



BETA ALPHA PSI

THE INTERNATIONAL HONOR ORGANIZATION FOR FINANCIAL INFORMATION PROFESSIONALS

Hi,

Welcome back to **SCHOOL NAME**. I want to first congratulate you on performing well in **COURSE NAME** with **Professor NAME** this past spring. **PROFESSOR NAME** was kind enough to share your email address with me as a potential candidate for Beta Alpha Psi (BAP), the international honors organization for financial information students and professionals. The first upper level **accounting** course is not an easy transition, and you have proven yourself by doing well in this course.

General requirements for membership in Beta Alpha Psi include:

- A major in accounting, finance, business analytics or digital technology (IS),
- A 3.0 or higher in all upper level courses in your major (**301** and higher), and
- A 3.0 or higher cumulative GPA

[Beta Alpha Psi](#) is an extraordinary organization that has been around for more than one hundred years with campus, regional, and international resources to provide you opportunities for professional development, expanding your social and professional networks, and serving your campus and local community. Opportunities to be involved as a leader in the **GREEK NAME** chapter here at **SCHOOL NAME** are numerous! In addition to events on campus, student members have opportunities to travel to **REGION NAME** cities for regional meetings, compete in competitions, and travel to the national meeting annually. In recent years, this meeting has been held in Washington D.C., Southern California, Denver, and San Francisco.

I hope you will consider learning more about Beta Alpha Psi by visiting one or all of our first meetings of the semester listed below:

<u>Date</u>	<u>Time</u>	<u>Room</u>	<u>Presenting Organization and Topic</u>
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Please note that the dress code for all Beta Alpha Psi meetings is BUSINESS CASUAL. These first three meetings will serve as callouts and are open to all accounting, finance, business analytics and digital technology majors who may be interested in joining BAP. Additional information about Beta Alpha Psi may be found [here](#).

I sincerely hope we'll see you at one of these meetings. If you have other questions, thoughts, or concerns, please reach out to me!



Beta Alpha Psi Reporting Reminders 2021 – 2022

October 15 US Chapters - \$300 chapter maintenance fee due from all chapters not in the petitioning phase. \$50 late fee if paid after October 15. **August 15 deadline** for Oceania chapters.

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

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

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

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

Regional Meeting Registration - deadline (to be determined) for early bird registration for Regional meetings is \$110. Registration fee increases to \$125 per attendee if payment is not received by our office on **TO BE DETERMINED**. Late fee is \$175.

Want to receive payments from our office deposited directly into your account? Send ACH (bank routing number & account number) information to Lisa Wicker, Manager of Chapter Services at lwicker@bap.org.

How do I complete a W9 for my chapter? Download the most current W9 from the IRS website [here](#). Line 1 should read, Beta Alpha Psi (Greek name) Chapter
Line 2 should read, Name of Your School
Use your chapter's tax id number, which may be found on the Chapter Profile page by logging in [here](#). For Organization type, check Other, then write 501 c 3.
Write your chapter's address. Sign it, date it and send it to bap@bap.org.

Where do I mail payments? Send checks made **payable to Beta Alpha Psi** to the following address:
Beta Alpha Psi
220 Leigh Farm Road
Durham, NC 27707

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



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

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

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

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

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

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

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

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

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

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

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

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

PROGRAM FOR CHAPTER ACTIVITIES AT-A-GLANCE 2021-2022

CHAPTER REQUIREMENTS

Chapters must meet certain requirements depending upon the desired achievement level. The requirements include submission of reports, initiation, Reaching Out activities, professional activities and service activities. Chapters not meeting the mission-based requirements will be placed on probation for the subsequent year.

A summary of the required activities by achievement level follows:

MINIMUM ACTIVITIES REQUIRED BASED ON CHAPTER ACHIEVEMENT LEVEL

Chapter Achievement Level	Beginning of Year Report	Mid-Year Report	Initiation	End of Year Report	Reaching Out Activities	Professional Activities	Service Activities
<i>Mission Based</i>	Yes	N/A	Yes	Yes	3	6	1
<i>Distinguished</i>	Yes	Yes	Yes	Yes	5	6	1
<i>Superior</i>	Yes	Yes	Yes	Yes	8	6	1

To qualify as a professional or service activity, the event must be at least 50 minutes in length and at least 25% of the chapter's active members/candidates for the month must participate in the event.

ACTIVITY HOURS REQUIRED FOR AWARD SEEKING CHAPTERS

To qualify as a superior or distinguished chapter, there are also individual member/ candidate professional and service hour requirements. These requirements are designed to encourage involvement of Beta Alpha Psi members and candidates in professional and community service activities, not only as a chapter but also individually.

Chapter Achievement Level	Minimum Hours of Professional Activities (per Member/Candidate)	Minimum Hours of Service Activities (per Member/Candidate)	Total Minimum Hours of Professional and Service Activities (per Member/Candidate)
<i>Distinguished</i>	8	8	20
<i>Superior</i>	12	12	32

The online student can meet their service requirements via the same model as non-BAP hours, only theirs would count as "BAP-Service Hours for Online Students". Examples of service hours they could report includes:

- Tutoring other online students in accounting, finance or IS
- Tutoring high school students in math
- Tutoring Community College Students in accounting, finance or IS
- Volunteering at a local food bank, animal shelter, nursing home or community center

PROGRAM FOR CHAPTER ACTIVITIES AT-A-GLANCE 2021-2022

ESSENTIAL SKILLS REQUIREMENT FOR AWARD-SEEKING CHAPTERS

Essential Skill - Mandatory Professional Activity – Award Seeking Chapters (Distinguished, Superior & Gold). Award-seeking chapters are required to conduct one mandatory professional session that will include a session devoted to “Essential Skills.” Many students seek to obtain internships and full-time job opportunities through Beta Alpha Psi, but once they have the job, they must develop their “essential skills” in order to succeed professionally. Each chapter can choose one of the below topics for their Essential Skills session.

Each Essential Skill activity should be entered into the Reporting Intranet as: **ES – Topic Title.**

CHAPTER REBOOT – 2021-2022 – NEW!

As we move towards a post-COVID environment, BAP has established a BAP Chapter Reboot program to assist chapters in planning for 2021-2022. The BAP Chapter Reboot provides chapters with more Reaching Out Activities (ROAs). The Executive Office will be offering chapters resources for hybrid (live and virtual) opportunities that include the below:

Chapter Reboot Timeline

- September 14, 2021 – Virtual Recruitment Event – **New ROA!**
 - A recruiting event for faculty advisors, officers, and prospective students.
- September 2021 (TBD) – Chapter Reporting 101 – **New ROA!**
 - A reporting event for faculty advisors and officers. In this session, you will learn the basics of chapter reporting in the BAP intranet.
- Diversity, Equity & Inclusion - **New ROA!**
 - October 2021 (TBD) Chapters are invited to attend this DEI event designed to encourage a greater awareness of diversity and to promote equity and inclusion professionally and within Beta Alpha Psi.
- November 2021 (TBD) – Fall Virtual Initiation Event
 - The executive office and professional partners will host this professional session and live virtual initiation for all eligible members.

NON-BAP HOURS

At the individual level, **chapters may report a maximum of five hours (250 minutes) per semester (per student) of professional activities and a maximum of five hours (250 minutes) per semester (per student) of service activities** that are not sponsored by Beta Alpha Psi. These hours should be reported as a single professional or service activity on the Reporting Intranet online activity screen. Fall and spring hours should be reported separately. **Non-BAP hours are limited to 10 per year for professional activities and 10 per year for service activities.** Chapters must retain detailed information regarding the non-Beta Alpha Psi activities until October 1 of the following year.

OFFICER HOURS

Officers and committee chairs for a chapter may receive up to 10 hours for their time providing service to the chapter. A maximum of 10 hours each may be reported for up to 10 officers and committee chairs. Please report this at the end of each semester or at the end of the year on a single report. The limit of 10 is for the year, not by semester or quarter. Under the Program for Chapter Activities, an hour consists of 50 minutes. Therefore only 5,000 minutes may be reported for the full reporting year.