

End-of-Year Reporting Guide Reporting Intranet Beta Alpha Psi



Reporting Intranet Table of Contents, Main Topic Links

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Clarification of Roles

Faculty Advisors

- Create and manage officer login accounts
- Review all chapter reports:
 - Beginning of Year Due October 15 (U.S.), June 15 (Oceania)
 - Mid-Year Report Due December 15 (U.S. award-seeking chapters), August 15 (Oceania)
 - Student Participation Report
 - Complete 990-N e-Postcard filing by June 1Sign off on End-of-Year Report – Due June 1 (U.S.), December 15 (Oceania)
 - Meet with Chapter Reporter each semester to review reporting
 - Meet with Chapter Treasurer to confirm membership dues and chapter maintenance fee are 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
- Coordinate with the faculty advisor to process membership dues and confirm that the chapter maintenance fee is paid on time.



End-of-Year Report Checklist



- ✓ Update Chapter Profile
- ✓ Upload Chapter Financials
- ✓ Confirm all activities are marked complete
- ✓ Ensure Faculty Advisor completes the FA sign-off
- ✓ Complete Tax Information:
 - If annual revenue is under \$50,000

 file IRS e-Postcard
 - If annual revenue is over \$50,000 submit Over \$50K spreadsheet

Submissions are due June 1 for U.S. chapters (no exceptions) and December 15 for Oceania chapters; late submissions will incur a \$250 fine.

Update Chapter Profile

Home	Reporting and Membersh	nip 🔻 Chapter File Submissions	PCA	Forms	Tutorials	Contact	BAP Home	
Annou	Create/Manage Officer Logins							
• 1	View/Update Chapter Profile	y and the second se						
•	Membership Roster 🔹 🕨	embership roster.						
• 1	Generate Dues Invoice	to: Beta Alpha Psi						
	YTD Statement	Road, Durham NC 27707-811	0					
New	Beginning of Year Report	atch Tutorial						
new	Report Activity							
•	End of Year Report	nerate Activation Email for Of	ficers					
	Scorecard							
Dead	ines for Eiscal Vea	- 2012						

Once logged in, the officer should navigate to "Reporting and Membership" and select "View/Update Chapter Profile" to access the Update Chapter Profile screen.



Update Chapter Profile

Reporting and Me hapter Profile indicates a required fi	mbership 🔻	Chapter File Subm	issions PCA Forms Tutorials Contact BAP Home
Admin Only Fields	School	Chapter Officers	Chapter Contacts
	С	hapter Website:	www.bap.org
		School Year:	Semester
	Ach	ievement Type:	Award-Seeking
Gra	d Students	in Accounting?:	Yes
		School:*	Beta Alpha Psi University
		Country:*	Select Country
		Address 1:*	220 Leigh Farm Road
		Address 2:	
		City:*	Durham
	State/P	rovince/Region:	

The Chapter Profile screen appears in a tabbed format.

Under the "School" tab, Faculty Advisors and officers can update school-related information such as the chapter website link, achievement level, and school mailing address.

Fields marked with a red asterisk (*) are required.



The tab labeled "Admin Only Fields" is for the Executive Office use only.

Update Chapter Profile

ndicates a required f	eld			Save Chapter
Admin Only Fields	School	Chapter Officers	Chapter Contacts	
President				
	Nam	e:* Chambers, Cir	ndy 💌	
	E-ma	ail:* cchambers@b	ap.org	
	Pho	one: 222-222-2222	2	
		Note: Phone not requ	uired, but must be valid for your Chapter's country if supplied.	
Reporter				
	Nam	e:* Baum, Hadass	sah 💌	
	E-ma	ail:* hhbaum@bap	org	
	Pho	one: 222-222-2222	2	
			ind but much be will for some Chapterie souther if supplied	

The "Chapter Officers" tab is where officer information is updated—this is separate from officer user accounts.

To assign a role, select the officer's name from the dropdown list; their name, email, and phone number will automatically populate the appropriate fields.

Note: The dropdown list pulls from the "Submit for Initiation" and "Active Members" folders. Fields marked with a red star are required, and officers must be either Active Members or Submitted for Initiation.



View/Update Membership

Add New	Submit	for Initiation	Make Inactive	Delete			
Candidates							
Active (4)	Ac	tive Cand	idates				
Submitted for Initiation (6)	Clic	k Member/0	Candidate Name	to Edit Profile	Record		
Inactive (2)	\$	Name	Member N	umber	E-mail	Candidate Date	Membership Type
Momhors		V	~	\Diamond			
Members		Jackman , H	Yugh 201325010	≎ 0011 hiackm	an1@vahoo.com	6/10/2013	Undergraduate
Members Active (0) On Leave (0)		Jackman , H Johnson, Sa	Hugh 201325010 arah 201325010	0011 <u>hjackm</u> 0003 <u>sjohns</u>	an1@yahoo.com	6/10/2013 4/1/2013	Undergraduate Undergraduate
Members Active (0) On Leave (0)		Jackman , H Johnson, Sa Smith, Eliza	V lugh 201325010 arah 201325010 beth 201325010	0011 <u>hjackm</u> 0003 <u>sjohnso</u> 0001 <u>esmith</u>	an1@yahoo.com on@bap.org @bap.org	6/10/2013 4/1/2013 4/1/2013	Undergraduate Undergraduate Undergraduate

The Membership Roster screen is where reporters can add new candidates, submit them for initiation or move them to the Inactive folder, and update Active members by changing their status to On Leave or Alumni.

The Membership Roster is divided into two sections:

- **Candidates**, which includes folders for Active Candidates, Submit for Initiation, and Inactive Candidates
- Members, which includes folders for Active Members, On Leave, and Alumni.



View/Update Membership

To add a new candidate, select "Add New". Do not add a candidate until your chapter has collected the \$85 fee. Adding a candidate always creates a receivable for your chapter.

Membership F	Roste/				
Add New	Submit for Initiation Ma	ake Inactive	Delete		
Candidates					
Active (4)	Active Candidat	es			
Submitted for Initiation (6)	Click Member/Candi	date Name to Edit	Profile Record		
Inactive (2)	♦ Name	Member Number	E-mail	Candidate Date	Membership Ty
Members		~	×		×
Active (0)	Jackman , Hugh	201325010011	hjackman1@yahoo.co	<u>m</u> 6/10/2013	Undergraduate
On Leave (0)	Johnson, Sarah	201325010003	sjohnson@bap.org	4/1/2013	Undergraduate
	Smith, Elizabeth	201325010001	esmith@bap.org	4/1/2013	Undergraduate
Alumni (0)	Stevens, John	201325010008	jstevens@bap.org	9/3/2012	Undergraduate



Add a New Candidate

a Alpha Psi Universi dicates a required field, al	ity, Chapter 2502, Beta Alpha Psi Un I dates should be in the format MM/DD/YYYY	niversity	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 / Region*:		Ethnicity:	Select Ethnicity	•
ZIP/Postal Code*:		Birth Date:		
Country*:		Comments:		*
country .				
	Membership Status Changes Membe	rship Payments and Credits		

All fields marked with a red asterisk (*) are required; the Candidate Start Date should reflect when the student began participating, not when they are being entered into the system. Important: email address must be valid and unique, as duplicate addresses are not allowed.



Submit a Candidate for Induction

Submit for Initiation Mak	ke Inactive	Delete			
Candidates		Delete			
Active (4) Submitted for Initiation (1)	tive Candidat	es date Name to Edit	Profile Record		
Inactive (2)	Name	Member Number	E-mail	Candidate Date	Membership Type
Active (5)	Jackman , Hugh	201325010011	hjackman1@yahoo.com	6/10/2013	Undergraduate
On Leave (0)	<u>Johnson, Sarah</u>	201325010003	sjohnson@bap.org	4/1/2013	Undergraduate
	Smith, Elizabeth	201325010001	esmith@bap.org	4/1/2013	Undergraduate
Alumni (0)	<u>Stevens, John</u>	201325010008	jstevens@bap.org	9/3/2012	Undergraduate

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 user will be prompted 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 Induction

Reporting a	nd Men	nbership 🔻 Char	pter File Submissions	PCA Forms	Futorials Contact	BAP Home
Return to Active	Make	e Member				
Candidates Active (2) Submitted for Enitiation (3)	Sul	bmitted Cand	didates	rofile Record		
Inactive (2)	\$	Name	Member Number	E-mail	Initiation Date	Membership Type
Active (5)		Baum, Hadassah	201325010004	hhbaum@bap.org	5/2/2013	Faculty
On Leave (0)		Johnson, Sarah	201325010003	sjohnson@bap.org	4/22/2013	Undergraduate
		Smith, Elizabeth	201325010001	esmith@bap.org	4/22/2013	Undergraduate
Alumni (0)						
Deleted (0)						

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

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



Menu Bar Item Reporting and Membership> Report Activity

Online Activity Reporting System

The online activity reporting screen can be found under Reporting and Membership and Report Activity.

Hom	e Reporting and Member	rship 🔻	Chapter File Submissions	PCA F	Forms Tutorials	Contact BA	P Home		
Ann	Create/Manage Officer Logins								
Tha	nk View/Update Chapter Profile	test	the new Reporting Intran	et! Please	make sure to the	w the script p	rovided and docu	ment all of your fe	edback!
Dea	dli Generate Dues Invoice	⁾ 20	13						
Copy	YTD Statement	l Priv	acy Policy						
	Beginning of Year Report								
	Report Activity End of Year Report								
	Scorecard								



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	Reaching	Induction	Hours Summary	Scorecard	Student	Participation Verif	ication Report
Add	1 of 1 ent	P Activity			Filt	ter by Yea	nr: 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



Online Activity Reporting Entering an Activity

dd New Professional Activity	
Save Cancel	
Date of Activity:	
Was the Activity at Least 50 Minutes Long?:	○Yes ●No
Confirm that the Activity was Performed in the Name of Beta Alpha Psi:	✓ Yes
Professional Activity Type:	Firm Presentation or Visit ~
Name of firm/company/org:	Firm Presentation or Visit Company Presentation or Visit
Essential Skill?	Meet the Firms (Networking)
Activity Name:	Trade Organization/NFP
Impact Activity?:	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.



Add New Profe	ssional Activity						
Confirm that t	he Activity was Perfo	ormed in the Name of Be Alpha P	eta ☑Yes si:				
		Professional Activity Typ	e: Firm Presentation or Visit ~				
	N	ame of firm/company/or	g: Test				
		II? No ~					
		e: Nonprofit Accounting					
	Impact Activity?: No 🗸						
What to do if the The Chapter Acti participation belo Showing 1 to 9 o	re are missing or ext vity was saved at 1:3 w. f 9 entries	ra members in this list. 31 PM. Click "Close" to e	xit this window, or edit member				
Member Number	Name	□ Check if attended					
201104440002	Affleck, Ben						
201204440002	Best, Pete						
201004440004	Fiorentino, Margare	t 🗹					
200904440003	Lennon, John						
201204440004	Osborne, Ozzie						
201104440001	Pattison, Robert						
201204440000	Smith Many	12					

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



Menu Bar Item Reporting and Membership> Report Activity

Online Activity Reporting

Add New Service Activity								
	Save	Delete	Close					
		Date of	Activity:	11/26/2024				
Was the Activity at Least 50 Minutes Long?: ● Yes ○ No								
Confirm that the Activity	was Performe	d in the Name A	e of Beta Ipha Psi:	✓ Yes				
Service Activity Type: Food Insecurity Activities ~								
Activity Name: Campus Food Bank								
		Impact A	Activity?:	Yes ~				
		Impact C	ategory:	Media Promotion (TV or Pv				
What to do if there are missing or extra members in this list.								
pa Submit Impact Activi	ty Form			x				
 Sh Please make sure to submit the form in the link mentioned to complete the edit impact activity process, if needed or not done already <u>Click Here</u> for Impact Activity Form. 								
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
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 *	
	1.
Please upload any photos or additional documentation here. Please title school name and Impact Activity.	the submission with your
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 BAP	Activity			Fi	lter by Ye	ar: 2024 - 2025	~
	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:							- I	

Add New Professional Activity			<u>ng:</u> Fab
Save	Cancel		
			ES-Business Writing Skills
	Data of Activi	-	ES-Negotiation Skills
	ES-Emotional Intelligence		
Was the Activity at Least 5	ES-Facilitation Skills		
Confirm that the Activity was Performed in	ES-Managing Distractions		
committed the Activity was renormed in	ES-Conflict Management		
Professio	ES-Change Management		
Professio	ES-Interpersonal Skills at the Workplace		
Name of fi	ES-Diversity and Inclusion		
	ES-Ethical Decision Making Skills		
	LSSential Sk	:	ES-Accepting Feedback
	Activity Nam	ne: [ES-Business Writing Skill:
	Impact Activity	y?:	No Y

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	irements
Mission Based (Bronze) Requirements	YTD Credited	Mission Based (Bror	nze) Points Required
Beginning of Year ReportInductionMid Year ReportEnd of Year ReportReaching Out Activities (ROAs)Professional ActivitiesService ActivitiesTotal Points			L L D L 3 5 2 4 Required for
Additional Requirements for Award-Seeking Chapters Only	YTD Achieved	Required for Silver	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 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 Reaching Out Activities



(ROAs)

Menu Bar Item Reporting and Membership> Report Activity

ep	port Chapter Activities									
	Professional	Service	Reaching Out	Induction	Hours Summary	Scorec	ard	Student Pa		
	Showing 1 to	26 of 26 enti	ries				Filte	r by Year:		
	\$		Reaching Out Act	tivities		Sponsor ≎	Status \$	Upload Required?		
	2025 Annual Meeting Attendance							No		
	2025 Annual Meeting Presentation - Best Practices or Chapter Operations							No		
	AAA/CTLA Annual Meeting							No		
	2025 Participation In Project Run With It							No		
	Hosting or co-hosting Mid-Year Meeting – verified by Chapter Advocate							No		
	2026 Nomina Page.	tion for Outs	tanding Dean - Su	ubmit online o	n the Competitions	Executive Office		No		
	2026 Mid-Year Meeting Attendance							No		
	2026 Mid-Yea	r Meeting Pr	esentation - Best	Practices or Cl	napter Operations	Executive Office		No		

Online Activity Reporting Reaching Out Activities (ROAs)

100 Books Donation	Executive 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	Executive Office	No	Sama BOAs require
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 🗎	ETA ALPHA AS



Online Activity Reporting Induction

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

me Reporting and Membership Chapter Fil	e Submissions Award	d Letters PCA Reporti	ng Intri net Resource	es Contact BAP Home	
Professional Service Reaching Filter by Year: 2024 - 2025	Out Induction	Hours Summary	Scorecard S	Student Participation Ver	ification Report
Fi	rst Induction: 0]		
Setu		Save			



Student Participation Verification Report

Professional Service Reaching Out Induction Hours Summary Scorecard Student Participation Verification Report Filter by Activity type: All	rt Chapter A	ctivities							
Filter by Activity type: All Filter by Year: 20024 - 2025 Refresh Excel Export Member Number Member Name test (All) (All)	Professional	Service Re	eaching Out	Induction	Hours Su	immary	Scorecard	Student Part	cicipation Verification Repor
Member NumberMember Nametest(All) · (All)	Filter by Activit	ty type: All		∽ Filte	by Year:	2024 - 20	025	▼ Refresh	Excel Export
(All) · · …(All) · · …(All · · …)200904440003Lennon, JohnYes20120444005Vaughn, YinceNo20120440007test, testYes20120440007Osborne, OzzieNo20120444002Best, PeteYes20120444002Affleck, BenYes2011044002Affleck, BenYes2011044001Pattison, RobertYes	Member Numbe	r Member Name	test						
200904440003Lennon, JohnYes201204440005Vaughn, VlinceNo201204440007test, testYes201204440007test, testYes201204440004Osborne, OzzieNo20120444002Best, PeteYes20110444002Affleck, BenYes20110444001Pattison, RobertYes	(AII) ~	(All) 🗸	(AII: ~						
201204440005Vaughn, VinceNo201204440007test, testYes201204440004Osborne, OzzieNo201204440002Best, PeteYes201104440002Affleck, BenYes201104440001Pattison, RobertYes	200904440003	Lennon, John	Yes						
20120440007test, testYes20120440004Osborne, OzzieNo20120440002Best, PeteYes20110440002Affleck, BenYes20110440001Pattison, RobertYes	201204440005	Vaughn, Vince	No						
201204440004 Osborne, Ozzie No 20120444002 Best, Pete Yes 20110444002 Affleck, Ben Yes 20110444001 Pattison, Robert Yes		test, test	Yes						
201204440002 Best, Pete Yes 201104440002 Affleck, Ben Yes 201104440001 Pattison, Robert Yes	201204440007	Osborne, Ozzie	No						
201104440002 Affleck, Ben Yes 201104440001 Pattison, Robert Yes	201204440007 201204440004		Maa						
201104440001 Pattison, Robert Yes	201204440007 201204440004 201204440002	Best, Pete	res						
	201204440007 201204440004 201204440002 201104440002	Best, Pete Affleck, Ben	Yes						
201204440008 Smith, Mary Yes	201204440007 201204440004 201204440002 201104440002 201104440001	Best, Pete Affleck, Ben Pattison, Robert	Yes Yes						
201204440008 Smith Mary Yes	201204440007 201204440004 201204440002	Bost Data	YOC						

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.



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 (Bron	ize) Points Required	
Beginning of Year Report	1	1	L	
Induction	<u>0</u>	1		
Mid Year Report	<u>0</u>)		
End of Year Report	<u>0</u>	1		
Reaching Out Activities (ROAs)	<u>0</u>	3	3	
Professional Activities	<u>0</u>	e	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	0	5	8	
Additional Professional Activities	0	4	6	
Additional Service Activities	0	2	4	
Mandatory Essential Skills Activity	<u>0</u>	1	1	
Overall Chapter Status	Under Review ~	Yes	Yes	



End-of-Year Report Checklist

Report Items		Our Chapter's Stat		
Update Chapter Profile		Submitted		
Attach Financial Statements		Submitted		
Confirm that all chapter activity reporting is complete (Professional, Service, ROAs, and Initiations)		Submitted		
Enter Faculty Advisor Sign-off (Financial, Tax and Non-BAP Hours)	Faculty Advisor Must Complete	Submitted		
Overall Report Status		Credited		

- ✓ Update Chapter Profile
- ✓ Upload Chapter Financials
- ✓ Confirm all activities are marked complete
- ✓ Ensure Faculty Advisor completes the FA sign-off
- ✓ Complete Tax Information:
 - If annual revenue is under \$50,000

 file IRS e-Postcard
 - If annual revenue is over \$50,000 submit Over \$50K spreadsheet

Submissions are due June 1 for U.S. chapters (no exceptions) and December 15 for Oceania chapters; late submissions will incur a \$250 fine.

Upload Chapter Financials

Reporting Intranet Resources

- Reporting Intranet Guide (PDF)
 - Reporting Intranet FAQs (PDF)
- Oceania FAQs (PDF)
- Ideas for Online Service Activities
- <u>Chapter Reporting 101</u> (PDF) and <u>Webinar Recording</u> (Sept 2023 AM Session)
 - FY 2023-2024 Maintenance Fee Invoice (PDF)
- Mid Year Reporting Guide (PDF) and Webinar Recording (Dec. 2023)
- Mid-Year Reporting in 90 Seconds
- End of Year Reporting Guide (PDF) and Webinar Recording (April 2023 AM Session)
 - Chapters will be fined \$250 for using incorrect EIN. If you don't know your chapters EIN, please contact <u>bap@bap.org</u>.
- IRS Form 990-N (e-Postcard) User Guide
 - What we will need from your chapter for the 990n tax filing (Please send to <u>bap@bap.org</u>):
 - 990-N Submission (PDF)
 - 990-N Confirmation (PDF)
 - IRS Form 990-N (e-Postcard) Filing
- Sample Financial Statements
- <u>Replacement Certificates Form</u> (PDF)



Upload Chapter Financials

The sample financials will download as an Excel file. Please save a copy, enter your chapter's information, and upload the completed file to the End-of-Year (EOY) screen.

Be sure to review both tabs in the Excel workbook.

	Beta Alpha Psi			
Stat	tement of Financial Position as of Apri	l 30, 2024		
chool Name:				
hapter Number:				
hapter Name:				
	Assets	4/30/20)24	
	Cash	.,,.		
	Accounts receivable			
	Prepaid expenses and other assets			
	Total Current Assets			
	Liabilities and Net Assets			
	Liabilities:			
	Accounts payable			
	Unearned revenue			
	Total liabilities			
	Net Assets:			
	Unrestricted			
	Temporarily restricted			
	Total Net Assets			
> Stat	ement of Financial Position Statemer	nt of Activities	+	



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

Upload Chapter Financials



Once you have uploaded your chapter financials, this task will be credited.



Faculty Advisor Sign Off

Step 1 -- Verify Non-BAP Hours*

I, Lisa Wicker, Faculty Advisor of the Fab Four Chapter, have reviewed and verified that the non-BAP professional and service hours reported by the Chapter meet the definition of professional or service activities under the Program of Chapter Activities.

Sign-off Not Signed-off

Step 2 -- Complete Tax Info*

Step 2A -- Sign Tax Release Form*

Beta Alpha Psi Tax Release Form Chapter 444, Fab Four University, Fab Four For Inclusion in Group Exemption and Combined Filing of Form 990

Fab Four Chapter Fab Four University School of Knowledge Abbey Road RTP, NC 27707

Chapter's Separate IRS Employer Identification Number: Not available

I, **Lisa Wicker**, Faculty Advisor of this chapter of Beta Alpha Psi, hereby authorize the Executive Office of Beta Alpha Psi to **include** our chapter in a group exemption letter and in a combined filing of Form 990 with the IRS, and state that I have authority to execute this authorization by virtue of a resolution passed by the chapter executive committee at its meeting.

Note: This authorization covers the Federal Filing Requirements. Any chapter also having separate state requirements must fulfill them separately.

Sign-off Not Signed-off

Step 2B*

For receipts less than \$50,000, you are required to file the IRS e-Postcard at: IRS ePostcard

Once completed - please enter your confirmation number:

My chapter had less than \$50,000 in receipts this year:

The Faculty Advisor Sign-Off screen confirms that the FA has reviewed and approved the chapter's activity reporting and financial statements and has completed the tax filing for the fiscal year.

On the 990-N Acceptance screen, enter the submission ID in the designated field and email a copy to <u>bap@bapeo.org.</u>



Faculty Advisor Sign Off



If your chapter has revenue exceeding \$50,000 over a threeyear period, you are required to complete the "Over \$50K" spreadsheet.

A link to download the spreadsheet will appear once you select "Yes" under Step 2C.



How to Complete the 990n e-Postcard

MIRS				Help News	English 🗸	🕫 🤇	Charities & Nonprofits	🔳 Та	x Pros
File	Pay	Refunds	Credits & Deductions	Forms & Instructions		Search		Q	
PAY BY Bank Accou Payment Pl Electronic f	ınt (Dire lan (Ins Federal	ect Pay) tallment Agre Tax Payment	POPU Your C rement) Tax Wi System (EFTPS) Estima Penalt	LAR Online Account ithholding Estimator ated Taxes ties					
Individuals Businesses and Sel Charities and Non	lf-Empl profits	loyed	Nho May File Form Reporting Require n general, exempt organizat Ithough there are <u>exceptior</u>	n 990-N to Satisfy T ement? iions have an annual reportin as.	Fheir Ann g requirement	ual	Charities & N <u>A-Z Index</u> <u>Educational F</u> Guidance 	on-Profit	s Topics

After April 30 – Go to the IRS login page [insert link].

- 1. If you haven't already registered, create a new user account.
- 2. Enter your **chapter's EIN number** (available on the Chapter Profile screen FA login only).
- 3. The system will default the organization name to "Beta Alpha Psi National Council" – this is correct.
- 4. Enter your school's address and list your Faculty Advisor as the principal officer.
- 5. Answer the four required questions, confirming that your chapter's revenue was under \$50,000 for the tax fiscal year.
- 6. After submitting, refresh the page to access the Acceptance screen, which will display your submission ID.
- 7. You'll need this submission ID for Step 2B on the FA Sign-Off screen.
- 8. Please also email a copy of the Acceptance to the EO at <u>bap@bapeo.org.</u>



Complete a One-Time Registration with the IRS





Complete a One-time Registration with the IRS



WIRS

Sign In or Create a New Account

IRS now offers sign-in options with Login.gov and ID.me. Both offer access to IRS online services with a secure account that protects your privacy.

Login.gov is an account created, maintained, and secured by the U.S. government. ID.me is an account created, maintained, and secured by a technology provider. Currently, Login.gov can only be used to access IRS Form 990-N (e-Postcard) and Qualified Intermediary Application and Account Management System (QAAMS).

If you don't have a Login.gov or ID.me account, you must create a new account.





Did You Know?

Paper Certificates The Executive Office (EO) sends a PDF version of membership certificates to the faculty advisor.

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. [Scan the QR code here for instructions on claiming your digital badge.]





Program for Chapter Activities (PCA)





Quiz on Program for Chapter Activities (PCA)

Score 80% or better for the ROA





Alumni & Member Network

BAP members may join





Questions?

Contact the Executive Office

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



