Reporting Intranet Resources – Reporting Intranet Guide

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
- Create officer logins
- 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

- Beginning of Year Report
  - Update Chapter Profile Page
  - Plan of Activities
  - Upload chapter bylaws
  - Pay Maintenance Fee

- Mid-Year Report
  - Enter candidates and activities

- 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

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.
Each Advisor and Officer will be required to login through a valid email address and a unique password. We recommend Google Chrome as your browser.
Login System

Activation Screen

On the Activation Screen, enter a unique password, confirm and activate.
Terms of Use Agreement
One time acceptance for all users

License Agreement

Terms of Agreement for Beta Alpha Psi Reporting Intranet

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

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

Upon initial login, each user reads and confirms acceptance of the Terms of Use Agreement.
Navigating the Reporting Intranet

On the landing page, the menu bar is as follows:

1. **Home** – Landing page
2. **Reporting and Membership** – This is where all screens for chapter reporting can be found.
3. **Chapter File Submissions** – This screen will display all the files that your chapter has uploaded to the RI for that fiscal year.
4. **PCA** - A link to the Program for Chapter Activities.
5. **Tutorials** - A link to interactive tutorials.
6. **Contact** - Information for the Executive Office.
7. **BAP Home** – A link back to the BAP Website.
Once the Faculty Advisor has completed their activation process, and have logged in to the Reporting Intranet.

1. The FA will enter the officers under Reporting and Membership > Create/Manage Officer Logins.
FA – Create Officer Logins

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

Activation Process for Officers
By Faculty Advisors

2. Under the “Officers” tab, the FA will select the officer name and officer role.
3. Then, select “Create User”.

![Create New RI Users](image)
Create Officer Logins

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

Activation Process for Officers By Faculty Advisors.

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

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

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

This is where the advisors can deactivate or reactivate officers.

It is the advisor’s responsibility to keep this log current. This should be updated each semester/quarter.
Password Reset

To reset a password, go to the login page and select the link titled “Reset Password”, enter your email address and an automated email will be sent to you that will include a link to reset your password.
Once logged in, the officer will access the Update Chapter Profile screen under Reporting and Membership and View/Update Chapter Profile.
Update Chapter Profile Screen

Menu Bar Item: Reporting and Membership > 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.
Update Chapter Profile Screen

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

The tab titled “Chapter Officers” is where the officer information is updated. This is a separate from the officer user accounts.

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

Note: the names on the drop down list are pulled from the “Submit for Initiation” and “Active Members” folders. The red stars are required fields.
The tab titled “Chapter Contacts” is where the Faculty Advisor, Co-Advisor, Department Chair and Business School Dean information is updated. Note: Dean and Department Chair information is required.
View/Update Membership

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

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

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

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

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

Enter all the required information and select “Save”.

Beta Alpha Psi
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

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

Once the fees for candidates that have been paid, the Executive Office will print the membership certificates and move the records to the “Active Members” folder. Please allow two weeks to receive certificates.
Beginning of Year Reports are due on October 15 for U.S. chapters.

Oceania Chapters – due June 15

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

---

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

**Beginning of Year Report**

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

<table>
<thead>
<tr>
<th>Report Items</th>
<th>Our Chapter’s Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Chapter Profile</td>
<td>Not Submitted</td>
</tr>
<tr>
<td>Enter Plan of Activities</td>
<td>Not Submitted</td>
</tr>
<tr>
<td>Attach Chapter Bylaws</td>
<td>Not Submitted</td>
</tr>
<tr>
<td>□ No Changes Needed to Bylaws</td>
<td></td>
</tr>
<tr>
<td>Your annual maintenance fee $300.00</td>
<td></td>
</tr>
<tr>
<td>Annual Chapter Maintenance Fee</td>
<td>Not Received</td>
</tr>
</tbody>
</table>

**Overall Report Status**

Not Credited
Enter Plan of Activities

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

Enter your chapter’s plan for 6 Professional Activities and 1 Service Activity.

3 Reaching Out Activities (ROAs).

Select “Save”.

<table>
<thead>
<tr>
<th>Professional Activity Plan</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPMG Prof. Speaker</td>
<td>September</td>
</tr>
<tr>
<td>Audit Careers</td>
<td>October</td>
</tr>
<tr>
<td>Tax Careers</td>
<td>November</td>
</tr>
<tr>
<td>Corporate Finance</td>
<td>December</td>
</tr>
<tr>
<td>PwC Prof. Speaker</td>
<td>January</td>
</tr>
<tr>
<td>Passing the CPA Exam</td>
<td>March</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Activity Plan</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Bank</td>
<td>October</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reaching Out Activities (Check at least three)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
</tr>
<tr>
<td>Annual Community Service Day Attendance</td>
</tr>
<tr>
<td>Annual Meeting Attendance</td>
</tr>
<tr>
<td>Annual Meeting Presentation</td>
</tr>
<tr>
<td>Nomination for Project Run With It</td>
</tr>
<tr>
<td>Nomination for Business Information Professional of the Year</td>
</tr>
<tr>
<td>Submitted Nomination for Outstanding Dean</td>
</tr>
<tr>
<td>Regional Meeting Attendance</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Planned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Office</td>
<td></td>
</tr>
<tr>
<td>Executive Office</td>
<td></td>
</tr>
<tr>
<td>Executive Office</td>
<td></td>
</tr>
<tr>
<td>Executive Office</td>
<td></td>
</tr>
<tr>
<td>Executive Office</td>
<td></td>
</tr>
<tr>
<td>Executive Office</td>
<td></td>
</tr>
<tr>
<td>Executive Office</td>
<td></td>
</tr>
</tbody>
</table>

Report Status: Credited
Local Chapter Bylaws

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

### Beginning of Year Report

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

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

- Your annual maintenance fee $300.00
- Payment Options
- Annual Chapter Maintenance Fee: Not Received
- Overall Report Status: Not Credited

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

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

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

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

Check Payment

Please remit immediately. Make a check payable to **Beta Alpha Psi**, and include your chapter number on the check. Send your payment with the copy of this invoice to:

Beta Alpha Psi
220 Leigh Farm Road
Durham, NC 27707

To download Chapter Maintenance Fee Invoice for Current year **Click here**.
Online Activity Reporting System

All reporting is completed online.

- Professional and Service Activities
- Reaching Out Activities (ROAs)
- Initiations
- Non-BAP Activities
Online Activity Reporting System

Menu Bar Item: Reporting and Membership > Report Activity

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

Menu Bar Item: Reporting and Membership > Report Activity

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

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

Menu Bar Item: Reporting and Membership > Report Activity

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

Select “Save”.

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 • Yes
Alpha Psi:
Online Activity Reporting

Menu Bar Item: Reporting and Membership> Report Activity

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
Online Activity Reporting
Program for Chapter Activities FY24

Upload evidence for each activity to add Impact Activity Point
Online Activity Reporting
Menu Bar Item: Reporting and Membership > Report Activity

Impact Activity

Enter the activity name and date

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

Select Impact Category

Upload evidence of impact
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

---

### Chapter Scorecard

Chapter #1, Alpha, University of Illinois

Planned Achievement Level: Mission-Based

<table>
<thead>
<tr>
<th>PCA Achievements</th>
<th>PCA Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission Based Requirements</td>
<td>YTD Credited</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>0</td>
</tr>
<tr>
<td>Reaching Out Activities (ROAs)</td>
<td>0</td>
</tr>
<tr>
<td>Professional Activities</td>
<td>1</td>
</tr>
<tr>
<td>Service Activities</td>
<td>1</td>
</tr>
<tr>
<td>Total Points</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Requirements for Award-Seeking Chapters Only</th>
<th>YTD Achieved</th>
<th>Required for Distinguished</th>
<th>Required for Superior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional ROAs</td>
<td>0</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>Overall Chapter Status</td>
<td>Under Review</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Each activity that is saved and meets the 20% participation requirement automatically gets registered on the Scorecard screen.
Online Activity Reporting
Report Activities

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

Choose Option to Add the type of activity.
Online Activity Reporting
Essential Skill

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

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>2023 Annual Community Impact Day Attendance or Participation in Back to School Supplies drive</td>
<td>Executive Office</td>
<td></td>
<td>No</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>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2023 Annual Meeting Attendance</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2023 Annual Meeting Presentation - Best Practices or Chapter Operations</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2024 Nomination for Project Run With It</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></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>No</td>
<td></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>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2024 Mid-Year Meeting Attendance</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2024 Mid-Year Meeting Presentation - Best Practices or Chapter Operations</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mid-Year Meeting Service Activity</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Published Article for Spotlight Section of BAP Newsletter</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Societal Impact Case</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Showing 1 to 40 of 40 entries

Filter by Year: 2023 - 2024
### Online Activity Reporting

More Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership > Report Activity

<table>
<thead>
<tr>
<th>Activity Description</th>
<th>Office</th>
<th>Approved?</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>
## Online Activity Reporting
### More Reaching Out Activities (ROAs)

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

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

Beta Alpha Psi
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”.
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.
Mid-Year Report
Award Seeking Chapters Only

• U.S. Award Seeking Chapters must declare award status by December 15th on the Chapter Profile Screen. Oceania Chapters due August 15.

The following must be completed on the Reporting Intranet:
• All Fall activities (June 1st thru December 15th) must be entered on the RI.
• All Fall candidates must be entered into the RI.
### Mid Year Report Screen

**Menu Bar Item:** Reporting and Membership > Mid Year Report

<table>
<thead>
<tr>
<th>Report Items</th>
<th>Our Chapter’s Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Declared Award-Status on the Chapter Profile Screen</td>
<td>□ Not Submitted</td>
</tr>
<tr>
<td>Entered all Fall Candidates into the Reporting Intranet</td>
<td>□ Not Submitted</td>
</tr>
<tr>
<td>Reported all Chapter Activities between 6/1/2023 and 12/15/2023</td>
<td>□ Not Submitted</td>
</tr>
</tbody>
</table>

**Overall Report Status**

Not Credited

Review that all items have been addressed, check the applicable boxes, and the report status will update to Credited.

---

Beta Alpha Psi
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 reporting is complete
• Faculty Advisor must complete the FA sign-off
• Complete Tax Information
• < $50,000 – IRS e-Postcard
• >$50,000 – Over $50K spreadsheet

U.S. Due June 1st – No Exceptions
Late submittals will be subject to a $100 fine.
Oceania due December 15.
End-of-Year Reports

U.S. Due June 1st – No Exceptions. Oceania due December 15. Late submittals will be subject to a $100 fine.

Update Chapter Profile
- Update for upcoming fall semester.

Upload Chapter Financials
- Statement of Activities and Financial Position.

Confirm Reporting Is Complete
Faculty Advisor Must Complete Sign-Off
- This includes the tax filing:
  - 990n e-Postcard tax filing for chapters with less than $50K in revenue.
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 2022 AM Session)
  - FY 2023-2024 Maintenance Fee Invoice (PDF)
- Mid Year Reporting Guide (PDF) and Webinar Recording (Dec. 2022)
- 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.

<table>
<thead>
<tr>
<th>School Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter Number:</td>
<td></td>
</tr>
<tr>
<td>Chapter Name:</td>
<td></td>
</tr>
</tbody>
</table>

**Statement of Financial Position as of April 30, 2023**

**Assets**

- Cash
- Accounts receivable
- Prepaid expenses and other assets
- Long term assets

**Liabilities and Net Assets**

- Liabilities
- Accounts payable
- Unearned income
- Total liabilities

**Statement of Financial Position**

<table>
<thead>
<tr>
<th>Statement of Financial Position</th>
<th>Statement of Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a)</td>
<td>(a)</td>
</tr>
</tbody>
</table>
# Upload Chapter Financials

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>
</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,</td>
<td>Submitted</td>
</tr>
<tr>
<td>Service, ROAs, and Initiations)</td>
<td></td>
</tr>
<tr>
<td>Enter Faculty Advisor Sign-off (Financial, Tax and Non-BAP Hours)</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

## Overall Report Status

Credited

Once you have uploaded your chapter financials, this task will be credited.
End-of-Year Reports – Faculty Advisor
How to Complete the 990n e-Postcard

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 that Acceptance screen to the EO at: bap@bap.org. Note: you WILL NOT get an email from the IRS stating that the return was accepted.
Complete a one time registration with the IRS
Complete a one time registration with the IRS

First Time Users

Create a Login to:

- Verify your identity for access to your personal tax information.
- Create a user ID and password to save time on future visits.
- Lock your online account to prevent access.

Information you need to verify your identity

GET STARTED

Returning Users

Log in below if you've previously created a UserID for any of the following applications:

- Get Transcript
- Identity Protection PIN (IP PIN)
- Online Payment Agreement (OPA)

User ID

Mask User ID

LOGIN
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 in Step 2B.
## Scorecard Screen

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

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

### Chapter Scorecard

Chapter #1, Alpha, University of Illinois

**Planned Achievement Level: Mission-Based**

<table>
<thead>
<tr>
<th>Mission Based Requirements</th>
<th>PCA Achievements</th>
<th>PCA Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YTD Credited</td>
<td>Mission Based Points Required</td>
</tr>
<tr>
<td>Beginning of Year Report</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Initiation</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Mid-Year Report</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>End of Year Report</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Reaching Out Activities (ROAs)</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Professional Activities</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>Service Activities</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Total Points</td>
<td>2</td>
<td>14</td>
</tr>
</tbody>
</table>

**Additional Requirements for Award-Seeking Chapters Only**

<table>
<thead>
<tr>
<th>Additional ROAs</th>
<th>YTD Achieved</th>
<th>Required for Distinguished</th>
<th>Required for Superior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Professional Activities</td>
<td>0</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Additional Service Activities</td>
<td>0</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Mandatory Essential Skills Activity</td>
<td>0</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Overall Chapter Status</td>
<td>Under Review</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Generate a Membership Dues Invoice.

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

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

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

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

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

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

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

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

Chapter Balance Prior to Fiscal Year 2021 - 2022: $275.00

<table>
<thead>
<tr>
<th>Member #</th>
<th>Member Name</th>
<th>Charge Year</th>
<th>Charge Date</th>
<th>Total Charge</th>
<th>Amount Owed</th>
</tr>
</thead>
<tbody>
<tr>
<td>202204440007</td>
<td>Bynum, Sam</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440008</td>
<td>Carruthers, Harrison</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440009</td>
<td>Douglas, Beth</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440010</td>
<td>Drummond, Will</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440011</td>
<td>Higginbotham, Mark</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440012</td>
<td>Patterson, Andrew</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440013</td>
<td>Powell, Amy</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440014</td>
<td>Roberts, John</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440015</td>
<td>Sanz, Paul</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>202204440016</td>
<td>Sullivan, Amy</td>
<td>2022</td>
<td>02/10/2022</td>
<td>75.00</td>
<td>75.00</td>
</tr>
</tbody>
</table>

Total Amount Owed: $1025.00
Unpaid Members in Current Fiscal Year: 10
Membership Dues Payment by Credit Card

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

Enter valid credit card information.

Select “Submit”.
Membership Dues Payment by Credit Card

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

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

Table of Contents

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

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

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

A 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

<table>
<thead>
<tr>
<th>Member ID</th>
<th>Member Name</th>
<th>Year</th>
<th>Amount Due</th>
<th>Item Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>322529</td>
<td>Baum, Hadassah</td>
<td>2020</td>
<td>75.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>322531</td>
<td>Boop, Betty</td>
<td>2020</td>
<td>75.00</td>
<td>$75.00</td>
</tr>
<tr>
<td>322527</td>
<td>Doeson, John</td>
<td>2020</td>
<td>75.00</td>
<td>$75.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Subtotal</strong> $225.00</td>
</tr>
</tbody>
</table>

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

You may print this as a receipt.

A confirmation email will also be sent to the system administrator.
Membership Dues Payment by Credit Card

Menu Bar Item: Reporting and Membership > Year to Date Statement

View year to date statement showing payment history
Chapter Maintenance Fee Payment by Credit Card

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

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

Select “Submit”.

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

Select “Confirm”.

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

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

Annual maintenance fee total: $300.00

Billing Address

Name: Margaret Fiorentino
Address: 220 Leigh Farm Road,
Durham,
NC, US,
27707

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

You may print this as a receipt.

A confirmation email will also be sent to the system administrator.
2023-2024 Program for Chapter Activities
Quiz on 2023-2024 PCA

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

Beta Alpha Psi
2024 Mid-Year Meeting Schedule – US
All meetings start on Friday at 1:00 and end on Saturday at 1:30

February 9-10, 2024
Atlanta, GA – Hilton Atlanta

February 16-17, 2024
University of San Diego

February 23-24, 2024
Dallas, TX – Dallas Marriott Downtown

March 9-10, 2024
Indianapolis, IN – Indianapolis Marriott Downtown
Questions?

Contact the Executive Office:

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