



# Reporting Intranet

## End of Year Reporting Guide

# Reporting Intranet Resources



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# Reporting Intranet

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# Clarification of Roles

## Faculty Advisors vs. Officers



### Faculty Advisors

- Create and manage officer login accounts
- Review all chapter reports:
  - Beginning of Year - October 15 for U.S., June 15 for Oceania
  - Mid-Year Report – December 15<sup>th</sup> U.S., award-seeking chapters, August 15 for Oceania
  - Student Participation Report
  - Complete 990n e-Postcard filing by June 1<sup>st</sup>
  - Sign Off on End of Year Report by June 1 for U.S., December 15 for Oceania.
- Meet with Chapter Reporter throughout each semester to review chapter reporting.
- Meet with Chapter Treasurer to ensure that membership dues and chapter maintenance fee have been 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 chapters)
  - End of Year Report
- Work with faculty advisor to process payments for membership dues and ensure that chapter maintenance fee has been paid on time.

# End-of-Year Report

Menu Bar Item: Reporting and Membership > End of Year Report



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

Make sure to complete the following tasks:

- Update Chapter Profile
- Upload Chapter Financials
- Confirm activities are complete
- Faculty Advisor must complete the FA sign-off
- Complete Tax Information
- < \$50,000 – IRS e-Postcard
- >\$50,000 – Over \$50K spreadsheet

Due June 1 for U.S. – No Exceptions. Oceania due Dec 15. Late submittals will be subject to a \$250 fine.

# Update Chapter Profile Screen



Menu Bar Item: Reporting and Membership > View/Update Chapter Profile

A screenshot of a web application's navigation menu. The menu bar is dark grey with white text. The items are: Home, Reporting and Membership (with a dropdown arrow), Chapter File Submissions, PCA, Forms, Tutorials, Contact, and BAP Home. The 'Reporting and Membership' dropdown is open, showing a list of options. The option 'View/Update Chapter Profile' is highlighted in red. Other options include 'Create/Manage Officer Logins', 'Membership Roster', 'Generate Dues Invoice', 'YTD Statement', 'Beginning of Year Report', 'Report Activity', 'End of Year Report', and 'Scorecard'. The background of the page is white with some text and a 'Match Tutorial' link visible.

Once logged in, the officer will access the Update Chapter Profile screen under Reporting and Membership and View/Update Chapter Profile.

# Update Chapter Profile Screen

Menu Bar Item: Reporting and Membership > View/Update Chapter Profile

A screenshot of the "Chapter Profile" update screen. The page has a dark header with the Beta Alpha Psi logo on the left and "Welcome, M" on the right. Below the header is a navigation menu with items: Home, Reporting and Membership (selected), Chapter File Submissions, PCA, Forms, Tutorials, Contact, and BAP Home. The main content area is titled "Chapter Profile" and includes a note: "\* indicates a required field". There are four tabs: "Admin Only Fields", "School", "Chapter Officers", and "Chapter Contacts". The "School" tab is active. A "Save Chapter" button is circled in red. The form fields include: Chapter Website (www.bap.org), School Year (Semester), Achievement Type (Award-Seeking), Grad Students in Accounting? (Yes), School (\* Beta Alpha Psi University), Country (\* Select Country), Address 1 (\* 220 Leigh Farm Road), Address 2, City (\* Durham), and State/Province/Region. A red arrow points from the "Admin Only Fields" tab to the "School" tab.

The Chapter Profile screen is displayed in a tabbed format.

The tab titled "School" is where FAs and officers can update their school information such as a link to your chapter's website, achievement level and school mailing address.

The red stars are required fields.

The tab labeled "Admin Only Fields" is for the Executive Office use only.

# Update Chapter Profile Screen

Menu Bar Item: Reporting and Membership > View/Update Chapter Profile

A screenshot of a web application interface for updating a chapter profile. The top navigation bar includes a logo on the left and a "Welcome" message on the right. Below the navigation bar is a menu with items: Home, Reporting and Membership (with a dropdown arrow), Chapter File Submissions, PCA, Forms, Tutorials, Contact, and BAP Home. The main content area is titled "Chapter Profile" and includes a note: "\* indicates a required field". There are four tabs: "Admin Only Fields", "School", "Chapter Officers" (which is selected), and "Chapter Contacts". A "Save Chapter" button is circled in red. The "Chapter Officers" tab contains two sections: "President" and "Reporter". Each section has fields for Name (with a dropdown menu), E-mail, and Phone. A note below each section states: "Note: Phone not required, but must be valid for your Chapter's country if supplied." The "President" section shows "Chambers, Cindy" in the Name dropdown, "cchambers@bap.org" in the E-mail field, and "222-222-2222" in the Phone field. The "Reporter" section shows "Baum, Hadassah" in the Name dropdown, "hhbaum@bap.org" in the E-mail field, and "222-222-2222" in the Phone field.

The tab titled “Chapter Officers” is where the officer information is updated. This is separate from the officer user accounts.

Select the name of the officer from the drop down list and the name, email and phone information will populate the fields for the appropriate role.

Note: the names on the drop down list are pulled from the “Submit for Initiation” and “Active Members” folders. The red stars are required fields. An officer must be a member or Submitted for Initiation.



# View/Update Membership



Menu Bar Item: Reporting and Membership > Membership Roster > 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
<a href="#">Jackman, Hugh</a>	201325010011	<a href="mailto:hjackman1@yahoo.com">hjackman1@yahoo.com</a>	6/10/2013	Undergraduate
<a href="#">Johnson, Sarah</a>	201325010003	<a href="mailto:sjohnson@bap.org">sjohnson@bap.org</a>	4/1/2013	Undergraduate
<a href="#">Smith, Elizabeth</a>	201325010001	<a href="mailto:esmith@bap.org">esmith@bap.org</a>	4/1/2013	Undergraduate
<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 will add new candidates, submit them for initiation or move to the Inactive folder, and move Active members to On Leave or Alumni status.

There are two groupings on the Membership Roster:

**Candidates** section that includes folders for: Active Candidates, Submit for Initiation and Inactive Candidates.

**Members** section that includes folders for: Active Members, On Leave, and Alumni.

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# View/Update Membership



Menu Bar Item: Reporting and Membership > Membership Roster > 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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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.*

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# Add a New Candidate

Menu Bar Item: Reporting and Membership > Membership Roster > View/Update Membership



**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 that have a red star “\*” are required fields.

The Candidate start date is the date the student started participating (not the date that they are being entered into the system).

**Important:** Email address must be a valid email address. The system will not allow duplicate addresses.

Enter all the required information and select “Save”.

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# Submit a Candidate for Induction



Menu Bar Item: Reporting and Membership > Membership Roster > View/Update Membership

**Membership Roster**

Submit for Initiation | Make Inactive | Delete

**Candidates**  
Active (4)  
Submitted for Initiation (1)  
Inactive (2)

**Members**  
Active (5)  
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, Nick</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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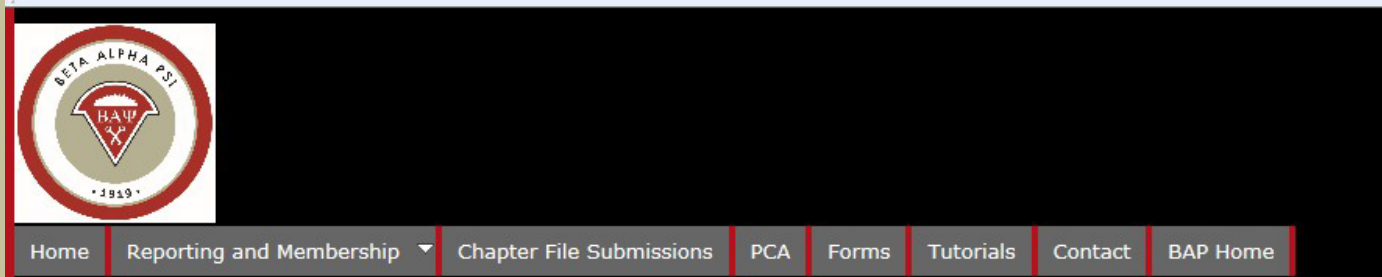
To submit a candidate for initiation, in the “Active Candidates” folder, check off the box next to the appropriate name and select “Submit for Initiation”.

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

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# Submit a Candidate for Induction

Menu Bar Item: Reporting and Membership > Membership Roster  
> View/Update Membership



## 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"/>	<a href="#">Baum, Hadassah</a>	201325010004	<a href="mailto:hhbaum@bap.org">hhbaum@bap.org</a>	5/2/2013	Faculty
<input type="checkbox"/>	<a href="#">Johnson, Sarah</a>	201325010003	<a href="mailto:sjohnson@bap.org">sjohnson@bap.org</a>	4/22/2013	Undergraduate
<input type="checkbox"/>	<a href="#">Smith, Elizabeth</a>	201325010001	<a href="mailto:esmith@bap.org">esmith@bap.org</a>	4/22/2013	Undergraduate

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

Once the fees for candidates that have been paid, the Executive Office will send a pdf file of membership certificates to the advisor upon request and move the records to the “Active Members” folder.

# Online Activity Reporting System



Menu Bar Item: Reporting and Membership > Report Activity

The screenshot displays the website's interface. At the top right, it says "Welcome, Margie Fiorentino | [Reset](#)". Below that, it identifies "Beta Alpha Psi University" and "Beta Alpha Psi University (#2501)". The main navigation bar includes "Home", "Reporting and Membership" (which is expanded), "Chapter File Submissions", "PCA", "Forms", "Tutorials", "Contact", and "BAP Home". The expanded "Reporting and Membership" menu lists several options: "Create/Manage Officer Logins", "View/Update Chapter Profile", "Membership Roster", "Generate Dues Invoice", "YTD Statement", "Beginning of Year Report", "Report Activity" (highlighted in red), "End of Year Report", and "Scorecard". A red circle is drawn around the "Report Activity" option. In the background, there are partial announcements: "Annou", "Thank", "Deadli", "Date D", and "Copyrig".

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

# Online Activity Reporting Entering an Activity

Menu Bar Item: Reporting and Membership > Report 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

     Filter by Year:

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

Menu Bar Item: Reporting and Membership > Report 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:

Name of firm/company/org:

Essential Skill?:

Activity Name:

Impact Activity?:

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

Menu Bar Item: Reporting and Membership > Report Activity



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: Firm Presentation or Visit ▾

Name of firm/company/org: Test

Essential Skill? No ▾

Activity Name: Nonprofit Accounting

Impact Activity?: No ▾

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

Menu Bar Item: Reporting and Membership > > Professional and Service Activities – Impact Points



- 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

Program for Chapter Activities FY25



## ▼ 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

Complete Wufoo form for each activity to earn Impact Activity Point

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# Online Activity Reporting

Menu Bar Item: Reporting and Membership > Report Activity



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

**Add New Service Activity**

Save Delete Close

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

Service Activity Type:

Activity Name:

Impact Activity?:

Impact Category:

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

The following activity was submitted on 11/26/2024 at 11:26 AM. Click the link to edit member

pa Sh

**Submit Impact Activity Form** [X]

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

# Online Activity Reporting



Select  
Impact  
Category

Menu Bar Item: Reporting and Membership> Report Activity

Complete  
form with  
metrics

## 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 \*

Region \*

Year

Activity Name \*

Date of Activity \*

MM DD YYYY

Please indicate which Impact Activity your chapter completed. \*

# Online Activity Reporting

Menu Bar Item: Reporting and Membership > Report Activity



Add description of activity and support.

Include date, summary and audience.

## 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

# Online Activity Reporting

Menu Bar Item: Reporting and Membership > Report Activity



## 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>	<a href="#">Reject</a>	Campus Food Bank	11/26/2024	2024 - 2025	Yes	Yes	33%	2

Search:



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.

# Online Activity Reporting

Menu Bar Item: Reporting and Membership > Report Activity  
**Essential Skill – required for award seeking chapters**

Choose 1 from 11 listed for a Professional session



## 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 ▾



# Online Activity Reporting Scorecard Screen



Menu Bar Item: Reporting and Membership > Report Activity or 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	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	
<b>Total Points</b>	<b>1</b>	<b>14</b>	
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
<b>Overall Chapter Status</b>	Under Review	Yes	Yes

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

# Non-BAP Activities



Menu Bar Item: Reporting and Membership> Report Activity

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

Activity Type:

Date of Activity:

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

Activity Name:

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

# Online Activity Reporting Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership > Report Activity



## Report Chapter Activities

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

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# Online Activity Reporting More Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership > Report Activity



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

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# Online Activity Reporting More Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership > Report Activity



**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

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# Online Activity Reporting Induction Screen



Menu Bar Item: Reporting and Membership > Report Activity



[Admin Impersonating:](#) Fab Four University  
Fab Four (#444)

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

Alpha

## Report Chapter Activities

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

Filter by Year: 2024 - 2025

First Induction:

Second Induction:

Save

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

# Student Participation Verification Report

Menu Bar Item: Reporting and Membership > Report Activity



## 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
(All) ...	(All) ...	(All) ...
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	Fiorentino, Margaret	No

Download into Excel to verify attendance

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.

# Scorecard Screen



Menu Bar Item: Reporting and Membership > Report Activity or 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	
<b>Total Points</b>	<b>1</b>	<b>14</b>	
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

Menu Bar Item: Reporting and Membership > End of Year Report



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

Make sure to complete the following tasks:

- Update Chapter Profile
- Upload Chapter Financials
- Confirm activities are complete
- Faculty Advisor must complete the FA sign-off
- Complete Tax Information
- < \$50,000 – IRS e-Postcard
- >\$50,000 – Over \$50K spreadsheet

Due June 1 for U.S. – No Exceptions. Oceania due Dec 15. Late submittals will be subject to a \$250 fine.

# Upload Chapter Financials

Menu Bar Item: Reporting and Membership> End of Year Report



## 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)

# Upload Chapter Financials

Menu Bar Item: Reporting and Membership > End of Year Report



Beta Alpha Psi	
Statement of Financial Position as of April 30, 2024	
School Name:	
Chapter Number:	
Chapter Name:	
<b>Assets</b> <span style="float: right;"><b>4/30/2024</b></span>	
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	

Navigation tabs: **Statement of Financial Position** | Statement of Activities | +

The sample financials will open as an Excel file. You must resave, enter your chapter information and upload to the EOY screen.

Note the two tabs on the Excel workbook.

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# Upload Chapter Financials

Menu Bar Item: Reporting and Membership > End of Year Report



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

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

# End-of-Year Reports – Faculty Advisor



Menu Bar Item: Reporting and Membership > End of Year Report

## 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.

Sign-off  Not Signed-off

## 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.

Sign-off  Not Signed-off

### 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 reviewed and approved their chapter's activity reporting and financial statements, as well as completed the tax filing for the fiscal year. From the 990n Acceptance screen, enter the submission ID here and email to [bap@bapeo.org](mailto:bap@bapeo.org).

# End-of-Year Reports – Faculty Advisor



Menu Bar Item: Reporting and Membership > End of Year Report

## 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

If your chapter has revenue of revenue greater than \$50K over a three-year period, you will be required to complete the “Over \$50K” spreadsheet. A link to the spreadsheet will be visible once you check “Yes” under Step 2C.

## 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

# End-of-Year Reports – Faculty Advisor How to Complete the 990n e-Postcard



Menu Bar Item: Reporting and Membership> End of Year Report

After April 30<sup>th</sup> - Go to the IRS login page [here](#)

1. If you have not registered, create a new user account.
2. Enter your chapter's EIN number that can be found on the chapter profile screen (FA login only)
3. The number will default to "Beta Alpha Psi National Council" – this is ok.
4. Enter your school address and your faculty advisor name as the principal officer.
5. Answer the four questions where you are confirming that your chapter's revenue was less than \$50K for tax fiscal year.
6. Once you submit, you will need to refresh your screen to show the Acceptance screen with a submission ID that you will need for the FA sign off screen (step 2b). Please forward the Acceptance to the EO at [bap@bapeo.org](mailto:bap@bapeo.org).

A screenshot of the IRS website. The top navigation bar is blue with the IRS logo on the left and links for Help, News, English, Charities & Nonprofits, and Tax Pros on the right. Below this is a dark blue bar with menu items: File, Pay, Refunds, Credits & Deductions, Forms & Instructions, and a search box. The main content area is white and divided into two columns. The left column is titled "PAY BY" and lists "Bank Account (Direct Pay)", "Payment Plan (Installment Agreement)", and "Electronic Federal Tax Payment System (EFTPS)". The right column is titled "POPULAR" and lists "Your Online Account", "Tax Withholding Estimator", "Estimated Taxes", and "Penalties". At the bottom, there are three sections: "Individuals", "Businesses and Self-Employed", and "Charities and Nonprofits". The "Charities and Nonprofits" section is highlighted. To the right of this section is a heading "Who May File Form 990-N to Satisfy Their Annual Reporting Requirement?" followed by a paragraph: "In general, exempt organizations have an annual reporting requirement although there are [exceptions](#)." To the right of this is another section titled "Charities & Non-Profits Topics" with two bullet points: "• [A-Z Index](#)" and "• [Educational Resources and Guidance](#)".

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# Complete a one time registration with the IRS



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# 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?**

**EO will order paper certificates only upon request starting in January 2025.**

**After spring semester, a pdf file will be sent to the faculty advisor upon request.**



**How do I download a digital badge?**

**Inducted members, look for an email from [admin@credly.com](mailto:admin@credly.com) to claim it. Then, add it to your LinkedIn profile.**

**Instructions here for claiming your digital badge.**



# 2024-2025 Program for Chapter Activities



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# Quiz on 2024-2025 PCA



Score 80% or better for the ROA



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# Alumni & Member Network

BAP members may join



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# Questions?



Contact the Executive Office:

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



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