Reporting Intranet

Beginning of Year Reporting
Reporting Intranet
Table of Contents - Main Topic Links

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

- Roles of Advisors & Officers
- Login Screen
- Terms of Use Agreement
- Navigating the RI
- Password Reset
- Activating Officer Accounts
- Update Chapter Profile Screen
- Update Membership Roster
  - Add a New Candidate
  - Submit a Candidate for Initiation
- Active Members Folder
- Membership Counts
- Beginning of Year Report
  - Chapter Maintenance Fee Invoice
- Online Reporting System
  - Recording the Essential Skills activity
  - Non-BAP Hours
- Student Hours Verification Report
- Payments by Credit Card
  - Membership Dues
  - Chapter Maintenance Fee

A link back to the Table of Contents is located on the lower right 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 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 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.
Each Advisor and Officer will be required to login through a valid email address and a unique password. We recommend Google Chrome as your browser.
On the Activation Screen, enter a unique password, confirm and activate.
Terms of Use Agreement
One time acceptance for all users

License Agreement

Terms of Agreement for Beta Alpha Psi Reporting Intranet

As an officer or faculty advisor, I agree to uphold the terms of the Beta Alpha Psi use of Reporting Intranet that includes Reporting Intranet Guidelines:

- I confirm that I have reviewed the training materials for the Reporting Intranet.
- I understand that once a record has been saved, it will be considered a receivable to Beta Alpha Psi and that our chapter is responsible for payment.
- All activities reported are truthful and complete.

Upon initial login, each user reads and confirms acceptance of the Terms of Use Agreement.
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.
Login System

Activation Process - Officers

Once the Faculty Advisor has completed their activation process, and have logged in to the Reporting Intranet.

1. The FA will enter the officers under 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”.

Menu Bar Item: Reporting and Membership> Create/Manage Officer Logins
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.
Creating RI Accounts

Menu Bar Item: Reporting and Membership> Create/Manage Officer Logins

Once the Faculty Advisors have created the Officer accounts, a log is established and can be found at the bottom of the screen.

This is where the advisors can deactivate or reactivate officers.

It is the advisor’s responsibility to keep this log current. This should be updated each semester/quarter.
To reset a password, go to the login page and select the link titled “Reset Password”, enter your email address and an automated email will be sent to you that will include a link to reset your password.
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

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 a 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.
The tab titled “Chapter Contacts” is where the Faculty Advisor, Co-Advisor, Department Chair and Business School Dean information is updated. Note: Dean and Department Chair information is required.
View/Update Membership

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

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.
View/Update Membership

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

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.
Add a New Candidate

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”.

Menu Bar Item: Reporting and Membership > Membership Roster > View/Update Membership
Submit a Candidate for Initiation

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

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

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.
Beginning of Year Reports are due on October 15 for U.S. chapters.

Oceania Chapters – due June 15

For the “Update Chapter Profile” screen to be credited for the BOY report, select the button. You must either update the profile screen from here or choose “No Changes”.

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

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

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

<table>
<thead>
<tr>
<th>Report Items</th>
<th>Our Chapter’s Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Chapter Profile</td>
<td>Not Submitted</td>
</tr>
<tr>
<td>Enter Plan of Activities</td>
<td>Not Submitted</td>
</tr>
<tr>
<td><strong>Attach Chapter Bylaws</strong></td>
<td>Not Submitted</td>
</tr>
<tr>
<td><strong>☑️ No Changes Needed to Bylaws</strong></td>
<td></td>
</tr>
</tbody>
</table>

Your annual maintenance fee $300.00

Annual Chapter Maintenance Fee Not Received

Overall Report Status Not Credited

Upload amended bylaws to the BOY screen. If there were no changes, check off the box, “No Changes Needed to Bylaws”.

Contact the Executive Office if you need a copy of your chapter’s bylaws.
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”.

**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](#)
Online Activity Reporting System

All reporting is completed online.

• Professional and Service Activities
• Reaching Out Activities (ROAs)
• Initiations
• Non-BAP Hours
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.
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”.

![Report Chapter Activities](image-url)
Online Activity Reporting

Entering an Activity

Menu Bar Item: Reporting and Membership> Report Activity

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”.

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”.

Table of Contents
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.

Enter the minutes 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.
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
Scorecard Screen

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

Choose Option to Add Essential Skills activity.
Choose the Essential Skills activity your chapter completed from the drop down menu.
### Report Chapter Activities

<table>
<thead>
<tr>
<th>Reaching Out Activities</th>
<th>Sponsor</th>
<th>Status</th>
<th>Upload Required</th>
<th>View Attachment</th>
<th>Delete Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hosting or co-hosting Community Service Day - verified by Community Service Day Chair</td>
<td>Executive Office</td>
<td>✔️</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Annual Meeting CSD</td>
<td>Executive Office</td>
<td>✔️</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Annual Meeting Attendance</td>
<td>Executive Office</td>
<td>✔️</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Annual Meeting Presentation</td>
<td>Executive Office</td>
<td>❌</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Nomination for Project Run With It</td>
<td>Executive Office</td>
<td>✔️</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Nomination for Business Information Professional of the Year</td>
<td>Executive Office</td>
<td>❌</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Submitted Nomination for Outstanding Dean</td>
<td>Executive Office</td>
<td>✔️</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Regional Meeting Attendance</td>
<td>Executive Office</td>
<td>❌</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Regional Meeting Presentation</td>
<td>Executive Office</td>
<td>❌</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Published Article for Spotlight Section of BAP Newsletter</td>
<td>Executive Office</td>
<td>❌</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Participation In Ernst &amp; Young Diversity Initiative</td>
<td>Executive Office</td>
<td>❌</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Mentoring a Developing Chapter - Must have CA Approval</td>
<td>Executive Office</td>
<td>❌</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Once the check box has been selected the screen will automatically save the updates.
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

Report Chapter Activities

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

Minutes will be translated to hours automatically as you report activities.
Non-BAP Hours

Menu Bar Item: Reporting and Membership> Report Activity

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. Hours are recorded as 50 minutes, so the maximum is 250 minutes for non-BAP Professional, 250 minutes for non-BAP Service.

Just add a new activity, enter the activity name as, “Non BAP xxxxx”, and enter the date. 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.
Scorecard Screen
Menu Bar Item: Reporting and Membership> Report Activity or Scorecard
Always make sure to check your chapter’s final scorecard.

### 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>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of Year Report</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Initiation</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>End of Year Report</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Reaching Out Activities (ROAs)</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Professional Activities</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>Service Activities</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Total Points</td>
<td>18</td>
<td>13</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Requirements for Award-Seeking Chapters Only</th>
<th>YTD Achieved</th>
<th>Required for Distinguished</th>
<th>Required for Superior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional ROAs</td>
<td>5</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

### Overall Chapter Status

<table>
<thead>
<tr>
<th>Overall Hours</th>
<th>Professional Hours</th>
<th>Service Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieved Superior</td>
<td>Achieved Superior</td>
<td>Achieved Superior</td>
</tr>
</tbody>
</table>

| Overall Chapter Status | Yes | Yes |

![Copyright © 2013 Beta Alpha Psi | Privacy Policy](https://www.betaalphapsi.org)
Generate a Membership Dues Invoice.
Menu Bar Item: Reporting and Membership > Generate Membership Dues Invoice

Membership Dues Invoice will list the names of outstanding records owed to the Executive Office.

Dues are payable within 60 days of being entered into the Reporting Intranet.

Payment options are located at the bottom of the screen.
Payment Options for Membership Dues

Menu Bar Item: Reporting and Membership > Generate Membership Dues Invoice

Membership Dues may be paid either by credit card or check.

If your chapter’s invoices will be paid by a business school or student union administrator via credit card, please find the Credit Card Authorization Form on the Chapters page here.
Membership Dues Payment by Credit Card
Menu Bar Item: Reporting and Membership> Generate Membership Dues Invoice

Membership Dues Invoice for Fiscal Year 2019 - 2020

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

<table>
<thead>
<tr>
<th>Member #</th>
<th>Member Name</th>
<th>Charge Year</th>
<th>Charge Date</th>
<th>Total Charge</th>
<th>Amount Owed</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ 201325010004</td>
<td>Baum, Hadassah</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>✔ 201325010006</td>
<td>Boop, Betty</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>✔ 201325010002</td>
<td>Desco, John</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td></td>
<td>Jackman, Hugh</td>
<td>2020</td>
<td>6/10/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>✔ 201325010012</td>
<td>Jackson, Janet</td>
<td>2020</td>
<td>6/10/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>✔ 201325010009</td>
<td>Johns, Steven</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td></td>
<td>Smith, Elizabeth</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>✔ 201325010008</td>
<td>Stevens, John</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>✔ 201325010010</td>
<td>TEST, BOP</td>
<td>2020</td>
<td>6/10/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>✔ 201325010007</td>
<td>Wagon, Chuck</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
</tbody>
</table>

Total Amount Owed: $750.00
Unpaid Members in Current Fiscal Year: 10

Check off the names of the records to be paid by credit card.
Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership > Generate Membership Dues Invoice > Credit Card Payment Process

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

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

The next screen will post a notification if the payment was successful or not. It will include a transaction ID. You may print this screen as a receipt.

If successful the records processed will no longer appear on the Membership Dues invoice.
Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership> Generate Membership Dues Invoice> Credit Card Payment Process

A confirmation email will be sent to the email address associated with the login.

You may print this as a receipt.

A confirmation email will also be sent to the system administrator.
Chapter Maintenance Fee Payment by Credit Card

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

On the Beginning of the Year Report screen, under the Payment Options of the Chapter Maintenance fee task. Select the tab titled “Card” and enter valid credit card information.

Select “Submit”.

If your chapter’s invoices will be paid by a business school or student union administrator via credit card, please contact the Executive Office for a Credit Card Authorization Form.
Once submitted, the screen will prompt you to confirm the payment of $300.

Select “Confirm”.

Chapter Maintenance fee is due on October 15 for U.S. chapters, June 15 for Oceania.

A $50 late fee will be added after the due date.
A screen notification will confirm if your payment was successful or not.

A print option is provided.
A confirmation email will be sent to the email address associated with the login.

You may print this as a receipt.

A confirmation email will also be sent to the system administrator.
Questions?

Contact the Executive Office:

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