Mid Year Reporting Guide

Due December 15
Mid Year Reporting Guide
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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.
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.
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.
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.

**Active Candidates**

<table>
<thead>
<tr>
<th>Name</th>
<th>Member Number</th>
<th>E-mail</th>
<th>Candidate Date</th>
<th>Membership Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jackman, Hugh</td>
<td>201325010011</td>
<td><a href="mailto:hjackman1@yahoo.com">hjackman1@yahoo.com</a></td>
<td>6/10/2013</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Johnson, Sarah</td>
<td>201325010003</td>
<td><a href="mailto:sjohnson@bap.org">sjohnson@bap.org</a></td>
<td>4/1/2013</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Smith, Elizabeth</td>
<td>201325010001</td>
<td><a href="mailto:esmith@bap.org">esmith@bap.org</a></td>
<td>4/1/2013</td>
<td>Undergraduate</td>
</tr>
<tr>
<td>Stevens, John</td>
<td>201325010008</td>
<td><a href="mailto:jstevens@bap.org">jstevens@bap.org</a></td>
<td>9/3/2012</td>
<td>Undergraduate</td>
</tr>
</tbody>
</table>
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

Enter all the required information and select “Save”.

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

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

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

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

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

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

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

Once the fees for candidates that have been paid, the Executive Office will print the membership certificates and move the records to the “Active Members” folder.
Online Activity Reporting System

All reporting is completed online.

- Professional and Service Activities
- Reaching Out Activities (ROAs)
- Initiations
- Non-BAP Hours
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.
The online reporting activity screen is now in a tabbed format. To add a new Professional Activity select “Add”.

![Image of online reporting activity screen]
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”.

For easier data entry, enter total minutes in the Activity Minutes box, select “check all” and “Save”. Then enter “0” for the students who did not participate. Select “Save” and “Close”.

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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 Members folders.

Enter the minutes for the candidates and members who participated in the activity by using the tab function to each record and then select “Save”.

Then close the screen.
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 25%. If attendance is below 25%, a point will not be generated.
Online Activity Reporting
Scorecard Screen

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

Each activity that is saved and meets the 25% participation requirement automatically gets registered on the Scorecard screen.
Online Activity Reporting
Reaching Out Activities (ROAs)

Menu Bar Item: Reporting and Membership> Report Activity

Once the check box has been selected the screen will automatically save the updates.

<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>2016 Annual Community Service Day Attendance</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hosting or co-hosting Regional Meeting - verified by Chapter Advocate</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hosting or co-hosting Community Service Day - verified by Community Service Day Chair</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016 Annual Meeting Attendance</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016 Annual Meeting Presentation</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017 Nomination for Project Run With It</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017 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>2017 Nomination for</td>
<td>Executive Office</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Enter the total number of initiates for first and second initiations. Make sure to “Save”.
Online Activity Reporting Hours Screen

Menu Bar Item: Reporting and Membership> Report Activity

Minutes will be translated to hours automatically as you report activities.
The Student Hours Verification screen is a new tool for faculty advisors and officers to keep track of candidates and members minutes. 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.

An Excel export is provided to download a full list of activities in Excel format.
Scorecard Screen

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

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

---

### Report Chapter Activities

<table>
<thead>
<tr>
<th>Professional</th>
<th>Service</th>
<th>Reaching Out</th>
<th>Initiation</th>
<th>Hours Summary</th>
<th>Scorecard</th>
</tr>
</thead>
</table>

### Chapter Scorecard

Chapter #444, Fab Four, Fab Four University

Planned Achievement Level: Award-Seeking

<table>
<thead>
<tr>
<th>PCA Achievements</th>
<th>YTD Credited</th>
<th>PCA Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of Year Report</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Initiation</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>End of Year Report</td>
<td>1</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>8</td>
<td>6</td>
</tr>
<tr>
<td>Service Activities</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Total Points</td>
<td>18</td>
<td>13</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>5</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall Hours</th>
<th>Professional Hours</th>
<th>Service Hours</th>
<th>Overall Chapter Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieved Superior</td>
<td>Achieved Superior</td>
<td>Achieved Superior</td>
<td>Superior</td>
</tr>
</tbody>
</table>

Each Individual Must Earn:

- Hours: 20 hrs (2), 8 hrs (2), yes (2)
- Hours: 32 hrs (2), 12 hrs (2), yes (2)
At the individual level, chapters may report a maximum of five hours per semester (per student) of professional activities and a maximum of five hours per semester (per student) of service activities that are not sponsored by Beta Alpha Psi.

Just add a new activity, enter the activity name as, “Non BAP xxxxx”, and enter the date. Then, select “Save” and enter the minutes accordingly.
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.

If your chapter's invoices will be paid by a business school or student union administrator via credit card, please find the Credit Card Authorization Form on the Chapters page here.
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

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

### Membership Dues Invoice for Fiscal Year 2019 - 2020

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

<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>201325010004</td>
<td>Baum, Hadassah</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>201325010006</td>
<td>Boop, Betty</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>201325010002</td>
<td>Daisen, John</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td></td>
<td>Jackman, Hugh</td>
<td>2020</td>
<td>6/10/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>201325010012</td>
<td>Jackson, Janet</td>
<td>2020</td>
<td>6/10/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>201325010009</td>
<td>Johns, Steven</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>201325010001</td>
<td>Smith, Elizabeth</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>201325010008</td>
<td>Stevens, John</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>201325010010</td>
<td>TEST, POP</td>
<td>2020</td>
<td>6/10/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
<tr>
<td>201325010007</td>
<td>Wagon, Chuck</td>
<td>2020</td>
<td>5/20/2020</td>
<td>75.00</td>
<td>75.00</td>
</tr>
</tbody>
</table>

Total Amount Owed: $750.00

Unpaid Members in Current Fiscal Year: 10

Payment Options

Card | Check
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”.

Total: $225.00

Card Details
Card Type: Master Card
Card Number: xxxx xxxx xxxx 4444
Expiration Date: 01/2023

Billing Address
Name: Margaret Fiorentino
Address: 220 Leigh Farm Road, Durham, NC, US, 27707
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>Beurn, 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> 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.
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.

A $50 late fee will be added after October 15.

### Payment confirmation

<table>
<thead>
<tr>
<th>Description</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual maintenance fee total</td>
<td>$300.00</td>
</tr>
<tr>
<td>Card Details</td>
<td></td>
</tr>
<tr>
<td>Card Type</td>
<td>American Express</td>
</tr>
<tr>
<td>Card Number</td>
<td>xxxx xxxx xxxx 0005</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>03/2023</td>
</tr>
<tr>
<td>Billing Address</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Margaret Fiorentino</td>
</tr>
<tr>
<td>Address</td>
<td>220 Leigh Farm Road,</td>
</tr>
<tr>
<td></td>
<td>Durham, NC, US,</td>
</tr>
<tr>
<td></td>
<td>27707</td>
</tr>
</tbody>
</table>
Questions?

Contact the Executive Office:

- Email – bap@bap.org, lwicker@bap.org
- Phone - 919-402-4044, 919-402-4968