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.

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.

Reporting Intranet Login

Please enter your email address and password to login to the Reporting Intranet

Email Address: _____ ← **Valid Email Address**
Password: _____ ← **Unique Password**

[Log In]

Reset Password

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

BAP Reporting Intranet, New User Account Activation

Enter and confirm your password. Then click the 'Activate' button to enable your account for login.

Enter Password: [   ]   Confirm Password: [   ]

Note: Your password must be at least 8 characters in length.

[Activate]

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.

[Yes] [No]

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.
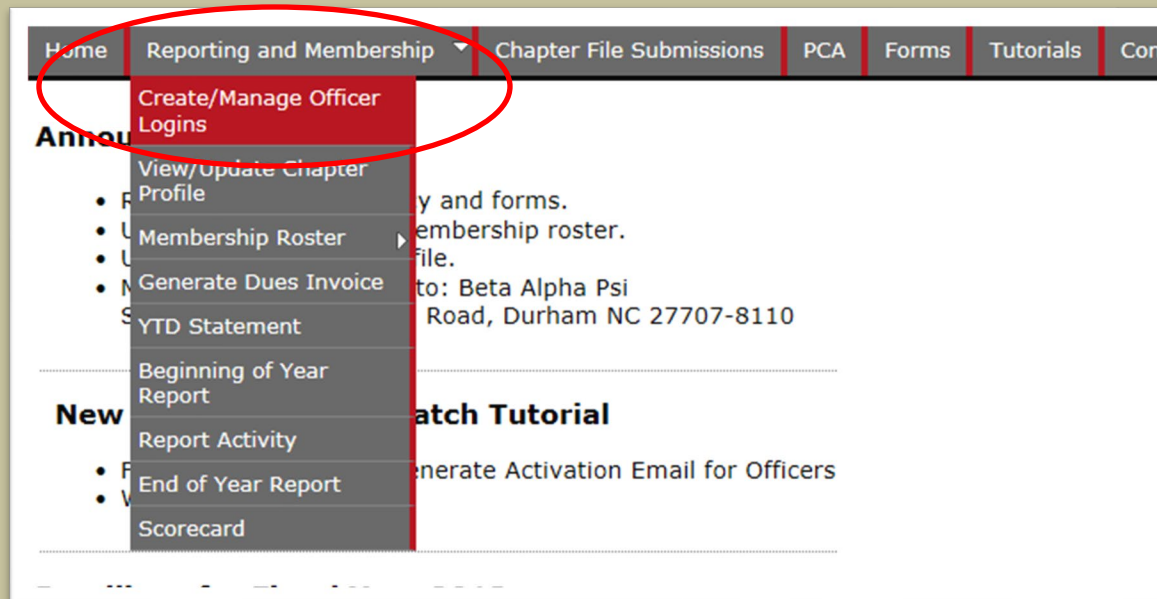7. **BAP Home** – A link back to the BAP Website.

Login System

Activation Process - Officers

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

| Advisors | Officers | Admins and Chapter Advocates |

Note: Officer/Users Must Be Matched to Active Chapter Members

Select Chapter: 444 - Fab Four - Fab F ▼

Search Members by Last Name: [   ] Search
Leave blank for all active members.

Choose Matching Member:
- Affleck, Ben
- Clooney, George
- Fiorentino, Margaret
- Harrison, George
- Jolie, Angelina

Note: Only Members with a valid e-mail address are listed above. If the member you want is missing, you must first record a valid e-mail address by editing the membership roster for the chapter.

Email Address: aj123@yahoo.com

First Name: Angelina

Last Name: Jolie

Select Officer/User Type: Reporter ▼

Cancel   Create User

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.

Advisors	Officers	

Note: Officer/Users Must Be Matched to Active Chapter Members

Select Chapter: 444 - Fab Four - Fab F▼

Search Members by Last Name: [   ] Search
Leave blank for all active members.

Choose Matching Member:
Affleck, Ben
Clooney, George
Fiorentino, Margaret
Harrison, George
Jolie, Angelina

Note: Only Members with a valid e-mail address are listed above. If the member you want is missing, you must first record a valid e-mail address by editing the membership roster for the chapter.

Email Address: aj123@yahoo.com

First Name: Angelina

Last Name: Jolie

Select Officer/User Type: President ▼

The new user account has been successfully created. An activation e-mail has been sent to the address specified above.

Create Another User

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.

Note: Only Members with a valid e-mail address are listed above. If the member you want is missing, you must first record a valid e-mail address by editing the membership roster for the chapter.

Email Address:

First Name:

Last Name:

Select Officer/User Type: Select

Cancel   Create User

| User Full Name	User Login Name/Registered E-mail	User Role	Date Invitation Sent	Account Activation Date	Status	Account Action	Resend Activation Email
Chambers, Cindy	Edit cchambers@bap.org	President	5/21/2013		Not Activated	Disable	Resend
Doeson, John	Edit jdoeson@bap.org	Treasurer	5/21/2013		Not Activated	Disable	Resend

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.

Update Chapter Profile Screen

Menu Bar Item: Reporting and Membership > View/Update Chapter Profile
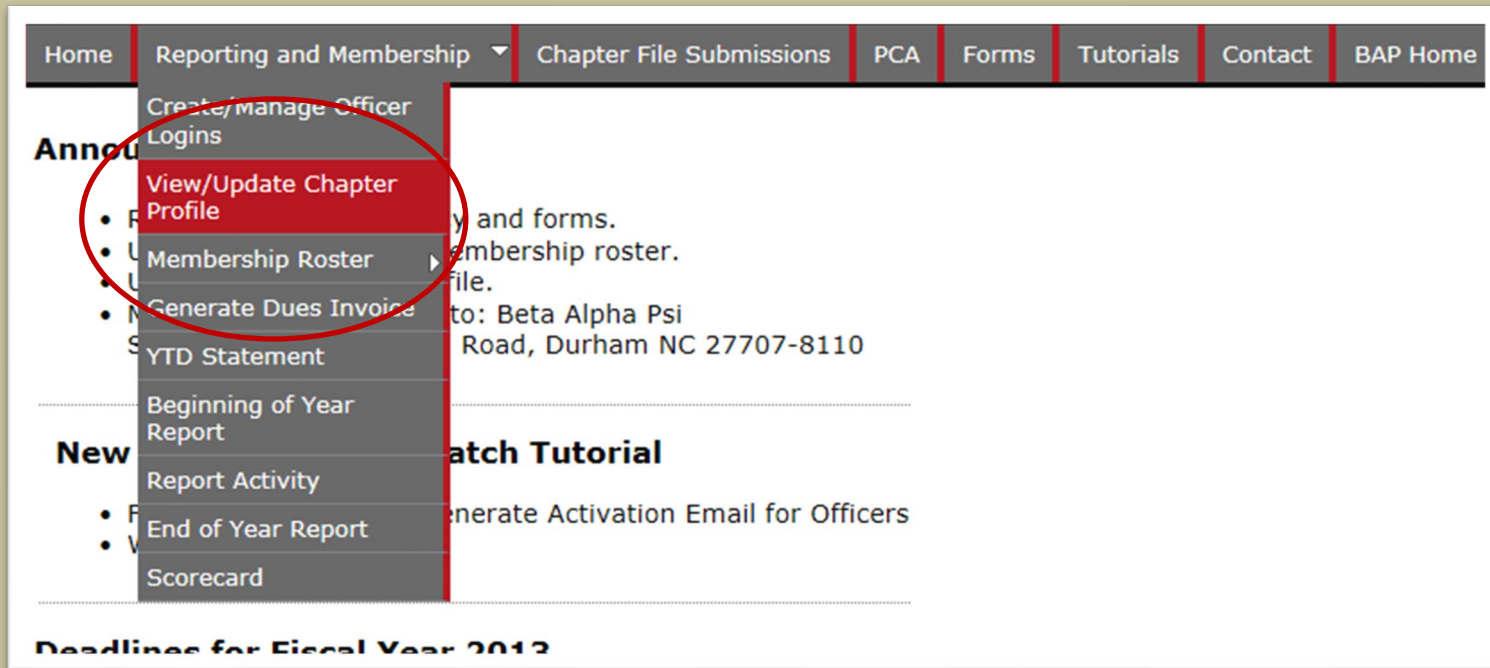
Once logged in, the officer will access the Update Chapter Profile screen under Reporting and Membership and View/Update Chapter Profile.

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.

Update Chapter Profile Screen

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

Admin Only Fields	School	Chapter Officers	Chapter Contacts					

Add Contact   Save Chapter

Showing 1 to 4 of 4 entries

	First Name	Last Name	Type	Phone	Ext.	Fax	Email	Dept./College
Edit/Delete	Margie	Fiorentino	Advisor	919-402-4001			mfiorentino@aicpa.org	
Edit/Delete	Salvatore	Bling	Co-Advisor	444-444-4444			sbling13@yahoo.com	
Edit/Delete	John	Dean	Dean	919-402-4044			jdean@bap.org	BAP School of Business
Edit/Delete	Jane	Chair	Department Chair	919-402-4000			jchair@bap.org	BAP Dept. of Accountancy

Search:

Comments:

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.

View/Update Membership

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

| Home | Reporting and Membership ▼ | Chapter File Submissions | PCA | Forms | Tutorials | Contact | BAP Home |

Membership Roster

| Add New | Submit for Initiation | Make Inactive | Delete |

Candidates

Active (4)
Submitted for Initiation (6)
Inactive (2)

Members

Active (0)
On Leave (0)

Alumni (0)

Deleted (0)

Active Candidates

Click Member/Candidate Name to Edit Profile Record

	Name	Member Number	E-mail	Candidate Date	Membership Type
☐	Jackman , Hugh	201325010011	hjackman1@yahoo.com	6/10/2013	Undergraduate
☐	Johnson, Sarah	201325010003	sjohnson@bap.org	4/1/2013	Undergraduate
☐	Smith, Elizabeth	201325010001	esmith@bap.org	4/1/2013	Undergraduate
☐	Stevens, John	201325010008	jstevens@bap.org	9/3/2012	Undergraduate

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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

Create New Chapter Candidate

Beta Alpha Psi University, Chapter 2502, Beta Alpha Psi University
* indicates a required field, all dates should be in the format MM/DD/YYYY

Field	Value
Member Number:	Not Yet Assigned
Candidate Start Date*:	
Initiation Date:	
Current Folder:	Adding to Active Candidates
Type of Membership*:	Select Membership Type
Major*:	Select Major
Address Line 1*:	
Address Line 2:	
City*:	
State / Province / Region*:	
ZIP/Postal Code*:	
Country*:	Select Country

Save   Cancel

Field	Value
First Name*:	
Middle Initial:	
Last Name*:	
Suffix:	
E-mail Address*:	
Primary Phone*:	
Other Phone:	
Gender:	Select Gender
Ethnicity:	Select Ethnicity
Birth Date:	
Comments:	

Membership Status Changes   Membership Payments and Credits

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".

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.

Beginning of Year Report

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

Beginning of Year Report (2023 - 2024)

Chapter Number 444, Fab Four University, Fab Four

Report Items	Our Chapter's Status
Update Chapter Profile	☐ Not Submitted
Enter Plan of Activities	☐ Not Submitted
Attach Chapter Bylaws ☐ No Changes Needed to Bylaws	☐ Not Submitted
Your annual maintenance fee $325.00	Payment Options
Annual Chapter Maintenance Fee View History	☐ Not Received
Overall Report Status	**Not Credited**

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".

Enter Plan of Activities

Professional Activity Plan

Activity Name	Month
KPMG Prof. Speaker	September
Audit Careers	October
Tax Careers	November
Corporate Finance	December
PwC Prof. Speaker	January
Passing the CPA Exam	March

Service Activity Plan

Activity Name	Month
Food Bank	October

Save   Cancel

Reaching Out Activities (Check at least three)

Activity	Sponsor	Planned
Annual Community Service Day Attendance	Executive Office	☑
Annual Meeting Attendance	Executive Office	☑
Annual Meeting Presentation	Executive Office	☑
Nomination for Project Run With It	Executive Office	☐
Nomination for Business Information Professional of the Year	Executive Office	☐
Submitted Nomination for Outstanding Dean	Executive Office	☐
Regional Meeting Attendance	Executive Office	☐

Report Status   **Credited**

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

3 Reaching Out Activities (ROAs).

Select "Save".

Beta Alpha Psi

Local Chapter Bylaws

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

Beginning of Year Report (2023 - 2024)

Chapter Number 444, Fab Four University, Fab Four

Report Items	Our Chapter's Status
Update Chapter Profile	☐ Not Submitted
Enter Plan of Activities	☐ Not Submitted
Attach Chapter Bylaws ☐ No Changes Needed to Bylaws	☐ Not Submitted
Your annual maintenance fee $325.00	Payment Options
Annual Chapter Maintenance Fee View History	☐ 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".

Payment Options

| Card | Check |

Check Payment

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

Beta Alpha Psi
220 Leigh Farm Road
Durham, NC 27707

To download Chapter Maintenance Fee invoice for Current year Click here.

Close   Print

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".

Online Activity Reporting
Entering an Activity

Menu Bar Item: Reporting and Membership> Report Activity

Save	Cancel

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

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".

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.

| | Save | Delete | Cancel | |

Activity Name: Firm Visit

Date of Activity: 1/3/2022 [Change Date]

Was the Activity at Least 50 Minutes Long?: ●Yes ○No

Confirm that the Activity was Performed in the Name of Beta Alpha Psi: ☑Yes

What to do if there are missing or extra members in this list.
Showing 1 to 13 of 13 entries

Member Number	Name	Check if attended
201204440002	Best, Pete	☑
202204440007	Bysum, Sam	☑
202204440008	Carruthers, Harrison	☐
201004440002	Clooney, George	☐
202204440005	Douglas, Beth	☐
202204440003	Drummond, Will	☑
201004440004	Fiorentino, Margaret	☑
202204440010	Higgns, Mark	☐
202204440006	Patterson, Andrew	☑

Beta Alpha Psi

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

▼ 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

Complete Wufoo form for each activity to earn Impact Activity Point

Online Activity Reporting

Menu Bar Item: Reporting and Membership> Report Activity

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

Add New Impact Activity

Save	Delete	Close

Activity Name: Community College Outrea

Date of Activity: 03/04/2024

Was the Activity at Least 50 Minutes Long?: ○ Yes ● No

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.

Ok

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
MM   DD   YYYY

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 activiy impact students outside your chapter? *
- ● High School
- ○ Community College
- ○ Students at current school
- ○ Other

If Community College students: *
- ● High School
- ○ Undecided

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

Online Activity Reporting

Menu Bar Item: Reporting and Membership> Report Activity

Report Chapter Activities

Professional	Service	Reaching Out	Initiation	Hours Summary	Scorecard	Student Participation Verification Report

Add	Add Non BAP Activity	Add Essential Skills Activity	Add Impact Activity

Filter by Year:

2021 - 2022

Showing 1 to 5 of 5 entries

	Status	Name	Date	Year	At Least 50 Minutes Long?	In Name of BAP?	% Participation	Points
Edit/Delete	N/A	Test 1	9/6/2021	2021 - 2022	Yes	Yes	0%	0
Edit/Delete	N/A	Firm Visit	1/3/2022	2021 - 2022	Yes	Yes	46%	1
Edit/Delete	Reject	EGH High School	2/18/2022	2021 - 2022	Yes	Yes	93%	2
Edit/Delete	N/A	ES-Managing Distractions	3/15/2022	2021 - 2022	Yes	Yes	100%	1
Edit/Delete	Reject	CC transition to Uni	3/25/2022	2021 - 2022	Yes	Yes	100%	2

Search:

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 #444, Fab Four, Fab Four University

Planned Achievement Level: Award-Seeking

PCA Achievements		PCA Requirements
Mission Based Requirements	YTD Credited	Mission Based Points Required
Beginning of Year Report	0	1
Initiation	0	1
Mid Year Report	0	0
End of Year Report	0	1
Reaching Out Activities (ROAs)	3	3
Professional Activities	4	6
Service Activities	1	2
Total Points	8	14

Additional Requirements for Award-Seeking Chapters Only	YTD Achieved	Required for Silver	Required for Gold
Additional ROAs	1	5	8
Additional Professional Activities	0	4	6
Additional Service Activities	0	2	4
Mandatory Essential Skills Activity	0	1	1
Overall Chapter Status	Under Review ⌄	Yes	Yes

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

Report Chapter Activities

| | Professional | Service | Reaching Out | Initiation | Hours Summary | Scorecard | Student Participation Verification Report |

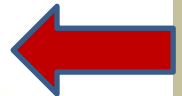| Add | Add Non BAP Activity | Add Essential Skills Activity | Add Impact Activity | | Filter by Year: |

2021 - 2022 ⌄

Showing 1 to 5 of 5 entries

	Status	Name	Date	Year	At Least 50 Minutes Long?	In Name of BAP?	% Participation	Points
Edit/Delete	N/A	Test 1	9/6/2021	2021 - 2022	Yes	Yes	0%	0
Edit/Delete	N/A	Firm Visit	1/3/2022	2021 - 2022	Yes	Yes	46%	1
Edit/Delete	Reject	EGH High School	2/18/2022	2021 - 2022	Yes	Yes	93%	2
Edit/Delete	N/A	ES-Managing Distractions	3/15/2022	2021 - 2022	Yes	Yes	100%	1
Edit/Delete	Reject	CC transition to Uni	3/25/2022	2021 - 2022	Yes	Yes	100%	2

Search:

Choose Option to Add the type of activity.

Online Activity Reporting
Essential Skill

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

Add New Essential Skill Activity

| Save | Cancel |

Activity Name:

ES-Business Writing Skills ▼

ES-Business Writing Skills
ES-Negotiation Skills
ES-Emotional Intelligence
ES-Facilitation Skills
ES-Managing Distractions
ES-Conflict Management
ES-Change Management
ES-Interpersonal Skills at the Workplace
ES-Diversity and Inclusion

ate of Activity:

Minutes Long?: ○ Yes ● No

Name of Beta ☑ Yes
Alpha Psi:

vity Minutes : [   ] ☐ Check All
in the Activity

Minutes box, select "check all" and "Save". Then enter "0" for the students who did not participate. Select "Save" and "Close".

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

| Professional | Service | **Reaching Out** | Initiation | Hours Summary | Scorecard | Student Participation Verification Report |

Filter by Year: 2023 - 2024

Showing 1 to 40 of 40 entries

Reaching Out Activities	Sponsor	Status	Upload Required?	View Attachment	Delete Attachment
2023 Annual Community Impact Day Attendance or Participation in Back to School Supplies drive	Executive Office	☐	No		
Hosting or co-hosting Mid-Year Meeting – verified by Chapter Advocate	Executive Office	☐	No		
2023 Annual Meeting Attendance	Executive Office	☐	No		
2023 Annual Meeting Presentation - Best Practices or Chapter Operations	Executive Office	☐	No		
2024 Nomination for Project Run With It	Executive Office	☐	No		
2024 Nomination for Business Information Professional of the Year - Online Competitions Page	Executive Office	☐	No		
2024 Nomination for Outstanding Dean - Submit online on the Competitions Page.	Executive Office	☐	No		
2024 Mid-Year Meeting Attendance	Executive Office	☐	No		
2024 Mid-Year Meeting Presentation - Best Practices or Chapter Operations	Executive Office	☐	No		
Mid-Year Meeting Service Activity	Executive Office	☐	No		
Published Article for Spotlight Section of BAP Newsletter	Executive Office	☐	No		

Online Activity Reporting
More Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership> Report Activity

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

Online Activity Reporting
More Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership> Report Activity

Activity	Type		Status
Current members join BAP Member and Alumni Network	Executive Office	☐	No
Community College/High School Outreach	Executive Office	☐	Yes
Quiz on 2023-2024 PCA	Executive Office	☐	No
Diversity, Equity and Inclusion Awareness event	Chapter	☐	Yes
Alumni Activity (25% + significant alumni participation)	Chapter	☐	No
Minority Recruitment Event #1	Chapter	☐	No
Minority Recruitment Event #2	Chapter	☐	No
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 Initiation	Chapter	☐	No
Multi-Cultural Professional/Global Event	Chapter	☐	No
Wellness Session	Chapter	☐	Yes

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".

Student Participation Verification Report

Menu Bar Item: Reporting and Membership> Report Activity

Download into Excel to verify attendance

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

Report Items	Our Chapter's Status
Declared Award-Status on the Chapter Profile Screen	☐ Not Submitted
Entered all Fall Candidates into the Reporting Intranet	☐ Not Submitted
Reported all Chapter Activities between 6/1/2023 and 12/15/2023	☐ Not Submitted
Overall Report Status	**Not Credited**

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

End-of-Year Report

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

Report Items		Our Chapter's Status
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**

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

Beta Alpha Psi

Statement of Financial Position as of April 30, 2024

School Name:	
Chapter Number:	
Chapter Name:	

Assets	4/30/2024
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	

Statement of Financial Position   Statement of Activities   +

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.

Upload Chapter Financials

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

Report Items		Our Chapter's Status
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**

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

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 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.

IRS

Subscriptions

Search

| Filing | Payments | Refunds | Credits & Deductions | News & Events | Forms & Pubs | Help & |

Charitable Organizations

Churches & Religious Organizations

Political Organizations

Private Foundations

Other Non-Profits

Contributors

Charities & Non-Profits

Annual Electronic Filing Requirement for
Small Exempt Organizations — Form 990-N (e-Postcard)

How to file

To electronically submit Form 990-N, *Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ*, use the Form 990-N Electronic Filing system (e-Postcard).

- All organizations are required to register at IRS.gov prior to filing Form 990-N. You won't be asked to register again the next time you file.
- Form 990-N must be completed and filed electronically. **There is no paper form.**
- Form 990-N filers may choose to file a complete Form 990 or Form 990-EZ instead.

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 >

End-of-Year Reports – Faculty Advisor

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

Faculty Advisor Sign-off

Step 2B*
For receipts less than $50,000, you are required to file the IRS e-Postcard at: <u>IRS ePostcard</u>

Once completed - please enter your confirmation number: [   ]

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

My chapter had $50K or more in receipts this year: ☐

[Sign-off] Not Signed-off

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

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

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 #444, Fab Four, Fab Four University

Planned Achievement Level: Award-Seeking

PCA Achievements		PCA Requirements	
Mission Based Requirements	**YTD Credited**	**Mission Based Points Required**	
Beginning of Year Report	0	1	
Initiation	0	1	
Mid Year Report	0	0	
End of Year Report	0	1	
Reaching Out Activities (ROAs)	3	3	
Professional Activities	4	6	
Service Activities	1	2	
Total Points	8	14	
Additional Requirements for Award-Seeking Chapters Only	**YTD Achieved**	**Required for Silver**	**Required for Gold**
Additional ROAs	1	5	8
Additional Professional Activities	0	4	6
Additional Service Activities	0	2	4
Mandatory Essential Skills Activity	0	1	1
Overall Chapter Status	Under Review ⌄	Yes	Yes

Generate a Membership Dues Invoice.

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

—— Print Option

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

Payment Options

Card | Check

All fields are required.

Credit/Debit Card

Card Type: Master Card

Card Number: *

CVV: * Expiration Date: 01 2023

Billing Address

First Name: * Last Name: *

Address: *

City: * State: *

Country: United States ZIP: *

Cancel | Submit

Payment Options

Card | Check

Check Payment

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

Beta Alpha Psi
220 Leigh Farm Road
Durham, NC 27707

If the amount is not paid in full, please indicate the individual(s) to whom the check applies.

To download Chapter Maintenance Fee invoice for Current year Click here.

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

			Save as PDF	Print		

Membership Dues Invoice for Fiscal Year 2021 - 2022

Chapter Number 444, Fab Four University, Fab Four

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

☑	Member #	Member Name	Charge Year	Charge Date	Total Charge	Amount Owed
☑	202204440007	Bynum, Sam	2022	02/10/2022	75.00	75.00
☑	202204440008	Carruthers, Harrison	2022	02/10/2022	75.00	75.00
☑	202204440005	Douglas, Beth	2022	02/10/2022	75.00	75.00
☑	202204440003	Drummond, Will	2022	02/10/2022	75.00	75.00
☑	202204440010	Higgns, Mark	2022	02/10/2022	75.00	75.00
☑	202204440006	Patterson, Andrew	2022	02/10/2022	75.00	75.00
☑	202204440009	Powell, Amy	2022	02/10/2022	75.00	75.00
☑	202204440011	Roberts, John	2022	02/10/2022	75.00	75.00
☑	202204440002	Sanz, Paul	2022	02/10/2022	75.00	75.00
☑	202204440004	Sullivan, Amy	2022	02/10/2022	75.00	75.00

Total Amount Owed: $1025.00
Unpaid Members in Current Fiscal Year: 10

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

Membership Dues Payment by Credit Card

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

Unpaid Members in Current Fiscal Year: 10

Payment Options

Card	Check

All fields are required.

Credit/Debit Card

First Name	Donald
Middle Name	H
Last Name	Williams
Card Type	Master Card
Card Number	5267 21167758 0896
CVV	463 Expiration Date 06 2024

Billing Address

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".

Membership Dues Payment by Credit Card

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

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

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

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

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

Payment Options

Card | Check

All fields are required.

Credit/Debit Card

Card Type: American Express

Card Number: 378282246310005

CVV: 2345   Expiration Date: 03 2023

Billing Address

First Name: Margaret   Last Name: Fiorentino

Address: 220 Leigh Farm Road

City: Durham   State: NC

Country: United States   ZiP: 27707

Cancel   Submit

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.

Chapter Maintenance Fee Payment by Credit Card

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

Payment confirmation

Annual maintenance fee total: $300.00

Card Details

Card Type	American Express
Card Number	xxxx xxxx xxxx 0005
Expiration Date	03/2023

Billing Address

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

Cancel Confirm

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.

Chapter Maintenance Fee Payment by Credit Card

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

Payment confirmation

Payment Successful!

Thank you Margaret Fiorentino for your payment of **$300.00**.

Your transaction ID is **1CH6009482053751X**.

Annual maintenance fee total: $300.00

Billing Address

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

Close   Print

Not Credited

A screen notification will confirm if your payment was successful or not.

A print option is provided.

Beta Alpha Psi

Chapter Maintenance Fee Payment by Credit Card

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

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

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

Beta Alpha Psi