Reporting Intranet

End of Year

Reporting Guide
Reporting Intranet

Table of Contents - Main Topic Links

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

- 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

- Navigating the RI
  - Online Reporting System
  - Monthly Membership Counts
  - Non-BAP Hours
  - Student Hours Verification Report
  - Roles of Advisors & Officers

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

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.
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.
Upload Chapter Financials

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

A template for financial statements can be found in the Financial Reporting Guide.

On the Chapters page under “Chapter Handbook” select the link titled “Financial Reporting Guide”.

Table of Contents
On the Financial Reporting Guide page, under Chapter Treasurer Reporting Responsibilities, select the link for the “Sample Financial Statements”.

Each chapter must prepare and submit an End of the Year Report by June 1. The Treasurer’s responsibilities for this report include:

1. Preparing the financial statements for the fiscal year ending April 30:
   - Statement of Financial Position
   - Statement of Activities
   - Sample Financial Statements
   - Summaries of SFAS 116, SFAS 117, and SFAS 124 have been provided for your reference.
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.
Upload Chapter Financials

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

<table>
<thead>
<tr>
<th>Report Items</th>
<th>Our Chapter's Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Chapter Profile</td>
<td>Submitted</td>
</tr>
<tr>
<td>Attach Financial Statements</td>
<td>Submitted</td>
</tr>
<tr>
<td>Confirm that all chapter activity reporting is complete</td>
<td></td>
</tr>
<tr>
<td>(Professional, Service, ROAs, and Initiations)</td>
<td>Submitted</td>
</tr>
<tr>
<td>Enter Faculty Advisor Sign-off</td>
<td>Submitted</td>
</tr>
<tr>
<td>(Financial, Tax and Non-BAP Hours)</td>
<td></td>
</tr>
</tbody>
</table>

**Overall Report Status**: Credited

Once you have uploaded your chapter financials, this task will be credited.
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.
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.
How to Complete the 990n e-Postcard

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@bap.org](mailto:bap@bap.org).
Complete a one time registration with the IRS

First Time Users

Create a Login to:

- Verify your identity for access to your personal tax information.
- Create a user ID and password to save time on future visits.
- Lock your online account to prevent access.

Information you need to verify your identity

Returning Users

Log in below if you’ve previously created a UserID for any of the following applications:

- Get Transcript
- Identity Protection PIN (IP PIN)
- Online Payment Agreement (OPA)

User ID

Mask User ID

GET STARTED

LOGIN
Navigating the Reporting Intranet

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

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

All reporting is done online.

• Professional and Service Activities
• Reaching Out Activities (ROAs)
• Initiations
• Non-BAP Hours
The online activity reporting screen can be found under Reporting and Membership and Report Activity.
The average monthly membership counts are all the records in the “Active Candidates”, “Submitted for Initiation” and “Active Members” folders. The count is determined by the status on the last day of the month.

<table>
<thead>
<tr>
<th>Month*</th>
<th>Number of Active Candidates, Active Members and Initiates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 1</td>
<td>4</td>
</tr>
<tr>
<td>Month 2</td>
<td>4</td>
</tr>
<tr>
<td>Month 3</td>
<td>4</td>
</tr>
<tr>
<td>Month 4</td>
<td>5</td>
</tr>
<tr>
<td>Month 5</td>
<td>6</td>
</tr>
<tr>
<td>Month 6</td>
<td>6</td>
</tr>
<tr>
<td>Month 7</td>
<td>8</td>
</tr>
<tr>
<td>Month 8</td>
<td>9</td>
</tr>
</tbody>
</table>

*Only the 8 months are used in the Average Membership calculation.
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”.

Make sure to label your chapter’s Essential Skill activity with “ES – Activity Name”.
Online Activity Reporting
Entering an Activity

Menu Bar Item: Reporting and Membership> Report Activity

Enter:
Name of Activity and Date of Activity

Confirm that the activity was at least 50 minutes long.
Confirm that your chapter sponsored the activity.

Select “Save”.

For easier data entry, enter total minutes in the Activity Minutes box, select “check all” and “Save”. Then enter “0” for the students who did not participate. Select “Save” and “Close”.
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 Members folders.

Enter the minutes for the candidates and members who participated in the activity by using the tab function to each record and then select “Save”.

Then close the screen.
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 25%. If attendance is below 25%, a point will not be generated.
Online Activity Reporting
Scorecard Screen

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

Each activity that is saved and meets the 25% participation requirement automatically gets registered on the Scorecard screen.
Online Activity Reporting
Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership> Report Activity

The ROA screen is a check box format.

Once the check box has been selected the screen will automatically save the updates.
Online Activity Reporting
Initiation Screen

Menu Bar Item: Reporting and Membership > Report Activity

Enter the total number of initiates for first and second initiations. Make sure to “Save”.
Online Activity Reporting Hours Screen

Menu Bar Item: Reporting and Membership> Report Activity

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**Report Chapter Activities**

![Activity Reporting Hours Screen]

**Year to Date Hours**

- Average Membership for the Reporting Year: 6
- Total Number of Professional Hours Achieved YTD: 16
- Total Number of Service Hours Achieved YTD: 45
- Total Number of Overall Hours Achieved YTD: 61

<table>
<thead>
<tr>
<th>Professional Hours</th>
<th>Service Hours</th>
<th>Overall Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Hours Needed for Distinguished per Candidate/Member</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Number of Hours Needed for Superior per Candidate/Member</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Your Total Professional/Service Hours Needed for Distinguished</td>
<td>48</td>
<td>48</td>
</tr>
<tr>
<td>Your Total Professional/Service Hours Needed for Superior</td>
<td>72</td>
<td>72</td>
</tr>
<tr>
<td>Achieved Distinguished Hours?</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Achieved Superior Hours?</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Minutes will be translated to hours automatically as you report activities.
At the individual level, chapters may report a maximum of five hours per semester (per student) of professional activities and a maximum of five hours per semester (per student) of 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 minutes accordingly.
The Student Hours Verification screen is a tool for faculty advisors and officers to keep track of candidates and members' minutes. 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.
### Student Hours Verification Screen

#### Excel Export

Menu Bar Item: Reporting and Membership > Report Activity > Student Hours Verification Report > Excel Export

---

<table>
<thead>
<tr>
<th>Member Number</th>
<th>Member Name</th>
<th>Business Writing Skills</th>
<th>Interviewing Tips</th>
<th>Audit Careers</th>
<th>VITA</th>
<th>Test Service 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Doe, John</td>
<td>120</td>
<td>60</td>
<td>0</td>
<td>240</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>Boop, Betty</td>
<td>0</td>
<td>0</td>
<td>90</td>
<td>240</td>
<td>90</td>
</tr>
<tr>
<td>3</td>
<td>Jackson, Janet</td>
<td>0</td>
<td>0</td>
<td>90</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>Johnson, Sarah</td>
<td>120</td>
<td>60</td>
<td>0</td>
<td>240</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>Stephens, John</td>
<td>0</td>
<td>0</td>
<td>90</td>
<td>240</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>Smith, Elizabeth</td>
<td>0</td>
<td>0</td>
<td>90</td>
<td>240</td>
<td>0</td>
</tr>
<tr>
<td>7</td>
<td>Chambers, Cindy</td>
<td>120</td>
<td>60</td>
<td>0</td>
<td>240</td>
<td>0</td>
</tr>
</tbody>
</table>

The Excel export gives the user the option to add totals, etc. This export is solely for chapters to use as a tool to verify candidates and members chapter participation.
Scorecard Screen

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

Always make sure to check your chapter’s final scorecard.

![Scorecard Screen]

### Report Chapter Activities

<table>
<thead>
<tr>
<th>Professional</th>
<th>Service</th>
<th>Reaching Out</th>
<th>Initiation</th>
<th>Hours Summary</th>
<th>Scorecard</th>
</tr>
</thead>
</table>

### Chapter Scorecard

Chapter #444, Fab Four, Fab Four University

Planned Achievement Level: Award-Seeking

<table>
<thead>
<tr>
<th>PCA Achievements</th>
<th>YTD Credited</th>
<th>PCA Requirements</th>
<th>Mission Based Points Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of Year Report</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Initiation</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>End of Year Report</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Reaching Out Activities (ROAs)</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Professional Activities</td>
<td>8</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Service Activities</td>
<td>4</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Total Points</td>
<td>18</td>
<td></td>
<td>13</td>
</tr>
</tbody>
</table>

### Additional Requirements for Award-Seeking Chapters Only

<table>
<thead>
<tr>
<th>YTD Achieved</th>
<th>Required for Distinguished</th>
<th>Required for Superior</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

**Each Individual Must Earn**

- **20 hrs**
- **32 hrs**
- **8 hrs**
- **12 hrs**
- **Yes**
- **Yes**

**Overall Chapter Status**

- Achieved Superior
- Superior

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Clarification of Roles
Faculty Advisors vs. Officers

**Faculty Advisors**
- Create and manage officer login accounts
- Review all chapter reports:
  - Beginning of the Year - October 15 for U.S., June 15 for Oceania
  - Mid-Year Reports – December 15 for U.S.
  - Entering Professional & Service Activities, Reaching Out Activities and Initiations
  - End-of-Year Report
- Student Hours Verification 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 all membership dues and the chapter maintenance fee have been paid on time.

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

Contact the Executive Office:

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