

# Chapter Reporting 101



# Chapter Reporting 101

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# Where do I Login?

## Bap.org – Reporting Intranet – top right corner



A screenshot of the BAP.org website. The browser's address bar shows "bap.org". Below the address bar is a row of application icons including Apps, Association of Inter..., Gmail, Analytics, Wells Fargo Comm..., Clockify, Projects, and Teams. The main content area features the BAP logo on the left, which includes the text "BETA ALPHA PSI" and "The International Honor Organization for Financial Information Students and Professionals". To the right of the logo is a navigation menu with links: ABOUT, BENEFITS, IMPACT, RECOGNITION, and NEWS &amp; CALENDARS. In the top right corner, there is a "Contact" link and a "Reporting Intranet" link. A large blue arrow points directly to the "Reporting Intranet" link.

# Topics for today:

- Login to the Reporting Intranet
- Beginning of Year Report
- Enter candidates
- Enter activities
- Pay the chapter maintenance fee
- Pay dues

Reporting Intranet Guide [here](#)

When in doubt, contact [bap@bapeo.org](mailto:bap@bapeo.org)

# What if I don't have an account?

Faculty advisor – Contact [bap@bap.org](mailto:bap@bap.org)

Student officer – Contact your advisor first

Activation requests not pushing through?

It's a system issue – contact [bap@bap.org](mailto:bap@bap.org) to  
resend

# Where do I Login?

## Bap.org – Reporting Intranet – top right corner



Please enter your email address and password to login to the Reporting Intranet

Email Address:

Password:

Log In

[Reset Password](#)

Valid Email Address  
Unique Password

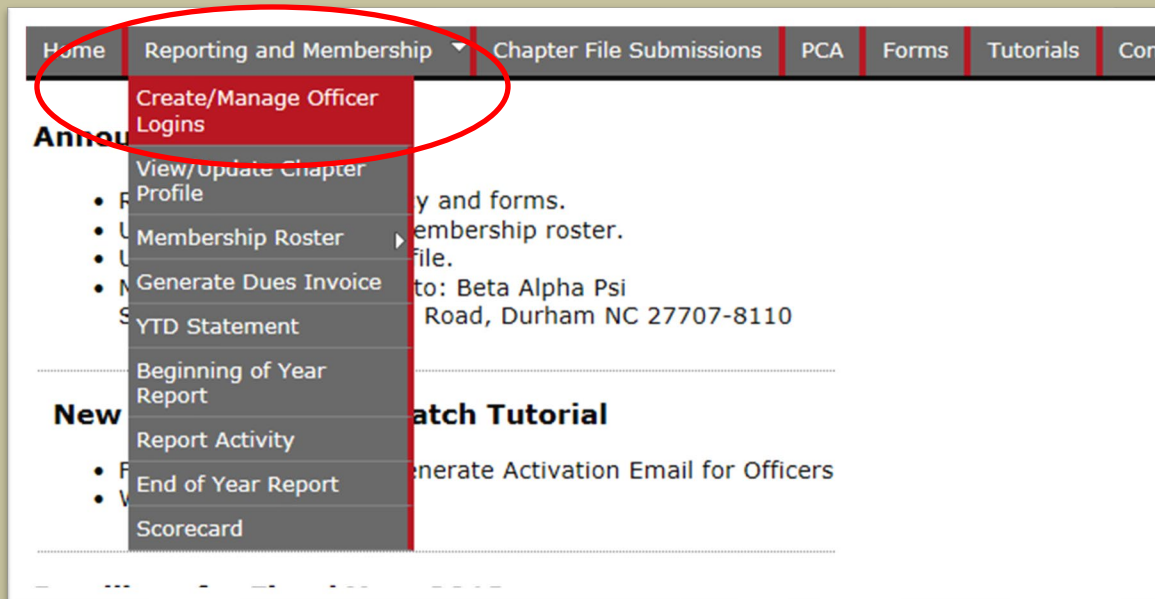
Use your own login and password, no sharing!

# Login System

## Activation Process - Officers



1. Advisor, this is you! 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

officer role.  
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

Choose Matching Member:  Leave blank for all active members.

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

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

Select Chapter: 444 - Fab Four - Fab f

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: President

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

Create Another User

# Why should I update the Chapter Profile page?

List current advisors, Dean, Department chair for award letters!

List the new officers

Verify address to send membership certificates

# 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

**Announcements**

- **View/Update Chapter Profile**
- Membership Roster
- Generate Dues Invoice
- YTD Statement

**New**

- Beginning of Year Report
- Report Activity
- End of Year Report
- Scorecard

**Deadlines for Fiscal Year 2013**

# Update Chapter Profile Screen

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



Welcome, M  
Beta Alpha P  
Beta Alpha P

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

### Chapter Profile

\* indicates a required field

Save Chapter

Admin Only Fields School Chapter Officers Chapter Contacts

Chapter Website:

School Year:

Achievement Type:

Grad Students in Accounting?:

School:\*

Country:\*

Address 1:\*

Address 2:

City:\*

State/Province/Region:

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.

# Update Chapter Profile Screen

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



Add the officer names here!

 Welcome  
Beta Al  
Beta Al

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

**Chapter Profile** Save Chapter

\* 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.

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# I'm ready to add a candidate!

But have you collected the \$75 fee?

Do you know their first day with BAP?

# 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

# 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

Save

Cancel

Member Number: Not Yet Assigned

First Name\*:

Candidate Start Date\*:

Middle Initial:

Initiation Date:

Last Name\*:

Current Folder: Adding to Active Candidates

Suffix:

Type of Membership\*: Select Membership Type

E-mail Address\*:

Major\*: Select Major

Address Line 1\*:

Primary Phone\*:

Address Line 2:

Other Phone:

City\*:

Gender: Select Gender

State / Province /  
Region\*:

Ethnicity: Select Ethnicity

ZIP/Postal Code\*:

Birth Date:

Country\*: Select Country

Comments:

Membership Status Changes

Membership Payments and Credits



# 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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**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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# Pop Quiz!

**How do I order membership  
certificates?**

# 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



Once the fees for candidates that have been paid, the Executive Office will order the membership certificates and move the records to the "Active Members" folder. Please allow two weeks to receive certificates.

**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, Hadassan</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



# Pop Quiz!

**When is the Beginning of  
Year report due?**

# Beginning of Year Report

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



**Due October 16 for US chapters**

**Oceania Chapters – due June 15**

## Report Items

## Our Chapter's Status

Update Chapter Profile

☐ Not Submitted

Enter Plan of Activities

☐ Not Submitted

Attach Chapter Bylaws

☐ Not Submitted

☐ No Changes Needed to Bylaws

Your annual maintenance fee \$325.00

Payment Options

Annual Chapter Maintenance Fee [View History](#)

☐ Not Received

**Overall Report Status**

**Not Credited**

# 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 ▾

## 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

# Local Chapter Bylaws

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



## Beginning of Year Report

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

Report Items	Our Chapter's Status
<input type="button" value="Update Chapter Profile"/>	Not Submitted
<input type="button" value="Enter Plan of Activities"/>	Not Submitted
<input type="button" value="Attach Chapter Bylaws"/> <input type="checkbox"/> No Changes Needed to Bylaws	Not Submitted
Your annual maintenance fee \$300.00	<input type="button" value="Payment Options"/>
Annual Chapter Maintenance Fee	Not Received
<b>Overall Report Status</b>	<b>Not Credited</b>

New bylaws? Upload them here!

Need a copy? Email [bap@bap.org](mailto:bap@bap.org)



# 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".

**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

# Online Activity Reporting System

Menu Bar Item: Reporting and Membership> Report Activity



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-Ba Initiation • Professional & Service Activities – Attach Local Chapter Workbook for Hours (Award-Seeking C Nominations for Outstanding Dean Award Due

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”.

**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 6 of 6 entries

	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

Search:

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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.

SaveDeleteCancel

Activity Name: Firm Visit

Date of Activity: 1/3/2022Change 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: Community College Outrea

Date of Activity: 03/04/2024

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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Select  
Impact  
Category

Complete  
form with  
metrics

# Online Activity Reporting

Menu Bar Item: Reporting and Membership> Report Activity



**Activity Name \***

Community College Outreach

**Date of Activity \***

03 / 04 / 2024  
MM DD YYYY

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

Community College Associate Candidate: ▾

**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

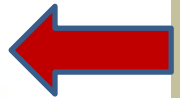
Filter by Year:

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 ▾  
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

Date of Activity:

Was the Activity at Least 50 Minutes Long?:

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

Report Chapter Activity

Professional Serv

Add Add Non

2022 - 2023

Showing 1 to 1 of 1

Sta

Edit/Delete Reject

Search:

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# 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:

Only one entry for fall and one entry for spring are allowed.

# 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	
Total Points	8	14	
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.

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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
20100440002	Choong, George	No	Yes	Yes	No	Yes	No	Yes	Yes
20120440002	Best, Pete	Yes	Yes	Yes	No	Yes	No	Yes	Yes
20100440004	Florentino, Margaret	Yes	Yes	Yes	No	Yes	No	Yes	Yes
20220440001	Draper, Josephine	No	Yes	Yes	No	Yes	No	Yes	No
20220440002	Sanz, Paul	No	Yes	Yes	No	Yes	No	Yes	No
20220440003	Drummond, Will	Yes	Yes	Yes	No	Yes	No	Yes	Yes
20220440004	Sullivan, Amy	No	No	Yes	No	Yes	No	No	No
20220440005	Douglas, Beth	No	Yes	Yes	No	Yes	No	Yes	Yes
20220440006	Patterson, Andrew	Yes	Yes	Yes	No	Yes	No	Yes	Yes
20220440007	Bynum, Sam	Yes	Yes	Yes	No	Yes	No	Yes	Yes
20220440008	Camuthers, Harrison	No	Yes	Yes	No	Yes	No	Yes	Yes
20220440009	Powell, Amy	Yes	Yes	Yes	No	Yes	No	Yes	Yes
20220440010	Higgins, Mark	No	Yes	Yes	No	Yes	No	Yes	Yes
20220440011	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	
Total Points	8	14	
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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# Pop Quiz!

**What are some fun Reaching  
Out Activities?**

# 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

Showing 1 to 40 of 40 entries

Filter by Year: 2023 - 2024

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		
Student Impact Card	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

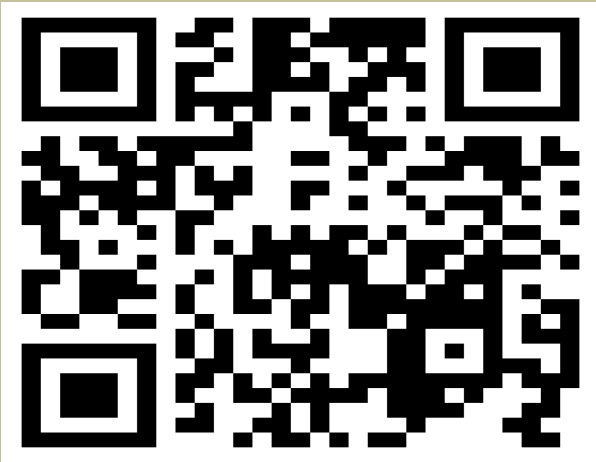
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## Executive Office Sponsored Reaching Out Activities Fall 2023



Tuesday, October 17, 7-8 pm ET  
Diversity, Equity and Inclusion

Tuesday, November 14, 7-8 pm ET  
Virtual Initiation and Professional Session



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# Online Activity Reporting Initiation Screen

How do I report initiations?



The screenshot shows the Beta Alpha Psi Online Activity Reporting Initiation Screen. At the top left is the Beta Alpha Psi logo. To the right of the logo, the text "Welcome, Margie" is displayed, followed by "Beta Alpha Psi Ur" and "Beta Alpha Psi Ur" on separate lines. Below the logo and text is a navigation bar with the following links: Home, Reporting and Membership (with a dropdown arrow), Chapter File Submissions, PCA, Forms, Tutorials, Contact, and BAP Home. The main content area is titled "Report Chapter Activities" and contains a series of tabs: Professional, Service, Reaching Out, Initiation (which is 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". Below these fields is a "Save" button. At the bottom of the page, there is a footer with the text "Copyright © 2013 Beta Alpha Psi | Privacy Policy" and a small icon.

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: 4

Second Initiation: 0

Save

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Enter the total number of initiates for first and second initiations.



# 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	
Total Points	8	14	
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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# 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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# Payment Options for Membership Dues

Pay by credit card or check

Checks must be made payable to Beta Alpha Psi



## 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  \*

Cancel

Submit

## 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 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

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



## 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

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



**Payment Options**

Card ☒ Check

*All fields are required.*

**Credit/Debit Card**

Card Type

Card Number

CVV  Expiration

**Billing Address**

First Name

Address

City

Country  ZIP

**Payment confirmation**

Showing 1 to 3 of 3 entries

Member #	Member Name	Amount Owed
201325010004	Baum, Hadassah	75.00
201325010006	Boop, Betty	75.00
201325010002	Doeson, John	75.00

Search:

**Total: \$225.00**

**Card Details**

Card Type

Card Number

Expiration Date

**Billing Address**

Name

Address

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**

# 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



# 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

Cancel

Submit

# 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@bapeo.org](mailto:bap@bapeo.org)
- Phone - 919-402-4044



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