Reporting Intranet

End of Year Reporting Guide
Reporting Intranet Resources

A link back to the Table of Contents is located on the lower right-hand side of each slide.
Reporting Intranet

Table of Contents - Main Topic Links

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

- Navigating the RI
- Roles of Advisors & Officers
- Enter candidates
- Submit for Initiation and get certificates
- Enter activities
- Impact Activity Categories
- Enter Essential Skills
- Reaching Out Activities
- Chapter Scorecard
- Student Participation Verification Report

- End of Year Report
  - Update Chapter Profile Screen
  - Upload Chapter Financial Statements
  - How to complete the IRS 990n e-Postcard
  - Over $50K spreadsheet
  - IRS One Time Registration for New Users

- Program for Chapter Activities 2023-2024
- PCA Quiz 2023-2024

A link back to the Table of Contents is located on the lower right-hand side of each slide.
Clarification of Roles
Faculty Advisors vs. Officers

**Faculty Advisors**
- Create and manage officer login accounts
- Review all chapter reports:
  - Beginning of Year - October 15 for U.S., June 15 for Oceania
  - Mid-Year Report – December 15th U.S., award-seeking chapters, August 15 for Oceania
  - Student Participation Report
  - Complete 990n e-Postcard filing by June 1st
  - Sign Off on End of Year Report by June 1 for U.S., December 15 for Oceania.
- Meet with Chapter Reporter throughout each semester to review chapter reporting.
- Meet with Chapter Treasurer to ensure that membership dues and chapter maintenance fee have been paid on time.

**Chapter Officers**
- All Chapter Reporting
  - Entering new candidates into the system
  - Beginning of Year Report
  - Entering Professional & Service Activities, Reaching Out Activities and Initiations
  - Mid-Year Report (award-seeking chapters)
  - End of Year Report
- Work with faculty advisor to process payments for membership dues and ensure that chapter maintenance fee has been paid on time.
End-of-Year Report
Menu Bar Item: Reporting and Membership> End of Year Report

Make sure to complete the following tasks:
- Update Chapter Profile
- Upload Chapter Financials
- Confirm activities are complete
- Faculty Advisor must complete the FA sign-off
- Complete Tax Information
  - <$50,000 – IRS e-Postcard
  - >$50,000 – Over $50K spreadsheet

Due June 1 for U.S. – No Exceptions. Oceania due Dec 15. Late submittals will be subject to a $250 fine.

<table>
<thead>
<tr>
<th>Report Items</th>
<th>Our Chapter's Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Chapter Profile</td>
<td>Submitted</td>
</tr>
<tr>
<td>Attach Financial Statements</td>
<td>Submitted</td>
</tr>
<tr>
<td>Confirm that all chapter activity reporting is complete (Professional, Service, ROAs, and Initiations)</td>
<td>Submitted</td>
</tr>
<tr>
<td>Enter Faculty Advisor Sign-off (Financial, Tax and Non-BAP Hours)</td>
<td>Faculty Advisor Must Complete Submitted</td>
</tr>
<tr>
<td>Overall Report Status</td>
<td>Credited</td>
</tr>
</tbody>
</table>
Update Chapter Profile Screen

Menu Bar Item: Reporting and Membership > View/Update Chapter Profile

Once logged in, the officer will access the Update Chapter Profile screen under Reporting and Membership and View/Update Chapter Profile.
The Chapter Profile screen is displayed in a tabbed format.

The tab titled “School” is where FAs and officers can update their school information such as a link to your chapter’s website, achievement level and school mailing address.

The red stars are required fields.

The tab labeled “Admin Only Fields” is for the Executive Office use only.
The tab titled “Chapter Officers” is where the officer information is updated. This is separate from the officer user accounts.

Select the name of the officer from the drop down list and the name, email and phone information will populate the fields for the appropriate role.

Note: the names on the drop down list are pulled from the “Submit for Initiation” and “Active Members” folders. The red stars are required fields. An officer must be a member or Submitted for Initiation.
View/Update Membership

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

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

There are two groupings on the Membership Roster: Candidates section that includes folders for: Active Candidates, Submit for Initiation and Inactive Candidates. Members section that includes folders for: Active Members, On Leave, and Alumni.
View/Update Membership

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

To add a new candidate select “Add New”. *Do not add a candidate until your chapter has collected the $75 fee. Adding a candidate always creates a receivable for your chapter.*
Add a New Candidate

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

Enter all the required information and select “Save”.

All fields that have a red star “*” are required fields.
The Candidate start date is the date the student started participating (not the date that they are being entered into the system).

Important: Email address must be a valid email address. The system will not allow duplicate addresses.
Submit a Candidate for Initiation

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

To submit a candidate for initiation, in the “Active Candidates” folder, check off the box next to the appropriate name and select “Submit for Initiation”.

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

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

The records will appear in the “Submit for Initiation” folder.

Once the fees for candidates that have been paid, the Executive Office will print the membership certificates and move the records to the “Active Members” folder. Please allow two weeks to receive certificates.

<table>
<thead>
<tr>
<th>Name</th>
<th>Member Number</th>
<th>E-mail</th>
<th>Initiation Date</th>
<th>Membership Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baum, Hadżasz</td>
<td>201325010004</td>
<td><a href="mailto:hhbaum@bap.org">hhbaum@bap.org</a></td>
<td>5/2/2013</td>
<td>Faculty</td>
</tr>
<tr>
<td>Johnson, Sarah</td>
<td>201325010003</td>
<td><a href="mailto:sjohnson@bap.org">sjohnson@bap.org</a></td>
<td>4/22/2013</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Smith, Elizabeth</td>
<td>201325010001</td>
<td><a href="mailto:esmith@bap.org">esmith@bap.org</a></td>
<td>4/22/2013</td>
<td>Undergraduate</td>
</tr>
</tbody>
</table>
The online activity reporting screen can be found under Reporting and Membership and Report Activity.
Online Activity Reporting
Entering an Activity

Menu Bar Item: Reporting and Membership > Report Activity

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

![Screenshot of online reporting activity screen with tabbed format and options for adding activities]
Online Activity Reporting
Entering an Activity

Menu Bar Item: Reporting and Membership> Report Activity

Enter:
Name of Activity
Date of Activity
Confirm that the activity was at least 50 minutes long.
Confirm that your chapter sponsored the activity.

Select “Save”.

Activity Name: 
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
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.
New - Impact Categories

Menu Bar Item: Reporting and Membership > Professional and Service Activities – Impact Points

• 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
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.

Submit Impact Activity Form:
Please make sure to submit the form in the link mentioned to complete the add impact activity process Click Here for Impact Activity Form.
Online Activity Reporting

Menu Bar Item: Reporting and Membership > Report Activity

Select Impact Category

Complete form with metrics

Activity Name *
Community College Outreach

Date of Activity *
03 / 04 / 2024

Please indicate which Impact Activity your chapter completed. *
Community College Associate Candidate

Number of participating Beta Alpha Psi students *

Number of participants outside Beta Alpha Psi chapter *

Number of hours spent on activity *

Did your activity impact students outside your chapter? *
- High School
- Community College
- Students at current school
- Other

If Community College students: *
- High School
- Undecided

Table of Contents
Online Activity Reporting

Menu Bar Item: Reporting and Membership > Report Activity

Add description of activity and support.

Include date, summary and audience.

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
Online Activity Reporting

Menu Bar Item: Reporting and Membership > Report Activity

Essential Skill – required for award seeking chapters
Choose 1 from 11 listed for a Professional session
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.
Online Activity Reporting
Scorecard Screen

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

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**Chapter Scorecard**
Chapter #444, Fab Four, Fab Four University

Planned Achievement Level: Award-Seeking

<table>
<thead>
<tr>
<th>PCA Achievements</th>
<th>PCA Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mission Based Requirements</strong></td>
<td><strong>YTD Credited</strong></td>
</tr>
<tr>
<td>Beginning of Year Report</td>
<td>0</td>
</tr>
<tr>
<td>Initiation</td>
<td>0</td>
</tr>
<tr>
<td>Mid Year Report</td>
<td>0</td>
</tr>
<tr>
<td>End of Year Report</td>
<td>3</td>
</tr>
<tr>
<td>Reaching Out Activities (ROAs)</td>
<td>4</td>
</tr>
<tr>
<td>Professional Activities</td>
<td>2</td>
</tr>
<tr>
<td>Service Activities</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total Points</strong></td>
<td><strong>8</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Requirements for Award-Seeking Chapters Only</th>
<th><strong>YTD Achieved</strong></th>
<th><strong>Required for Silver</strong></th>
<th><strong>Required for Gold</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional ROAs</td>
<td>1</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Additional Professional Activities</td>
<td>0</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Additional Service Activities</td>
<td>0</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Mandatory Essential Skills Activity</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>Overall Chapter Status</strong></td>
<td><strong>Under Review</strong></td>
<td><strong>Yes</strong></td>
<td><strong>Yes</strong></td>
</tr>
</tbody>
</table>

---

Each activity that is saved and meets the 20% participation requirement automatically gets registered on the Scorecard screen.
Choose Option to Add the type of activity.
Choose the Essential Skills activity your chapter completed from the drop-down menu.
### Online Activity Reporting
#### Reaching Out Activities (ROAs)

**Menu Bar Item:** Reporting and Membership > Report Activity

## Report Chapter Activities

<table>
<thead>
<tr>
<th>Reaching Out Activities</th>
<th>Sponsor</th>
<th>Status</th>
<th>Upload Required?</th>
<th>View Attachment</th>
<th>Delete Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showing 1 to 40 of 40 entries</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2023 Annual Community Impact Day</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Attendance or Participation in Back to School Supplies drive</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hosting or co-hosting Mid-Year Meeting - verified by Chapter Advocate</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>2023 Annual Meeting Attendance</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>2023 Annual Meeting Presentation - Best Practices or Chapter Operations</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>2024 Nomination for Project Run With It</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>2024 Nomination for Business Information Professional of the Year - Online Competitions Page</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>2024 Nomination for Outstanding Dean - Submit online on the Competitions Page</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>2024 Mid-Year Meeting Attendance</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>2024 Mid-Year Meeting Presentation - Best Practices or Chapter Operations</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Mid-Year Meeting Service Activity</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Published Article for Spotlight Section of BAP Newsletter</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Social Impact shady</td>
<td>Executive Office</td>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
# Online Activity Reporting

More Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership > Report Activity

<table>
<thead>
<tr>
<th>Activity Description</th>
<th>Responsible Office</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Round Winner EY Inclusive Leadership Award</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Nomination for Intl or Regional Alumni Advocate Position</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>100 Books Donation</td>
<td>Executive Office</td>
<td>Yes</td>
</tr>
<tr>
<td>Fall 2023 Virtual Recruitment event - Chapter Reboot (TBD)</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Virtual Chapter Reporting 101 Attendance - Fall 2023</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Live Diversity &amp; Inclusiveness Event-fall or spring</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Societal Impact Goal</td>
<td>Executive Office</td>
<td>Yes</td>
</tr>
<tr>
<td>Chapter Mentorship Program</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Attendance at Live Virtual Initiation-fall or spring</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Mentoring a Developing Chapter-Must have CA Approval</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>IS &amp; Finance Interaction</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Social Media Engagement - Must Work with EO</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Career Launchpad</td>
<td>Executive Office</td>
<td>Yes</td>
</tr>
<tr>
<td>Literacy/College Application</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Promotion of Executive Graduate Membership Program</td>
<td>Executive Office</td>
<td>No</td>
</tr>
</tbody>
</table>

Beta Alpha Psi
<table>
<thead>
<tr>
<th>Event Description</th>
<th>Responsibility</th>
<th>Yes/No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current members join BAP Member and Alumni Network</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Community College/High School Outreach</td>
<td>Executive Office</td>
<td>Yes</td>
</tr>
<tr>
<td>Quiz on 2023-2024 PCA</td>
<td>Executive Office</td>
<td>No</td>
</tr>
<tr>
<td>Diversity, Equity and Inclusion Awareness event</td>
<td>Chapter</td>
<td>Yes</td>
</tr>
<tr>
<td>Alumni Activity (25% + significant alumni participation)</td>
<td>Chapter</td>
<td>No</td>
</tr>
<tr>
<td>Minority Recruitment Event #1</td>
<td>Chapter</td>
<td>No</td>
</tr>
<tr>
<td>Minority Recruitment Event #2</td>
<td>Chapter</td>
<td>No</td>
</tr>
<tr>
<td>Multi-Chapter Event (25% membership participation)</td>
<td>Chapter</td>
<td>No</td>
</tr>
<tr>
<td>Promoting Careers in Accounting/Finance/Data Analytics #1</td>
<td>Chapter</td>
<td>Yes</td>
</tr>
<tr>
<td>Promoting Careers in Accounting/Finance/Data Analytics #2</td>
<td>Chapter</td>
<td>Yes</td>
</tr>
<tr>
<td>Second Initiation</td>
<td>Chapter</td>
<td>No</td>
</tr>
<tr>
<td>Multi-Cultural Professional/Global Event</td>
<td>Chapter</td>
<td>No</td>
</tr>
<tr>
<td>Wellness Session</td>
<td>Chapter</td>
<td>Yes</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Member Number</th>
<th>Member Name</th>
<th>Firm Visit</th>
<th>EGHI High School</th>
<th>ES-Managing Distractions</th>
<th>Test 1</th>
<th>CC transition to Uni</th>
<th>Test 2</th>
<th>Bookkeeping at Camp</th>
<th>Test 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>201204440002</td>
<td>Clooney, George</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>201204440003</td>
<td>Best, Pete</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>201204440004</td>
<td>Florentino, Margaret</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>201204440001</td>
<td>Drape, Josephine</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>201204440002</td>
<td>Soto, Paul</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>201204440003</td>
<td>Drummond, Will</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>201204440004</td>
<td>Sullivan, Amy</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>201204440005</td>
<td>Douglas, Beth</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>201204440006</td>
<td>Patterson, Andrew</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>201204440007</td>
<td>Bynum, Sam</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>201204440008</td>
<td>Carruthers, Harrison</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>201204440009</td>
<td>Powell, Amy</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>201204440010</td>
<td>Higgins, Mark</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>201204440011</td>
<td>Roberts, John</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
Online Activity Reporting
Initiation Screen

Menu Bar Item: Reporting and Membership> Report Activity

Enter the total number of initiates for first and second initiations. Make sure to “Save”.
# End-of-Year Report

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

### Report Items

<table>
<thead>
<tr>
<th>Report Items</th>
<th>Our Chapter's Status</th>
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<tbody>
<tr>
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<td>Attach Financial Statements</td>
<td>Submitted</td>
</tr>
<tr>
<td>Confirm that all chapter activity reporting is complete</td>
<td>Submitted</td>
</tr>
<tr>
<td>(Professional, Service, ROAs, and Initiations)</td>
<td></td>
</tr>
<tr>
<td>Enter Faculty Advisor Sign-off</td>
<td>Faculty Advisor Must Complete</td>
</tr>
<tr>
<td>(Financial, Tax and Non-BAP Hours)</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

### Overall Report Status

- **Credited**

---

Make sure to complete the following tasks:

- Update Chapter Profile
- Upload Chapter Financials
- Confirm activities are complete
- Faculty Advisor must complete the FA sign-off
- Complete Tax Information
- **< $50,000 – IRS e-Postcard**
- **>$50,000 – Over $50K spreadsheet**

Due June 1 for U.S. – No Exceptions. Oceania due Dec 15. Late submittals will be subject to a $250 fine.
Upload Chapter Financials

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

Reporting Intranet Resources

- Reporting Intranet Guide (PDF)
  - Reporting Intranet FAQs (PDF)
- Oceania FAQs (PDF)
- Ideas for Online Service Activities
- Chapter Reporting 101 (PDF) and Webinar Recording (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 bap@bap.org.
- IRS Form 990-N (e-Postcard) User Guide
  - What we will need from your chapter for the 990n tax filing (Please send to bap@bap.org):
    - 990-N Submission (PDF)
    - 990-N Confirmation (PDF)
  - IRS Form 990-N (e-Postcard) Filing
- Sample Financial Statements
- Replacement Certificates Form (PDF)
Upload Chapter Financials

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

- The sample financials will open as an Excel file. You must resave, enter your chapter information and upload to the EOY screen.

- Note the two tabs on the Excel workbook.
Once you have uploaded your chapter financials, this task will be credited.

### Upload Chapter Financials

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

<table>
<thead>
<tr>
<th>Report Items</th>
<th>Our Chapter's Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Chapter Profile</td>
<td>Submitted</td>
</tr>
<tr>
<td>Attach Financial Statements</td>
<td>Submitted</td>
</tr>
<tr>
<td>Confirm that all chapter activity reporting is complete (Professional, Service, ROAs, and Initiations)</td>
<td>Submitted</td>
</tr>
<tr>
<td>Enter Faculty Advisor Sign-off (Financial, Tax and Non-BAP Hours)</td>
<td>Faculty Advisor Must Complete Submitted</td>
</tr>
</tbody>
</table>

**Overall Report Status**: Credited
End-of-Year Reports – Faculty Advisor

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

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 reviewed and approved their chapter’s activity reporting and financial statements, as well as completed the tax filing for the fiscal year. From the 990n Acceptance screen, enter the submission ID here and email to bap@bapeo.org.
End-of-Year Reports – Faculty Advisor

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

Step 2C -- Upload Over $50K Spreadsheet*

Does your chapter have an average gross receipts of $50,000 or more, for the last three years?
- No  ○ Yes

1. If your chapter had gross receipts of over $50K for the last three years, please download Over $50K Spreadsheet
2. Attach Spreadsheet [Attach]
3. Email copy of Over $50K Spreadsheet to the Executive Office

Not Complete

Step 3 -- Complete Financial Statement Sign-Off*

Does your chapter have gross receipts for this year...
- Less than $100,000?
- $100,000 or More?

Not Complete

Step 4 -- Submit

Submit  Cancel

If your chapter has revenue of revenue greater than $50K over a three-year period, you will be required to complete the “Over $50K” spreadsheet. A link to the spreadsheet will be visible once you check “Yes” under Step 2C.
End-of-Year Reports – Faculty Advisor
How to Complete the 990n e-Postcard

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

After April 30th - Go to the IRS login page here

1. If you have not registered, create a new user account.
2. Enter your chapter’s EIN number that can be found on the chapter profile screen (FA login only)
3. The number will default to “Beta Alpha Psi National Council” – this is ok.
4. Enter your school address and your faculty advisor name as the principal officer.
5. Answer the four questions where you are confirming that your chapter’s revenue was less than $50K for tax fiscal year.
6. Once you submit, you will need to refresh your screen to show the Acceptance screen with a submission ID that you will need for the FA sign off screen (step 2b). Please forward the Acceptance to the EO at bap@bapeo.org.
Complete a one time registration with the IRS
Complete a one time registration with the IRS

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.

**Sign in with an existing account**

Sign in with ![LOGIN.GOV](#)

Sign in with ![ID.me](#)

--- OR ---

**Create a new account**

Create an account ![LOGIN.GOV](#)
2023-2024 Program for Chapter Activities

Beta Alpha Psi
Quiz on 2023-2024 PCA

Score 80% or better for the ROA
Alumni & Member Network
BAP initiates may join
Questions?

Contact the Executive Office:
• Email – bap@bapeo.org
• Phone - 919-402-4044