



Beta Alpha Psi Reporting Reminders 2023 – 2024

October 15 US Chapters - \$325 chapter maintenance fee due from all chapters not in the petitioning phase. \$50 late fee if paid after October 15. **June 15 deadline** for Oceania chapters.

How do I download an invoice for the Chapter Maintenance fee? Login [here](#). Go to Beginning of Year report, Payment Options. Click the link to pay by credit card or to download an invoice and pay by check.

Candidate dues – \$75 per record payable within 60 days of the names being entered into the Reporting Intranet. \$20 late fee per record if not paid within 60 days.

Honorary and faculty dues - \$75 per record payable within 60 days of the names being entered into the Reporting Intranet. \$20 late fee per record if not paid within 60 days.

How do I download an invoice for candidate dues? Login [here](#). Go to Reporting and Membership, Generate Dues invoice. Select the names to pay by credit card or print an invoice to pay by check. If you need an invoice on Beta Alpha Psi letterhead, email bap@bapeo.org.

Mid-Year Meeting Registration - deadline (to be determined) for early registration for Mid-Year meetings is \$140. Registration fee increases to \$175 per attendee if payment is not received by our office on **TO BE DETERMINED**. Late fee is \$200.

Want to receive payments from our office deposited directly into your account? Send ACH (bank routing number & account number) information to bap@bapeo.org

How do I complete a W9 for my chapter? Download the most current W9 from the IRS website [here](#). Line 1 should read, Beta Alpha Psi (Greek name) Chapter

Line 2 should read, Name of Your School

Use your chapter's tax id number, which may be found on the Chapter Profile page by logging in [here](#). For Organization type, check Other, then write 501 c 3.

Write your chapter's address. Sign it, date it and send it to bap@bapeo.org.

Where do I mail payments? Send checks made **payable to Beta Alpha Psi** to the following address:

Beta Alpha Psi
c/o American Accounting Association
9009 Town Center Parkway
Lakewood Ranch, FL 34202



BETA ALPHA PSI

THE INTERNATIONAL HONOR ORGANIZATION FOR FINANCIAL INFORMATION PROFESSIONALS

December 15 – Mid-Year report due for US award seeking and petitioning chapters. Enter fall candidates and fall activities.

December 15 – End of Year report due for Oceania chapters.

April 1 – Annual meeting website launch, check back for registration deadlines.

April 30 – Beta Alpha Psi Executive Office fiscal year end. Pay candidate dues by April 30.

June 1 – End of Year reporting deadline for US chapters. Go to Reporting and Membership [here](#), End of Year report. Complete chapter reporting and file the [990n e-postcard](#) by June 1 if your average chapter receipts are \$50K or under for the last three years. Use your chapter's tax id number found on the Chapter Profile page. If you don't know where to locate this, reach out to bap@bapeo.org. File the 990n e-postcard between May 1 and June 1. Send proof of filing to bap@bapeo.org and enter the submission id number into the End of Year report. If your chapter receipts are over \$50K for the last three years, download the Over \$50K spreadsheet and complete all three tabs. Upload it as part of the End of Year report due on June 1. No exceptions, \$100 penalty for filing late. Upload financial statements, template [here](#).

June 20 - End of Year Reporting status communicated to Faculty Advisors

July 5 – Last day to appeal End of Year reporting results. Email bap@bapeo.org

How do I get a credit for a transfer student? – Email bap@bapeo.org with the student's name, former chapter and dates and we will verify attendance, then follow up with next steps.

How do I order certificates? Enter candidate records, pay the \$75 fee, move records to the Submit for Initiation folder, wait two weeks to receive in the mail. Email bap@bapeo.org to confirm if you need by a certain date or need certificates mailed to an alternate address. Certificates are sent from Award Concepts located outside Chicago, Illinois.

How does an advisor get access to the Reporting Intranet? Email bap@bapeo.org

How do chapter officers get access to the Reporting Intranet? Advisor creates their accounts and adds them to the Chapter Profile page, review the Reporting Intranet Guide [here](#).

What's the Alumni & Member Network? A free resource for alumni and members to connect, join [here](#)! Wait til you are a member or an alum to apply.

Where do I go for more questions? Check the Faculty Advisor Resources [here](#), then email bap@bapeo.org