



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.
 - [2025-2026 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](#).



Alumni & Member Network • Contact • Reporting Intranet • Donate

BETA ALPHA PSI
The International Honor Organization
for Financial Information Students
and Professionals

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**Review the 2025-2026
Program for Chapter
Activities**

Recording Activities and Monitoring Scorecard

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



Home Reporting and Membership ▾ Chapter File Submissions Award Letters PCA Reporting Intranet Resou

Annou View/Update Chapter Profile

Make Membership Roster ▾ [apter Reporting 101 Guide.](#)

Faculty Generate Chapter Email Lists [ate their officer accounts.](#)

Welcome Generate Dues Invoice [you have any questions about the Reporting Intranet you can contact us at:](#)

Report YTD Statement

Report Beginning of Year Report

Report Report Activity [apter Reporting 101 Guide.](#)

Deadline Mid Year Report

Date End of Year Report

Scorecard Scorecard

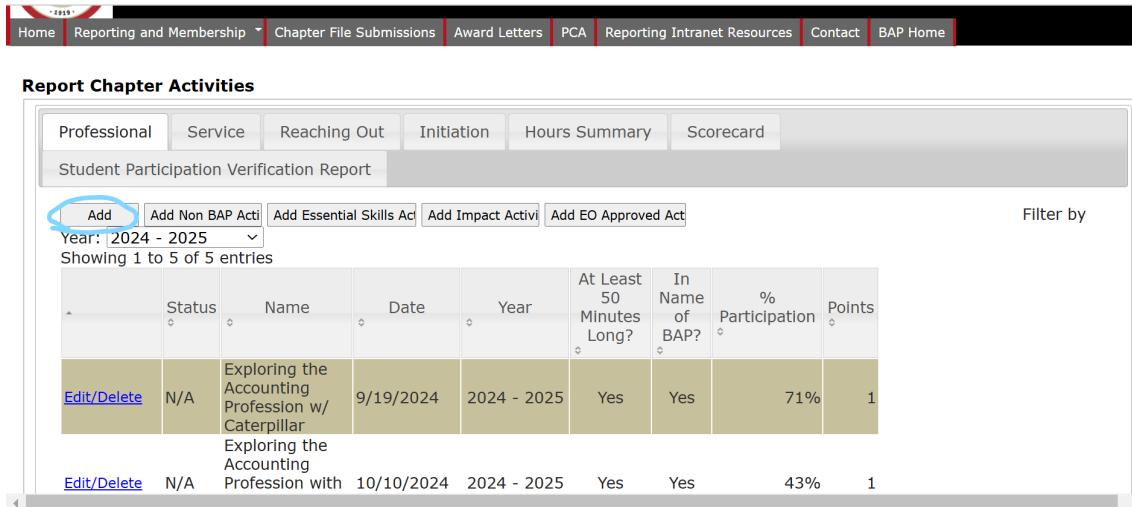
2026 Chapter activities occurring between 6/1/25 and 12/15/25. / (ROAs) • Initiation

6/1/2026 2026 E Postcard The 2026 e postcard/Over \$50K spreadsheet is due on June

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

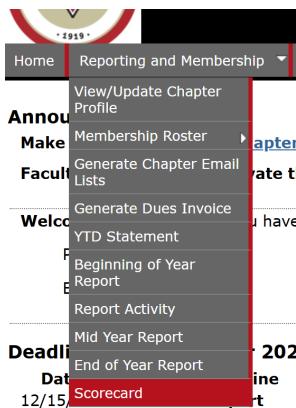
- 2) To record a professional activity, select the Professional Tab and click on the *Add* button.

On this same page is also where you will record all activities that count towards the scorecard as well as to access the scorecard.



Student Participation Verification Report									
Add Add Non BAP Act Add Essential Skills Ac Add Impact Activ Add EO Approved Act Filter by									
Year: 2024 - 2025									
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	Exploring the Accounting Profession w/ Caterpillar	9/19/2024	2024 - 2025	Yes	Yes	71%	1	
Edit/Delete	N/A	Exploring the Accounting Profession with	10/10/2024	2024 - 2025	Yes	Yes	43%	1	

- 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		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

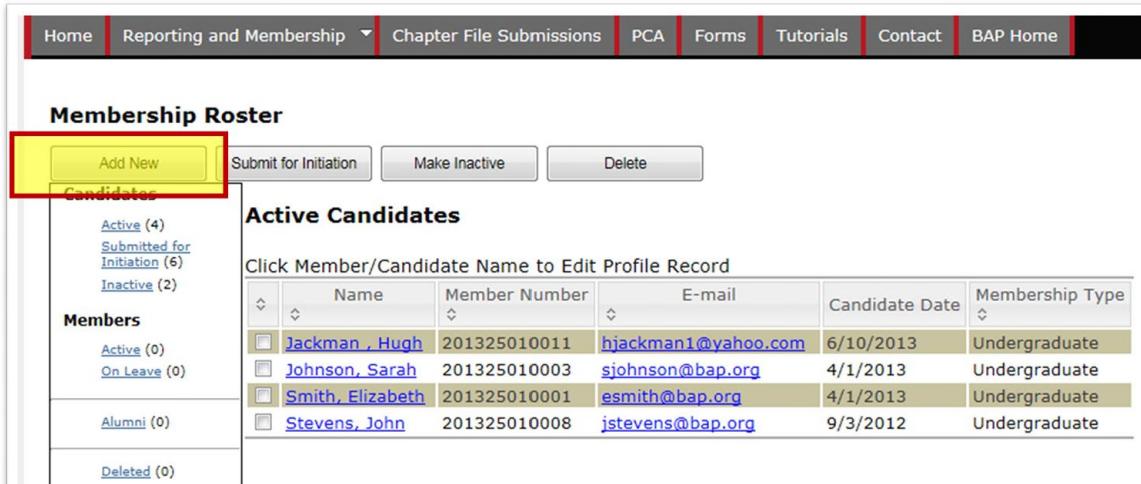
Recording New Members and Managing Memberships

***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:

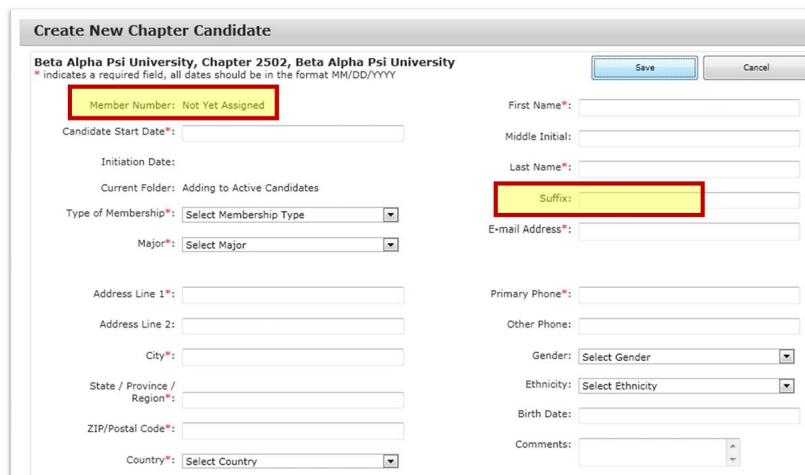
View/Update Membership



The screenshot shows the 'Membership Roster' page. At the top, there is a navigation bar with links: Home, Reporting and Membership (with a dropdown arrow), Chapter File Submissions, PCA, Forms, Tutorials, Contact, and BAP Home. Below the navigation bar, the page title 'Membership Roster' is displayed. Underneath the title, there are two main sections: 'Candidates' and 'Active Candidates'. The 'Candidates' section has three categories: Active (4), Submitted for Initiation (6), and Inactive (2). The 'Active Candidates' section contains a table with four columns: Name, Member Number, E-mail, and Candidate Date. The table lists four entries: Jackman, Hugh (Member Number 201325010011, E-mail hjackman1@yahoo.com, Candidate Date 6/10/2013, Membership Type Undergraduate); Johnson, Sarah (Member Number 201325010003, E-mail sjohnson@bap.org, Candidate Date 4/1/2013, Membership Type Undergraduate); Smith, Elizabeth (Member Number 201325010001, E-mail esmith@bap.org, Candidate Date 4/1/2013, Membership Type Undergraduate); and Stevens, John (Member Number 201325010008, E-mail jstevens@bap.org, Candidate Date 9/3/2012, Membership Type Undergraduate). Below the table, there is a link 'Click Member/Candidate Name to Edit Profile Record'.

- 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.**

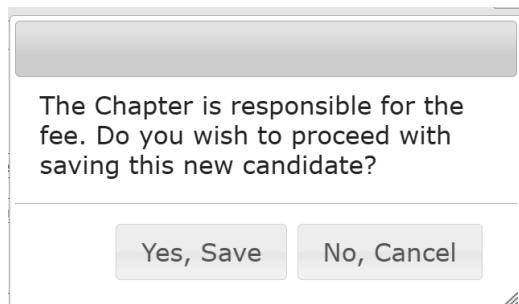
Add a New Candidate



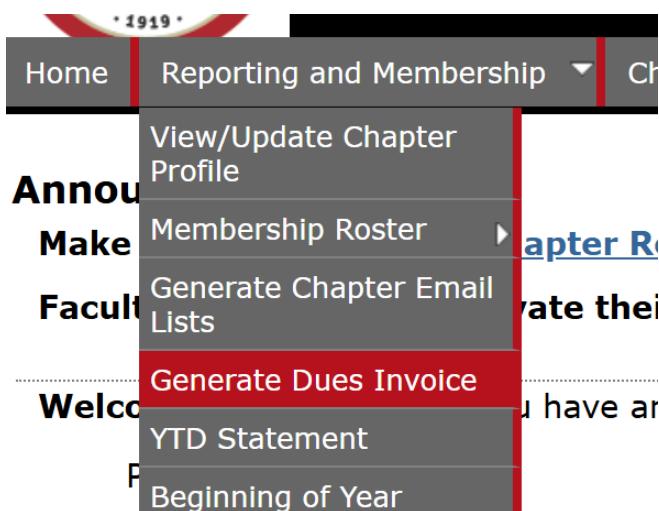
The screenshot shows the 'Create New Chapter Candidate' form. At the top, it says 'Beta Alpha Psi University, Chapter 2502, Beta Alpha Psi University' and includes a note: '• indicates a required field; all dates should be in the format MM/DD/YYYY'. The form has several input fields: 'Member Number: Not Yet Assigned' (highlighted with a red box), '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', 'First Name*', 'Middle Initial*', 'Last Name*', 'Suffix*' (highlighted with a red box), 'E-mail Address*', 'Primary Phone*', 'Other Phone*', 'Gender: Select Gender', 'Ethnicity: Select Ethnicity', 'Birth Date*', and 'Comments*'. There are 'Save' and 'Cancel' buttons at the top right.

- 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.



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
<input checked="" type="checkbox"/> 202204440007	Bynum, Sam	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 202204440008	Caruthers, Harrison	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 202204440009	Douglas, Beth	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 202204440003	Drummond, Will	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 202204440010	Higgins, Mark	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 202204440006	Patterson, Andrew	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 202204440009	Powell, Amy	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 202204440011	Roberts, John	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 202204440002	Sanz, Paul	2022	02/10/2022	75.00	75.00
<input checked="" type="checkbox"/> 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.

Payment Options for Membership Dues

Payment Options

Card Check

All fields are required.

Credit/Debit Card

First Name

Middle Name

Last Name

Card Type

Card Number

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 print the membership certificates and automatically move the records to the *Active Members* folder. A pdf file of membership certificates will be emailed to the faculty advisor within two weeks.
- 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*.



Membership Roster

[Make On-Leave](#) [Make Alumnus](#) [Return to Candidate](#) [Undo Most Recent Change](#)

Active Members			
Click Member/Candidate Name to Edit Profile Record			
	Name	Member Number	E-mail
<input type="checkbox"/>	Affleck, Ben	201104440002	test@yahoo.com
<input type="checkbox"/>	Best, Pete	201204440002	pete@best.com
<input type="checkbox"/>	Florentino, Margaret	201004440004	mfiorentino2011@gmail.com

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, 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.

 [Home](#) [Reporting and Membership](#) [Chapter File Submissions](#) [Award Letters](#) [PCA](#) [Reporting Intranet Resources](#) [Contact](#) [BAP Home](#)

Announcements
Make sure to review the [online guide](#).
Faculty Advisors must activate their officer accounts.

Welcome All Chapters If you have any questions about the Reporting Intranet you can contact us at:
Phone: 919.402.4044
Email: bap@bapeo.org

Deadlines for Fiscal Year 2025

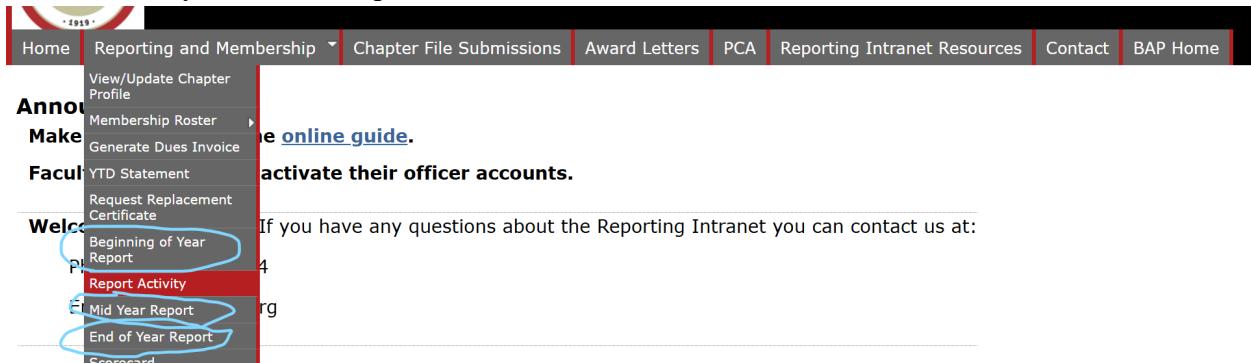
Date	Deadline
10/15/2024	Beginning of Year Report

Make sure to complete the following tasks:

- Update Chapter Profile Screen
- Enter Plan of Activities
- Upload Chapter Bylaws (if needed)
- Pay \$325 Chapter Maintenance Fee online

12/15/2024 **Mid-Year Chapter Activities Reporting** Chapter activities occurring between 6/1/24 and 12/15/24. Award Seeking and Petitioning Chapters • Professional & Service Activities – Reaching Out Activities (ROAs) • Initiation

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



The screenshot shows the 'Reporting and Membership' dropdown menu open. The 'Beginning of Year Report' and 'Mid Year Report' options are circled in blue. The 'Beginning of Year Report' is highlighted in red.

Deadlines for Fiscal Year 2025

Date	Deadline
10/15/2024	Beginning of Year Report

Make sure to complete the following tasks:

- Update Chapter Profile Screen
- Enter Plan of Activities
- Upload Chapter Bylaws (if needed)
- Pay \$325 Chapter Maintenance Fee online

<https://intranet02.bap.org/MembersOnly/ReportActivity.aspx>

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.

Report Items	Our Chapter's Status
Update Chapter Profile	Submitted
Enter Plan of Activities	Submitted
Attach Chapter Bylaws <input type="checkbox"/> No Changes Needed to Bylaws	Submitted
Your annual maintenance fee \$325.00	Maintenance Fee Paid on 10/3/2024 (Transaction Number: 1232)
Annual Chapter Maintenance Fee	View History
Overall Report Status	Credited

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

Chapter Profile
* indicates a required field

Admin Only Fields School Chapter Officers Chapter Contacts Save Chapter

President

Name: * Chambers, Cindy

E-mail: * cchambers@bap.org

Phone: 222-222-2222

Note: Phone not required, but must be valid for your Chapter's country if supplied.

Reporter

Name: * Baum, Hadassah

E-mail: * hhbaum@bap.org

Phone: 222-222-2222

Note: Phone not required, but must be valid for your Chapter's country if supplied.



Update Chapter Profile

1919

Home Reporting and Membership Chapter File Submissions Award Letters PCA Reporting Intranet Reso

Begin Chapter View/Update Chapter Profile

Chapter Membership Roster Start (2025 - 2026) Year: 2025 - 2026

Generate Chapter Email Lists

Generate Dues Invoice

YTD Statement

Beginning of Year Report

Report Activity

Mid Year Report

End of Year Report

Scorecard

Attach Chapter Bylaws

Our Chapter's Status

Not Submitted

Not Submitted

Not Submitted