Last Revised: 9/28/2026

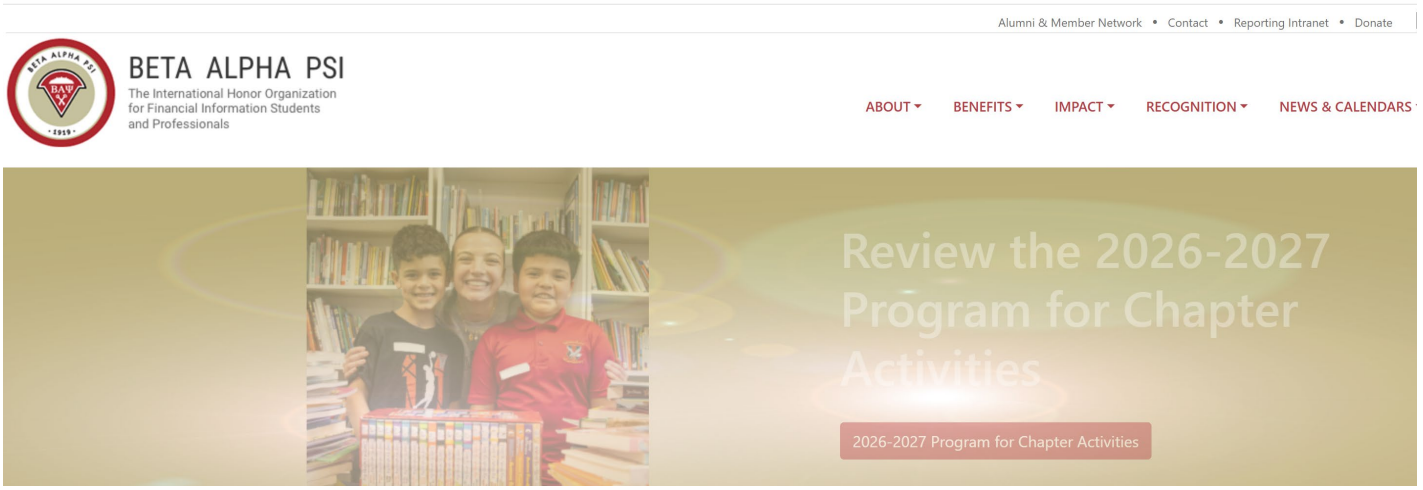
Beta Alpha Psi Chapter Reporter and Treasurer Duties

- Create a copy of a list of activities done during the entire year and save it on a Google drive for future reference of what was done for that year.
- Take notes on elections day
    - Recommendation - also take meeting minutes for all exec meetings
- Prepare Beginning of year report, Mid-Year report, and End of Year report
- Monitor the chapter scorecard and advise the president on how the chapter can achieve Gold, Silver, or Bronze status
- Record all events in the proper category. The 3 main categories are Professional, Service, and Reaching Out Activities (ROA). Essential skills are a subcategory of Professional activities. If the event is not considered to be one of those categories no entry needs to be made on intranet.
    - Please refer to the YYYY-YYYY Program for Chapter Activities page on BAP. This page can be searched for on your browser. Instead of YYYY put the academic year that you are currently serving as chapter officer.
    - 2026-2027 Program for Chapter Activities
        - Please update this link for the next secretary
    - Use this page to help brainstorm ideas for chapter activities as well for helping you classify chapter activities. If possible, read everything that is on this page as it will help you with every aspect of being a chapter officer.
- Submit new candidates for initiation every semester in the Reporting Intranet
    - **Work with treasurer to ensure all receivables are received from new members before you record the new candidates in the Reporting Intranet**
    - **See important notes in the recording *New Members and Monitoring Memberships* subsection below the *How to Use Reporting Intranet* header**
- Manage all membership status (Actives, Alumni, Submitted for Initiation, etc.)

Reporting Intranet - The Basics

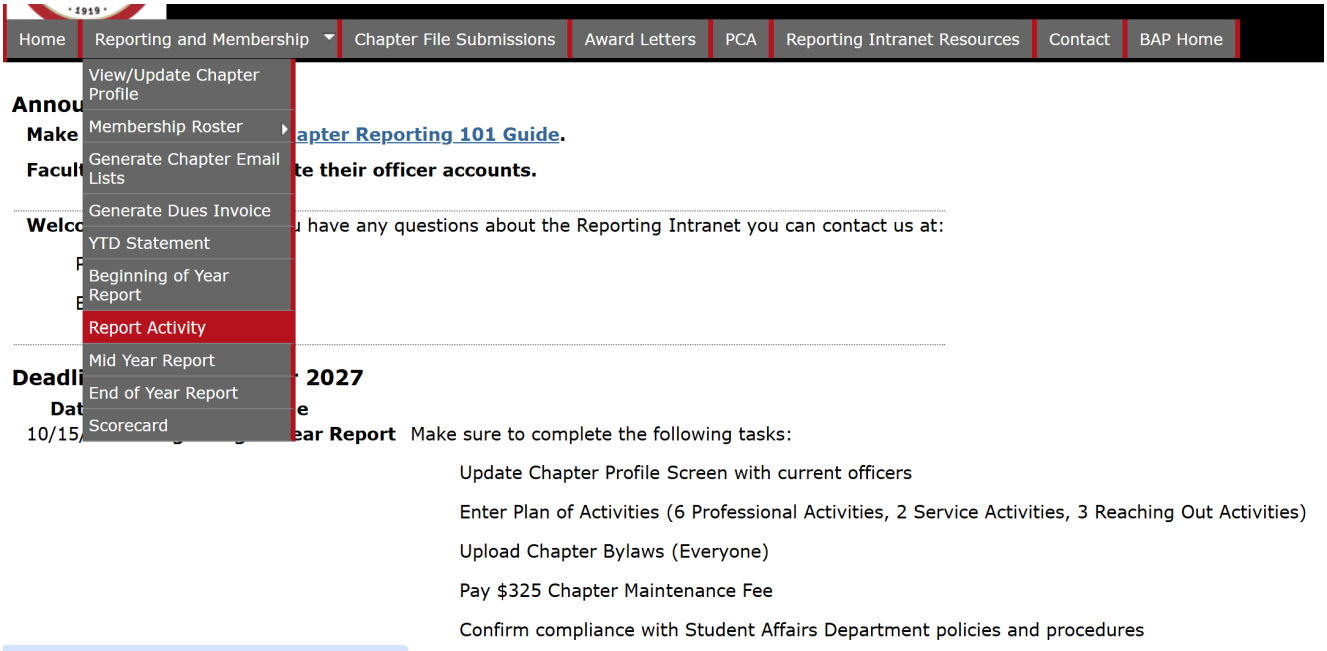
To access Reporting Intranet, first go to https://www.bap.org/
Then in the top banner click on Reporting Intranet. The faculty advisor will create your Reporting Intranet account. If you need additional help, email bap@bapeo.org.
For more assistance please review the Reporting Intranet Resources. Here you can access the many other rules/info about reporting intranet that is beyond what is presented in this document. The very first pdf that is embedded on this page called Chapter Reporting 101 will give you a more detailed overview of

how to use the Reporting Intranet. Please also review Chapter Reporting 101 At A Glance and the webinar recording.



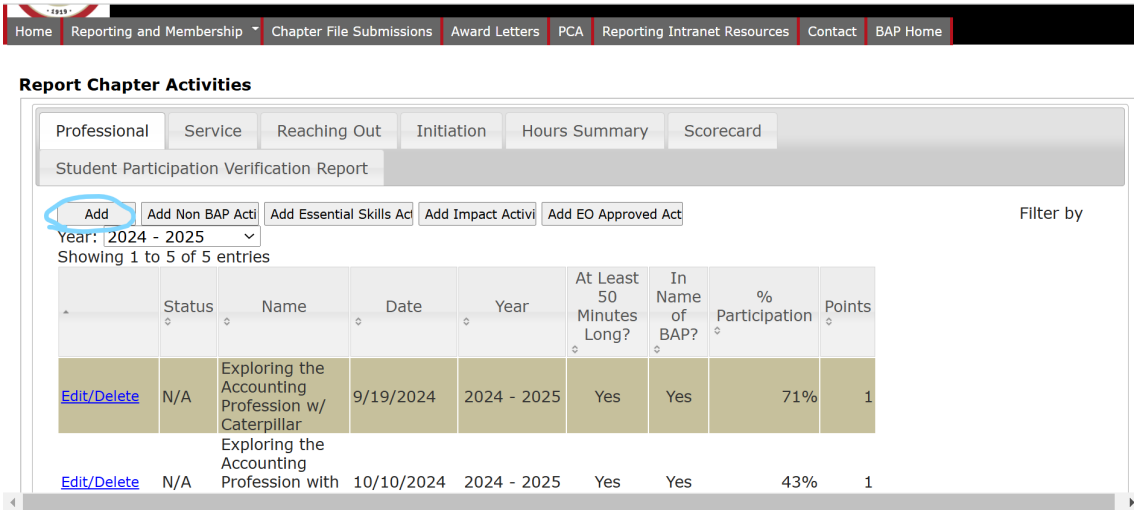
Recording Activities and Monitoring Scorecard

1) In the drop-down menu of *Reporting and Membership*; click on *Report Activity.*

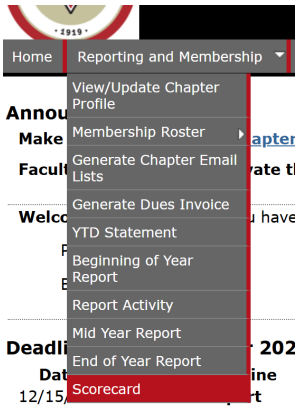


***Everything you will need to access is under Reporting and Membership.

2) To record a professional activity, select the Professional Tab and click on the *Add* button. On this same page is also where you will record all activities that count towards the scorecard as well as to access the scorecard.



3) When the pop-up report appears, fill out all the prompts and hit save. This will load a list of all active members and any new members who were recently added. Check the box next to the names of all members who attended the event. Click save again and once the screen finishes reloading, close out of the report. If the activity has 20% or more attendance, a point will be generated on the Scorecard.
4) To record a service activity, go to the Service tab. Similar to recording a professional activity, fill out all the asked prompts.
5) Some professional and service events may qualify as Impact activities. Impact activities generate 2 points if attendance is 20% or greater.
6) To record a ROA, simply go to the ROA tab. Then click on the checkbox in the status column next to the ROA your chapter had executed.
    a) Some ROAs require a document to be uploaded as proof of the event happening while some ROAs do not. Usually, the ROAs that do not require an uploaded document are those where the attendance is managed by the Executive Office. If you see a blue folder, you will need to upload a document with the date, number of attendees, and a description of the event.
    b) A photo of the event is sufficient documentation.
7) To monitor the chapter progress, go back to the *Reporting and Membership* drop down menu and select *Scorecard*.



8) When interpreting the scorecard, compare the "YTD Credited/Achieved" column with the "PCA Requirements" column. If your chapter only wants to strive for bronze, the "Mission Based (Bronze) Points Required" is the minimum requirement that all chapters need to meet.

Planned Achievement Level: Award-Seeking

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

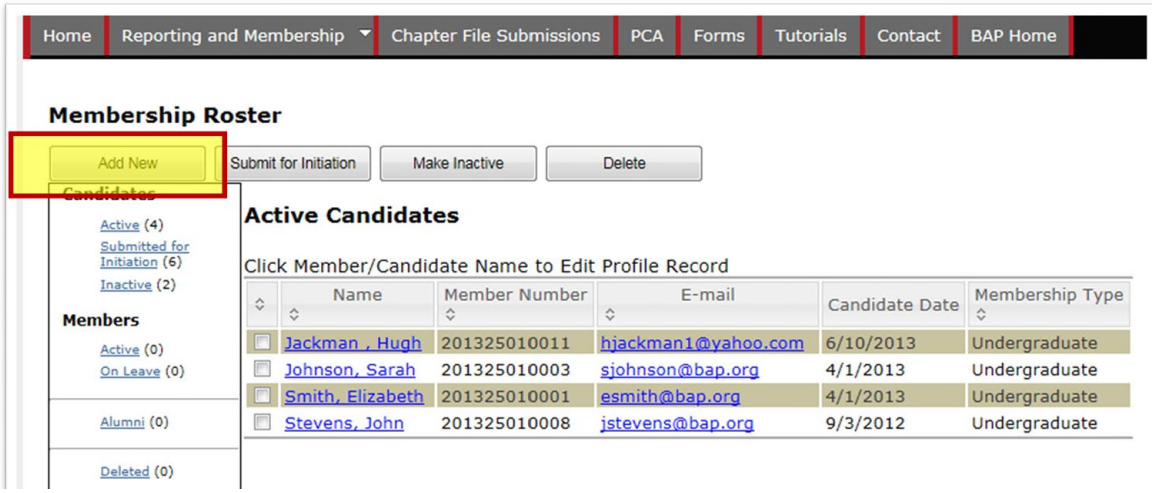
Recording New Members and Managing Memberships

***Two Important Points to emphasize:

1. Before you proceed further: Know that if you record a new member and save it, this will record a permanent Accounts Receivable record:
   - Test entries should not be entered into the Reporting Intranet!!
   - Each entry creates an $85 receivable for the chapter
2. Members need to be submitted for initiation 2 weeks prior to obtain certificates on time. The Executive Office will send a pdf file of membership certificates to the faculty advisors and move records to member.

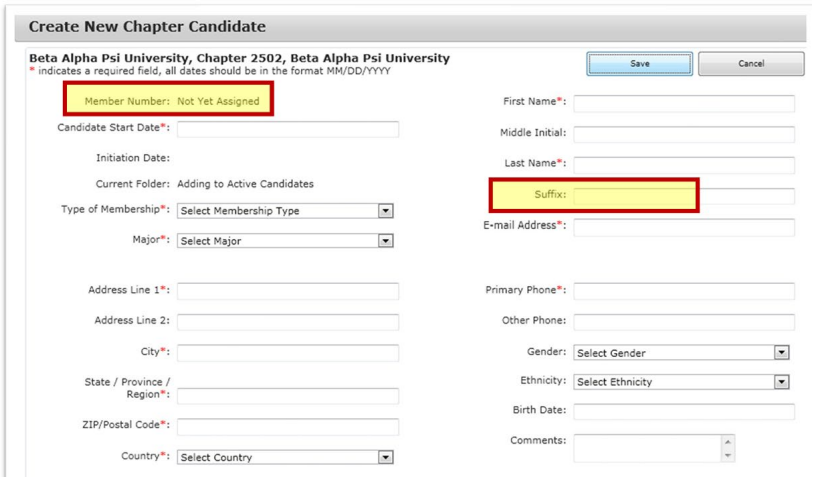
1) To record a new candidate, go to *View/Update Membership* in the *Reporting and Membership* Menu, as shown below:

View/Update Membership



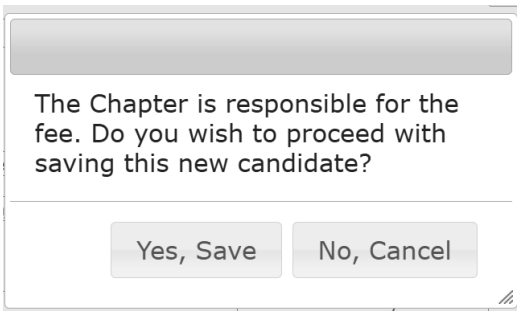
2) Click Add New. This will open a report menu for you to enter all the necessary information the Executive Office needs for that student. Fill this form out and click save. **Review the list with the faculty advisor before entering any records.**

Add a New Candidate

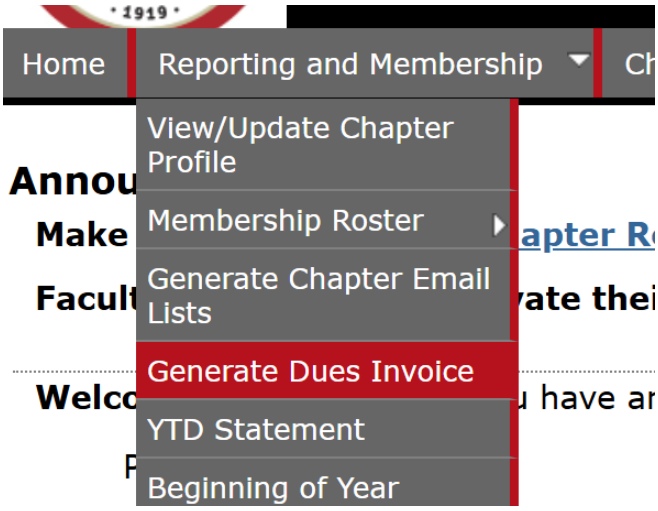


3) Two warning messages will appear subsequently. They are there to prevent accidental entries from being recorded. **Test entries should not be entered into the Reporting Intranet**. **Each entry creates an $85 receivable for the chapter**. Please make sure the chapter has collected the $85 fee before recording the new candidate. This is because the

chapter is responsible for the $85 regardless of whether the student pays or qualifies for membership. The Candidate start date is the student's first day of activities with the chapter.

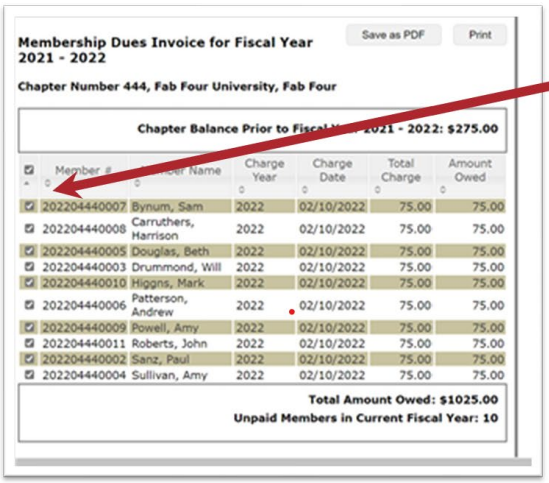


4) After you click yes to both messages, the new record will appear in the *Active Candidates* Folder. To submit a candidate for initiation, check off the box next to the appropriate name and select *Submit for Initiation*. This will transfer the candidates into the Submit for Initiation Folder (located on the left side bar).
5) The next step is to work with the advisor and the treasurer to write a check for the total amount owed to the BAP Executive Office. In the *Reporting and Membership* drop down menu, click on Generate Dues Invoice.



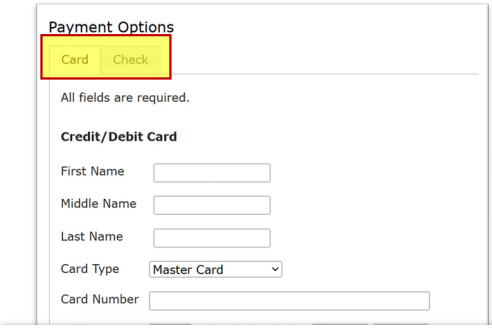
6) This shows the total dollar amount of candidate dues owed to the Beta Alpha Psi Executive Office. Here you also have the option to pay the amount in either credit/debit card or by check. If you can pay by ACH, please contact bap@bapeo.org to request ACH information.

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

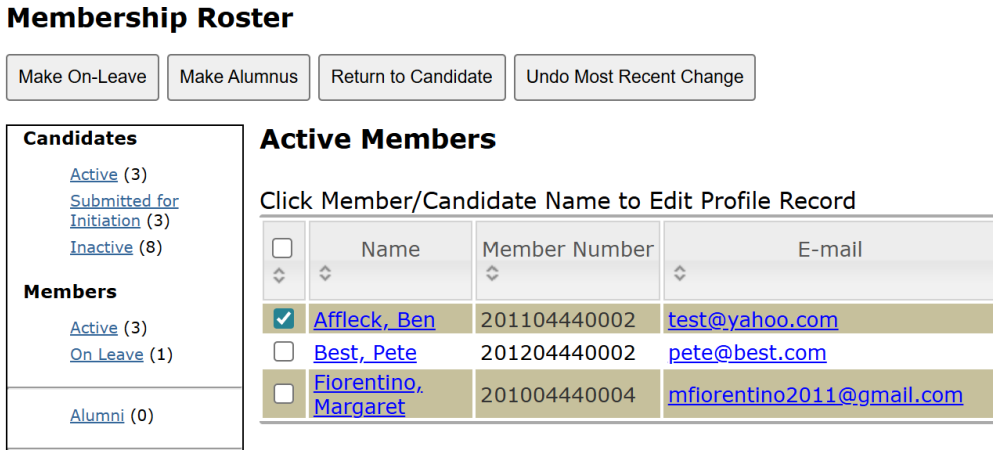
Payment Options for Membership Dues



Make Check Payable to:
Beta Alpha Psi

Send Payment to:
Beta Alpha Psi
11161 E. State Rd 70
Ste 110-608
Lakewood Ranch, FL 34202

7) Once the fees for candidates have been paid, the Executive Office will save a pdf of the membership certificates and move the records to the *Active Members* folder. A pdf file of membership certificates will be emailed to the faculty advisor within two weeks. Digital badges will be issued upon request. Contact bap@bapeo.org for digital badges.
8) At the beginning or end of every semester, move active members who have graduated into the *Alumni* Folder. To do this, check the box next to the graduated active member and then click on *Make Alumnus*.



Preparing Beginning, Mid-Year and End of Year Reports

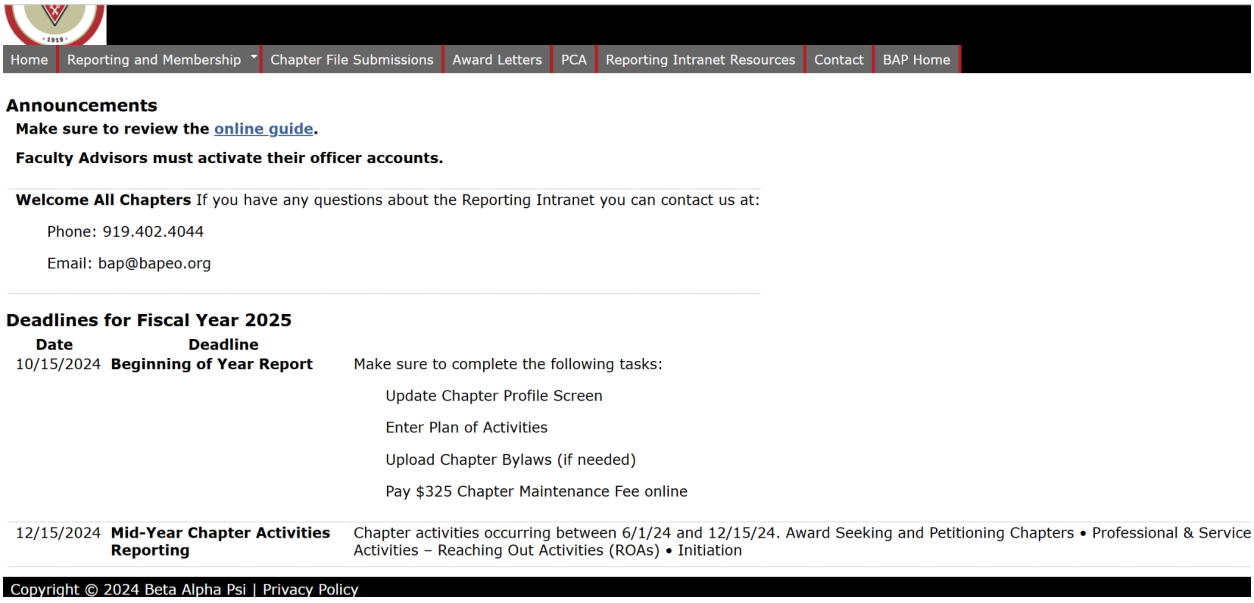
Review the BAP Reporting Intranet Resources page.

Beginning of year report is due October 15. Update the Chapter Profile page, upload bylaws, pay the $325 maintenance fee, enter Plan of Activities and confirm compliance with University Student Affairs.

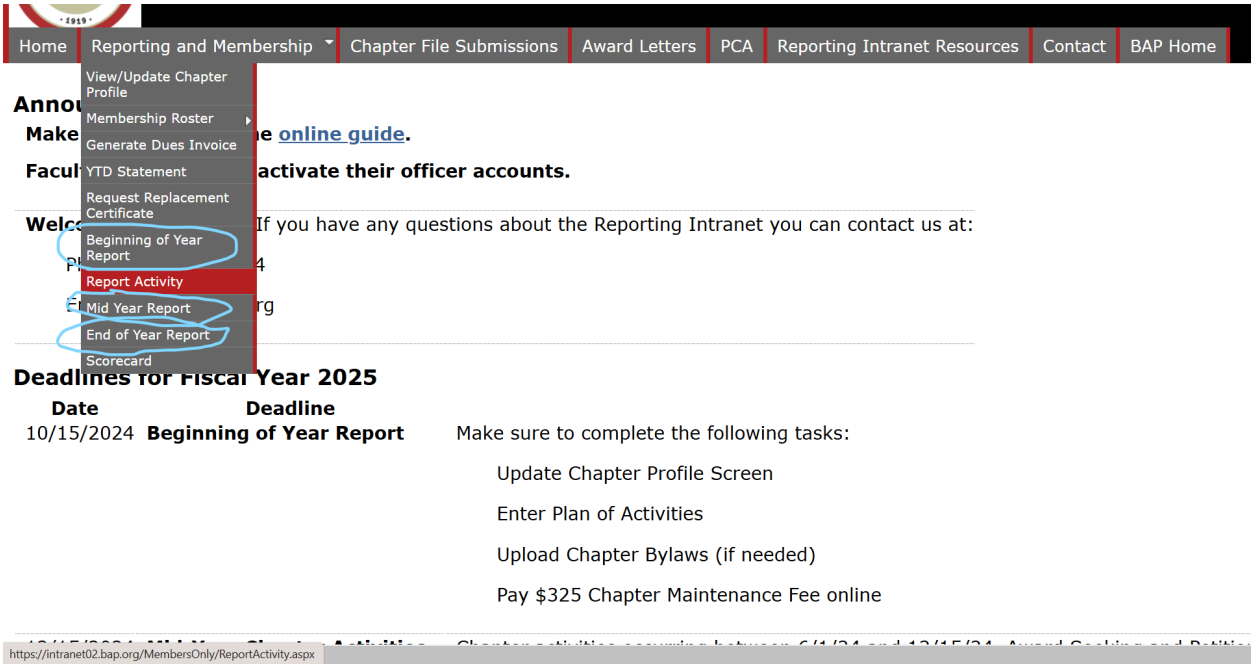
Mid-year report is due December 15. Enter fall candidates, fall activities, and check the boxes to confirm completion.

End of year report is due June 1. Enter candidates, activities, upload financial statements, file 990n e-postcard or complete Over $50K spreadsheet and sign off on the report.

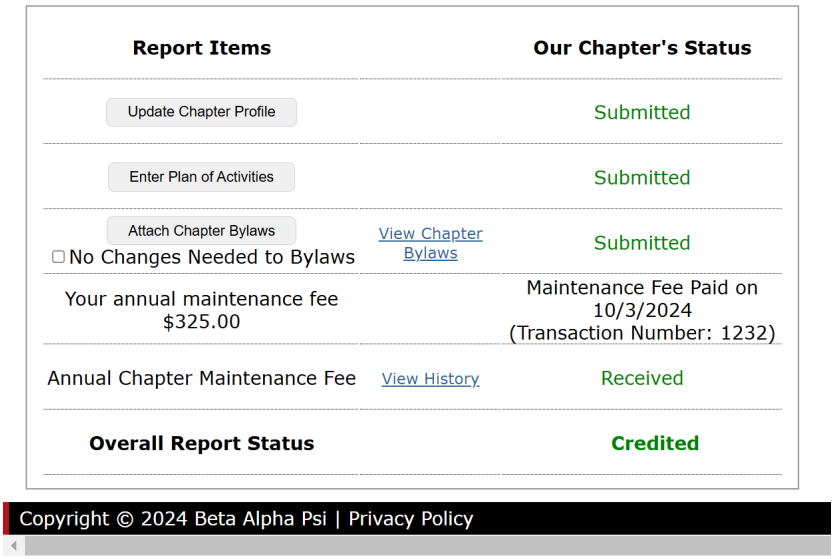
1) On the home page, you will see the due dates for all the reports that are due by the end of the year. Because the end of year was already completed, the screen only shows the due date for the beginning and mid-year report.



2) To access these reports, go to the same *Reporting and Membership* drop down menu and select your desired report.



3) For example purposes, the beginning of the year report looks like this. Once you complete all report items, the status of each item will all turn green.
The annual chapter maintenance fee will turn green after the Executive Office has processed your $325 submitted check.

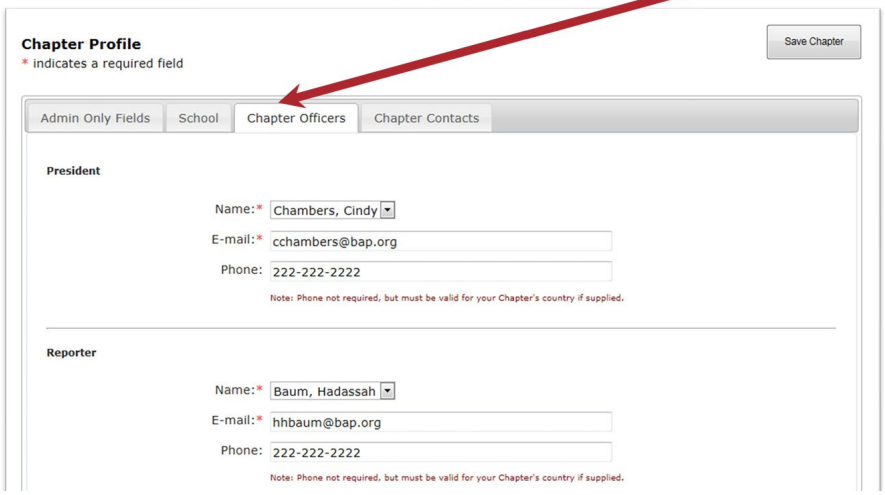


4) When completing the mid-year report, one of the tasks is to update the chapter profile. To do this go to the *Reporting and Membership* drop down menu and click on *View/Update Chapter Profile*.

5) In the chapter officers tab, update the officers' names, emails and phones.

Update Chapter Profile

Add the officers' names here



Update Chapter Profile

