



# Mid Year Reporting Guide

Due December 15

# Reporting Intranet Resources



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# Mid Year Reporting Guide

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# What do we need to do?



**For the Mid Year Report, just do 3 things:**

- 1. Declare award status (On the Chapter Profile Page)**
- 2. Enter Fall Candidates**
- 3. Enter Activities between June 1 and Dec 15**



**Why should we declare Award status if we may not achieve it?**

**Because you just might!**

# Mid-Year Reports Award Seeking Chapters Only



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

The following must be completed on the Reporting Intranet:

- All Fall activities (June 1<sup>st</sup> thru December 15<sup>th</sup>) 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



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

### Mid Year Report (2022 - 2023)

Chapter Number 444, Fab Four University, Fab Four Year: 2022 - 2023

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 6/1/2022 and 12/15/2022	<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.

# Clarification of Roles

## Faculty Advisors vs. Officers



### Faculty Advisors

- Create and manage officer login accounts
- Review all chapter reports:
  - Beginning of the Year - October 15<sup>th</sup>
  - Mid-Year Reports – December 15<sup>th</sup> award-seeking chapters
  - Student Hours Verification Report
  - Complete 990n e-Postcard filing by June 1<sup>st</sup>
  - Sign Off on End-of-Year Report by June 1<sup>st</sup>
- Meet with Chapter Reporter throughout each semester to review chapter reporting.
- Meet with Chapter Treasurer to ensure that all payments for membership dues and chapter maintenance fee are paid on time.

### Chapter Officers

- All Chapter Reporting
  - Entering new candidates into the system
  - Beginning of the Year Reports
  - Entering Professional & Service Activities, Reaching Out Activities and Initiations
  - Mid-Year Reports (award-seeking chapters)
  - End-of-Year Report
- Work with faculty advisor to process all payments for membership dues and chapter maintenance fee on time.



# Update Chapter Profile Screen



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

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

Create/manage Officer Logins

**View/Update Chapter Profile**

- Membership Roster
- Generate Dues Invoice
- YTD Statement

Beginning of Year Report

**New** Match Tutorial

- Report Activity
- End of Year Report
- Scorecard

Generate Activation Email for Officers

Deadlines for Fiscal Year 2013

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  
Declare Award Seeking Status



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.

# 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.

# 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 creates a receivable for your chapter.*

# 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”.

# 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
<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 date for multiple candidates. Confirm both.

# Submit a Candidate for Initiation

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



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.

**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

# Online Activity Reporting System



All reporting is completed online.

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



# 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”.

A screenshot of the online reporting activity screen. At the top left is 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 are several 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 set to "2021 - 2022". Below the filter, 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. A search bar is located at the bottom left of the table area.

	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".

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# 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



## 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

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 Essential Skill Activity**

Save Cancel

Activity Name: ES-Business Writing Skill ▾  
Date of Activity:

Was the Activity at Least 50 Minutes Long?:

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

- 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

Home Reporting and Membership

**Report Chapter Activity**

Professional Service

Add Add Non

2022 - 2023

Showing 1 to 1 of 1

Search:

Points

2

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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.

# 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**

Save Cancel

Activity Type:  Fall  Spring

Activity Name:

Date of Activity:

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

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

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		
...	...	...	...		

# 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

Welcome, Margie

Beta Alpha Psi Ur  
Beta Alpha Psi Ur

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

### Report Chapter Activities

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

First Initiation:

Second Initiation:

Save

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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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# 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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# Mid Year Report Screen

Menu Bar Item: Reporting and Membership > Mid Year Report



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

### Mid Year Report (2022 - 2023)

Chapter Number 444, Fab Four University, Fab Four Year: 2022 - 2023

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 6/1/2022 and 12/15/2022	<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.

# What happens after December 15?



1. Reports are sent to Chapter Advocate for their respective region(s).
2. If you have not reported and are award seeking, advisor and chapter officers will receive an email from the EO.

**Note: Membership dues are still payable within 60 days from the day candidates are entered into the Reporting Intranet. Membership dues are not due on December 15, but you may want to pay while you are logged into the Reporting Intranet.**

# Generate a Membership Dues Invoice.

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



## 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

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.

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# 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

CVW  \* 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

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

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

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# 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".

# 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

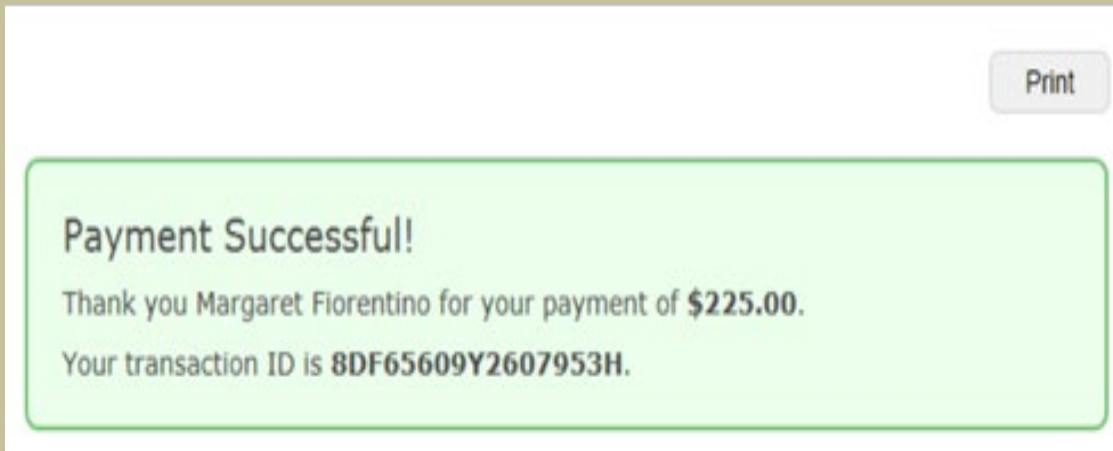
Name: Donald H Williams  
Address: 447 Horseshoe Lane, Philadelphia, Pennsylvania, US, 19108

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



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.

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# 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



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

Select Year  
Print

View/Update Chapter Profile

Membership Roster

Generate Chapter Email Lists

Generate Dues Invoice

**YTD Statement**

Request Replacement Certificate

Beginning of Year Report

Review Activity Participation

Report Activity

Mid Year Report

End of Year Report

Scorecard

202204440006 Patterson, Andrew

**Fiscal Year 2021 - 2022**

**Four University, Fab Four**

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

	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
2022	75.00	75.00	81B8186039491452U	2/10/2022	0.00

tpic://bapstaging.azurewebsites.net/MembersOnly/YTDStatement.aspx

View year to date statement showing payment history

# 2023-2024 Program for Chapter Activities



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# Quiz on 2023-2024 PCA



Score 80% or better for the ROA



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# Alumni & Member Network

BAP initiates may join



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## 2024 Mid-Year Meeting Schedule – US

All meetings start on Friday at 1:00 and end on Saturday at 1:30

February 9-10, 2024

Atlanta, GA – Hilton Atlanta

February 16-17, 2024

University of San Diego

February 23-24, 2024

Dallas, TX – Dallas Marriott Downtown

March 9-10, 2024

Indianapolis, IN – Indianapolis Marriott Downtown

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# Questions?



Contact the Executive Office:

- Email – [bap@bap.org](mailto:bap@bap.org)
- Phone - 919-402-4044



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