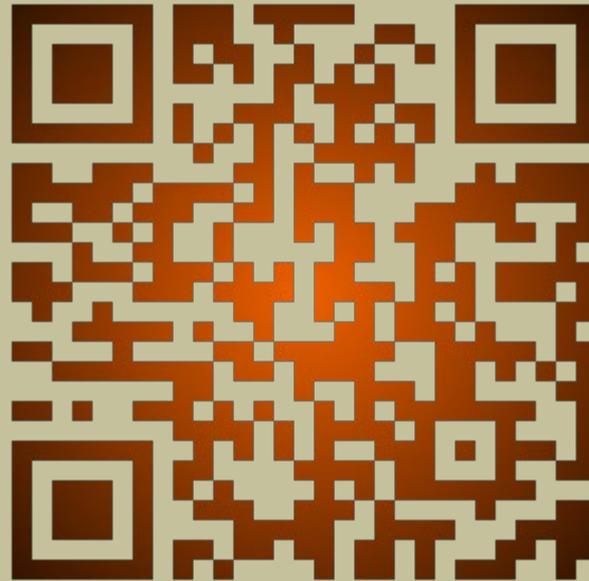




Reporting Intranet

End of Year Reporting Guide

Reporting Intranet Resources



A link back to the Table of Contents is located on the lower right-hand side of each slide.

[Table of Contents](#)

Reporting Intranet

Table of Contents - Main Topic Links



Go to main link and make sure to scroll through all slides for that topic.

- [Navigating the RI](#)
- [Roles of Advisors & Officers](#)
- [Enter candidates](#)
- [Submit for Initiation and get certificates](#)
- [Enter activities](#)
- [Impact Activity Categories](#)
- [Enter Essential Skills](#)
- [Reaching Out Activities](#)
- [Chapter Scorecard](#)
- [Student Participation Verification Report](#)
- [End of Year Report](#)
 - [Update Chapter Profile Screen](#)
 - [Upload Chapter Financial Statements](#)
 - [How to complete the IRS 990n e-Postcard](#)
 - [Over \\$50K spreadsheet](#)
 - [IRS One Time Registration for New Users](#)
- [Program for Chapter Activities 2023-2024](#)
- [PCA Quiz 2023-2024](#)

A link back to the Table of Contents is located on the lower right-hand side of each slide.

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 15th U.S., award-seeking chapters, August 15 for Oceania
 - Student Participation Report
 - Complete 990n e-Postcard filing by June 1st
 - Sign Off on End of Year Report by June 1 for U.S., December 15 for Oceania.
- Meet with Chapter Reporter throughout each semester to review chapter reporting.
- Meet with Chapter Treasurer to ensure that membership dues and chapter maintenance fee have been paid on time.

Chapter Officers

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

End-of-Year Report

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



Report Items	Our Chapter's Status
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
Overall Report Status	Credited

Make sure to complete the following tasks:

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

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

Update Chapter Profile Screen



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

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

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

Update Chapter Profile Screen

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



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.

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

Update Chapter Profile Screen

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



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 separate from the officer user accounts.

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

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

View/Update Membership



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

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

Membership Roster

Add New Submit for Initiation Make Inactive Delete

Candidates
Active (4)
[Submitted for Initiation](#) (6)
Inactive (2)

Members
Active (0)
[On Leave](#) (0)
Alumni (0)
Deleted (0)

Active Candidates

Click Member/Candidate Name to Edit Profile Record

Name	Member Number	E-mail	Candidate Date	Membership Type
Jackman, Hugh	201325010011	hjackman1@yahoo.com	6/10/2013	Undergraduate
Johnson, Sarah	201325010003	sjohnson@bap.org	4/1/2013	Undergraduate
Smith, Elizabeth	201325010001	esmith@bap.org	4/1/2013	Undergraduate
Stevens, John	201325010008	jstevens@bap.org	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.

[Table of Contents](#)

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"/>	Jackman, Hugh	201325010011	hjackman1@yahoo.com	6/10/2013	Undergraduate
<input type="checkbox"/>	Johnson, Sarah	201325010003	sjohnson@bap.org	4/1/2013	Undergraduate
<input type="checkbox"/>	Smith, Elizabeth	201325010001	esmith@bap.org	4/1/2013	Undergraduate
<input type="checkbox"/>	Stevens, John	201325010008	jstevens@bap.org	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.*

[Table of Contents](#)

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”.

[Table of Contents](#)

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"/> Jackman, Nick	201325010011	hjackman1@yahoo.com	6/10/2013	Undergraduate
<input checked="" type="checkbox"/> Johnson, Sarah	201325010003	sjohnson@bap.org	4/1/2013	Undergraduate
<input checked="" type="checkbox"/> Smith, Elizabeth	201325010001	esmith@bap.org	4/1/2013	Undergraduate
<input type="checkbox"/> Stevens, John	201325010008	jstevens@bap.org	9/3/2012	Undergraduate

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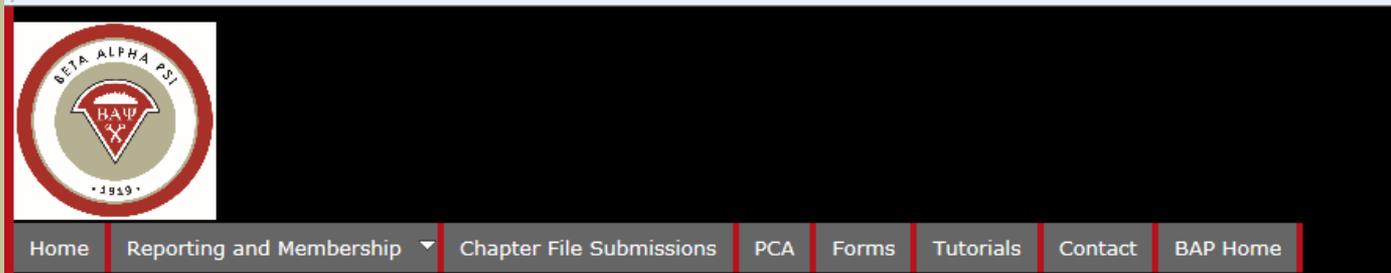
To submit a candidate for initiation, in the “Active Candidates” folder, check off the box next to the appropriate name and select “Submit for Initiation”.

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.

[Table of Contents](#)

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

[Table of Contents](#)

Online Activity Reporting System



Menu Bar Item: Reporting and Membership > Report Activity

The screenshot displays the website's interface. At the top right, it says "Welcome, Margie Fiorentino | [Reset](#)". Below this, it identifies "Beta Alpha Psi University" and "Beta Alpha Psi University (#2501)". A navigation bar contains links for Home, Reporting and Membership (with a dropdown arrow), Chapter File Submissions, PCA, Forms, Tutorials, Contact, and BAP Home. The dropdown menu for "Reporting and Membership" is open, listing options: Create/Manage Officer Logins, View/Update Chapter Profile, Membership Roster, Generate Dues Invoice, YTD Statement, Beginning of Year Report, Report Activity (highlighted in red), End of Year Report, and Scorecard. A red circle is drawn around the "Report Activity" option. In the background, there is an announcement: "Thank you for testing the new Reporting Intranet! Please make sure to follow the script provided and document all of your feedback!". Below the announcement, there is a "Deadline" section for "2013" and a "Date Due" section. A "Copyright" notice and a "Privacy Policy" link are also visible at the bottom of the page.

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

Online Activity Reporting Entering an Activity

Menu Bar Item: Reporting and Membership > Report Activity



The online reporting activity screen is in a tabbed format. To add a new Professional Activity select “Add”.

The screenshot shows the 'Report Chapter Activities' interface. At the top, there is a navigation menu with items: Home, Reporting and Membership (selected), Chapter File Submissions, PCA, Tutorials, Contact, and BAP Home. Below the menu are several tabs: Professional (selected), Service, Reaching Out, Initiation, Hours Summary, Scorecard, and Student Participation Verification Report. Under the 'Professional' tab, there are buttons for 'Add', 'Add Non BAP Activity', 'Add Essential Skills Activity', and 'Add Impact Activity'. A 'Filter by Year:' dropdown is set to '2021 - 2022'. The text 'Showing 1 to 6 of 6 entries' is displayed above a table of activities.

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

Search:

[Table of Contents](#)

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".

[Table of Contents](#)

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
201204443002	Best, Pete	<input checked="" type="checkbox"/>
202204443007	Bysum, Sam	<input checked="" type="checkbox"/>
202204443008	Carruthers, Harrison	<input type="checkbox"/>
201004443002	Clooney, George	<input type="checkbox"/>
202204443005	Douglas, Beth	<input type="checkbox"/>
202204443003	Drummond, Will	<input checked="" type="checkbox"/>
201004443004	Florentino, Margaret	<input checked="" type="checkbox"/>
202204443010	Higgins, Mark	<input type="checkbox"/>
202204443006	Patterson, Andrew	<input checked="" type="checkbox"/>

[Table of Contents](#)

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

[Table of Contents](#)

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

[Table of Contents](#)

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

[Table of Contents](#)

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

[Table of Contents](#)

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 is 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 these are several form fields: 'Activity Name' with a dropdown menu, 'Date of Activity', and a question 'Was the Activity at Least 50 Minutes Long?'. A confirmation message reads 'Confirm that the Activity was Performed in the Name of Beta Alpha Psi:'. A dropdown menu is open, listing 11 essential skills: 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, and ES-Accepting Feedback. The 'ES-Business Writing Skills' option is highlighted in blue. At the bottom left of the sidebar, there is a 'Report Chapter Activity' section with buttons for 'Professional' and 'Service', and a table with columns for 'Add', 'Add Non', '2022 - 2023', 'Showing 1 to 1 of 1', 'Status', 'Edit/Delete', and 'Reject'. A search bar is also present.

[Table of Contents](#)

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
Edit/Delete	N/A	Test 1	9/6/2021	2021 - 2022	Yes	Yes	0%	0
Edit/Delete	N/A	Firm Visit	1/3/2022	2021 - 2022	Yes	Yes	46%	1
Edit/Delete	Reject	EGH High School	2/18/2022	2021 - 2022	Yes	Yes	93%	2
Edit/Delete	N/A	ES-Managing Distractions	3/15/2022	2021 - 2022	Yes	Yes	100%	1
Edit/Delete	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.

[Table of Contents](#)

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.

[Table of Contents](#)

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
Edit/Delete	N/A	Test 1	9/6/2021	2021 - 2022	Yes	Yes	0%	0
Edit/Delete	N/A	Firm Visit	1/3/2022	2021 - 2022	Yes	Yes	46%	1
Edit/Delete	Reject	EGH High School	2/18/2022	2021 - 2022	Yes	Yes	93%	2
Edit/Delete	N/A	ES-Managing Distractions	3/15/2022	2021 - 2022	Yes	Yes	100%	1
Edit/Delete	Reject	CC transition to Uni	3/25/2022	2021 - 2022	Yes	Yes	100%	2

Search:

Choose Option to Add the type of activity.

[Table of Contents](#)

Online Activity Reporting Essential Skill



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

Add New Essential Skill Activity

Save Cancel

Activity Name:

Cor 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.

[Table of Contents](#)

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

[Table of Contents](#)

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

[Table of Contents](#)

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.

[Table of Contents](#)

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:

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

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
Overall Report Status	Credited

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.**
- [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):**
 - [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



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.

Beta Alpha Psi	
Statement of Financial Position as of April 30, 2024	
School Name:	
Chapter Number:	
Chapter Name:	
Assets 4/30/2024	
Cash	
Accounts receivable	
Prepaid expenses and other assets	
Total Current Assets	
Liabilities and Net Assets	
Liabilities:	
Accounts payable	
Unearned revenue	
Total liabilities	
Net Assets:	
Unrestricted	
Temporarily restricted	
Total Net Assets	

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

[Table of Contents](#)

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
Overall Report Status		Credited

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

End-of-Year Reports – Faculty Advisor



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

Step 1 -- Verify Non-BAP Hours*

I, **Lisa Wicker**, Faculty Advisor of the **Fab Four** Chapter, have reviewed and verified that the non-BAP professional and service hours reported by the Chapter meet the definition of professional or service activities under the Program of Chapter Activities.

Sign-off Not Signed-off

Step 2 -- Complete Tax Info*

Step 2A -- Sign Tax Release Form*

Beta Alpha Psi Tax Release Form
Chapter 444, Fab Four University, Fab Four
For Inclusion in Group Exemption and Combined Filing of Form 990

Fab Four Chapter
Fab Four University
School of Knowledge
Abbey Road
RTP, NC 27707

Chapter's Separate IRS Employer Identification Number: **Not available**

I, **Lisa Wicker**, Faculty Advisor of this chapter of Beta Alpha Psi, hereby authorize the Executive Office of Beta Alpha Psi to **include** our chapter in a group exemption letter and in a combined filing of Form 990 with the IRS, and state that I have authority to execute this authorization by virtue of a resolution passed by the chapter executive committee at its meeting.

Note: This authorization covers the Federal Filing Requirements. Any chapter also having separate state requirements must fulfill them separately.

Sign-off Not Signed-off

Step 2B*

For receipts less than \$50,000, you are required to file the IRS e-Postcard at: [IRS ePostcard](#)

Once completed - please enter your confirmation number:

My chapter had less than \$50,000 in receipts this year:

The Faculty Advisor sign off screen confirms that the FA reviewed and approved their chapter's activity reporting and financial statements, as well as completed the tax filing for the fiscal year. From the 990n Acceptance screen, enter the submission ID here and email to bap@bap.org.

End-of-Year Reports – Faculty Advisor



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

Step 2C -- Upload Over \$50K Spreadsheet*

Does your chapter have an average gross receipts of \$50,000 or more, for the last three years?

No Yes

1. If your chapter had gross receipts of over \$50K for the last three years, please download [Over \\$50K Spreadsheet](#)
2. Attach Spreadsheet
3. Email copy of Over \$50K Spreadsheet to the Executive Office

Not Complete

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

Step 3 -- Complete Financial Statement Sign-Off*

Does your chapter have gross receipts for this year...

- Less than \$100,000?
 \$100,000 or More?

Not Complete

Step 4 -- Submit

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



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

After April 30th - 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.

The screenshot shows the top portion of the IRS website. 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 white and divided into two columns. The left column is titled "PAY BY" and lists "Bank Account (Direct Pay)", "Payment Plan (Installment Agreement)", and "Electronic Federal Tax Payment System (EFTPS)". The right column is titled "POPULAR" and lists "Your Online Account", "Tax Withholding Estimator", "Estimated Taxes", and "Penalties". Below this, 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?" and 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 links for "A-Z Index" and "Educational Resources and Guidance".

[Table of Contents](#)

Complete a one time registration with the IRS



[Table of Contents](#)

Complete a one time registration with the IRS



Sign In or Create a New Account

IRS now offers sign-in options with Login.gov and ID.me. Both offer access to IRS online services with a secure account that protects your privacy.

Login.gov is an account created, maintained, and secured by the U.S. government. ID.me is an account created, maintained, and secured by a technology provider. Currently, Login.gov can only be used to access IRS Form 990-N (e-Postcard) and Qualified Intermediary Application and Account Management System (QAAMS).

If you don't have a Login.gov or ID.me account, you must create a new account.

Sign in with an existing account

Sign in with  LOGIN.GOV

Sign in with **ID.me**

OR

Create a new account

Create an account  LOGIN.GOV

[Table of Contents](#)

2023-2024 Program for Chapter Activities



[Table of Contents](#)

Quiz on 2023-2024 PCA



Score 80% or better for the ROA



[Table of Contents](#)

Alumni & Member Network

BAP initiates may join



[Table of Contents](#)

Questions?



Contact the Executive Office:

- Email – bap@bapeo.org
- Phone - 919-402-4044

