Mid Year Reporting Guide

Due December 15
Reporting Intranet Resources

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

Table of Contents - Main Topic Links

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

- What’s required?
- Why declare award status?
- Mid-Year Report Screen
- Roles of Advisors & Officers
- Update Chapter Profile Screen
- Update Membership Roster
  - Add a New Candidate
  - Submit a Candidate for Initiation
- Reporting Activities
- Impact Categories
- Essential Skills
- Non-BAP Activities
- Reaching Out Activities
- Scorecard
- Student Participation Verification Report
- What Happens after December 15?
- Payments by Credit Card
  - Membership Dues
- Program for Chapter Activities
- PCA Quiz
- 2023 Mid-Year Meetings
- Questions – Contact Us

A link back to the Table of Contents is located on the lower right-hand side of each slide.
What do we need to do?

For the Mid Year Report, just do 3 things:

1. Declare award status (On the Chapter Profile Page)

2. Enter Fall Candidates

3. Enter Activities between June 1 and Dec 15
Why should we declare Award status if we may not achieve it?

Because you just might!
Mid-Year Reports
Award Seeking Chapters Only

• Award Seeking Chapters must declare award status by December 15th on the Chapter Profile Screen.

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

Review that all items have been addressed, check the applicable boxes, and the report status will update to Credited.
Clarification of Roles
Faculty Advisors vs. Officers

**Faculty Advisors**
- Create and manage officer login accounts
- Review all chapter reports:
  - Beginning of the Year - October 15\textsuperscript{th}
  - Mid-Year Reports – December 15\textsuperscript{th} award-seeking chapters
  - Student Hours Verification Report
  - Complete 990n e-Postcard filing by June 1\textsuperscript{st}
  - Sign Off on End-of-Year Report by June 1\textsuperscript{st}
- Meet with Chapter Reporter throughout each semester to review chapter reporting.
- Meet with Chapter Treasurer to ensure that all payments for membership dues and chapter maintenance fee are paid on time.

**Chapter Officers**
- All Chapter Reporting
  - Entering new candidates into the system
  - Beginning of the Year Reports
  - Entering Professional & Service Activities, Reaching Out Activities and Initiations
  - Mid-Year Reports (award-seeking chapters)
  - End-of-Year Report
- Work with faculty advisor to process all payments for membership dues and chapter maintenance fee on time.
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
Declare Award Seeking Status

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 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 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”.

Table of Contents
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.
Online Activity Reporting System

All reporting is completed online.

- Professional and Service Activities
- Non-BAP Activities
- Reaching Out Activities (ROAs)
- Initiations
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 screenshot]
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  ○ No
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
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

Activity Name: Community College Outreach

Date of Activity: 03/04/2024

Was the Activity at Least 50 Minutes Long?: Yes

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

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
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

Submit
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.

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

<table>
<thead>
<tr>
<th>Mission Based Requirements</th>
<th>YTD Credited</th>
<th>PCA Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of Year Report</td>
<td>0</td>
<td></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>3</td>
<td>3</td>
</tr>
<tr>
<td>Professional Activities</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Service Activities</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Total Points</td>
<td>8</td>
<td>14</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Requirements for Award-Seeking Chapters Only</th>
<th>YTD Achieved</th>
<th>Required for Silver</th>
<th>Required for Gold</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>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.
Non-BAP Activities

At the individual level, chapters may report a maximum of 3 professional activities and 3 service activities that are not sponsored by Beta Alpha Psi.

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

Only three entries for fall and three entries for spring are allowed.
## 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</td>
<td>Executive Office</td>
<td>□</td>
<td>No</td>
<td></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>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2023 Annual Meeting</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</td>
<td>Executive Office</td>
<td>□</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional of the Year - Online Competitions Page</td>
<td></td>
<td></td>
<td></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>Responsible 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>

Beta Alpha Psi
# Online Activity Reporting

## More Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership > Report Activity

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Responsibility</th>
<th>ROA</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>
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.

<table>
<thead>
<tr>
<th>Member Number</th>
<th>Member Name</th>
<th>Firm Visit</th>
<th>EGH 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 Grad</th>
<th>Test 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>201004440002</td>
<td>Clooney, George</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>201204440002</td>
<td>Best, Pete</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>201004440004</td>
<td>Florentino, Margaret</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>202004440001</td>
<td>Drane, Josephine</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>202004440002</td>
<td>Sear, Paul</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>202004440003</td>
<td>Drummond, Will</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>202004440004</td>
<td>Sullivan, Amy</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
# Chapter Scorecard

Chapter #444, Fab Four, Fab Four University

**Planned Achievement Level:** Award-Seeking

## PCA Achievements

<table>
<thead>
<tr>
<th>Mission Based Requirements</th>
<th>YTD Credited</th>
<th>PCA Requirements</th>
</tr>
</thead>
<tbody>
<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>3</td>
<td>3</td>
</tr>
<tr>
<td>Professional Activities</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Service Activities</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total Points</strong></td>
<td><strong>8</strong></td>
<td><strong>14</strong></td>
</tr>
</tbody>
</table>

## Additional Requirements for Award-Seeking Chapters Only

<table>
<thead>
<tr>
<th>Requirement</th>
<th>YTD Achieved</th>
<th>Required for Silver</th>
<th>Required for Gold</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>
</tbody>
</table>

**Overall Chapter Status:** Under Review

Status: Yes |
Status: Yes
Review that all items have been addressed, check the applicable boxes, and the report status will update to Credited.
What happens after December 15?

1. Reports are sent to Chapter Advocate for their respective region(s).
2. If you have not reported and are award seeking, advisor and chapter officers will receive an email from the EO.

Note: Membership dues are still payable within 60 days from the day candidates are entered into the Reporting Intranet. Membership dues are not due on December 15, but you may want to pay while you are logged into the Reporting Intranet.
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.

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 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.
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”.

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
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.
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>Beun, 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>
</tbody>
</table>

Subtotal $225.00

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

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Amount Charged</th>
<th>Amount Paid/Credited</th>
<th>Check # or Credit Reason</th>
<th>Date Recorded</th>
<th>Amount Owed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>75.00</td>
<td>75.00</td>
<td>9SL54124U05427803</td>
<td>1/27/2022</td>
<td>0.00</td>
</tr>
<tr>
<td>2022</td>
<td>75.00</td>
<td>75.00</td>
<td>8JB8186039491452U</td>
<td>2/10/2022</td>
<td>0.00</td>
</tr>
<tr>
<td>2022</td>
<td>75.00</td>
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<td>8JB8186039491452U</td>
<td>2/10/2022</td>
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<td>2022</td>
<td>75.00</td>
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<td>8JB8186039491452U</td>
<td>2/10/2022</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Beta Alpha Psi
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