

Beta Alpha Psi



Chapter Reporting 101 Table of Contents, Main Topic Links

A link to the Table of Contents may be found on select slides

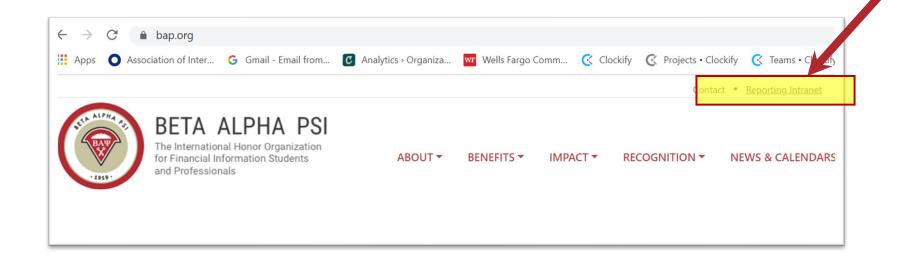
- Navigating the RI
- Create officer logins
- Enter candidates
- Submit for Initiation and get certificates
- Enter activities
- Impact Activity Categories
- Enter Essential Skills
- Non-BAP Activities
- Reaching Out Activities
- Chapter Scorecard
- Student Participation Verification Report

- Beginning of Year Report
 - Update Chapter Profile Page
 - Plan of Activities
 - Upload chapter bylaws
 - Pay Maintenance Fee
- Program for Chapter Activities
- PCA Quiz
- Beginning of Year Report Tutorial
- Mid-Year Report in 90 Seconds
- Contact Us



Where Do I Login?

Reporting Intranet – top right corner on BAP.org home page.





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

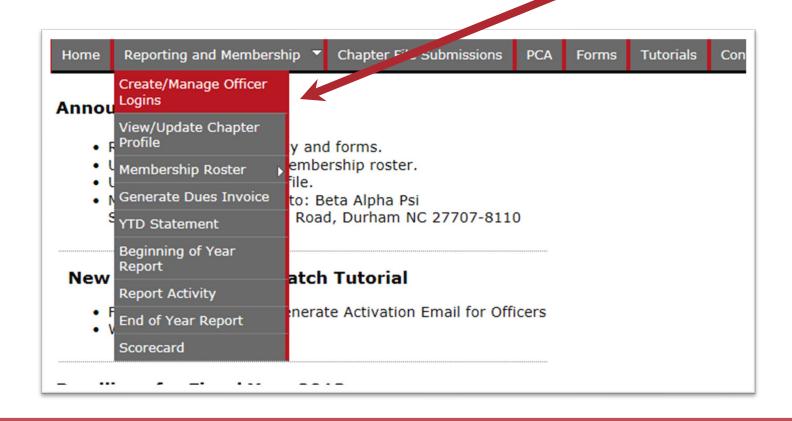


- No sharing!



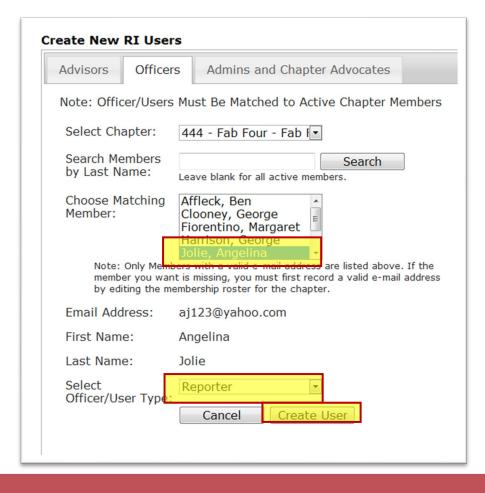
Login System Activation Process Officers

Faculty Advisors Enter the officers





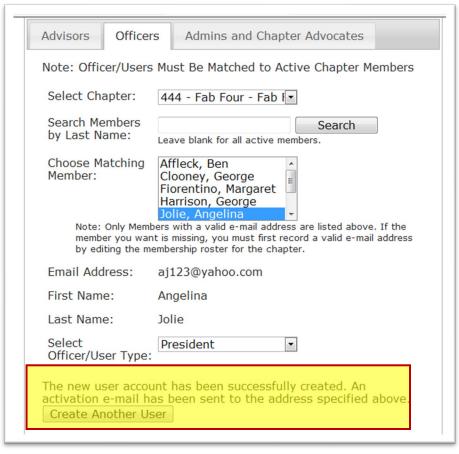
Activation Process for Officers by Faculty Advisors



- 2. Under the "Officers" tab, the FA will select the officer's name and officer's role.
- 3. Then, select "Create User".



Activation Process for Officers by Faculty Advisors



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



Why Should I Update the Chapter Profile Page?

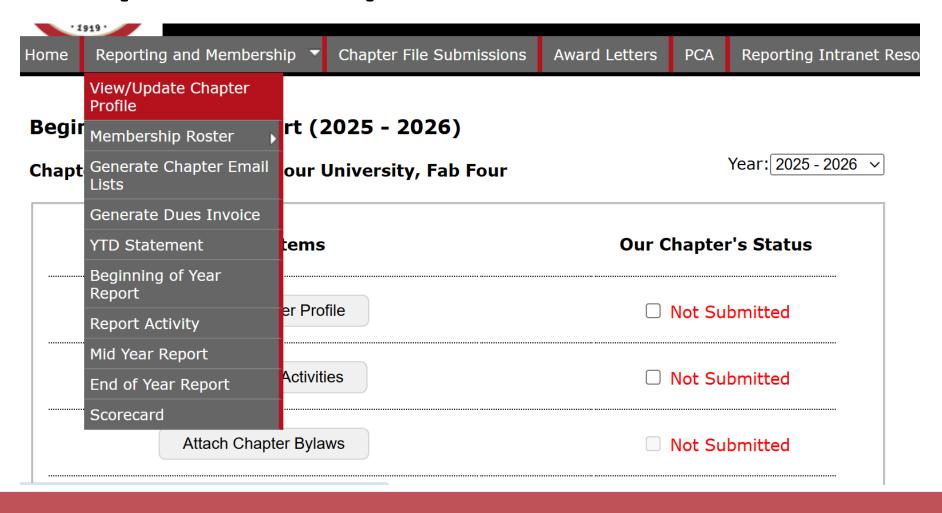
List current advisors, Dean, Department chair for award letters!

List the new officers

Verify address for award letters



Update Chapter Profile





Update Chapter Profile

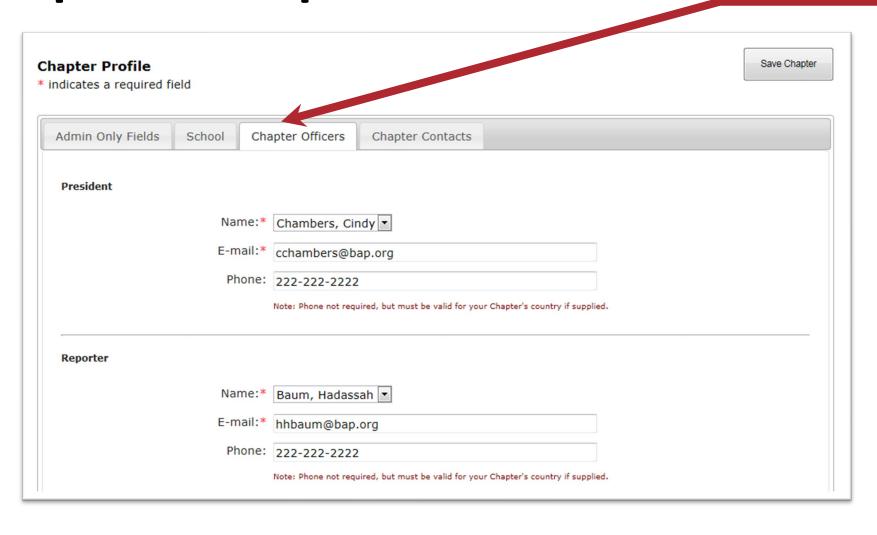
Update your chapter's school information—including website link, achievement level, and mailing address—under the "School" tab.

*	Chapter Profile * indicates a required field Your changes have been saved.									
	Admin Only Fields	School	Chapter Officers	Chapter Contacts						
				bap.org						
				https://www.linkedin.com/company/betaalphapsi						
			Twitter Link:							
			Facebook Link:							
			Instagram Link:							
		Ac	School Year:	Semester Award-Seeking						



Update Chapter Profile

Add the officers' names here





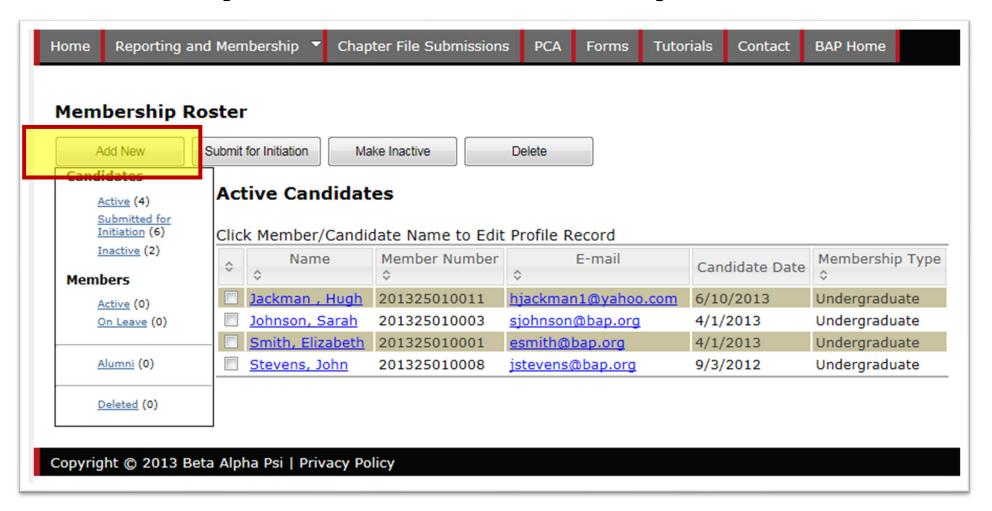


I'm Ready to Add a Candidate

But have you collected the \$85 fee?

Do you know the candidate's first day with Beta Alpha Psi?

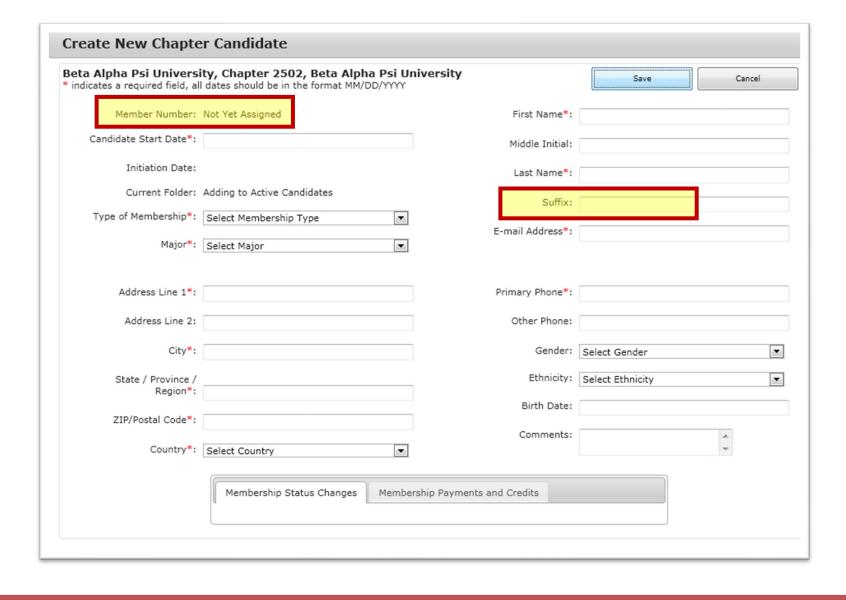
View/Update Membership





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

Add a New Candidate

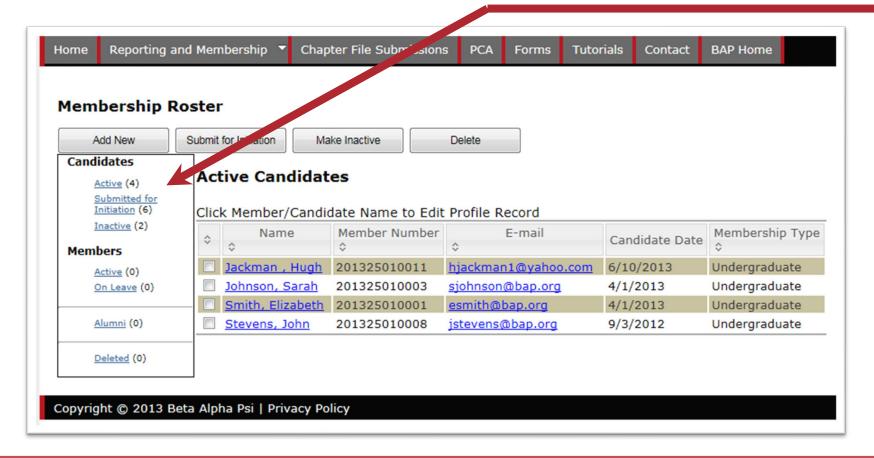




View/Update Membership

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

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





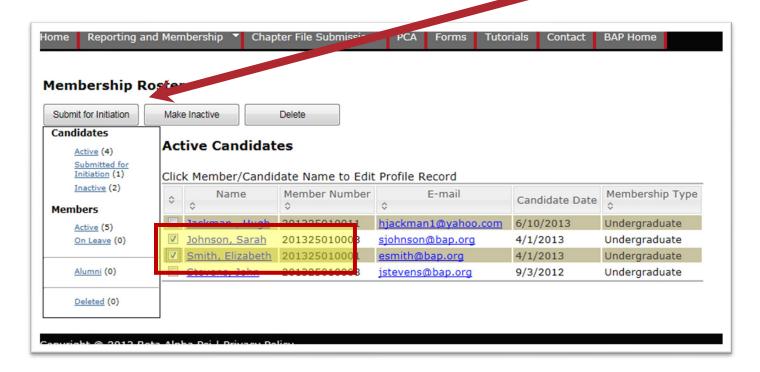
Pop Quiz

How do I get a pdf file of membership certificates?



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."

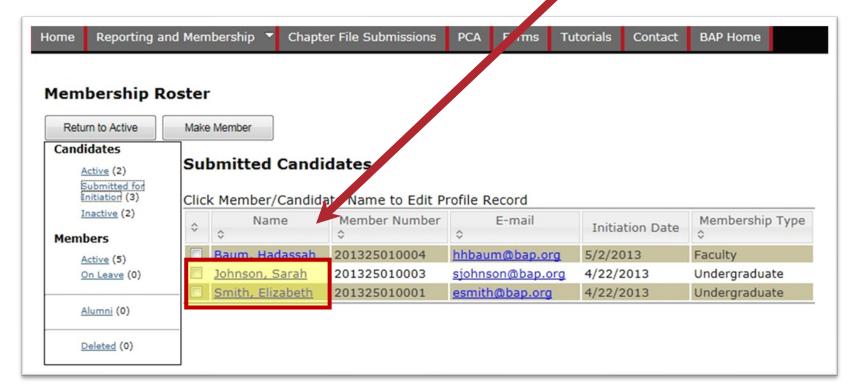


The system will prompt the user to confirm that the candidate met the requirements and that the date is the same date for multiple candidates. Confirm both.



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?



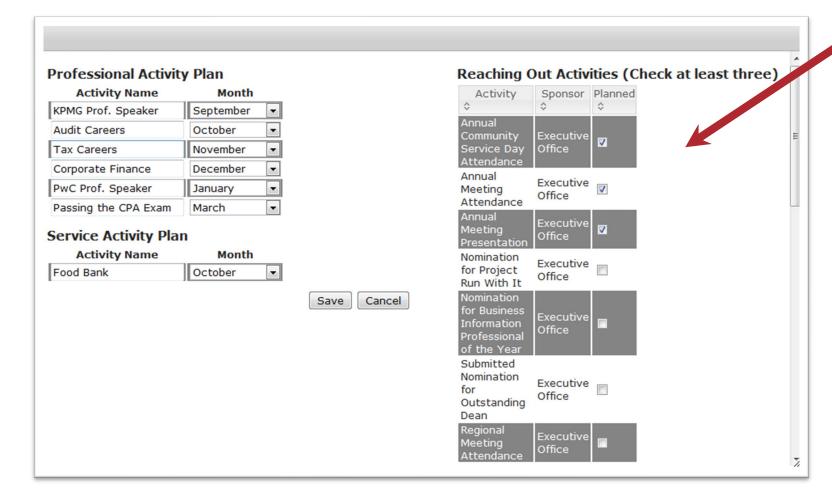
Beginning of Year Report

US Chapters, due October 15 Oceania Chapters, due June 15

Report Items		Our Chapter's Status
Update Chapter Profile		☐ Not Submitted
Enter Plan of Activities		☐ Not Submitted
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 Affa	airs department pol	licies and procedures
Overall Report Status		Not Credited



Plan of Activities



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



Local Chapter Bylaws – Required this year

Report Items		Our Chapter's Status
Update Chapter Profile		☐ Not Submitted
Enter Plan of Activities		☐ Not Submitted
Attach Chapter Bylaws		☐ Not Submitted
Pay the \$325.00 chapter maintenance fee		Payment Options
Annual Chapter Maintenance Fee	☐ Not Received	
Confirm compliance with Student Affa	irs department po	licies and procedures
Overall Report Status		Not Credited

New bylaws? Upload them here! Need a template? Email bap@bapeo.org



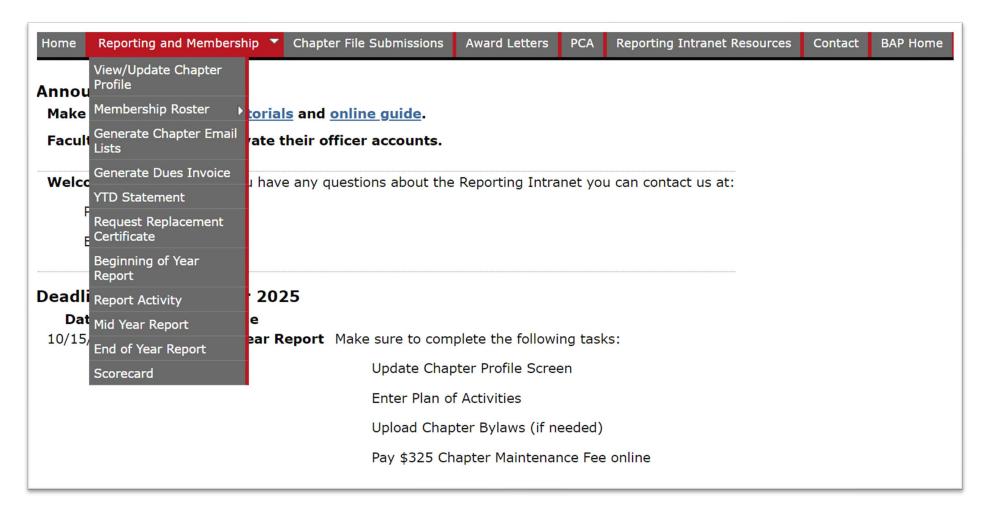
Chapter Maintenance Fee

To download a PDF of the Chapter Maintenance fee invoice, select the tab titled "Check".

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 Click here. Add Payment Close Print



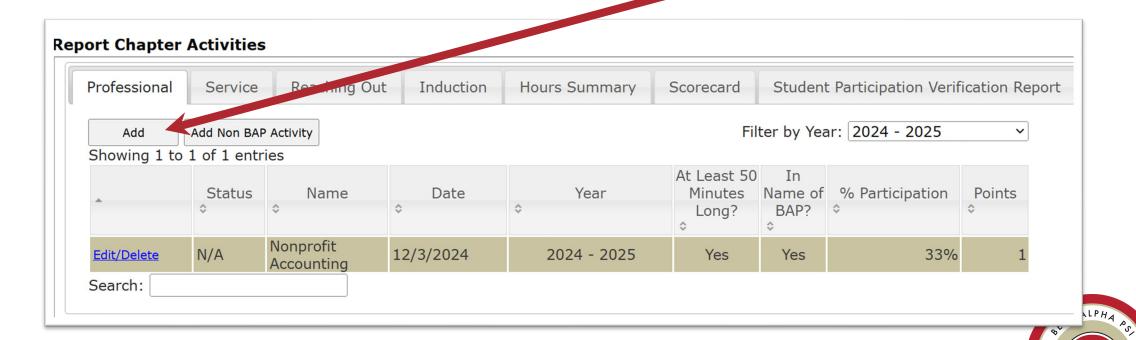
Online Activity Reporting System



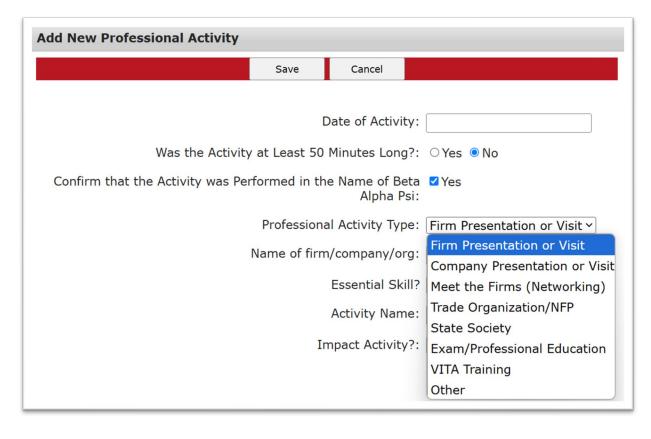


Online Activity Reporting Entering an Activity

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



Online Activity Reporting Entering an Activity



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".

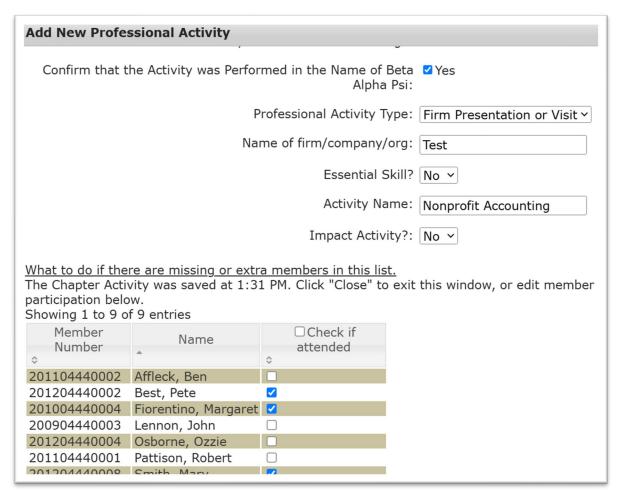


Once the activity information has been saved, the system will pull up all the records as of the "effective activity date" in the Active Candidate, Submitted for Initiation and Active Member folders.

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.





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 in addition to attendance point

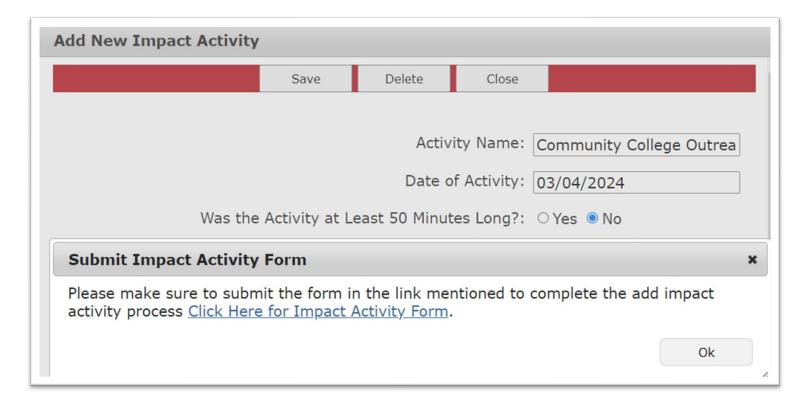
▼ IMPACT ACTIVITY POINTS - NEW!

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





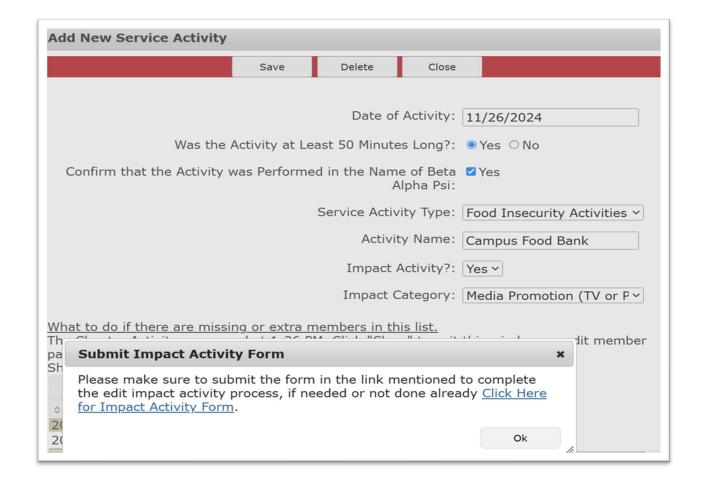
Enter the activity name and date

Confirm that it was at least 50 minutes long and sponsored by the chapter

Select Impact Category

Complete form with metrics





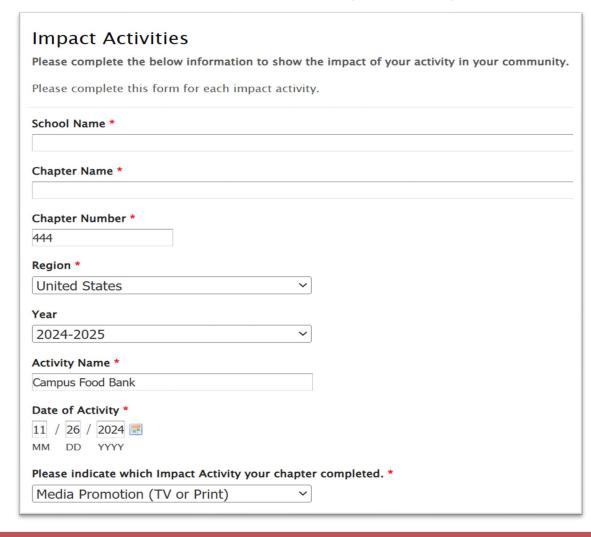
Enter the activity name and date

Confirm that it was at least 50 minutes long and sponsored by the chapter

Select Impact Category

Complete form with metrics

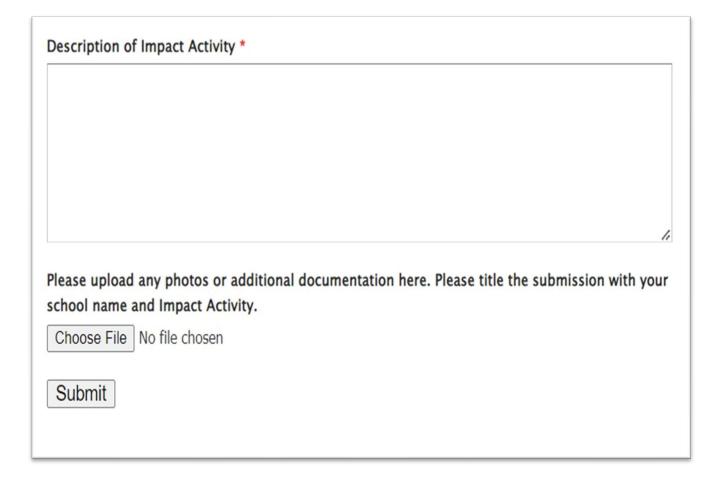




Select Impact Category

Complete form with metrics





Add description of activity and support.

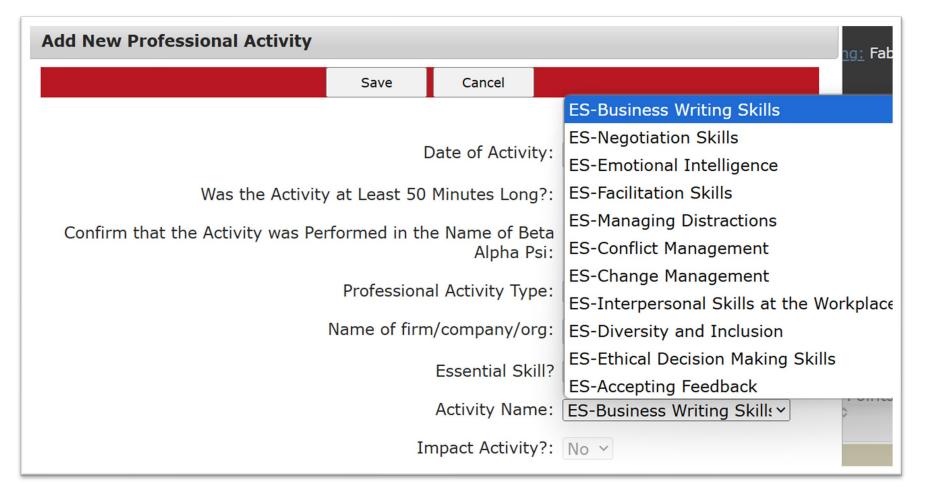
Include date, summary and audience.



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.

Professional	Service	Reaching C	Out Induction	Hours Summary	Scorecard	Scorecard Student Participation Verification Re		
Add	Add Non BAP	lter by Ye	Year: 2024 - 2025					
Showing 1 to	Status	Name	Date	Year	At Least 50 Minutes Long?	In Name of BAP?	% Participation	Points
Edit/Delete	Reject	Campus . Food Bank	11/26/2024	2024 - 2025	Yes	Yes	33%	2

Online Activity Reporting



Essential Skill – required for award seeking chapters

Choose 1 from 11 listed for a Professional session



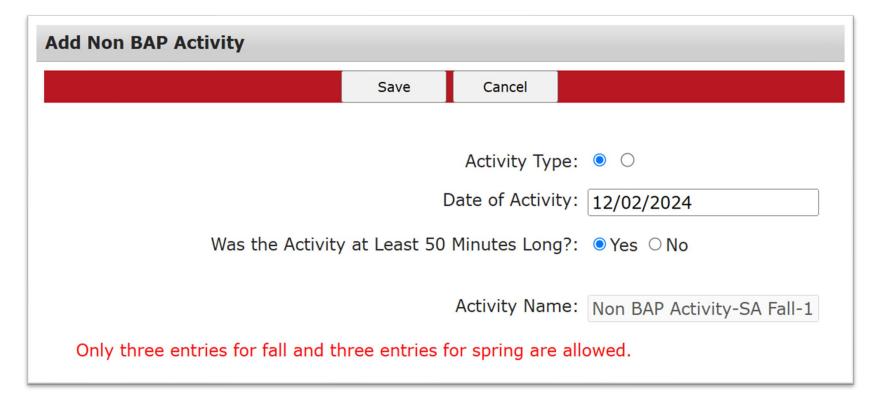
Online Activity Reporting

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

D Credited 1	PCA Require Mission Based (Bronze 1 1 0		
Credited			
Credited	Mission Based (Bronze 1 1	e) Points Required	
1 0 0	1 1		
<u>0</u>	1		
0	0		
0			
<u>U</u>	1		
0	3		
0	6		
0	2		
1	14		
O Achieved	Required for Silver	Required for Gold	
0	5	8	
0	4	6	
0	2 4		
0	1 1		
	0 0 1 Achieved 0 0 0	0 2 1 14 Achieved Required for Silver 0 5 0 4	



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.

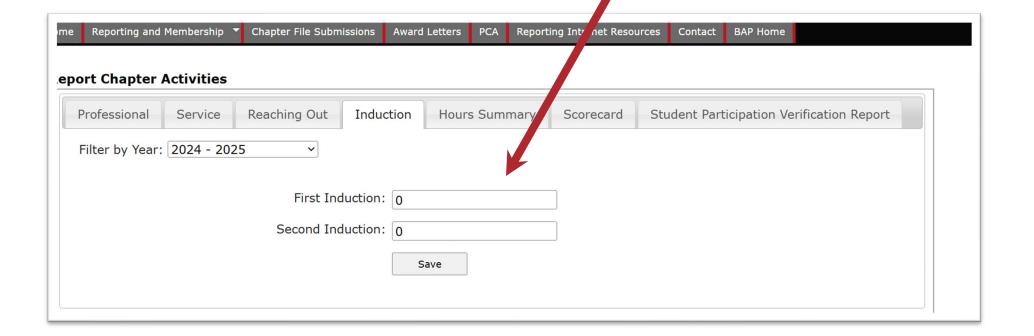
Just add a new activity, enter the activity name as, "Non BAP xxxxx", enter the date, and leave the activity time and BAP confirmation at the default of "No". Then, select, "Save" and enter the attendance accordingly.



Online Activity Reporting Induction

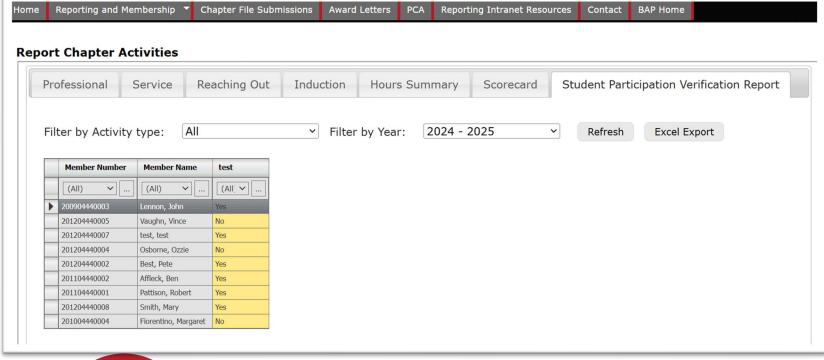
Enter the total number of initiates for first and second inductions.

Make sure to "Save".





Student Participation Verification Report



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 Req	uirements		
Mission Based (Bronze) Requirements	YTD Credited	Mission Based (Bro	nze) 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			
Reaching Out Activities (ROAs)	<u>0</u>	3			
Professional Activities	0		6		
Service Activities			2		
Total Points	1		14		
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	0	4	6		
Additional Service Activities	<u>0</u>	2 4			
Mandatory Essential Skills Activity	<u>0</u> <u>0</u>	1	1		
Overall Chapter Status	Under Review Y	Yes	Yes		



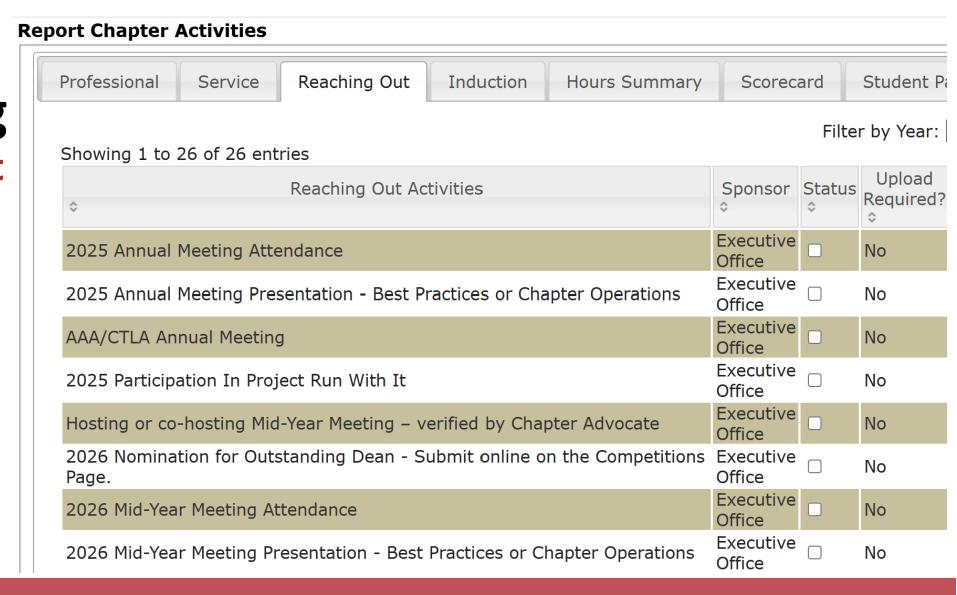
Pop Quiz

Can you name some fun Reaching Out Activities?



Online Activity Reporting

Reaching Out Activities (ROAs)





Online Activity Reporting Reaching Out Activities (ROAs) 100 BG 100 BG 101 BG 101 BG 101 BG 101 BG

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



Online Activity Reporting Reaching Out Activities (ROAs)

Quiz on 2025-2026 PCA	Office	No	Carra DO A a require
Alumni Activity (25% + significant alumni participation)	Chapter	No	Some ROAs require 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 🖼	ETA ALPHA PS

Even audive

Executive Office Sponsored Reaching Out Activities

- Virtual Induction
- Mid-Year Meeting
- Annual Meeting



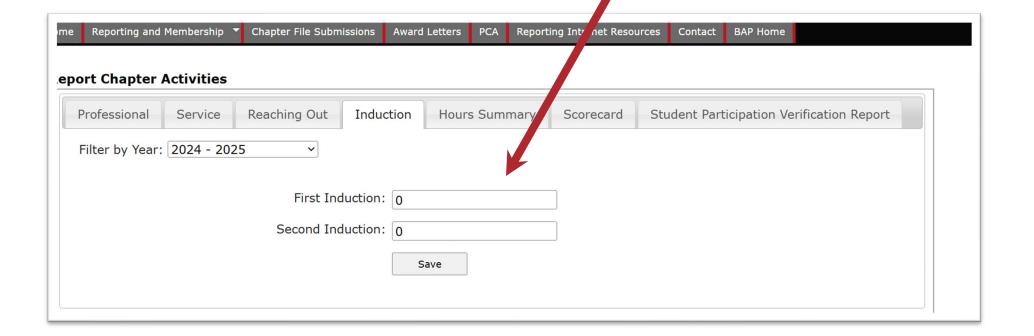
Table of Contents



Online Activity Reporting Induction

Enter the total number of initiates for first and second inductions.

Make sure to "Save".





Chapter Scorecard

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

Chapter #444, Fab Four, Fab Four University			
Planned Achievement Level: Award-Seeking			
PCA Achievements		PCA Requi	irements
Mission Based (Bronze) Requirements	YTD Credited	Mission Based (Bron	ze) Points Required
Beginning of Year Report	<u>1</u>	1	
Induction			
Mid Year Report	0		
End of Year Report	<u>0</u>		
Reaching Out Activities (ROAs)	<u>0</u>	3	
Professional Activities	0	6	
Service Activities	<u>o</u>	2	
Total Points	1	14	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> <u>0</u>	1	1
Overall Chapter Status	Under Review Y	Yes	Yes



Beginning of Year Report

US Chapters, due October 15 Oceania Chapters, due June 15

Report Items		Our Chapter's Status
Update Chapter Profile		☐ Not Submitted
Enter Plan of Activities		☐ Not Submitted
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 Affa	airs department po	licies and procedures
Overall Report Status		Not Credited



Our mailing address has changed!

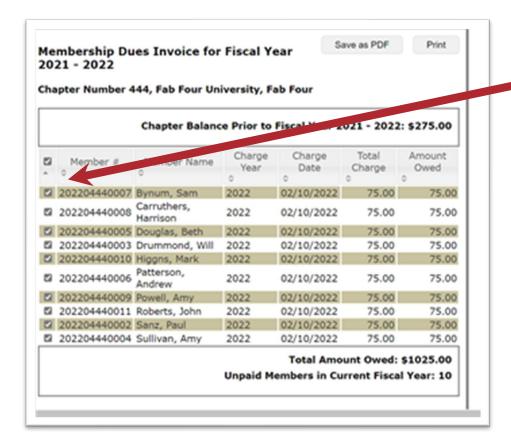
Our new address is:

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





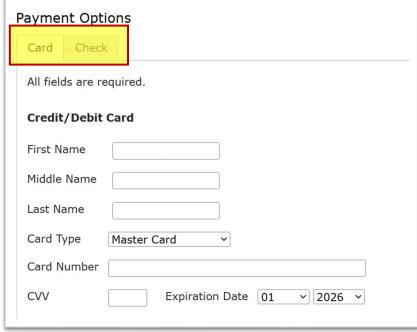
Membership Dues Payment by Credit Card



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



Payment Options for Membership Dues



Make Check Payable to:

Beta Alpha Psi

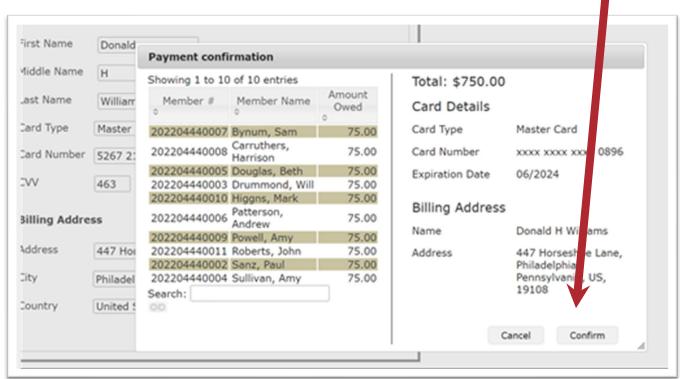
Send Payment to:

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



Membership Dues Payment by Credit Card

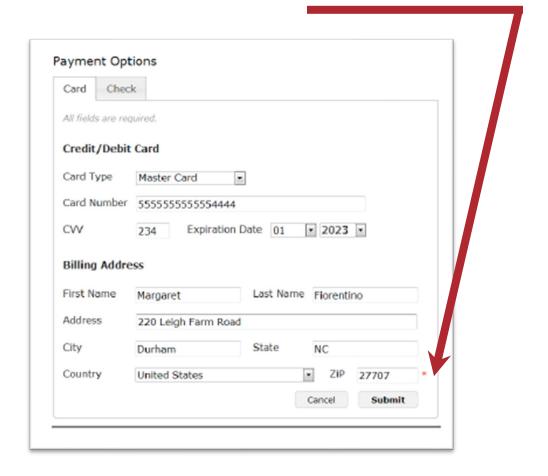
You will be prompted to confirm the records and the total amount that you are paying for by credit card. Select "Confirm."





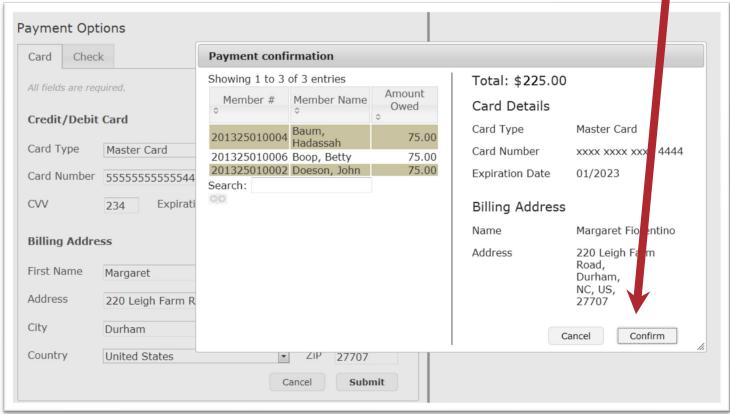
Enter valid credit card information.

Select "Submit".

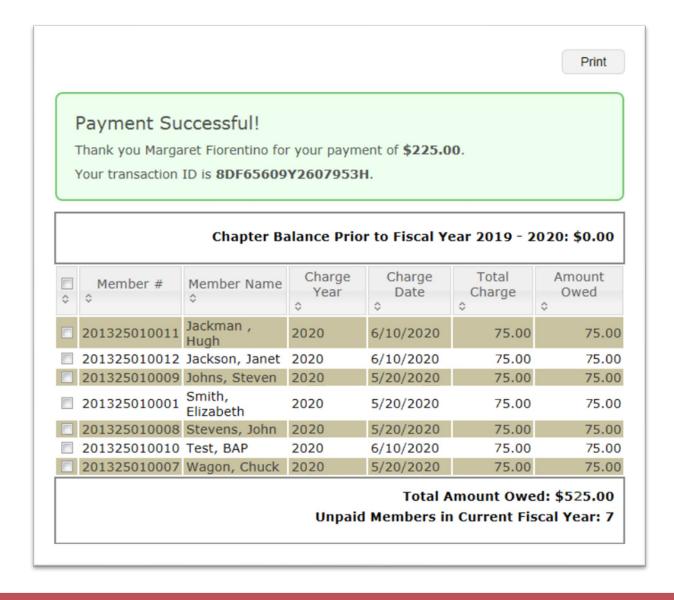




You will be prompted to confirm the records and the total amount that you are paying for by credit card. Select "Confirm."









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.

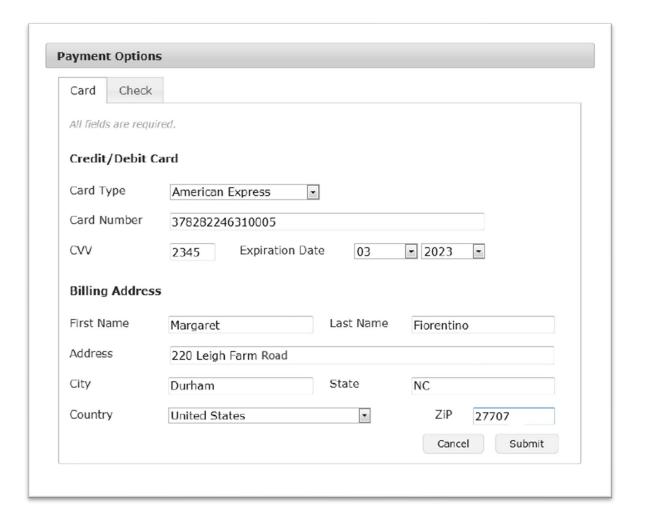
Chapter Number 2501, Beta Alpha Psi University, Beta Alpha Psi University

Member ID	Member Name	Year	Amount Due	Item Total
322529	Baum, Hadassah	2020	75.00	\$75.00
322531	Boop, Betty	2020	75.00	\$75.00
322527	Doeson, John	2020	75.00	\$75.00
			Subtotal	\$225.00

Billing Information			
Full Name	:	Margaret Fiorentino	
Address	:	220 Leigh Farm Road	
City	:	Durham	
State	:	NC	
Zip/Postal Code	:	27707	
Country	:	US	



Payment by Credit Card for Chapter Maintenance Fee





New! Candidates can pay their dues and update their profile information

Click Send Profile Update Link or click Send Payment Email.

Please ask students to check their spam folders.

Membership Roster

Add New	Submit for Ini	tiation	Make Inactive	Delete						
			t ive Candid k Member/Ca		o Edit Profile Record					
Members		\$	Name	Member Number	E-mail	Candidate Date	Membership Type	Effective Date	Send Profile Update Link	Send Payment Email
Active On Le	eave (13)		Active, Mail Becker,		mailactive@gmail.com	6/27/2025	Graduate	6/27/2025	<u>Send</u>	Send
Alumn	<u>ni</u> (0)		Raymond Brennan, Lisa		RaymondJBecker@teleworm.us LisaJBrennan@jourrapide.com	6/2/2025 9/7/2025	Undergraduate Undergraduate	6/2/2025 9/7/2025	Send Send	
<u>Delete</u>	ed (1)		<u>Campbell,</u> <u>Irvin</u>		<u>bap@bapeo.org</u>	6/1/2025	Undergraduate	6/1/2025	Send	Send
			<u>Demo, Profile</u> <u>Jaynes, John</u> <u>L.</u>	202800110012 202500110001	profiledemo@gmail.com John Jaynes@jourrapide.com	7/1/2025 5/28/2025	Undergraduate Undergraduate	7/1/2025 6/27/2025	Send Send	<u>Send</u>



Candidates may update their own profiles

Edit Member/Candidate Details

University of California * indicates a required field, al	Berkeley, Chapter 11, Lambda I dates should be in the format MM/DD/YYYY		Save	Cancel
Member Number:	202800110021	First Name*:	Ricky	
Candidate Start Date*:	9/2/2025	Middle Initial:		
Initiation Date:		Last Name*:	Ensign	
Current Folder:	Active Candidates		Liisigii	
Type of Membership*:	Undergraduate ✓	Suffix:		
Majors*:	Accounting, Finance	E-mail Address*:	RickyBEnsign@rhyta.cor	n
Minors:	Analytics	Personal E-mail:	RickyBEnsign@rhyta.cor	n
Targeted Graduation Date*:	5/15/2027	LinkedIn URL:	https://www.linkedin.co	m/in/yourprofile
City*:	Raleigh	Mobile Phone:		
State / Province / Region*:	NC	Gender:	Male	v
_	INC.	Ethnicity:	White	~
Country*:	United States	Comments:		_
Did you attend Community Colleae*:	Yes V			//



Email the candidate receives to pay

Subject line: Please complete the Beta Alpha Psi Candidate Payment Process

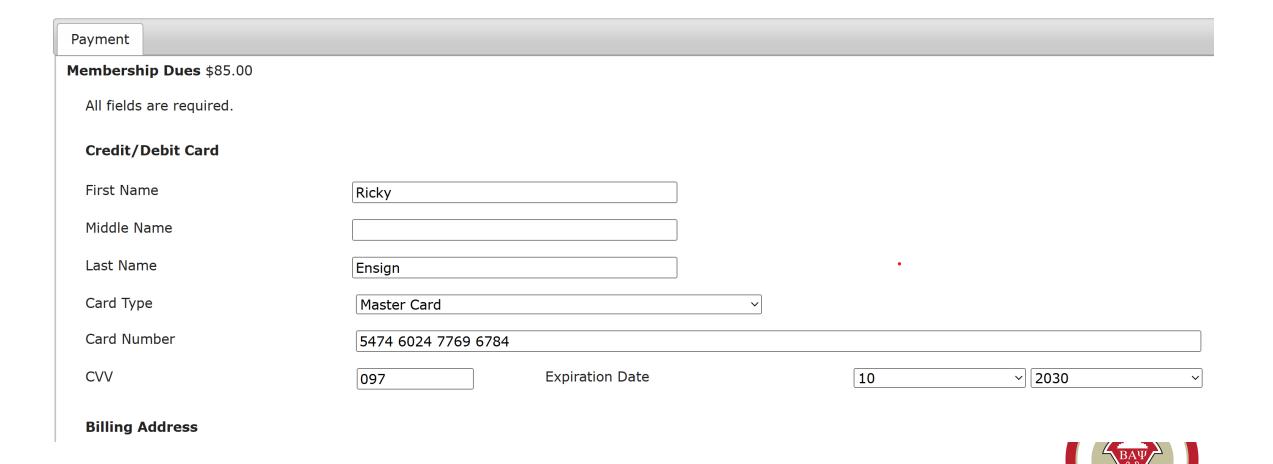
Dear Ricky Ensign:

Please click the following link to make your payment: Candidate Dues Payment in U.S. funds.

Beta Alpha Psi



Candidates will receive a payment link via email. Clicking on the payment link will navigate them to the payment page.



Enter necessary details and click "Submit". Payment confirmation will be as shown below

Payment confirmation

Membership Due fee total: \$85.00

Card Details

Name Ricky Ensign

Card Type Master Card

Card Number xxxx xxxx xxxx 6784

Expiration Date 10/2030

Billing Address

Address 1137 Jennifer Lane,

Raleigh,

Alabama, US,

27604

Cancel

Confirm



Click "Confirm"

Payment confirmation

Payment Successful!

Thank you Ricky Ensign for your payment of **\$85.00**.

Your transaction ID is 5SP84267BM505632C.

Membership Due fee total: \$85.00

Billing Address

Address 1137 Jennifer Lane,

Raleigh,

Alabama, US,

27604

Close

Print



Candidate email:

Dear Ricky Ensign,

Thank you for your payment of **\$85.00**

Your transaction ID is 5SP84267BM505632C.

Chapter Number 11, University of California Berkeley, Lambda

Member ID	Member Name	Year	Amount Due	Item Total
202800110021	Ricky Ensign	2028	85.00	85.00
			Subtotal	\$85.00

Billing Information

Full Name : Ricky Ensign

Address : 1137 Jennifer Lane

City : Raleigh

State : Alabama



Email the candidate receives to update his/her profile

Subject line:

Please update your candidate profile here

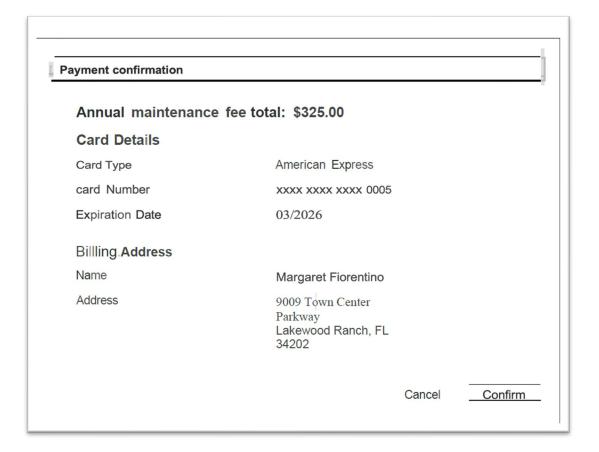
Dear Ricky Ensign:

Please update your candidate profile here. Click here to activate your account

Beta Alpha Psi



Payment by Credit Card for Chapter Maintenance Fee



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 admin@credly.com with instructions on claiming their digital badge. Once claimed, it can be added to their LinkedIn profile. [Click here 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





Alumni & Member Network

BAP members may join





Program for Chapter Activities (PCA)





2:33 <u>Tutorial</u> on Beginning of Year Report





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





Questions?

Contact the Executive Office

- Email bap@bapeo.org
- Phone 919.402.4044



