

# Reporting Intranet Resources – Reporting Intranet Guide



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# Reporting Intranet

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# Clarification of Roles

## Faculty Advisors vs. Officers



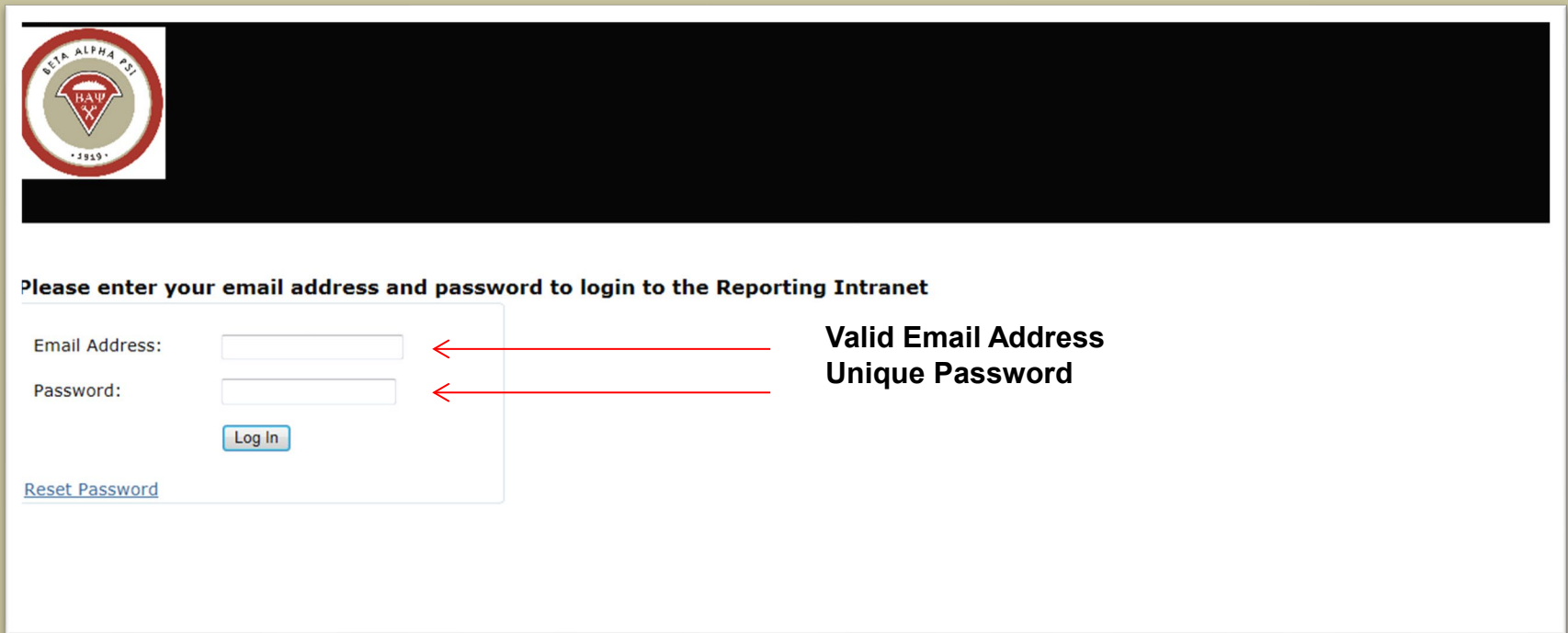
### Faculty Advisors

- 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.

# Reporting Intranet Login

A screenshot of the Reporting Intranet login page. At the top left is the Beta Alpha Psi logo. Below it is a black rectangular area. The main content area contains the text "Please enter your email address and password to login to the Reporting Intranet". There are two input fields: "Email Address:" and "Password:". Below the "Password:" field is a "Log In" button. To the left of the "Log In" button is a link for "Reset Password". To the right of the input fields, there are two red arrows pointing to the "Email Address:" and "Password:" fields, with the text "Valid Email Address" and "Unique Password" respectively.

Each Advisor and Officer will be required to login through a valid email address and a unique password. We recommend Google Chrome as your browser.

# Login System

## Activation Screen



### **BAP Reporting Intranet, New User Account Activation**

Enter and confirm your password. Then click the 'Activate' button to enable your account for login.

Enter Password:  Confirm Password:

Note: Your password must be at least 8 characters in length.

Activate

On the Activation Screen, enter a unique password, confirm and activate.

# Terms of Use Agreement

One time acceptance for all users



## License Agreement

### Terms of Agreement for Beta Alpha Psi Reporting Intranet

As an officer or faculty advisor, I agree to uphold the terms of the Beta Alpha Psi use of Reporting Intranet that includes Reporting Intranet Guidelines:

- I confirm that I have reviewed the training materials for the Reporting Intranet.
- I understand that once a record has been saved, it will be considered a receivable to Beta Alpha Psi and that our chapter is responsible for payment.
- All activities reported are truthful and complete.

Yes

No

Upon initial login, each user reads and confirms acceptance of the Terms of Use Agreement.

# Navigating the Reporting Intranet



On the landing page, the menu bar is as follows:

1. **Home** – Landing page
2. **Reporting and Membership** – This is where all screens for chapter reporting can be found.
3. **Chapter File Submissions** – This screen will display all the files that your chapter has uploaded to the RI for that fiscal year.
4. **PCA** - A link to the Program for Chapter Activities.
5. **Tutorials** - A link to interactive tutorials.
6. **Contact** - Information for the Executive Office.
7. **BAP Home** – A link back to the BAP Website.

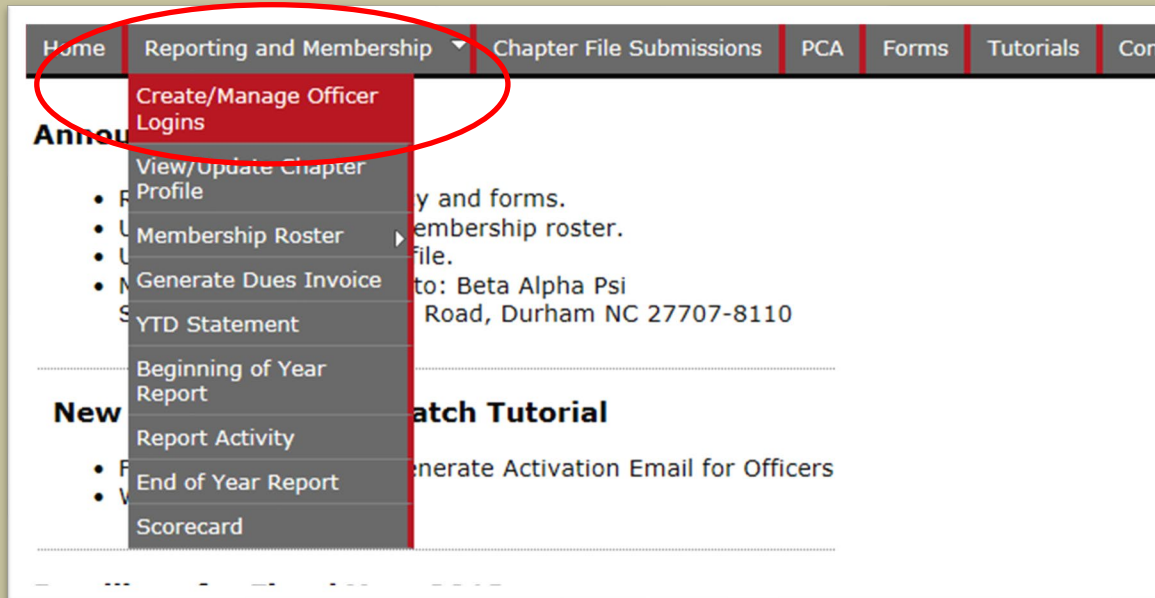
# Login System

## Activation Process - Officers



Once the Faculty Advisor has completed their activation process, and have logged in to the Reporting Intranet.

1. The FA will enter the officers under Reporting and Membership > Create/Manage Officer Logins





# FA – Create Officer Logins



Menu Bar Item: Reporting and Membership > Create/Manage Officer Logins

## Activation Process for Officers By Faculty Advisors

2. Under the “Officers” tab,  
the FA will select the  
officer name and

3. Then, select “Create  
User”.

**Create New RI Users**

Advisors Officers Admins and Chapter Advocates

Note: Officer/Users Must Be Matched to Active Chapter Members

Select Chapter: 444 - Fab Four - Fab i

Search Members by Last Name:  Search  
Leave blank for all active members.

Choose Matching Member: Affleck, Ben  
Clooney, George  
Fiorentino, Margaret  
Harrison, George  
Jolie, Angelina

Note: Only Members with a valid e-mail address are listed above. If the member you want is missing, you must first record a valid e-mail address by editing the membership roster for the chapter.

Email Address: aj123@yahoo.com

First Name: Angelina

Last Name: Jolie

Select Officer/User Type: Reporter

Cancel Create User

# Create Officer Logins



Menu Bar Item: Reporting and Membership > Create/Manage Officer Logins

## Activation Process for Officers By Faculty Advisors.

4. The screen will confirm that an activation email was sent to that officer.

Advisors Officers [Redacted]

Note: Officer/Users Must Be Matched to Active Chapter Members

Select Chapter: 444 - Fab Four - Fab f

Search Members by Last Name: [Text Box] Search  
Leave blank for all active members.

Choose Matching Member:  
Affleck, Ben  
Clooney, George  
Fiorentino, Margaret  
Harrison, George  
Jolie, Angelina

Note: Only Members with a valid e-mail address are listed above. If the member you want is missing, you must first record a valid e-mail address by editing the membership roster for the chapter.

Email Address: aj123@yahoo.com

First Name: Angelina

Last Name: Jolie

Select Officer/User Type: President

The new user account has been successfully created. An activation e-mail has been sent to the address specified above.

Create Another User

# Creating RI Accounts

Menu Bar Item: Reporting and Membership > Create/Manage Officer Logins



Once the Faculty Advisors have created the Officer accounts, a log is established and can be found at the bottom of the screen.

This is where the advisors can deactivate or reactivate officers.

It is the advisor's responsibility to keep this log current.

This should be updated each semester/quarter.

Note: Only Members with a valid e-mail address are listed above. If the member you want is missing, you must first record a valid e-mail address by editing the membership roster for the chapter.

Email Address:

First Name:

Last Name:

Select Officer/User Type:

User Full Name	User Login Name/Registered E-mail	User Role	Date Invitation Sent	Account Activation Date	Status	Account Action	Resend Activation Email
Chambers, Cindy	<a href="#">Edit</a> cchambers@bap.org	President	5/21/2013		Not Activated	<a href="#">Disable</a>	<a href="#">Resend</a>
Doeson, John	<a href="#">Edit</a> jdoeson@bap.org	Treasurer	5/21/2013		Not Activated	<a href="#">Disable</a>	<a href="#">Resend</a>

# Password Reset

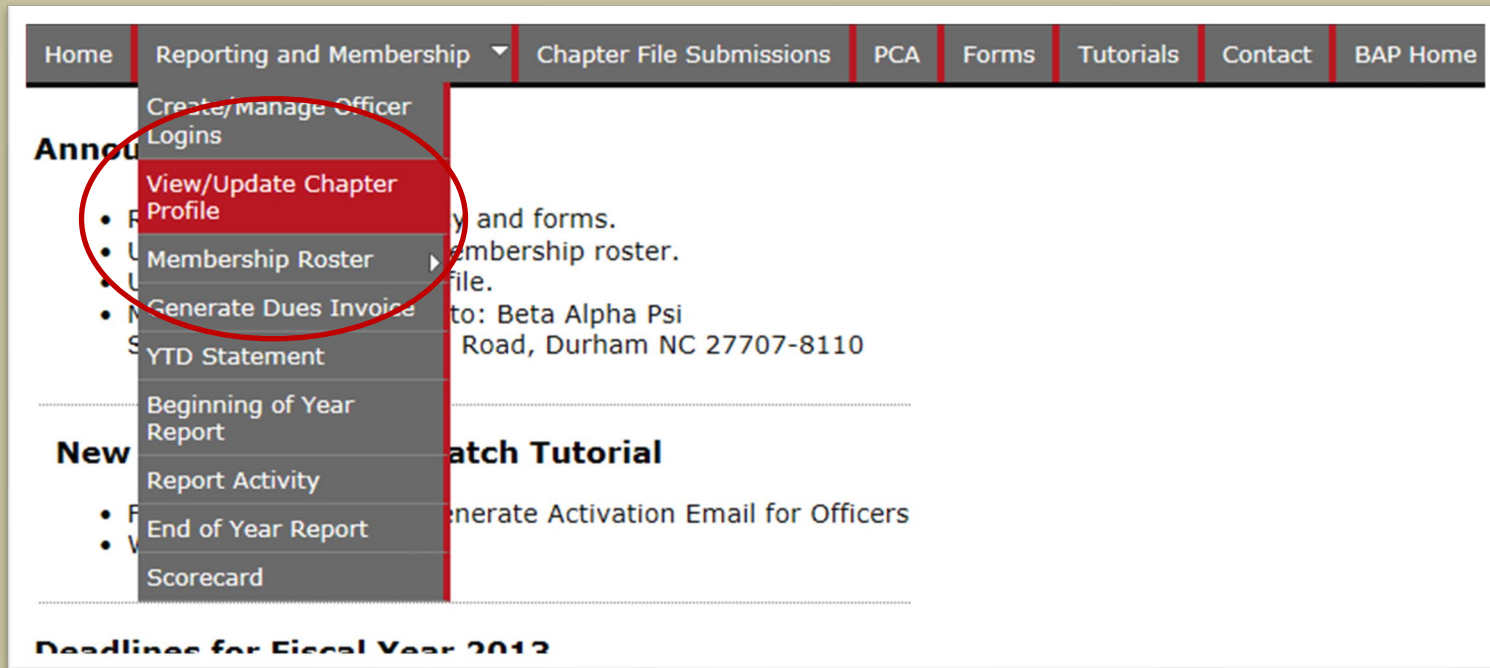
A screenshot of a web page for the Reporting Intranet. At the top left is the Beta Alpha Psi logo. Below it is a black horizontal bar. The main content area has the heading "Please enter your email address and password to login to the Reporting Intranet". There are two input fields: "Email Address:" and "Password:". Below the password field is a blue "Log In" button. A red oval highlights a blue "Reset Password" link located below the "Log In" button.

To reset a password, go to the login page and select the link titled “Reset Password”, enter your email address and an automated email will be sent to you that will include a link to reset your password.

# Update Chapter Profile Screen



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



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 bar with tabs: 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.

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# Update Chapter Profile Screen

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



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

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.

Save Chapter

The tab titled “Chapter Officers” is where the officer information is updated. This is a 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.

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# Update Chapter Profile Screen



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

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

[Add Contact](#) [Save Chapter](#)

Showing 1 to 4 of 4 entries

	First Name	Last Name	Type	Phone	Ext.	Fax	Email	Dept./College
<a href="#">Edit/Delete</a>	Margie	Fiorentino	Advisor	919-402-4001			mfiorentino@aicpa.org	
<a href="#">Edit/Delete</a>	Salvatore	Bling	Co-Advisor	444-444-4444			sbling13@yahoo.com	
<a href="#">Edit/Delete</a>	John	Dean	Dean	919-402-4044			jdean@bap.org	BAP School of Business
<a href="#">Edit/Delete</a>	Jane	Chair	Department Chair	919-402-4000			jchair@bap.org	BAP Dept. of Accountancy

Search:

Comments:

The tab titled “Chapter Contacts” is where the Faculty Advisor, Co-Advisor, Department Chair and Business School Dean information is updated.  
**Note: Dean and Department Chair information is required.**



# 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:

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 Initiation



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
<a href="#">Jackman, Huck</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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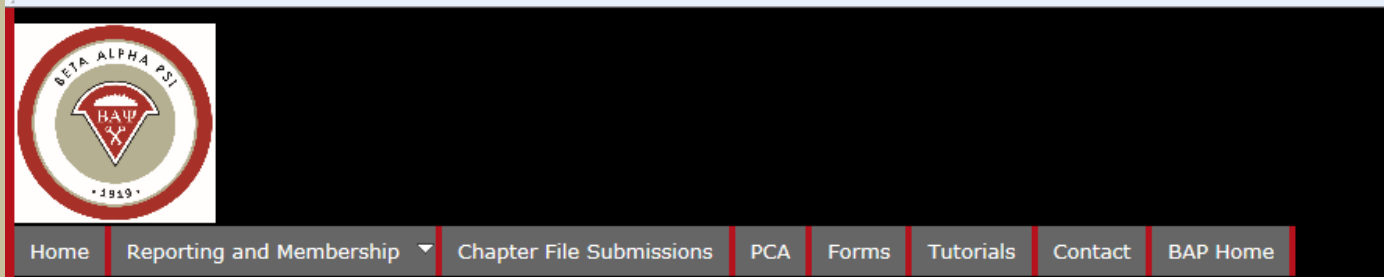
To submit a candidate for initiation, in the “Active Candidates” folder, check off the box next to the appropriate name and select “Submit for Initiation”.

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 Initiation

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 print the membership certificates and move the records to the “Active Members” folder.

Please allow two weeks to receive certificates.

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# Beginning of Year Report

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



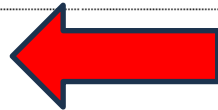
## Beginning of Year Report (2023 - 2024)

Chapter Number 444, Fab Four University, Fab Four

### Report Items

### Our Chapter's Status

Update Chapter Profile



Not Submitted

Enter Plan of Activities

Not Submitted

Attach Chapter Bylaws

No Changes Needed to Bylaws

Not Submitted

Your annual maintenance fee \$325.00

Payment Options

Annual Chapter Maintenance Fee [View History](#)

Not Received

**Overall Report Status**

**Not Credited**

Beginning of Year Reports are due on October 15 for U.S. chapters.

Oceania Chapters – due June 15

For the “Update Chapter Profile” screen to be credited for the BOY report, select the button. You must either update the profile screen from here or choose “No Changes”.

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# Enter Plan of Activities

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



## Professional Activity Plan

Activity Name	Month
KPMG Prof. Speaker	September
Audit Careers	October
Tax Careers	November
Corporate Finance	December
PwC Prof. Speaker	January
Passing the CPA Exam	March

## Service Activity Plan

Activity Name	Month
Food Bank	October

Save Cancel

## Reaching Out Activities (Check at least three)

Activity	Sponsor	Planned
Annual Community Service Day Attendance	Executive Office	<input checked="" type="checkbox"/>
Annual Meeting Attendance	Executive Office	<input checked="" type="checkbox"/>
Annual Meeting Presentation	Executive Office	<input checked="" type="checkbox"/>
Nomination for Project Run With It	Executive Office	<input type="checkbox"/>
Nomination for Business Information Professional of the Year	Executive Office	<input type="checkbox"/>
Submitted Nomination for Outstanding Dean	Executive Office	<input type="checkbox"/>
Regional Meeting Attendance	Executive Office	<input type="checkbox"/>

Enter your chapter 's plan for 6 Professional Activities and 1 Service Activity.

3 Reaching Out Activities (ROAs).

Select "Save".

Report Status

Credited

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# Local Chapter Bylaws



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

## Beginning of Year Report (2023 - 2024)

Chapter Number 444, Fab Four University, Fab Four

Report Items	Our Chapter's Status
<input type="checkbox"/> Update Chapter Profile	<input type="checkbox"/> Not Submitted
<input type="checkbox"/> Enter Plan of Activities	<input type="checkbox"/> Not Submitted
<input type="checkbox"/> Attach Chapter Bylaws <input type="checkbox"/> No Changes Needed to Bylaws	<input type="checkbox"/> Not Submitted
Your annual maintenance fee \$325.00	<input type="button" value="Payment Options"/>
Annual Chapter Maintenance Fee <a href="#">View History</a>	<input type="checkbox"/> Not Received
<b>Overall Report Status</b>	<b>Not Credited</b>

Upload amended bylaws to the BOY screen. If there were no changes, check off the box, "No Changes Needed to Bylaws".

Contact the Executive Office if you need a copy of your chapter's bylaws.

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# Chapter Maintenance Fee

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



To download a PDF of the Chapter Maintenance fee invoice, select the tab titled "Check".

A screenshot of a web application's "Payment Options" dialog box. The dialog has a title bar "Payment Options" and two tabs: "Card" and "Check". The "Check" tab is selected. The content of the "Check" tab includes the heading "Check Payment", a paragraph of instructions, the address "Beta Alpha Psi, 220 Leigh Farm Road, Durham, NC 27707", and a link "Click here." circled in red. At the bottom right of the dialog are "Close" and "Print" buttons.

**Payment Options**

Card Check

**Check Payment**

Please remit immediately. Make a check payable to **Beta Alpha Psi**, and include your chapter number on the check. Send your payment with the copy of this invoice to:

Beta Alpha Psi  
220 Leigh Farm Road  
Durham, NC 27707

To download Chapter Maintenance Fee invoice for Current year [Click here.](#)

Close Print

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# Online Activity Reporting System



All reporting is completed online.

- Professional and Service Activities
- Reaching Out Activities (ROAs)
- Initiations
- Non-BAP Activities

# Online Activity Reporting System



Menu Bar Item: Reporting and Membership > Report Activity

The screenshot shows the Beta Alpha Psi website interface. The top navigation bar includes 'Home', 'Reporting and Membership', 'Chapter File Submissions', 'PCA', 'Tutorials', 'Contact', and 'BAP Home'. The 'Reporting and Membership' dropdown menu is open, with 'Report Activity' highlighted by a red circle. Below the menu, there is a 'Welcome' section and a 'Deadlines' table for 2016.

Date	Deadline	
10/15/2015	Beginning of Year report	Make sure to complete the following tasks: Update Chapter Profile Screen Enter Plan of Activities Upload Chapter Bylaws (if needed) Pay \$300 Chapter Maintenance Fee (now you can pay online!)
12/15/2015	Mid-Year Chapter Activities Reporting	Chapter activities occurring between 6/1/15 and 12/15/15 • Professional & Service Activities – Mission-Based Initiation • Professional & Service Activities – Attach Local Chapter Workbook for Hours (Award-Seeking C

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

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# 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”.

The screenshot shows a web application interface for reporting activities. At the top left is a small version of the Beta Alpha Psi logo. Below it is a navigation menu with items: Home, Reporting and Membership (selected), Chapter File Submissions, PCA, Tutorials, Contact, and BAP Home. The main heading is "Report Chapter Activities". Below this is a series of tabs: Professional (selected), Service, Reaching Out, Initiation, Hours Summary, Scorecard, and Student Participation Verification Report. Under the "Professional" tab, there are four buttons: "Add", "Add Non BAP Activity", "Add Essential Skills Activity", and "Add Impact Activity". To the right of these buttons is a "Filter by Year:" dropdown menu currently set to "2021 - 2022". Below the filters, it says "Showing 1 to 6 of 6 entries". A table displays the activity data with columns for Status, Name, Date, Year, At Least 50 Minutes Long?, In Name of BAP?, % Participation, and Points. The table contains six rows of data. At the bottom left of the table area is a "Search:" input field.

	Status	Name	Date	Year	At Least 50 Minutes Long?	In Name of BAP?	% Participation	Points
<a href="#">Edit/Delete</a>	N/A	ES-Business Writing Skills	5/1/2022	2021 - 2022	No	Yes	23%	0
<a href="#">Edit/Delete</a>	Reject	Test IA Prof	5/1/2022	2021 - 2022	Yes	Yes	23%	2
<a href="#">Edit/Delete</a>	N/A	Test PA	5/1/2022	2021 - 2022	Yes	Yes	20%	1
<a href="#">Edit/Delete</a>	N/A	ES-Negotiation Skills	5/2/2022	2021 - 2022	Yes	Yes	20%	1
<a href="#">Edit/Delete</a>	Reject	Test IA Prof 1	5/2/2022	2021 - 2022	Yes	Yes	20%	2
<a href="#">Edit/Delete</a>	N/A	Test PA 1	5/2/2022	2021 - 2022	Yes	Yes	20%	1

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# Online Activity Reporting Entering an Activity

Menu Bar Item: Reporting and Membership > Report Activity



Save Cancel

Activity Name:

Date of Activity:

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

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

Enter:  
Name of Activity  
Date of Activity  
Confirm that the activity was at least 50 minutes long.  
Confirm that your chapter sponsored the activity.

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.

Save Delete Cancel

Activity Name: Firm Visit

Date of Activity: 1/3/2022 [Change Date](#)

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

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

What to do if there are missing or extra members in this list.  
Showing 1 to 13 of 13 entries

Member Number	Name	Check if attended
201204440002	Best, Pete	<input checked="" type="checkbox"/>
202204440007	Bysum, Sam	<input checked="" type="checkbox"/>
202204440008	Carruthers, Harrison	<input type="checkbox"/>
201004440002	Clooney, George	<input type="checkbox"/>
202204440005	Douglas, Beth	<input type="checkbox"/>
202204440003	Drummond, Will	<input checked="" type="checkbox"/>
201004440004	Florentino, Margaret	<input checked="" type="checkbox"/>
202204440010	Higgins, Mark	<input type="checkbox"/>
202204440006	Patterson, Andrew	<input checked="" type="checkbox"/>

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# 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 FY24



## ▼ 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 Impact Activity

Save Delete Close

Activity Name:

Date of Activity:

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

#### Submit Impact Activity Form

Please make sure to submit the form in the link mentioned to complete the add impact activity process [Click Here for Impact Activity Form.](#)

Ok

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# Online Activity Reporting


Menu Bar Item: Reporting and Membership > Report Activity



Select  
Impact  
Category

Complete  
form with  
metrics

**Activity Name \***

**Date of Activity \***  
 /  /    
MM DD YYYY

**Please indicate which Impact Activity your chapter completed. \***

**Number of participating Beta Alpha Psi students \***

**Number of participants outside Beta Alpha Psi chapter \***

**Number of hours spent on activity \***

**Did your activity impact students outside your chapter? \***

- High School
- Community College
- Students at current school
- Other

**If Community College students: \***

- High School
- Undecided

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# 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

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# 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



The screenshot shows a web application interface for reporting activities. On the left, there's a sidebar with the Beta Alpha Psi logo and navigation links for 'Home' and 'Reporting and Membership'. The main content area is titled 'Add New Essential Skill Activity' and features a red 'Save' button and a grey 'Cancel' button. Below the buttons, there are several form fields: 'Activity Name:' with a dropdown menu showing 'ES-Business Writing Skill' selected and a list of 11 other skills; 'Date of Activity:'; 'Was the Activity at Least 50 Minutes Long?'; and a confirmation statement 'Confirm that the Activity was Performed in the Name of Beta Alpha Psi:'. On the far left, a 'Report Chapter Activity' panel shows a table with columns for 'Professional' and 'Service' sessions, with '2022 - 2023' selected and 'Showing 1 to 1 of 1' items. The table has 'Add', 'Add Non', 'Edit/Delete', and 'Reject' buttons, and a search bar at the bottom.

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# Online Activity Reporting

Menu Bar Item: Reporting and Membership > Report Activity



## Report Chapter Activities

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

Add Add Non BAP Activity Add Essential Skills Activity Add Impact Activity Filter by Year: 2021 - 2022

Showing 1 to 5 of 5 entries

	Status	Name	Date	Year	At Least 50 Minutes Long?	In Name of BAP?	% Participation	Points
<a href="#">Edit/Delete</a>	N/A	Test 1	9/6/2021	2021 - 2022	Yes	Yes	0%	0
<a href="#">Edit/Delete</a>	N/A	Firm Visit	1/3/2022	2021 - 2022	Yes	Yes	46%	1
<a href="#">Edit/Delete</a>	Reject	EGH High School	2/18/2022	2021 - 2022	Yes	Yes	93%	2
<a href="#">Edit/Delete</a>	N/A	ES-Managing Distractions	3/15/2022	2021 - 2022	Yes	Yes	100%	1
<a href="#">Edit/Delete</a>	Reject	CC transition to Uni	3/25/2022	2021 - 2022	Yes	Yes	100%	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.

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

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

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# Online Activity Reporting Report Activities



Menu Bar Item: Reporting and Membership > Report Activity or Scorecard

## Report Chapter Activities

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

Add
Add Non BAP Activity
Add Essential Skills Activity
Add Impact Activity

Filter by Year:

2021 - 2022

Showing 1 to 5 of 5 entries

	Status	Name	Date	Year	At Least 50 Minutes Long?	In Name of BAP?	% Participation	Points
<a href="#">Edit/Delete</a>	N/A	Test 1	9/6/2021	2021 - 2022	Yes	Yes	0%	0
<a href="#">Edit/Delete</a>	N/A	Firm Visit	1/3/2022	2021 - 2022	Yes	Yes	46%	1
<a href="#">Edit/Delete</a>	Reject	EGH High School	2/18/2022	2021 - 2022	Yes	Yes	93%	2
<a href="#">Edit/Delete</a>	N/A	ES-Managing Distractions	3/15/2022	2021 - 2022	Yes	Yes	100%	1
<a href="#">Edit/Delete</a>	Reject	CC transition to Uni	3/25/2022	2021 - 2022	Yes	Yes	100%	2

Search:

Choose Option to Add the type of activity.

# Online Activity Reporting Essential Skill



Menu Bar Item: Reporting and Membership > Report Activity or Scorecard

**Add New Essential Skill Activity**

Save Cancel

Activity Name:

ES-Business Writing Skills  
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

Date of Activity:

Minutes Long?:  Yes  No

Name of Beta Alpha Psi:  Yes

Activity Minutes :   Check All

in the Activity

Minutes box, select "check all" and "Save". Then enter "0" for the students who did not participate. Select "Save" and "Close".

Choose the Essential Skills activity your chapter completed from the drop-down menu.

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# Online Activity Reporting Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership > Report Activity



## Report Chapter Activities

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

Filter by Year: 2023 - 2024 ▾

Showing 1 to 40 of 40 entries

Reaching Out Activities	Sponsor	Status	Upload Required?	View Attachment	Delete Attachment
2023 Annual Community Impact Day Attendance or Participation in Back to School Supplies drive	Executive Office	<input type="checkbox"/>	No		
Hosting or co-hosting Mid-Year Meeting - verified by Chapter Advocate	Executive Office	<input type="checkbox"/>	No		
2023 Annual Meeting Attendance	Executive Office	<input type="checkbox"/>	No		
2023 Annual Meeting Presentation - Best Practices or Chapter Operations	Executive Office	<input type="checkbox"/>	No		
2024 Nomination for Project Run With It	Executive Office	<input type="checkbox"/>	No		
2024 Nomination for Business Information Professional of the Year - Online Competitions Page	Executive Office	<input type="checkbox"/>	No		
2024 Nomination for Outstanding Dean - Submit online on the Competitions Page.	Executive Office	<input type="checkbox"/>	No		
2024 Mid-Year Meeting Attendance	Executive Office	<input type="checkbox"/>	No		
2024 Mid-Year Meeting Presentation - Best Practices or Chapter Operations	Executive Office	<input type="checkbox"/>	No		
Mid-Year Meeting Service Activity	Executive Office	<input type="checkbox"/>	No		
Published Article for Spotlight Section of BAP Newsletter	Executive Office	<input type="checkbox"/>	No		
...	...	<input type="checkbox"/>	Y		

# Online Activity Reporting More Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership> Report Activity



1st Round Winner EY Inclusive Leadership Award	Executive Office	<input type="checkbox"/>	No
Nomination for Intl or Regional Alumni Advocate Position	Executive Office	<input type="checkbox"/>	No
100 Books Donation	Executive Office	<input type="checkbox"/>	Yes
Fall 2023 Virtual Recruitment event - Chapter Reboot (TBD)	Executive Office	<input type="checkbox"/>	No
Virtual Chapter Reporting 101 Attendance - Fall 2023	Executive Office	<input type="checkbox"/>	No
Live Diversity & Inclusiveness Event-fall or spring	Executive Office	<input type="checkbox"/>	No
Societal Impact Goal	Executive Office	<input type="checkbox"/>	Yes
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
Social Media Engagement - Must Work with EO	Executive Office	<input type="checkbox"/>	No
Career Launchpad	Executive Office	<input type="checkbox"/>	Yes
Literacy/College Application	Executive Office	<input type="checkbox"/>	No
Promotion of Executive Graduate Membership Program	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



Current members join BAP Member and Alumni Network	Executive Office	<input type="checkbox"/>	No
Community College/High School Outreach	Executive Office	<input type="checkbox"/>	Yes
Quiz on 2023-2024 PCA	Executive Office	<input type="checkbox"/>	No
Diversity, Equity and Inclusion Awareness event	Chapter	<input type="checkbox"/>	Yes
Alumni Activity (25% + significant alumni participation)	Chapter	<input type="checkbox"/>	No
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
Multi-Cultural Professional/Global Event	Chapter	<input type="checkbox"/>	No
Wellness Session	Chapter	<input type="checkbox"/>	Yes

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# Online Activity Reporting Initiation Screen



Menu Bar Item: Reporting and Membership > Report Activity

The screenshot shows the "Report Chapter Activities" interface. At the top left is the Beta Alpha Psi logo. A navigation bar contains links for Home, Reporting and Membership (selected), Chapter File Submissions, PCA, Forms, Tutorials, Contact, and BAP Home. A dark header area on the right contains the text "Welcome, Margie" and "Beta Alpha Psi Ur". Below the navigation bar, the "Report Chapter Activities" section has a horizontal menu with tabs for Professional, Service, Reaching Out, Initiation (selected), Hours Summary, Scorecard, and Student Hours Verification Report. The "Initiation" tab is active, showing two input fields: "First Initiation:" with the value "4" and "Second Initiation:" with the value "0". A "Save" button is positioned below these fields. At the bottom of the page, a footer contains the text "Copyright © 2013 Beta Alpha Psi | Privacy Policy" and a small icon.

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

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# Student Participation Verification Report

Menu Bar Item: Reporting and Membership > Report Activity



Report Chapter Activities

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

Filter by Activity type: All Filter by Year: 2021 - 2022 Refresh Excel Export

Member Number	Member Name	Firm Visit	EGH High School	ES-Managing Distractions	Test 1	CC transition to Uni	Test	Bookkeeping at Cattery	Test 2
201204440002	Cooney, George	No	Yes	Yes	No	Yes	No	Yes	Yes
201204440002	Best, Pete	Yes	Yes	Yes	No	Yes	No	Yes	Yes
201004440004	Florentino, Margaret	Yes	Yes	Yes	No	Yes	No	Yes	Yes
202204440001	Drazer, Josephine	No	Yes	Yes	No	Yes	No	Yes	No
202204440002	Sanz, Paul	No	Yes	Yes	No	Yes	No	Yes	No
202204440003	Drummond, Will	Yes	Yes	Yes	No	Yes	No	Yes	Yes
202204440004	Sullivan, Amy	No	No	Yes	No	Yes	No	No	No
202204440005	Douglas, Beth	No	Yes	Yes	No	Yes	No	Yes	Yes
202204440006	Patterson, Andrew	Yes	Yes	Yes	No	Yes	No	Yes	Yes
202204440007	Bynum, Sam	Yes	Yes	Yes	No	Yes	No	Yes	Yes
202204440008	Caruthers, Harrison	No	Yes	Yes	No	Yes	No	Yes	Yes
202204440009	Powell, Amy	Yes	Yes	Yes	No	Yes	No	Yes	Yes
202204440010	Higgins, Mark	No	Yes	Yes	No	Yes	No	Yes	Yes
202204440011	Roberts, John	No	Yes	Yes	No	Yes	No	Yes	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.

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# Mid-Year Report Award Seeking Chapters Only



- U.S. Award Seeking Chapters must declare award status by December 15<sup>th</sup> on the Chapter Profile Screen. Oceania Chapters due August 15.

The following must be completed on the Reporting Intranet:

- All Fall activities (June 1<sup>st</sup> thru December 15th) must be entered on the RI.
- All Fall candidates must be entered into the RI.

# Mid Year Report Screen

Menu Bar Item: Reporting and Membership > Mid Year Report



Report Items	Our Chapter's Status
Declared Award-Status on the Chapter Profile Screen	<input type="checkbox"/> Not Submitted
Entered all Fall Candidates into the Reporting Intranet	<input type="checkbox"/> Not Submitted
Reported all Chapter Activities between 6/1/2023 and 12/15/2023	<input type="checkbox"/> Not Submitted
<b>Overall Report Status</b>	<b>Not Credited</b>

Review that all items have been addressed, check the applicable boxes, and the report status will update to Credited.

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# End-of-Year Report

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



Report Items	Our Chapter's Status
Update Chapter Profile	<input checked="" type="checkbox"/> Submitted
Attach Financial Statements	<input checked="" type="checkbox"/> Submitted
Confirm that all chapter activity reporting is complete (Professional, Service, ROAs, and Initiations)	<input checked="" type="checkbox"/> Submitted
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>

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 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 interface. At the top left is the IRS logo. To the right are links for "Help", "News", "English" (with a dropdown arrow), "Charities & Nonprofits", and "Tax Pros". Below this is a dark blue navigation bar with links for "File", "Pay", "Refunds", "Credits & Deductions", and "Forms & Instructions", along with a search bar. The main content area is 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" (which is highlighted). The "Charities and Nonprofits" section contains the heading "Who May File Form 990-N to Satisfy Their Annual Reporting Requirement?" followed by the text: "In general, exempt organizations have an annual reporting requirement although there are [exceptions](#)." To the right of this section is another heading "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



# End-of-Year Reports – Faculty Advisor



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

## Faculty Advisor Sign-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:

My chapter had \$50K or more in receipts this year:

Not Signed-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

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

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 in Step 2B.

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### Step 4 -- Submit

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

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# Generate a Membership Dues Invoice.

Menu Bar Item: Reporting and Membership > Generate Membership Dues Invoice



Print Option

Membership Dues Invoice will list the names of outstanding records owed to the Executive Office.

Dues are payable within 60 days of being entered into the Reporting Intranet.

Payment options are located at the bottom of the screen.

**Membership Dues Invoice for Fiscal Year 2021 - 2022** Save as PDF Print

Chapter Number 444, Fab Four University, Fab Four

**Chapter Balance Prior to Fiscal Year 2021 - 2022: \$275.00**

<input checked="" type="checkbox"/>	Member #	Member Name	Charge Year	Charge Date	Total Charge	Amount Owed
<input checked="" type="checkbox"/>	202204440007	Bynum, Sam	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440008	Carruthers, Harrison	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440005	Douglas, Beth	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440003	Drummond, Will	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440010	Higgins, Mark	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440006	Patterson, Andrew	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440009	Powell, Amy	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440011	Roberts, John	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440002	Sanz, Paul	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440004	Sullivan, Amy	2022	02/10/2022	75.00	75.00

**Total Amount Owed: \$1025.00**  
**Unpaid Members in Current Fiscal Year: 10**



# Payment Options for Membership Dues

Menu Bar Item: Reporting and Membership > Generate Membership Dues Invoice



**Payment Options**

Card  Check

*All fields are required.*

**Credit/Debit Card**

Card Type

Card Number

CVV  \* Expiration Date

**Billing Address**

First Name  \* Last Name  \*

Address  \*

City  \* State  \*

Country  ZIP  \*

## Payment Options

Card  Check

### Check Payment

Please remit immediately. Make a check payable to **Beta Alpha Psi**, and include your chapter number on the check. Send your payment with the copy of this invoice to:

Beta Alpha Psi  
220 Leigh Farm Road  
Durham, NC 27707

If the amount is not paid in full, please indicate the individual(s) to whom the check applies.

To download Chapter Maintenance Fee invoice for Current year [Click here](#).

Membership Dues may be paid either by credit card or check.

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# Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership > Generate Membership Dues Invoice



Membership Dues Invoice for Fiscal Year 2021 - 2022

Chapter Number 444, Fab Four University, Fab Four

Chapter Balance Prior to Fiscal Year 2021 - 2022: \$275.00

<input checked="" type="checkbox"/>	Member #	Member Name	Charge Year	Charge Date	Total Charge	Amount Owed
<input checked="" type="checkbox"/>	202204440007	Bynum, Sam	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440008	Carruthers, Harrison	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440005	Douglas, Beth	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440003	Drummond, Will	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440010	Higgins, Mark	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440006	Patterson, Andrew	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440009	Powell, Amy	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440011	Roberts, John	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440002	Sanz, Paul	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/>	202204440004	Sullivan, Amy	2022	02/10/2022	75.00	75.00

Total Amount Owed: \$1025.00

Unpaid Members in Current Fiscal Year: 10

Check off the names of the records to be paid by credit card.

# Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership> Generate Membership Dues Invoice> Credit Card Payment Process



Unpaid Members in Current Fiscal Year: 10

## Payment Options

Card  Check

All fields are required.

### Credit/Debit Card

First Name

Middle Name

Last Name

Card Type

Card Number

CVV  Expiration Date

### Billing Address

Enter valid credit card information.

Select "Submit".

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# Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership> Generate Membership Dues Invoice> Credit Card Payment Process



First Name: Donald  
Middle Name: H  
Last Name: William  
Card Type: Master  
Card Number: 5267 2  
CVV: 463  
Billing Address: 447 Horseshoe Lane, Philadelphia, Pennsylvania, US, 19108  
Country: United States

### Payment confirmation

Showing 1 to 10 of 10 entries

Member #	Member Name	Amount Owed
202204440007	Bynum, Sam	75.00
202204440008	Carruthers, Harrison	75.00
202204440005	Douglas, Beth	75.00
202204440003	Drummond, Will	75.00
202204440010	Higgins, Mark	75.00
202204440006	Patterson, Andrew	75.00
202204440009	Powell, Amy	75.00
202204440011	Roberts, John	75.00
202204440002	Sanz, Paul	75.00
202204440004	Sullivan, Amy	75.00

Search:

Total: \$750.00

### Card Details

Card Type: Master Card  
Card Number: xxxx xxxx xxxx 0896  
Expiration Date: 06/2024

### Billing Address

Name: Donald H Williams  
Address: 447 Horseshoe Lane, Philadelphia, Pennsylvania, US, 19108

Cancel Confirm

You will be prompted to confirm the records and the total amount that you are paying for by credit card. Select "Confirm".

# Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership> Generate Membership Dues Invoice> Credit Card Payment Process



Print

**Payment Successful!**  
 Thank you Margaret Fiorentino for your payment of **\$225.00**.  
 Your transaction ID is **8DF65609Y2607953H**.

**Chapter Balance Prior to Fiscal Year 2019 - 2020: \$0.00**

<input type="checkbox"/>	Member #	Member Name	Charge Year	Charge Date	Total Charge	Amount Owed
<input type="checkbox"/>	201325010011	Jackman , Hugh	2020	6/10/2020	75.00	75.00
<input type="checkbox"/>	201325010012	Jackson, Janet	2020	6/10/2020	75.00	75.00
<input type="checkbox"/>	201325010009	Johns, Steven	2020	5/20/2020	75.00	75.00
<input type="checkbox"/>	201325010001	Smith, Elizabeth	2020	5/20/2020	75.00	75.00
<input type="checkbox"/>	201325010008	Stevens, John	2020	5/20/2020	75.00	75.00
<input type="checkbox"/>	201325010010	Test, BAP	2020	6/10/2020	75.00	75.00
<input type="checkbox"/>	201325010007	Wagon, Chuck	2020	5/20/2020	75.00	75.00

**Total Amount Owed: \$525.00**  
**Unpaid Members in Current Fiscal Year: 7**

The next screen will post a notification if the payment was successful or not. It will include a transaction ID. You may print this screen as a receipt.

If successful the records processed will no longer appear on the Membership Dues invoice.

# Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership> Generate Membership Dues Invoice> Credit Card Payment Process



A payment in the amount of **\$225.00** has been processed successfully towards the membership dues for chapter 2501 (Beta Alpha Psi University, Beta Alpha Psi University).

Transaction ID is **8DF65609Y2607953H**.

Chapter Number 2501, Beta Alpha Psi University, Beta Alpha Psi University

Member ID	Member Name	Year	Amount Due	Item Total
322529	Baum, Hadassah	2020	75.00	\$75.00
322531	Boop, Betty	2020	75.00	\$75.00
322527	Doeson, John	2020	75.00	\$75.00
			<b>Subtotal</b>	<b>\$225.00</b>

#### Billing Information

Full Name : Margaret Fiorentino  
Address : 220 Leigh Farm Road  
City : Durham  
State : NC  
Zip/Postal Code : 27707  
Country : US

A confirmation email will be sent to the email address associated with the login.

You may print this as a receipt.

A confirmation email will also be sent to the system administrator.

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# Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership > Year to Date Statement



Fiscal Year 2021 - 2022						
Four University, Fab Four						
Chapter Balance Prior to Fiscal Year 2021 - 2022: \$275.00						
YTD Statement						
Me	Amount Charged	Amount Paid/Credited	Check # or Credit Reason	Date Recorded	Amount Owed	
2022	75.00	75.00	95L54124UU5427803	1/27/2022	0.00	
2022	75.00	75.00	81B8186039491452U	2/10/2022	0.00	
2022	75.00	75.00	81B8186039491452U	2/10/2022	0.00	
2022	75.00	75.00	81B8186039491452U	2/10/2022	0.00	
2022	75.00	75.00	81B8186039491452U	2/10/2022	0.00	
202204440006	75.00	75.00	81B8186039491452U	2/10/2022	0.00	Patterson, Andrew

View year to date statement showing payment history

# Chapter Maintenance Fee Payment by Credit Card



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

### Payment Options

Card  Check

*All fields are required.*

#### Credit/Debit Card

Card Type:

Card Number:

CVV:  Expiration Date:

#### Billing Address

First Name:  Last Name:

Address:

City:  State:

Country:  Zip:

On the Beginning of the Year Report screen, under the Payment Options of the Chapter Maintenance fee task. Select the tab titled “Card” and enter valid credit card information.

Select “Submit”.

**If your chapter’s invoices will be paid by a business school or student union administrator via credit card, please contact the Executive Office for a Credit Card Authorization Form.**

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# Chapter Maintenance Fee Payment by Credit Card



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

## Payment confirmation

Annual maintenance fee total: \$300.00

### Card Details

Card Type	American Express
Card Number	xxxx xxxx xxxx 0005
Expiration Date	03/2023

### Billing Address

Name	Margaret Fiorentino
Address	220 Leigh Farm Road, Durham, NC, US, 27707

Cancel

Confirm

Once submitted, the screen will prompt you to confirm the payment of \$300.

Select "Confirm".

Chapter Maintenance fee is due on October 15 for U.S. chapters, June 15 for Oceania.

A \$50 late fee will be added after the due date.

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# Chapter Maintenance Fee Payment by Credit Card



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

## Payment confirmation

### Payment Successful!

Thank you Margaret Fiorentino for your payment of **\$300.00**.

Your transaction ID is **1CH6009482053751X**.

Annual maintenance fee total: \$300.00

### Billing Address

Name	Margaret Fiorentino
Address	220 Leigh Farm Raod, Durham, NC, US, 27707

Close

Print

A screen notification will confirm if your payment was successful or not.

A print option is provided.

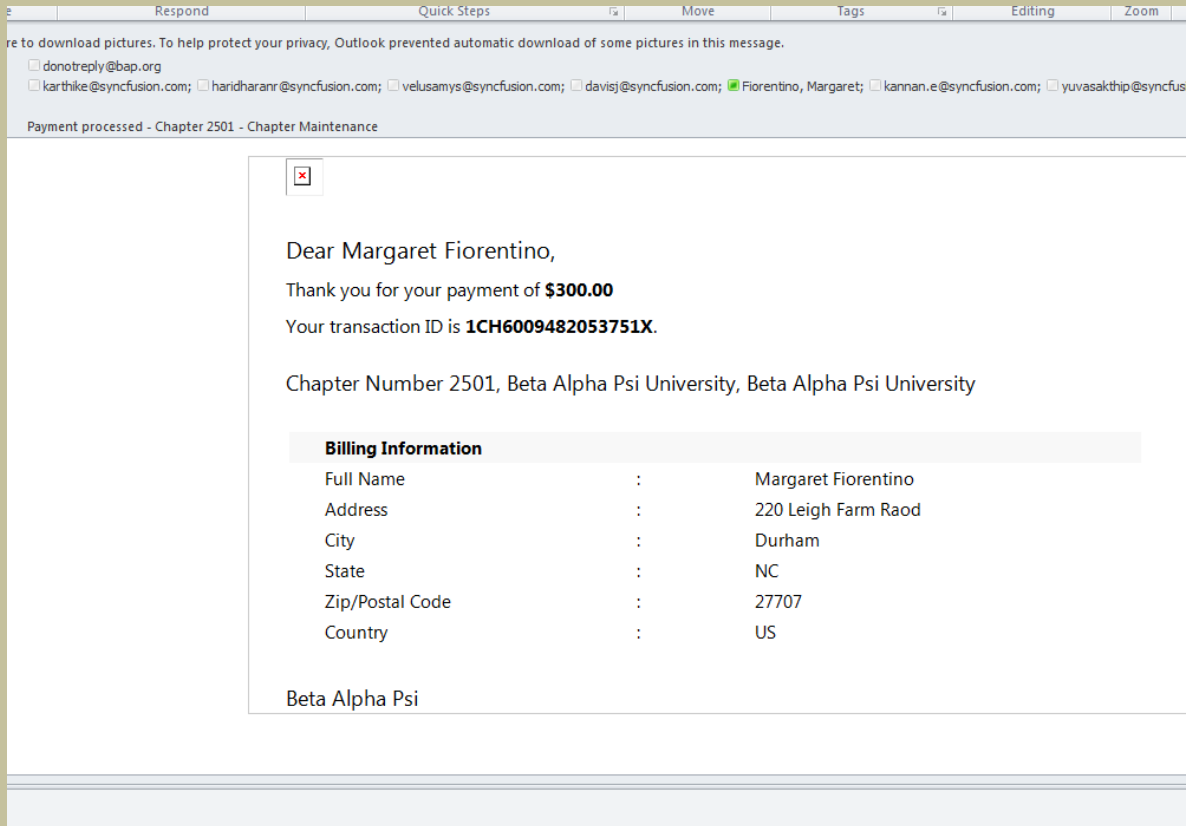
Not Credited

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# Chapter Maintenance Fee Payment by Credit Card



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



A confirmation email will be sent to the email address associated with the login.

You may print this as a receipt.

A confirmation email will also be sent to the system administrator.

# 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 initiates 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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