

Chapter Reporting 101

<u>Beta Alpha Psi</u>



Chapter Reporting 101 Table of Contents, Main Topic Links

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Where Do I Login?

<u>Reporting Intranet</u> – top right corner on BAP.org home page.

\leftrightarrow \rightarrow C $\hat{\bullet}$ bap.org		
Apps O Association of Inter G Gmail - Email from	C Analytics > Organiza	🚾 Wells Fargo Comm 🧭 Clockify 🔇 Projects • Clockify 🤇 Teams • Clockify
BETA ALPHA PSI The International Honor Organization for Financial Information Students and Professionals	ABOUT 🕶	BENEFITS - IMPACT - RECOGNITION - NEWS & CALENDARS



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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 <u>here</u> When in doubt, contact us



What If I Don't Have an Account?

Faculty advisor – Contact bap@bapeo.org

Student officer – Contact your advisor first

Activation requests not pushing through? It's a system issue – contact bap@bapeo.org to resend



Where do I Login? Bap.org – Reporting Intranet – top right corner

Valid Email Address + Unique Password

HISSO	
Please enter yo Email Address: Password:	our email address and password to login to the Reporting Intranet
Reset Password	

– No sharing!



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

Login System Activation Process Officers

Home	Reporting and Membersh	nip 🔻	Chapter F"_ Submissions	PCA	Forms	Tutorials	Cor
Annou	Create/Manage Officer Logins	4					
•	View/Update Chapter Profile	y an	d forms.				
•	Membership Roster 🛛 🕨	embe file.	ership roster.				
•	Generate Dues Invoice	to: B Roa	eta Alpha Psi d. Durham NC 27707-811	0			
	Beginning of Year						
New	Report	atch	n Tutorial				
•	Report Activity	nera	te Activation Email for Of	ficers			
•	Scorecard						
	• • -• •						

Faculty Advisors Enter the officers



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

Activation Process for Officers by Faculty Advisors

Advisors	Officers	Admins and Chapter Advocates
Note: Office	er/Users M	lust Be Matched to Active Chapter Member
Select Cha	pter: 4	144 - Fab Four - Fab 🔽
Search Men by Last Na	nbers me:	eave blank for all active members.
Choose Ma Member:	tching A C F	Affleck, Ben Clooney, George Fiorentino, Margaret
Note: O member	only Members	olie, Angelina s with a valid e mail address a missing, you must first record a valid e-mail address bership roster for the chapter.
by editi	ng the menn	
by editi Email Addre	ess: a	j123@yahoo.com
by editi Email Addre First Name	ess: a : A	j123@yahoo.com ngelina
by editi Email Addro First Name Last Name	ess: aj : A : Jo	j123@yahoo.com ngelina olie

2. Under the "Officers" tab, the FA will select the officer's name and officer's role.

3. Then, select "Create User".



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

Activation Process for Officers by Faculty Advisors

Advisors Officers	Admins and Chapter Advocates
Note: Officer/Users M	ust Be Matched to Active Chapter Members
Select Chapter: 4	144 - Fab Four - Fab 💽
Search Members by Last Name:	Search Search
Choose Matching Member: F H Note: Only Members member you want is	Affleck, Ben Clooney, George Forentino, Margaret Harrison, George olie, Angelina s with a valid e-mail address are listed above. If the s missing, you must first record a valid e-mail address
Email Address: a	j123@yahoo.com
First Name: A	ngelina
Last Name: Jo	blie
Select Officer/User Type:	President
The new user account activation e-mail has Create Another User	t has been successfully created. An been sent to the address specified above.

4. The screen will confirm that an activation email was sent to that officer.



Why Should I Update the Chapter Profile Page?

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

List the new officers

Verify address for award letters

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Update Chapter Profile

_	• 1	919 .				
Н	ome	Reporting and Membersh	ip 🔻 Chapter File Submissions	Award Letters	PCA	Reporting Intranet Reso
		View/Update Chapter Profile				
E	Begir	MembershipRoster	rt (2025 - 2026)			
(Chapt	Generate Chapter Email Lists	our University, Fab Four			Year: 2025 - 2026 🗸
		Generate Dues Invoice				
		YTD Statement	tems	Our C	hapte	r's Status
		Beginning of Year Report				
		Report Activity	er Profile		Not Su	bmitted
		Mid Year Report				
		End of Year Report	Activities		Not Su	bmitted
		Scorecard				
		Attach Chapte	er Bylaws		Not Su	bmitted



Update Chapter Profile

Update your chapter's school information including website link, achievement level, and mailing address—under the "School" tab.

Chapter Profile * indicates a required fi Your changes have been	eld n saved.		Save Chapter
Admin Only Fields	School	Chapter Officers	Chapter Contacts
		Chapter Website: LinkedIn Link:	bap.org https://www.linkedin.com/company/betaalphapsi
		Twitter Link:	
		Facebook Link:	
		Instagram Link:	
		School Year:	Semester ~
	Ac	hievement Type:	Award-Seeking ~



• 1919 •

pdate	e Ch	apt	er Profile	Add the officers' names he
napter Profile ndicates a required f	ïeld			Save Chapter
Admin Only Fields	School Cha	apter Officers	Chapter Contacts	
President				
	Name:*	Chambers, Ci	ndy 💌	
	E-mail:*	cchambers@b	ap.org	
	Phone:	222-222-2222	2	
		Note: Phone not req	uired, but must be valid for your Chapter's country if supplied.	
Reporter				
	Name:*	Baum, Hadass	sah 💌	
	E-mail:*	hhbaum@bap	.org	
	Phone:	222-222-2222	2	
		Note: Phone not req	uired, but must be valid for your Chapter's country if supplied.	\$E'



I'm Ready to Add a Candidate

But have you collected the \$85 fee? Do you know the candidate's first day with Beta Alpha Psi?

View/Update Membership

Add New	Submit for Initiation	1ake Inactive	Delete		
Candidates	Active Candida	tes			
Submitted for	Click Member/Cand	idata Nama ta Edi	- Drofile Decord		
Inactive (2)	Name	Member Number	E-mail		Membership Type
Members	÷ .	\$	\$	Candidate Date	¢
	🔲 Jackman, Hugh	201325010011	hjackman1@yahoo.com	6/10/2013	Undergraduate
Active (0)	Jackman, nugn				
<u>Active</u> (0) <u>On Leave</u> (0)	Johnson, Sarah	201325010003	sjohnson@bap.org	4/1/2013	Undergraduate
<u>Active</u> (0) <u>On Leave</u> (0)	 Johnson, Sarah Smith, Elizabeth 	201325010003 201325010001	sjohnson@bap.org esmith@bap.org	4/1/2013 4/1/2013	Undergraduate Undergraduate



Add a New Candidate

. W	ALPHA A	
*	BAW	~
	V	
	• 1919 •	

Create New Chapte	er Candidate			
Beta Alpha Psi Univers * indicates a required field, al	ity, Chapter 2502, Beta Alpha Psi Un Il dates should be in the format MM/DD/YYYY	iversity	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 /		Ethnicity:	Select Ethnicity	
Region*:		Birth Date:		
ZIP/Postal Code*:		Comments:		*
Country*:	Select Country			Ŧ
	Membership Status Changes Member	ship Payments and Credits		

View/Update Membership

Candidates Section includes folders for Active Candidates, Submit for Initiation, and Inactive Candidates.

Members Section includes folders for Active Members, On Leave, and Alumni.

1embership F	Rostei	r					
Add New	Submit	for lettation	Make Inactive	Delete			
Active (4) Submitted for Initiation (6)	Ac	t ive Candid a k Member/Can	ates didate Name to Edii	t Profile Re	ecord		
Inactive (2)	\$	Name	Member Number	\$	E-mail	Candidate Date	Membership Type
Active (0)		Jackman , Hug	<u>h</u> 201325010011	<u>hjackman</u>	1@yahoo.com	6/10/2013	Undergraduate
On Leave (0)		Johnson, Sarah	201325010003	sjohnson(abap.org	4/1/2013	Undergraduate
		Smith, Elizabet	h 201325010001	esmith@b	ap.org	4/1/2013	Undergraduate
Alumni (0)		<u>Stevens, John</u>	201325010008	jstevens@	bap.org	9/3/2012	Undergraduate



Pop Quiz

How do I get a pdf file of membership certificates?

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Submit a Candidate for Initiation

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."

Home Reporting and Membership T Chapter File Submiseiner PCA Forms Tutorials Contact BAP Home	
Membership Roster	
Submit for Initiation Make Inactive Delete	
Candidates	
Active (4) Active Candidates	
Submitted for Initiation (1) Click Member/Candidate Name to Edit Profile Record	
Inactive (2)	р Туре
members	iate
Active (5)	ate
Smith Elizabeth 20132501000 esmith@hap.org 4/1/2013 Undergradu	ate
Alumni (0) <u>Stevene, John</u> 201325010001 <u>istevens@bap.org</u> 9/3/2012 Undergradu	late
Deleted (0)	
Converset @ 2012 Pots Alpha Dei Drivary Daligy	

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

The records will appear in the "Submit for Initiation" folder.



Once the fees for candidates have been paid, the Executive Office will send a pdf file of membership certificates to the advisor and move the records to the "Active Members" folder.



Pop Quiz

When is the Beginning of the Year Report due?

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Beginning of Year Report

US Chapters, due October 15

Oceania Chapters, due June 15

Our Chapter's Status
Not Submitted
Not Submitted
Not Submitted
Payment Options
Not Received
policies and procedures
Not Credited



Plan of Activities

Professional Activity Plan

Reaching Out Activities (Check at least three) Sponsor Planned Activity Ŷ ŝ Annual Community Executive V Service Day Attendance Annual Executive Meeting Office Attendance Annual Executive Meeting V Presentatior Nomination Executive for Project Office Run With It Nomination for Business Executive Information Office Professional of the Year Submitted Nomination Executive for Office Outstanding Dean Regional Executive Meeting Office Attendance

2

Enter your chapter's plan for six Professional Activities, one Service Activity, and three Reaching Out Activities (ROAs), then select "Save."



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Local Chapter Bylaws – Required this year

Report Items	Our Chapter's Status	
Update Chapter Profile	Not Submitted	New bylaws? Upload them here! Need a template?
Enter Plan of Activities	Not Submitted	Email <u>bap@bapeo.org</u>
Attach Chapter Bylaws	Not Submitted	
Pay the \$325.00 chapter maintenance fee	Payment Options	
Annual Chapter Maintenance Fee <u>View History</u>	Not Received	
Confirm compliance with Student Affairs department po	olicies and procedures	
Overall Report Status	Not Credited	SETA ALPHA

Menu Bar Item Reporting and Membership> Beginning of Year Report

Chapter Maintenance Fee

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 11161 E. State Rd 70 Ste 110-608 Lakewood Ranch, FL 34202	
To download Chapter Maintenance Fee invoice for Current year <u>Click here</u> .	
Add Payment Close Print	



Online Activity Reporting System

Home Reporting and Membersh	ip Chapter File Submissions	Award Letters PC	Reporting Intranet Resources	Contact	BAP Home
Annou Make Facult Generate Chapter Email Lists	<u>torials</u> and <u>online guide</u> . rate their officer accounts.				
Welcc Generate Dues Invoice YTD Statement Request Replacement E Certificate Beginning of Year	I have any questions about the	e Reporting Intranet	′ou can contact us at:		
Report Deadli Report Activity Dat Mid Year Report 10/15, End of Year Report Scorecard	• 2025 e ear Report Make sure to com Update Cha	nplete the following ta	isks:		
Scorecard	Enter Plan o Upload Char Pay \$325 Cl	of Activities pter Bylaws (if neede hapter Maintenance F	d) ee online		



Online Activity Reporting Entering an Activity

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

Professional	Service	Rea hing Out	Induction	Hours Summary	Scorecard	Student	Participation Verif	ication Repor
Add	Add Non BA	P Activity			Filt	ter by Yea	r: 2024 - 2025	~
	Status	Name	Date ≎	Year	At Least 50 Minutes Long? ≎	In Name of BAP? ¢	% Participation ≎	Points ≎
Edit/Delete	N/A	Nonprofit Accounting	12/3/2024	2024 - 2025	Yes	Yes	33%	1
Search:								

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Online Activity Reporting Entering an Activity

dd New Professional Activity		
Save	Cancel	
	Date of Activity:	
Was the Activity at Least 50	⊖Yes ●No	
Confirm that the Activity was Performed in the	✓ Yes	
Profession	Firm Presentation or Visit ~	
Name of firm	Firm Presentation or Visit Company Presentation or Visit	
	Meet the Firms (Networking)	
	Trade Organization/NFP State Society	
I	Exam/Professional Education	
		VITA Training
		Other

Enter the date of the activity.

Confirm the length was at least 50 minutes long.

Confirm that your chapter sponsored the activity.

Choose the activity type from the drop- down list.

Select "Save".



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.



Confirm that the Activity was Performed in the Name of Beta Alpha Psi: Professional Activity Type: Firm Presenta Name of firm/company/org: Test Essential Skill? No マ Activity Name: Nonprofit Acco Impact Activity?: No マ What to do if there are missing or extra members in this list. The Chapter Activity was saved at 1:31 PM. Click "Close" to exit this window, o participation below. Showing 1 to 9 of 9 entries	tion or Visit ~					
Professional Activity Type: Firm Presenta Name of firm/company/org: Test Essential Skill? No Activity Name: Nonprofit Acco Impact Activity?: No What to do if there are missing or extra members in this list. The Chapter Activity was saved at 1:31 PM. Click "Close" to exit this window, o participation below. Showing 1 to 9 of 9 entries	tion or Visit 🗸					
Name of firm/company/org: Test Essential Skill? No Activity Name: Nonprofit Acco Impact Activity?: No <u>What to do if there are missing or extra members in this list.</u> The Chapter Activity was saved at 1:31 PM. Click "Close" to exit this window, o participation below. Showing 1 to 9 of 9 entries						
Essential Skill? No Activity Name: Nonprofit Acco Impact Activity?: No What to do if there are missing or extra members in this list. The Chapter Activity was saved at 1:31 PM. Click "Close" to exit this window, o participation below. Showing 1 to 9 of 9 entries						
Activity Name: Nonprofit Acco Impact Activity?: No ~ What to do if there are missing or extra members in this list. The Chapter Activity was saved at 1:31 PM. Click "Close" to exit this window, o participation below. Showing 1 to 9 of 9 entries						
Impact Activity?: No <u>What to do if there are missing or extra members in this list.</u> The Chapter Activity was saved at 1:31 PM. Click "Close" to exit this window, o participation below. Showing 1 to 9 of 9 entries	ounting					
What to do if there are missing or extra members in this list. The Chapter Activity was saved at 1:31 PM. Click "Close" to exit this window, o participation below.	Impact Activity?: No 🗸					
	r edit member					
Member Name Check if attended						
201104440002 Affleck. Ben						
201204440002 Best, Pete						
201004440004 Fiorentino, Margaret 🗹						
200904440003 Lennon, John 🗌						
201204440004 Osborne, Ozzie						
201104440001 Pattison, Robert 🗌						

Did You Know? Impact Categories

- 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





Complete Wufoo form for each activity to earn Impact Activity Point

▼ 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



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?: \odot Yes \odot No					
Submit Impact Activity Form ×					
Please make sure to submit the form in the link mentioned to complete the add impact activity process <u>Click Here for Impact Activity Form</u> .					
Ok					

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



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Add New Service Activity					
	Save	Delete	Close		
		Date of	Activity:	11/26/2024	
Was the	Activity at Le	ast 50 Minute	es Long?:	● Yes ○ No	
Confirm that the Activity was Performed in the Name of Beta Ves Alpha Psi:					
Service Activity Type: Food Insecurity Activities ~					
Activity Name: Campus Food Bank					
Impact Activity?: Yes ~					
Impact Category: Media Promotion (TV or P~					
What to do if there are missi	ng or extra n	nembers in th	is list.	tit member	
pa Submit Impact Activit	ty Form			×	
Please make sure to sub the edit impact activity for Impact Activity Form	pmit the form process, if ne <u>1</u> .	n in the link m eeded or not c	entioned t Ione alread	o complete dy <u>Click Here</u>	
20				Ok 🦼	

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



Menu Bar Item Reporting and Membership> Report Activity

Online Activity Reporting

Impact Activities

Please complete the below information to show the impact of your activity in your community.

 \sim

 \sim

Please complete this form for each impact activity.

School Name *

Chapter Name *

Chapter Number *

444

Region *

United	States	~

Year

2024-2025

Activity Name *

Campus Food Bank

Date of Activity *

11 / 26 / 2024 📰

MM DD YYYY

Please indicate which Impact Activity your chapter completed. *

Media Promotion (TV or Print)

Select Impact Category

Complete form with metrics



Description of Impact Activity * Please upload any photos or additional documentation here. Please title the submission with your school name and Impact Activity. Choose File No file chosen Submit

Add description of activity and support.

Include date, summary and audience.



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.

ofessional	Service	Reaching	Out Induction	Hours Summary	Scorecard	Studen	t Participation Veri	fication Report
Add	Add Non BAF	P Activity			Fi	lter by Ye	ar: 2024 - 2025	~
howing 1 to	1 of 1 entr	ies						
	Status ≎	Name ≎	Date ≎	Year ≎	At Least 50 Minutes Long?	In Name of BAP? ≎	% Participation \$	Points ≎
dit/Delete	<u>Reject</u>	Campus Food Bank	11/26/2024	2024 - 2025	Yes	Yes	33%	2
earch:								

Add New Professional Activity <u>ng:</u> Fab Save Cancel **ES-Business Writing Skills ES-Negotiation Skills** Date of Activity: **ES-Emotional Intelligence ES-Facilitation Skills** Was the Activity at Least 50 Minutes Long?: **ES-Managing Distractions** Confirm that the Activity was Performed in the Name of Beta **ES-Conflict Management** Alpha Psi: ES-Change Management Professional Activity Type: ES-Interpersonal Skills at the Workplace Name of firm/company/org: ES-Diversity and Inclusion **ES-Ethical Decision Making Skills** Essential Skill? ES-Accepting Feedback Activity Name: ES-Business Writing Skill: ~ Impact Activity?: No ~

Essential Skill – required for award seeking chapters

Choose 1 from 11 listed for a Professional session



Each activity that is saved and meets the 20% participation requirement automatically gets registered on the Scorecard screen.

Chapter Scorecard Chapter #444, Fab Four, Fab Four University					
Planned Achievement Level: Award-Seeking					
PCA Achievements		PCA Requ	lirements		
Mission Based (Bronze) Requirements	YTD Credited	Mission Based (Bronze) Points Required			
Beginning of Year Report	<u>1</u>	1			
Induction	<u>0</u>	1			
Mid Year Report	<u>0</u>	0			
End of Year Report	<u>0</u>	1	1		
Reaching Out Activities (ROAs)	<u>0</u>	3			
Professional Activities	<u>0</u>	6	5		
Service Activities	<u>0</u>	2			
Total Points	1	1	4		
Additional Requirements for Award-Seeking Chapters Only	YTD Achieved	Required for Silver	Required for Gold		
Additional ROAs	<u>0</u>	5	8		
Additional Professional Activities	<u>0</u>	4	6		
Additional Service Activities	<u>0</u>	2	4		
Mandatory Essential Skills Activity	<u>0</u>	1	1		
Overall Chapter Status	Under Review ~	Yes	Yes		

Non-BAP Activities



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 xxxx", enter the date, and leave the activity time and BAP confirmation at the default of "No". Then, select, "Save" and enter the attendance accordingly.



Online Activity Reporting Induction

Enter the total number of initiates for first and second inductions. Make sure to "Save".

me Reporting and Membership 🔻 Chapter File Subm	issions Award Letters PCA Report	ng Inty net Resources Conta	act BAP Home
eport Chapter Activities			
Professional Service Reaching Out	Induction Hours Summary	Scorecard Student I	Participation Verification Report
Filter by Year: 2024 - 2025 🗸			
First Ind	uction: 0]	
Second Ind	uction: 0		
	Save		



Student Participation Verification Report

	Y				í.	Y		(
Pro	ofessional	Service Re	eaching Out	Induction	Hours Sur	mmary	Scorecard	Student Parti	cipation Verification Report
Fil	ter by Activity	type: All		✓ Filter	by Year:	2024 - 2	025	✓ Refresh	Excel Export
	Member Number	Member Name	test						
	(All) 🗸	(All) 🗸	(AII] 🗸						
▶	200904440003	Lennon, John	Yes						
	201204440005	Vaughn, Vince	No						
	201204440007	test, test	Yes						
	201204440004	Osborne, Ozzie	No						
	201204440002	Best, Pete	Yes						
	201104440002	Affleck, Ben	Yes						
	201104440001	Pattison, Robert	Yes						
	201204440008	Smith, Mary	Yes						
	201004440004	Fiorentino, Margaret	No						

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.

Download into Excel to verify attendance.

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Chapter 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 Requ	irements		
Mission Based (Bronze) Requirements	YTD Credited	Mission Based (Bronze) Points Required			
Beginning of Year Report	1				
Induction	<u> </u>	1			
Mid Year Report	- 0	0			
End of Year Report	ō	1			
Reaching Out Activities (ROAs)	ō	3			
Professional Activities	0		5		
Service Activities	<u>0</u>		2		
Total Points	1	1	4		
Additional Requirements for Award-Seeking Chapters Only	YTD Achieved	Required for Silver	Required for Gold		
Additional ROAs	<u>0</u>	5	8		
Additional Professional Activities	<u>0</u>	4	6		
Additional Service Activities	<u>0</u>	2	4		
Mandatory Essential Skills Activity	<u>0</u>	1	1		
Overall Chapter Status	Under Review ~	Yes	Yes		



Pop Quiz

Can you name some fun Reaching Out Activities?



Online Activity Reporting Reaching Out Activities (ROAs)





Menu Bar Item Reporting and Membership> Report Activity

er	oort Chapter Activities						
	Professional Service	Reaching Out	Induction	Hours Summary	Scorec	ard	Student Pa
	Showing 1 to 26 of 26 entri	ies				Filte	r by Year:
	\$	Reaching Out Ac	tivities		Sponsor ≎	Status ≎	Upload Required? \$
	2025 Annual Meeting Atter	ndance			Executive Office		No
	2025 Annual Meeting Prese	entation - Best P	ractices or Cha	pter Operations	Executive Office		No
	AAA/CTLA Annual Meeting				Executive Office		No
	2025 Participation In Proje	ect Run With It			Executive Office		No
	Hosting or co-hosting Mid-	Year Meeting – v	erified by Cha	oter Advocate	Executive Office		No
	2026 Nomination for Outst Page.	anding Dean - S	ubmit online o	n the Competitions	Executive Office		No
	2026 Mid-Year Meeting Att	endance			Executive Office		No
	2026 Mid-Year Meeting Pre	esentation - Best	Practices or Cl	napter Operations	Executive Office		No

Online Activity Reporting Reaching Out Activities (ROAs)

100 Books Donation	Office Yes
1st Round Winner EY Leadership Award	Executive 🗆 No Office
Societal Impact Goal	Executive Office Yes
Virtual Chapter Reporting 101 Attendance - Fall 2025	Executive 🗆 No Office
Attendance at Live Virtual Induction-fall or spring	Executive Office No
IS & Finance Interaction	Executive 🗆 No Office
Natural Disaster Relief	Executive Ves 🖼
Alumni Advocate Podcasts-2	Executive 🗌 Yes 📹
Community College/High School Outreach	Executive Ves 🖼
Quiz on 2025-2026 PCA	Executive D No



Online Activity Reporting Reaching Out Activities (ROAs)

Quiz on 2025-2026 PCA	Executive Office	No	Somo BOAo roquiro
Alumni Activity (25% + significant alumni participation)	Chapter 🗌	No	an upload
Undeclared Recruitment Event #1	Chapter	Yes 🗎	(description of event)
Undeclared Recruitment Event #2	Chapter	Yes 🖼	
Multi-Chapter Event (25% membership participation)	Chapter 🗌	No	
Promoting Careers in Accounting/Finance/Data Analytics #1	Chapter 🛛	Yes 🖼	
Promoting Careers in Accounting/Finance/Data Analytics #2	Chapter	Yes 🗎	
Second Induction	Chapter 🗌	No	
Wellness Session	Chapter	Yes 🗎	ET ALPHA PS.

Executive Office Sponsored Reaching Out Activities

- Virtual Induction
- Mid-Year Meeting
- Annual Meeting



Table of Contents



Online Activity Reporting Induction

Enter the total number of initiates for first and second inductions. Make sure to "Save".

me Reporting and Membership 🔻 Chapter File Subm	issions Award Letters PCA Report	ng Inty net Resources Conta	act BAP Home
eport Chapter Activities			
Professional Service Reaching Out	Induction Hours Summary	Scorecard Student I	Participation Verification Report
Filter by Year: 2024 - 2025 🗸			
First Ind	uction: 0]	
Second Ind	uction: 0		
	Save		



Chapter 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 Requ	irements		
Mission Based (Bronze) Requirements	YTD Credited	Mission Based (Bronze) Points Required			
Beginning of Year Report	1	1	L		
Induction	<u>0</u>	1	L		
Mid Year Report	<u>0</u>		0		
End of Year Report	<u>0</u>	1			
Reaching Out Activities (ROAs)	<u>0</u>	3			
Professional Activities	<u>0</u>	6	5		
Service Activities	<u>0</u>	2	2		
Total Points	1	1	4		
Additional Requirements for Award-Seeking Chapters Only	YTD Achieved	Required for Silver	Required for Gold		
Additional ROAs	<u>0</u>	5	8		
Additional Professional Activities	<u>0</u>	4	6		
Additional Service Activities	<u>0</u>	2	4		
Mandatory Essential Skills Activity	<u>0</u>	1	1		
Overall Chapter Status	Under Review ~	Yes	Yes		



Menu Bar Item Reporting and Membership> Generate Membership Dues Invoice

Our mailing address has changed!

Our new address is:

Beta Alpha Psi 11161 E. State Rd 70 Ste 110-608 Lakewood Ranch, FL 34202





Membership Dues Payment by Credit Card

apt	er Number 4	144, Fab Four Un	iversity, F	ab Four		
		Chapter Balance	ce Prior to	Nisoat .	021 - 2022	: \$275.00
0	Member #	o O	Charge Year	Charge Date	Total Charge	Amount Owed
20	02204440007	Bynum, Sam	2022	02/10/2022	75.00	75.00
20	02204440008	Carruthers, Harrison	2022	02/10/2022	75.00	75.00
20	02204440005	Douglas, Beth	2022	02/10/2022	75.00	75.00
20	02204440003	Drummond, Will	2022	02/10/2022	75.00	75.00
20	02204440010	Higgns, Mark	2022	02/10/2022	75.00	75.00
20	02204440006	Patterson, Andrew	2022	02/10/2022	75.00	75.00
20	02204440009	Powell, Amy	2022	02/10/2022	75.00	75.00
20	02204440011	Roberts, John	2022	02/10/2022	75.00	75.00
20	02204440002	Sanz, Paul	2022	02/10/2022	75.00	75.00
20	02204440004	Sullivan, Amy	2022	02/10/2022	75.00	75.00
				Total Arrow		
				Total Amo	ount Owed:	\$1025.00

Check off the names of the records to be paid by credit card.



Menu Bar Item Reporting and Membership> Generate Membership Dues Invoice

Payment Options for Membership Dues

Card Check	<
All fields are re	equired.
Credit/Debit	Card
First Name	
Middle Name	
Last Name	
Card Type	Master Card ~
Card Number	
CVV	Expiration Date 01 v 2026 v

Make Check Payable to: Beta Alpha Psi

Send Payment to:

Beta Alpha Psi 11161 E. State Rd 70 Ste 110-608 Lakewood Ranch, FL 34202

Membership Dues Payment by Credit Card

You will be prompted to confirm the records and the total amount that you are paying for by credit card. Select "Confirm."

Niddle Name H Showing 1 to 10 of 10 entries Total: \$750.00 ast Name William Member # Member Name Amount Owed Card Details aard Type Master 202204440007 Bynum, Sam 75.00 Card Type Master Card aard Number 5267 2: 202204440005 Douglas, Beth 75.00 Card Number xxxx xxxx xxx 00 0896 XVV 463 202204440005 Douglas, Beth 75.00 Card Number 06/2024 Subling Address 202204440006 Patterson, Andrew 75.00 Billing Address 06/2024 ddress 447 Hor 202204440002 Sanz, Paul 75.00 Name Donald H Williams ity Philadel 202204440004 Sullivan, Amy 75.00 Philadelphia Pennsylvanii, US, 19108	irst Name	Donald	Payment confi	rmation			
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Asst Name William Member # Member Name Amount Owed Card Details Card Type Master 202204440007 Bynum, Sam 75.00 Card Type Master Card Card Number 5267 2: 202204440005 Douglas, Beth 75.00 Card Number XXXX XXXX XXX 000896 CVV 463 202204440003 Drummond, Will 75.00 Card Number 06/2024 SU2204440006 Patterson, Andrew 75.00 Expiration Date 06/2024 SU2204440009 Powell, Amy 75.00 Donald H Williams Name Address 447 Hor 202204440002 Sanz, Paul 75.00 Name Donald H Williams Address 447 Hor 202204440004 Sullivan, Amy 75.00 Address 447 Horseshie Lane, Philadelphia Pennsylvanii, US, 19108			Showing 1 to 10	of 10 entries		Total: \$750.00	
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address 447 Hoi 202204440011 Roberts, John 75.00 Address 447 Horsesh e Lane, 202204440002 Sanz, Paul 75.00 Philadelphia Philadelphia Sity Philadel 202204440004 Sullivan, Amy 75.00 Pennsylvani, US, Search: 19108 19108			202204440009	Powell, Amy	75.00	Name	Donald H Williams
City Philadel 202204440004 Sullivan, Amy 75.00 Pennsylvani, US, 19108	ddress	447 Hor	202204440011 202204440002	Roberts, John Sanz, Paul	75.00	Address	447 Horsesh e Lane, Philadelphia
ountry Illebad 6 one	lity	Philadel	202204440004 Search:	Sullivan, Amy	75.00		Pennsylvania, US, 19108
officed a coo	ountry	United 5	00				





Enter valid credit card information.

Select "Submit".

Card	Check	k					
All fields	are reg	uired.					
Credit/	Debit	Card					
Card Ty	pe	Master	Card				
Card Nu	umber	555555	555555444	14			
CW							
		234	Expiratio	on Date 01	202	3 💌	
Billing	Addre	234 ss	Expiration	on Date 01	• 202	3 •	
Billing First Na	Addr e	234 ss Margare	Expiratio	Last N	Tioren	3 ×	
Billing First Na Address	Addre me	234 ss Margare 220 Lei	et gh Farm Re	Last N	Tioren	3 •	
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Billing First Na Address City Country	Addre me	234 ss Margare 220 Lei Durham United S	Expiration et gh Farm Ro States	Last N Dad State	Floren NC ZIP	3 • tino	

You will be prompted to confirm the records and the total amount that you are paying for by credit card. Select "Confirm."

ayment Opt	tions					
Card Chec	:k	Payment confi	irmation			
All fields are red	quired.	Showing 1 to 3 Member #	of 3 entries Member Name \$	Amount Owed	Total: \$225.00 Card Details	0
Credit/Debit	Master Card	201325010004 201325010006	Baum, Hadassah Boop, Betty	75.00 75.00	Card Type Card Number	Master Card xxxx xxxx xxx 44
Card Number	5555555555544	201325010002 Search:	Doeson, John	75.00	Expiration Date	01/2023
Billing Addre	234 Expirau				Billing Address Name Address	Margaret Fio entir 220 Leigh Falm
First Name Address	Margaret 220 Leigh Farm R					Durham, NC, US, 27707
City	Durham					Cancel Confirm
Country	United States	C	ancel Subr	nit		







BAW Setta ALPHA Sor BAW Sor 1919 · 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	20/20	75.00	\$75.00
322531	Boop, Betty	2020	75.00	\$75.00
322527	Doeson, John	2020	75.00	\$75.00
			Subtotal	\$225.00
Billing Informati	on			
Full Name	:	Margaret Fig	prentino	
Address	:	220 Leigh Fa	rm Road	
City	:	Durham		
State	:	NC		
Zip/Postal Code	:	27707		
Country	:	US		

Payment by Credit Card for Chapter Maintenance Fee

ard Check	
ll fields are requ	ired.
redit/Debit (Card
ard Type	American Express
ard Number	378282246310005
2VV	2345 Expiration Date 03 - 2023 -
Billing Addres	5
irst Name	Margaret Last Name Fiorentino
ddress	220 Leigh Farm Road
	Durham State NC
lity	
iity Country	United States ZiP 27707



Payment by Credit Card for Chapter Maintenance Fee

ayment confirmation			
Annual maintenance	fee total: \$325.00		
Card Details			
Card Type	American Express		
card Number	XXXX XXXX XXXX 0005		
Expiration Date	03/2026		
Billing Address			
Name	Margaret Fiorentino		
Address	9009 Town Center Parkway Lakewood Ranch, FL 34202		
	34202		
		Cancel	Confirm

Once submitted, the screen will prompt you to confirm the payment of \$325. 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



Did You Know?

Faculty advisors will receive a PDF version of membership certificates.

Digital Badges Inducted members will receive an email from <u>admin@credly.com</u> with instructions on claiming their digital badge. Once claimed, it can be added to their <u>LinkedIn</u> profile. [Click <u>here</u> for instructions on claiming your digital badge or scan the QR code]





Quiz on Program for Chapter Activities (PCA)

Score 80% or better for the ROA





<u>Alumni & Member</u> <u>Network</u>

BAP members may join





Program for Chapter Activities (PCA)





4:33 <u>Tutorial</u> on Beginning of Year Report





Mid-Year Report in <u>90</u> Seconds





Questions?

Contact the Executive Office

- Email <u>bap@bapeo.org</u>
- Phone 919.402.4044





