must be either Active Members or Submitted for Initiation.*

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# View/Update Membership

Home Reporting and Membership Chapter File Submissions PCA Forms Tutorials Contact BAP Home

## Membership Roster

[Add New](#)
[Submit for Initiation](#)
[Make Inactive](#)
[Delete](#)

**Candidates**

[Active \(4\)](#)  
[Submitted for Initiation \(6\)](#)  
[Inactive \(2\)](#)

**Members**

[Active \(0\)](#)  
[On Leave \(0\)](#)  
[Alumni \(0\)](#)  
[Deleted \(0\)](#)

**Active Candidates**

Click Member/Candidate Name to Edit Profile Record

	Name	Member Number	E-mail	Candidate Date	Membership Type
<input type="checkbox"/>	<a href="#">Jackman, Hugh</a>	201325010011	<a href="mailto:hjackman1@yahoo.com">hjackman1@yahoo.com</a>	6/10/2013	Undergraduate
<input type="checkbox"/>	<a href="#">Johnson, Sarah</a>	201325010003	<a href="mailto:sjohnson@bap.org">sjohnson@bap.org</a>	4/1/2013	Undergraduate
<input type="checkbox"/>	<a href="#">Smith, Elizabeth</a>	201325010001	<a href="mailto:esmith@bap.org">esmith@bap.org</a>	4/1/2013	Undergraduate
<input type="checkbox"/>	<a href="#">Stevens, John</a>	201325010008	<a href="mailto:jstevens@bap.org">jstevens@bap.org</a>	9/3/2012	Undergraduate

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*The Membership Roster screen is where reporters can add new candidates, submit them for initiation or move them to the Inactive folder, and update Active members by changing their status to On Leave or Alumni.*

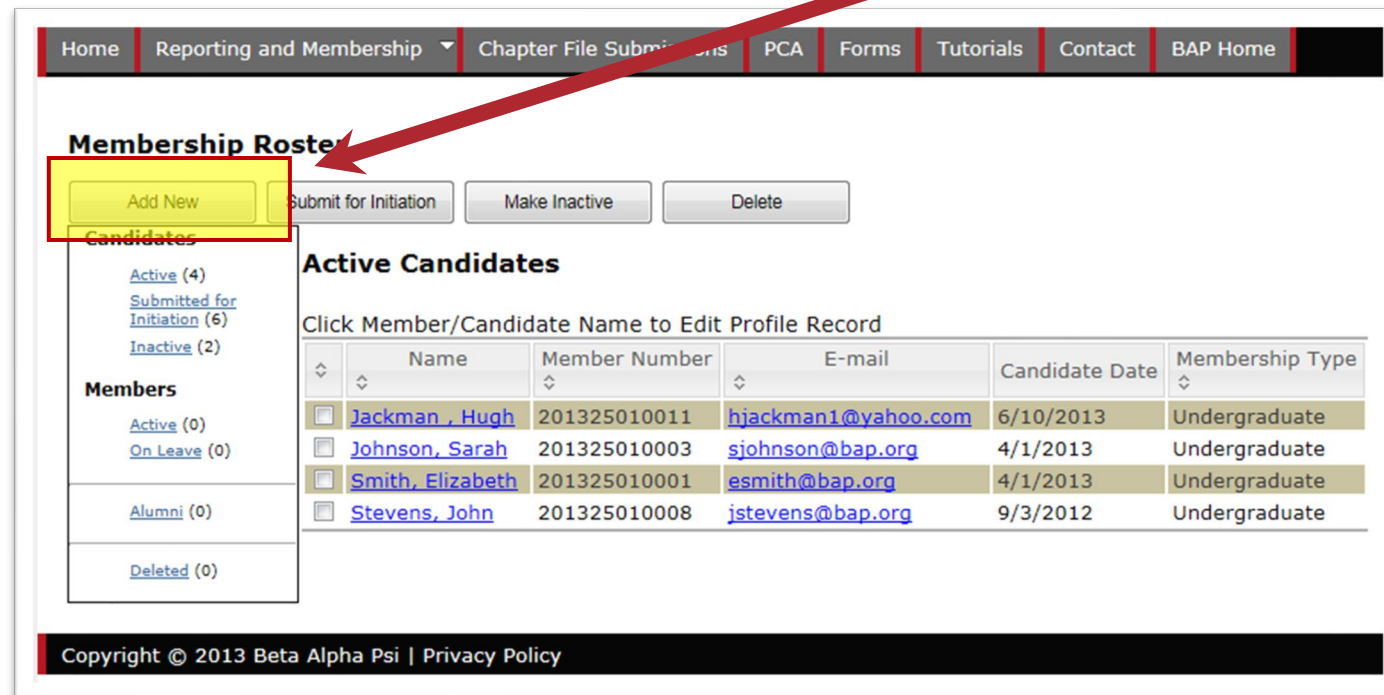
*The Membership Roster is divided into two sections:*

- **Candidates**, which includes folders for Active Candidates, Submit for Initiation, and Inactive Candidates
- **Members**, which includes folders for Active Members, On Leave, and Alumni.



# View/Update Membership

*To add a new candidate, select “Add New”. Do not add a candidate until your chapter has collected the \$75 fee. Adding a candidate always creates a receivable for your chapter.*



**Membership Roster**

[Add New](#) [Submit for Initiation](#) [Make Inactive](#) [Delete](#)

**Candidates**

- [Active \(4\)](#)
- [Submitted for Initiation \(6\)](#)
- [Inactive \(2\)](#)

**Members**

- [Active \(0\)](#)
- [On Leave \(0\)](#)
- [Alumni \(0\)](#)
- [Deleted \(0\)](#)

**Active Candidates**

Click Member/Candidate Name to Edit Profile Record

	Name	Member Number	E-mail	Candidate Date	Membership Type
<input type="checkbox"/>	<a href="#">Jackman, Hugh</a>	201325010011	<a href="mailto:hjackman1@yahoo.com">hjackman1@yahoo.com</a>	6/10/2013	Undergraduate
<input type="checkbox"/>	<a href="#">Johnson, Sarah</a>	201325010003	<a href="mailto:sjohnson@bap.org">sjohnson@bap.org</a>	4/1/2013	Undergraduate
<input type="checkbox"/>	<a href="#">Smith, Elizabeth</a>	201325010001	<a href="mailto:esmith@bap.org">esmith@bap.org</a>	4/1/2013	Undergraduate
<input type="checkbox"/>	<a href="#">Stevens, John</a>	201325010008	<a href="mailto:jstevens@bap.org">jstevens@bap.org</a>	9/3/2012	Undergraduate

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**Candidate fee  
increases to  
\$85 effective  
July 1**



# Add a New Candidate

**Create New Chapter Candidate**

Beta Alpha Psi University, Chapter 2502, Beta Alpha Psi University  
\* indicates a required field, all dates should be in the format MM/DD/YYYY

Member Number: Not Yet Assigned

Candidate Start Date\*:

Initiation Date:

Current Folder: Adding to Active Candidates

Type of Membership\*:

Major\*:

Address Line 1\*:

Address Line 2:

City\*:

State / Province / Region\*:

ZIP/Postal Code\*:

Country\*:

First Name\*:

Middle Initial:

Last Name\*:

Suffix:

E-mail Address\*:

Primary Phone\*:

Other Phone:

Gender:

Ethnicity:

Birth Date:

Comments:

Save Cancel

Membership Status Changes Membership Payments and Credits

*All fields marked with a red asterisk (\*) are required; the Candidate Start Date should reflect when the student began participating, not when they are being entered into the system. Important: email address must be valid and unique, as duplicate addresses are not allowed.*



# Submit a Candidate for Induction

Home | Reporting and Membership | Chapter File Submissions | PCA | Forms | Tutorials | Contact | BAP Home

## Membership Roster

Submit for Initiation

Candidates

[Active \(4\)](#)  
[Submitted for Initiation \(1\)](#)  
[Inactive \(2\)](#)

Members

[Active \(5\)](#)  
[On Leave \(0\)](#)

[Alumni \(0\)](#)

[Deleted \(0\)](#)

Make Inactive

Delete

### Active Candidates

Click Member/Candidate Name to Edit Profile Record

	Name	Member Number	E-mail	Candidate Date	Membership Type
<input type="checkbox"/>	<a href="#">Jackman, Hugh</a>	201325010011	<a href="mailto:hjackman1@yahoo.com">hjackman1@yahoo.com</a>	6/10/2013	Undergraduate
<input checked="" type="checkbox"/>	<a href="#">Johnson, Sarah</a>	201325010003	<a href="mailto:sjohnson@bap.org">sjohnson@bap.org</a>	4/1/2013	Undergraduate
<input checked="" type="checkbox"/>	<a href="#">Smith, Elizabeth</a>	201325010001	<a href="mailto:esmith@bap.org">esmith@bap.org</a>	4/1/2013	Undergraduate
<input type="checkbox"/>	<a href="#">Stevens, John</a>	201325010008	<a href="mailto:jstevens@bap.org">jstevens@bap.org</a>	9/3/2012	Undergraduate

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*To submit a candidate for initiation, in the “Active Candidates” folder, check off the box next to the appropriate name and select “Submit for Initiation”.*

*The user will be prompted to confirm that the candidate met the requirements and that the date is the same date for multiple candidates. Confirm both.*



# Submit a Candidate for Induction

*The records will appear in the “Submit for Initiation” folder.*

*Once candidate fees have been paid, the Executive Office will move the records to the “Active Members” folder and, upon request, send a PDF of the membership certificates to the advisor.*

Home
Reporting and Membership
Chapter File Submissions
PCA
Forms
Tutorials
Contact
BAP Home

Membership Roster

Return to Active

Make Member

Candidates

Active (2)

Submitted for Initiation (3)

Inactive (2)

Members

Active (5)

On Leave (0)

Alumni (0)

Deleted (0)

Submitted Candidates

Click Member/Candidate Name to Edit Profile Record

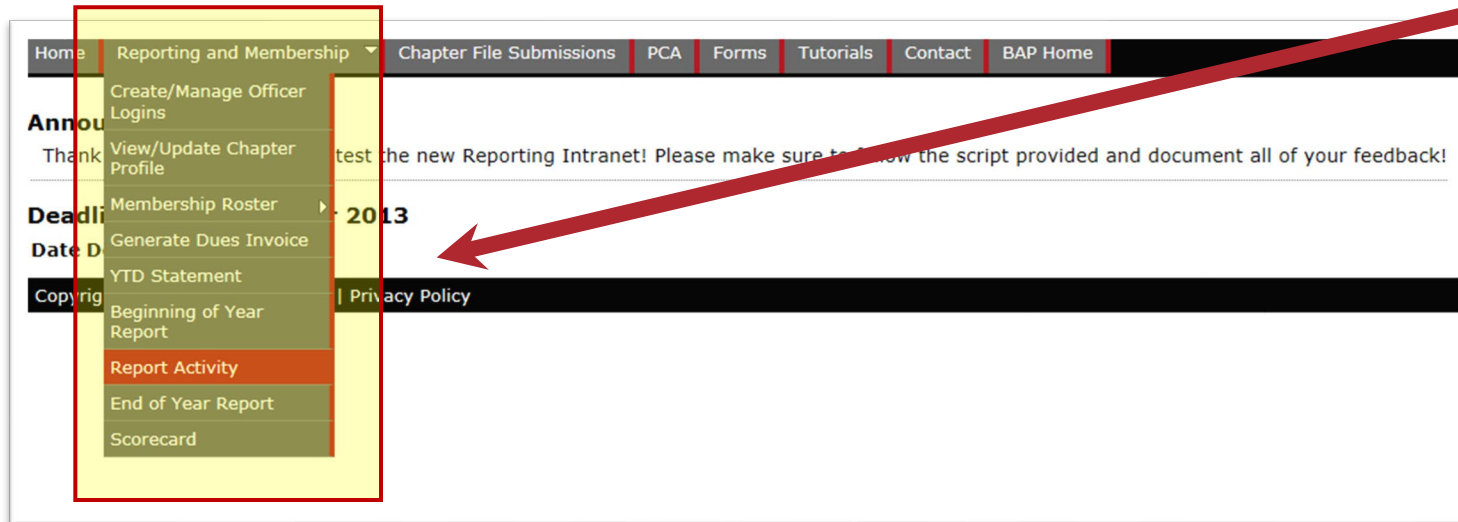
	Name	Member Number	E-mail	Initiation Date	Membership Type
<input type="checkbox"/>	Baum, Hadassah	201325010004	hhbaum@bap.org	5/2/2013	Faculty
<input type="checkbox"/>	Johnson, Sarah	201325010003	sjohnson@bap.org	4/22/2013	Undergraduate
<input type="checkbox"/>	Smith, Elizabeth	201325010001	esmith@bap.org	4/22/2013	Undergraduate

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The logo for Beta Alpha Psi is a circular emblem. It features a red outer ring with the text "BETA ALPHA PSI" in white. Inside the ring is a gold shield with a red border. The shield contains the Greek letters "ΒΑΨ" in red. At the bottom of the shield, the year "1919" is inscribed in red.

# Online Activity Reporting System

*The online activity reporting screen can be found under Reporting and Membership and Report Activity.*



# Online Activity Reporting

## Entering an Activity

*The online reporting activity screen is in a tabbed format. To add a new Professional Activity, select “Add”.*

### Report Chapter Activities

Professional Service Reaching Out Induction Hours Summary Scorecard Student Participation Verification Report

Add

Add Non BAP Activity

Filter by Year: 2024 - 2025

Showing 1 to 1 of 1 entries

	Status	Name	Date	Year	At Least 50 Minutes Long?	In Name of BAP?	% Participation	Points
<a href="#">Edit/Delete</a>	N/A	Nonprofit Accounting	12/3/2024	2024 - 2025	Yes	Yes	33%	1

Search:



# Online Activity Reporting

## Entering an Activity

Add New Professional Activity

Save

Cancel

Date of Activity:

Was the Activity at Least 50 Minutes Long?:

☐ Yes ☒ No

Confirm that the Activity was Performed in the Name of Beta Alpha Psi:

☒ Yes

Professional Activity Type:

Firm Presentation or Visit

Name of firm/company/org:

Firm Presentation or Visit

Essential Skill?

Company Presentation or Visit

Activity Name:

Meet the Firms (Networking)

Impact Activity?:

Trade Organization/NFP

State Society

Exam/Professional Education

VITA Training

Other

*Enter the date of the activity.*

*Confirm the length was at least 50 minutes long.*

*Confirm that your chapter sponsored the activity.*

*Choose the activity type from the drop- down list.*

*Select “Save”.*



# Online Activity Reporting

*Once the activity information has been saved, the system will pull up all the records as of the “effective activity date” in the Active Candidate, Submitted for Initiation and Active Member folders.*

*Check off attendance for the candidates and members who participated in the activity by using the tab function for each record and then select “Save”.*

*Then close the screen.*



## Add New Professional Activity

Confirm that the Activity was Performed in the Name of Beta ☒ Yes  
Alpha Psi:

Professional Activity Type:

Name of firm/company/org:

Essential Skill?

Activity Name:

Impact Activity?:

What to do if there are missing or extra members in this list.

The Chapter Activity was saved at 1:31 PM. Click "Close" to exit this window, or edit member participation below.

Showing 1 to 9 of 9 entries

Member Number	Name	<input type="checkbox"/> Check if attended
201104440002	Affleck, Ben	<input type="checkbox"/>
201204440002	Best, Pete	<input checked="" type="checkbox"/>
201004440004	Fiorentino, Margaret	<input checked="" type="checkbox"/>
200904440003	Lennon, John	<input type="checkbox"/>
201204440004	Osborne, Ozzie	<input type="checkbox"/>
201104440001	Pattison, Robert	<input type="checkbox"/>
201204440008	Smith, Mary	<input checked="" type="checkbox"/>

# New: Impact Categories

- *Media Promotion (TV or Print)*
- *Tutoring*
- *Mentoring*
- *Financial Volunteer Support (donating accounting or bookkeeping services)*
- *Sharing business/college knowledge (volunteering with high school, incoming freshmen, and undeclared students)*
- *VITA*
- *Community College Associate Candidates*
- *AACSB Societal Impact Goal for your business school*



# Online Activity Reporting

*Complete Wufoo form for each activity to earn Impact Activity Point*

## ▼ IMPACT ACTIVITY POINTS - NEW!

### IMPACT ACTIVITY POINTS

An Impact Activity is a Professional or Service Activity that demonstrates a strong effect has been made to your university or community. Impact activities earn an extra point toward award status (i.e., an extra professional or service point). Impact activities may include but are not limited to the following elements:

- Media Promotion (TV or Print)
- Tutoring
- Mentoring
- Financial Volunteer Support (donating accounting or bookkeeping services)
- Sharing business/college knowledge (e.g. volunteering with high school, incoming freshmen, and undeclared students)
- VITA (Impact Requirements Below)
- Community College Associate Candidates
- AACSB Societal Impact Goal for your business school

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# Online Activity Reporting

**Add New Service Activity**

Save Delete Close

Date of Activity: 11/26/2024

Was the Activity at Least 50 Minutes Long?: ☒ Yes ☐ No

Confirm that the Activity was Performed in the Name of Beta Alpha Psi: ☒ Yes

Service Activity Type: Food Insecurity Activities ▾

Activity Name: Campus Food Bank

Impact Activity?: Yes ▾

Impact Category: Media Promotion (TV or P ▾

What to do if there are missing or extra members in this list.

Submit Impact Activity Form

Please make sure to submit the form in the link mentioned to complete the edit impact activity process, if needed or not done already [Click Here for Impact Activity Form](#).

Ok

*Enter the activity name and date*

*Confirm that it was at least 50 minutes long and sponsored by the chapter*

*Select Impact Category*

*Complete form with metrics*



# Online Activity Reporting

### Impact Activities

Please complete the below information to show the impact of your activity in your community.

Please complete this form for each impact activity.

School Name \*

Chapter Name \*

Chapter Number \*

444

Region \*

United States

Year

2024-2025

Activity Name \*

Campus Food Bank

Date of Activity \*

11

/

26

/

2024

MMDDYYYY

Please indicate which Impact Activity your chapter completed. \*

Media Promotion (TV or Print)

*Select Impact Category*

*Complete form with metrics*



# Online Activity Reporting

Description of Impact Activity \*

Please upload any photos or additional documentation here. Please title the submission with your school name and Impact Activity.

No file chosen

*Add description of activity and support.*

*Include date, summary and audience.*



# Online Activity Reporting

*The new activity has been added to the online reporting screen, including the total number of minutes and a scorecard point has been factored in since the participation percentage is over 20%. If attendance is below 20%, a point will not be generated.*

**Report Chapter Activities**

ProfessionalServiceReaching OutInductionHours SummaryScorecardStudent Participation Verification Report

AddAdd Non BAP Activity

Filter by Year: 2024 - 2025

Showing 1 to 1 of 1 entries

	Status	Name	Date	Year	At Least 50 Minutes Long?	In Name of BAP?	% Participation	Points
<a href="#">Edit/Delete</a>	<a href="#">Reject</a>	Campus Food Bank	11/26/2024	2024 - 2025	Yes	Yes	33%	2

Search:



# Online Activity Reporting

Add New Professional Activity

Save

Cancel

Date of Activity:

Was the Activity at Least 50 Minutes Long?:

Confirm that the Activity was Performed in the Name of Beta Alpha Psi:

Professional Activity Type:

Name of firm/company/org:

Essential Skill?

Activity Name:

Impact Activity?:

ES-Business Writing Skills

ES-Negotiation Skills

ES-Emotional Intelligence

ES-Facilitation Skills

ES-Managing Distractions

ES-Conflict Management

ES-Change Management

ES-Interpersonal Skills at the Workplace

ES-Diversity and Inclusion

ES-Ethical Decision Making Skills

ES-Accepting Feedback

ES-Business Writing Skills

No

*Essential Skill –  
required for award  
seeking chapters*

*Choose 1 from 11  
listed for a  
Professional session*

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# Online Activity Reporting

*Each activity that is saved and meets the 20% participation requirement automatically gets registered on the Scorecard screen.*

Chapter Scorecard

Chapter #444, Fab Four, Fab Four University

Planned Achievement Level: Award-Seeking

PCA Achievements		PCA Requirements	
Mission Based (Bronze) Requirements	YTD Credited	Mission Based (Bronze) Points Required	
Beginning of Year Report	1	1	
Induction	0	1	
Mid Year Report	0	0	
End of Year Report	0	1	
Reaching Out Activities (ROAs)	0	3	
Professional Activities	0	6	
Service Activities	0	2	
Total Points	1	14	
Additional Requirements for Award-Seeking Chapters Only	YTD Achieved	Required for Silver	Required for Gold
Additional ROAs	0	5	8
Additional Professional Activities	0	4	6
Additional Service Activities	0	2	4
Mandatory Essential Skills Activity	0	1	1
Overall Chapter Status	<div>Under Review</div>	Yes	Yes



# Non-BAP Activities

*At the individual level, chapters may report a maximum of 3 professional activities and 3 service activities that are not sponsored by Beta Alpha Psi.*

*Just add a new activity, enter the activity name as, “Non BAP xxxxx”, enter the date, and leave the activity time and BAP confirmation at the default of “No”. Then, select, “Save” and enter the attendance accordingly.*

**Add Non BAP Activity**

Save

Cancel

Activity Type:

☒ ☐

Date of Activity:

12/02/2024

Was the Activity at Least 50 Minutes Long?:

☒ Yes ☐ No

Activity Name:

Non BAP Activity-SA Fall-1

Only three entries for fall and three entries for spring are allowed.



# Online Activity Reporting

## Reaching Out Activities (ROAs)



Report Chapter Activities

Professional

Service

Reaching Out

Initiation

Hours Summary

Scorecard

Showing 1 to 31 of 31 entries

Reaching Out Activities	Sponsor	Status	Upload Required?
2024 Annual Meeting Attendance	Executive Office	<input type="checkbox"/>	No
2024 Annual Community Impact Day Attendance or Participation in Back to School Supplies drive	Executive Office	<input type="checkbox"/>	No
2024 Annual Meeting Presentation - Best Practices or Chapter Operations	Executive Office	<input type="checkbox"/>	No
2025 Participation In Project Run With It	Executive Office	<input type="checkbox"/>	No
AAA/CTLA Annual Meeting	Executive Office	<input type="checkbox"/>	No
Hosting or co-hosting Mid-Year Meeting – verified by Chapter Advocate	Executive Office	<input type="checkbox"/>	No
2025 Mid-Year Meeting Attendance	Executive Office	<input type="checkbox"/>	No
2025 Mid-Year Meeting Presentation - Best Practices or Chapter Operations	Executive Office	<input type="checkbox"/>	No
2025 Winner for Business Information Professional of the Year - Online Competitions Page	Executive Office	<input type="checkbox"/>	No

# Online Activity Reporting

## More Reaching Out Activities (ROAs)

2025 Nomination for Outstanding Dean - Submit online on the Competitions Page.	Executive Office	<input type="checkbox"/>	No
1st Round Winner EY Inclusive Leadership Award	Executive Office	<input type="checkbox"/>	No
Societal Impact Goal	Executive Office	<input type="checkbox"/>	Yes
100 Books Donation	Executive Office	<input type="checkbox"/>	Yes
Virtual Chapter Reporting 101 Attendance - Fall 2024	Executive Office	<input type="checkbox"/>	No
Live Diversity & Inclusiveness Event-fall or spring	Executive Office	<input type="checkbox"/>	No
Chapter Mentorship Program	Executive Office	<input type="checkbox"/>	No
Attendance at Live Virtual Initiation-fall or spring	Executive Office	<input type="checkbox"/>	No
Mentoring a Developing Chapter-Must have CA Approval	Executive Office	<input type="checkbox"/>	No
IS & Finance Interaction	Executive Office	<input type="checkbox"/>	No
Alumni Advocate Podcasts-2	Executive Office	<input type="checkbox"/>	Yes
Literacy/College Application	Executive Office	<input type="checkbox"/>	No
Community College/High School Outreach	Executive Office	<input type="checkbox"/>	Yes
Quiz on 2024-2025 PCA	Executive Office	<input type="checkbox"/>	No
Alumni Activity (25% + significant alumni participation)	Chapter	<input type="checkbox"/>	No



# Online Activity Reporting

## More Reaching Out Activities (ROAs)

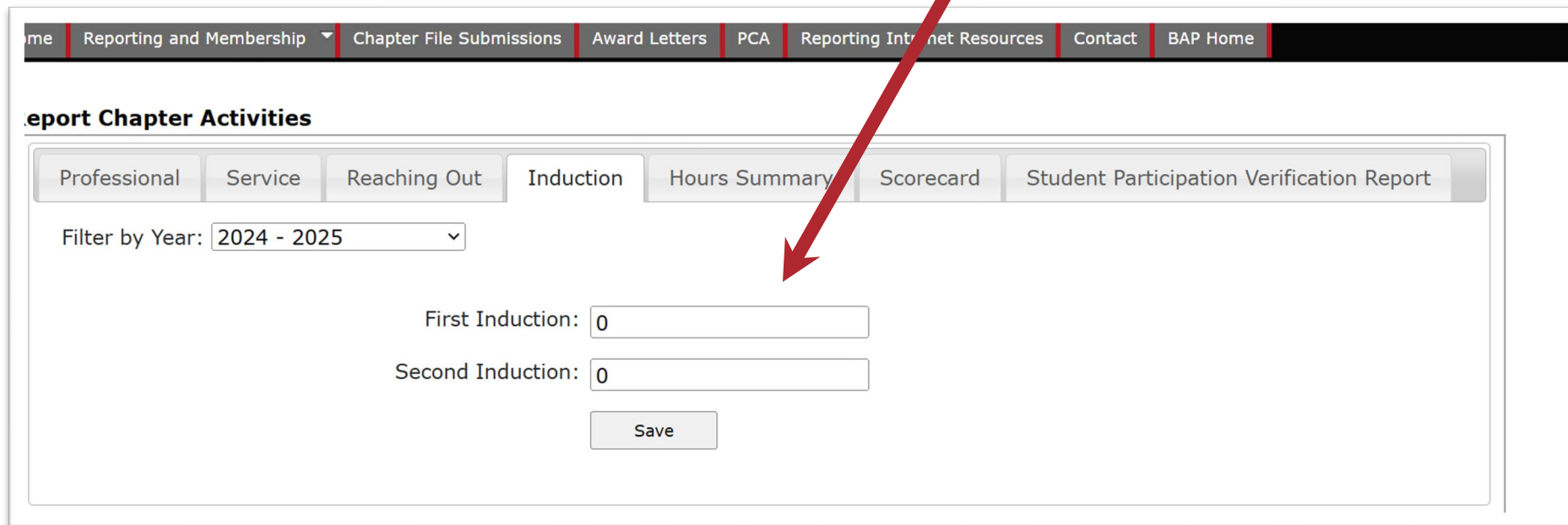
*Some ROAs require an upload (description of event)*

Minority Recruitment Event #1	Chapter	<input type="checkbox"/>	No
Minority Recruitment Event #2	Chapter	<input type="checkbox"/>	No
Multi-Chapter Event (25% membership participation)	Chapter	<input type="checkbox"/>	No
Promoting Careers in Accounting/Finance/Data Analytics #1	Chapter	<input type="checkbox"/>	Yes
Promoting Careers in Accounting/Finance/Data Analytics #2	Chapter	<input type="checkbox"/>	Yes
Second Initiation	Chapter	<input type="checkbox"/>	No
Wellness Session	Chapter	<input type="checkbox"/>	Yes



# Online Activity Reporting Induction

*Enter the total number of initiates  
for first and second inductions.  
Make sure to “Save”.*

A screenshot of a web application interface for reporting activities. At the top is a navigation bar with links: Home, Reporting and Membership (selected), Chapter File Submissions, Award Letters, PCA, Reporting Internet Resources, Contact, and BAP Home. Below the navigation bar is a section titled "Report Chapter Activities". Inside this section are several tabs: Professional, Service, Reaching Out, Induction (highlighted with a red arrow), Hours Summary, Scorecard, and Student Participation Verification Report. Below the tabs is a "Filter by Year:" dropdown menu set to "2024 - 2025". Underneath the filter are two input fields: "First Induction:" with the value "0" and "Second Induction:" with the value "0". At the bottom of these fields is a "Save" button.

Home | Reporting and Membership | Chapter File Submissions | Award Letters | PCA | Reporting Internet Resources | Contact | BAP Home

### Report Chapter Activities

Professional | Service | Reaching Out | **Induction** | Hours Summary | Scorecard | Student Participation Verification Report

Filter by Year: 2024 - 2025

First Induction: 0

Second Induction: 0

Save



# Student Participation Verification Report

*The Student Participation Verification screen is a tool for faculty advisors and officers to keep track of candidates and members attendance. Always make sure to “Refresh”.*

*The screen will default to “All”, Professional Activities highlighted in blue and Service Activities highlighted in yellow. You can filter by Professional or Service Activities under the Filter by Activity Type.*

*Download into Excel to verify attendance.*

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**Report Chapter Activities**

Professional | Service | Reaching Out | Induction | Hours Summary | Scorecard | **Student Participation Verification Report**

Filter by Activity type: 

All

 Filter by Year: 

2024 - 2025

Refresh

Excel Export

Member Number	Member Name	test
<div>(All)</div>	<div>(All)</div>	<div>(All)</div>
200904440003	Lennon, John	Yes
201204440005	Vaughn, Vince	No
201204440007	test, test	Yes
201204440004	Osborne, Ozzie	No
201204440002	Best, Pete	Yes
201104440002	Affleck, Ben	Yes
201104440001	Pattison, Robert	Yes
201204440008	Smith, Mary	Yes
201004440004	Florentino, Margaret	No



# Chapter Scorecard

*Always make sure to check your chapter's final scorecard.*

## Chapter Scorecard

Chapter #444, Fab Four, Fab Four University

Planned Achievement Level: Award-Seeking

PCA Achievements		PCA Requirements	
Mission Based (Bronze) Requirements	YTD Credited	Mission Based (Bronze) Points Required	
Beginning of Year Report	<u>1</u>	1	
Induction	<u>0</u>	1	
Mid Year Report	<u>0</u>	0	
End of Year Report	<u>0</u>	1	
Reaching Out Activities (ROAs)	<u>0</u>	3	
Professional Activities	<u>0</u>	6	
Service Activities	<u>0</u>	2	
Total Points	1	14	
Additional Requirements for Award-Seeking Chapters Only	YTD Achieved	Required for Silver	Required for Gold
Additional ROAs	<u>0</u>	5	8
Additional Professional Activities	<u>0</u>	4	6
Additional Service Activities	<u>0</u>	2	4
Mandatory Essential Skills Activity	<u>0</u>	1	1
Overall Chapter Status	Under Review ▼	Yes	Yes



# End-of-Year Report Checklist

Report Items	Our Chapter's Status
Update Chapter Profile	✓ Submitted
Attach Financial Statements	✓ Submitted
Confirm that all chapter activity reporting is complete (Professional, Service, ROAs, and Initiations)	✓ Submitted
Enter Faculty Advisor Sign-off (Financial, Tax and Non-BAP Hours)	Faculty Advisor Must Complete ✓ Submitted
<b>Overall Report Status</b>	<b>Credited</b>

- ✓ *Update Chapter Profile*
- ✓ *Upload Chapter Financials*
- ✓ *Confirm all activities are marked complete*
- ✓ *Ensure Faculty Advisor completes the FA sign-off*
- ✓ *Complete Tax Information:*
  - *If annual revenue is under \$50,000 – file IRS e-Postcard*
  - *If annual revenue is over \$50,000 – submit Over \$50K spreadsheet*

*Submissions are due June 1 for U.S. chapters (no exceptions) and December 15 for Oceania chapters; late submissions will incur a \$250 fine.*



# Upload Chapter Financials

## Reporting Intranet Resources

- [Reporting Intranet Guide](#) (PDF)
  - [Reporting Intranet FAQs](#) (PDF)
- [Oceania FAQs](#) (PDF)
- [Ideas for Online Service Activities](#)
- [Chapter Reporting 101](#) (PDF) and [Webinar Recording](#) (Sept 2023 AM Session)
  - [FY 2023-2024 Maintenance Fee Invoice](#) (PDF)
- [Mid Year Reporting Guide](#) (PDF) and [Webinar Recording](#) (Dec. 2023)
- [Mid-Year Reporting in 90 Seconds](#)
- [End of Year Reporting Guide](#) (PDF) and [Webinar Recording](#) (April 2023 AM Session)
  - **Chapters will be fined \$250 for using incorrect EIN. If you don't know your chapters EIN, please contact [bap@bap.org](mailto:bap@bap.org).**
- [IRS Form 990-N \(e-Postcard\) User Guide](#)
  - **What we will need from your chapter for the 990n tax filing (Please send to [bap@bap.org](mailto:bap@bap.org)):**
    - [990-N Submission](#) (PDF)
    - [990-N Confirmation](#) (PDF)
  - [IRS Form 990-N \(e-Postcard\) Filing](#)
- [Sample Financial Statements](#)
- [Replacement Certificates Form](#) (PDF)

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# Upload Chapter Financials

*The sample financials will download as an Excel file. Please save a copy, enter your chapter's information, and upload the completed file to the End-of-Year (EOY) screen.*

*Be sure to review both tabs in the Excel workbook.*



Beta Alpha Psi		
Statement of Financial Position as of April 30, 2024		
School Name:		
Chapter Number:		
Chapter Name:		
	<b>Assets</b>	<b>4/30/2024</b>
	Cash	
	Accounts receivable	
	Prepaid expenses and other assets	
	<b>Total Current Assets</b>	
	<b>Liabilities and Net Assets</b>	
	Liabilities:	
	Accounts payable	
	Unearned revenue	
	Total liabilities	
	Net Assets:	
	Unrestricted	
	Temporarily restricted	
	Total Net Assets	

>

Statement of Financial Position

Statement of Activities

+

# Upload Chapter Financials

Report Items	Our Chapter's Status
<div>Update Chapter Profile</div>	<input checked="" type="checkbox"/> Submitted
<div>Attach Financial Statements</div>	<input checked="" type="checkbox"/> Submitted
<div>Confirm that all chapter activity reporting is complete (Professional, Service, ROAs, and Initiations)</div>	<input checked="" type="checkbox"/> Submitted
<div>Enter Faculty Advisor Sign-off (Financial, Tax and Non-BAP Hours)</div> <div>Faculty Advisor Must Complete</div>	<input checked="" type="checkbox"/> Submitted
Overall Report Status	Credited

Once you have uploaded your chapter financials, this task will be credited.



# Faculty Advisor Sign Off

Step 1 -- Verify Non-BAP Hours\*

I, **Lisa Wicker**, Faculty Advisor of the **Fab Four** Chapter, have reviewed and verified that the non-BAP professional and service hours reported by the Chapter meet the definition of professional or service activities under the Program of Chapter Activities.

Step 2 -- Complete Tax Info\*

Step 2A -- Sign Tax Release Form\*

Beta Alpha Psi Tax Release Form  
Chapter 444, Fab Four University, Fab Four  
For Inclusion in Group Exemption and Combined Filing of Form 990

Fab Four Chapter  
Fab Four University  
School of Knowledge  
Abbey Road  
RTP, NC 27707

Chapter's Separate IRS Employer Identification Number: **Not available**

I, **Lisa Wicker**, Faculty Advisor of this chapter of Beta Alpha Psi, hereby authorize the Executive Office of Beta Alpha Psi to **include** our chapter in a group exemption letter and in a combined filing of Form 990 with the IRS, and state that I have authority to execute this authorization by virtue of a resolution passed by the chapter executive committee at its meeting.

Note: This authorization covers the Federal Filing Requirements. Any chapter also having separate state requirements must fulfill them separately.

Step 2B\*

For receipts less than \$50,000, you are required to file the IRS e-Postcard at: [IRS ePostcard](#)

Once completed - please enter your confirmation number:

My chapter had less than \$50,000 in receipts this year: ☐

*The Faculty Advisor Sign-Off screen confirms that the FA has reviewed and approved the chapter's activity reporting and financial statements and has completed the tax filing for the fiscal year.*

*On the 990-N Acceptance screen, enter the submission ID in the designated field and email a copy to [bap@bapeo.org](mailto:bap@bapeo.org).*

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# Faculty Advisor Sign Off

**Step 2C -- Upload Over \$50K Spreadsheet\***  
Does your chapter have an average gross receipts of \$50,000 or more, for the last three years?  
☐ No ☒ Yes  

1. If your chapter had gross receipts of over \$50K for the last three years, please download [Over \\$50K Spreadsheet](#)

2. Attach Spreadsheet

3. Email copy of Over \$50K Spreadsheet to the Executive Office

Not Complete

**Step 3 -- Complete Financial Statement Sign-Off\***  
Does your chapter have gross receipts for this year...  
☐ Less than \$100,000?  
☐ \$100,000 or More?  

Not Complete

**Step 4 -- Submit**

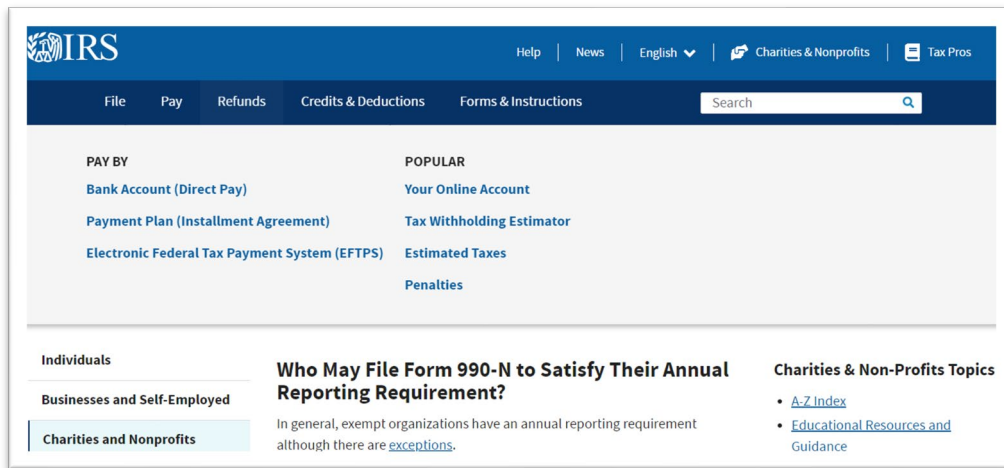
*If your chapter has revenue exceeding \$50,000 over a three-year period, you are required to complete the “Over \$50K” spreadsheet.*

*A link to download the spreadsheet will appear once you select “Yes” under Step 2C.*

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# How to Complete the 990n e-Postcard



After April 30 – Go to the IRS login page [insert link].

1. If you haven't already registered, create a new user account.
2. Enter your **chapter's EIN number** (available on the Chapter Profile screen – FA login only).
3. The system will default the organization name to "Beta Alpha Psi National Council" – this is correct.
4. Enter your school's address and list your Faculty Advisor as the principal officer.
5. Answer the four required questions, confirming that your chapter's revenue was under \$50,000 for the tax fiscal year.
6. After submitting, refresh the page to access the Acceptance screen, which will display your submission ID.
7. You'll need this submission ID for Step 2B on the FA Sign-Off screen.
8. Please also email a copy of the Acceptance to the EO at [bap@bapeo.org](mailto:bap@bapeo.org).

# Complete a One-Time Registration with the IRS



# Complete a One-time Registration with the IRS



## Sign In or Create a New Account

IRS now offers sign-in options with Login.gov and ID.me. Both offer access to IRS online services with a secure account that protects your privacy.

Login.gov is an account created, maintained, and secured by the U.S. government. ID.me is an account created, maintained, and secured by a technology provider. Currently, Login.gov can only be used to access IRS Form 990-N (e-Postcard) and Qualified Intermediary Application and Account Management System (QAAMS).

If you don't have a Login.gov or ID.me account, you must create a new account.

### Sign in with an existing account

Sign in with  LOGIN.GOV

Sign in with **ID.me**

OR

### Create a new account

Create an account  LOGIN.GOV

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# Did You Know?

**Paper Certificates Discontinued Effective June 1** Faculty advisors may request a PDF version.

For spring semester, paper certificates may be provided upon request.

**Digital Badges** Inducted members will receive an email from [admin@credly.com](mailto:admin@credly.com) with instructions on claiming their digital badge. Once claimed, it can be added to their [LinkedIn](#) profile. [Click [here](#) for instructions on claiming your digital badge.]



# Program for Chapter Activities (PCA)



# Quiz on Program for Chapter Activities (PCA)

*Score 80% or better for the ROA*



# Alumni & Member Network

*BAP members may join*



# Questions?

*Contact the Executive Office*

- *Email – [bap@bapeo.org](mailto:bap@bapeo.org)*
- *Phone – 919.402.4044*

