

Guide to a Secretary's Commendation (Tau Beta Pi's Required Reports)

Additional information at <http://www.tbp.org/Chapters/Reports/ReportsChecklist.cfm>

	Report	Type	Purpose	Sent/Available	Due	Pap/Elec	Complete
1	+ Convention Registration	Con	Estimate Convention attendance	July	July 31	E	
2	Travel Plans	Con	Confirm Convention attendance	August	September 27	E	
3	Fall Officer Information Update	Chp	Verify Chapter contact information	September	October 15	E	
4	Officer Signatures	Chp	Legal signatures for Chapter reports	September	October 15	P	
5	IRS Form 990-N	Chp	Basic chapter finance information to the IRS	Anytime	15th day of fifth month after fiscal year	E	
5	Fall Report of Eligibility	Mem	Report eligible students	September	First five weeks of the semester	E	
6	Top Portion of Credentials	Con	Verify member as Chapter delegate	February	October 27, at Convention	P	
7	Expense Report	Con	Reimburse voting delegate for expenses	August	Nov 11, two weeks after Convention	P	
8	Fall Report of Election - Catalog Cards/E-Cards	Mem	Report students elected to membership	September	Two weeks before Initiation	E	
		Mem	Permanent membership record	September		E & P	
9	Fall Report of Final Action - Roll Book Signatures	Mem	Reports initiation results	September	Within two weeks of Initiation	E	
			Legal signatures of membership			P	
10	Fall Initiation Fees	Mem	Pays all membership fees		Within two weeks of Initiation	P	
	Midterm Officer Election	Chp	Contact information for midterm officers	Anytime	Within two weeks of election	E	
	Midterm Officer Signatures	Chp	Legal signatures for Chapter reports	January	Within two weeks of election	P	
11	Ratification Ballot	Con	Validates work of Convention delegates	November	April 1	P	
12	* Winter Report of Eligibility	Mem	Report eligible students	January	First 5 weeks of the academic term	E	
13	* Winter Report of Election - Catalog Cards/E-Cards	Mem	Report students elected to membership	January	Two weeks before Initiation	E	
		Mem	Permanent membership record	January		E & P	
14	Officer Election	Chp	Contact information for new officers	Anytime	Within two weeks of election	E	
15	Bottom Portion of Credentials	Con	Reports voting delegate to Headquarters	February	Within two weeks of election, June 1	P	
16	* Spring Report of Final Action - Roll Book Signatures	Mem	Reports initiation results	January	Within two weeks of Initiation	E	
		Mem	Legal signatures of membership			P	
17	* Spring Initiation Fees	Mem	Pays all membership fees		Within two weeks of Initiation	P	
18	Financial Update	Chp	Report Chapter financial status	April	June 1	E	
19	Chapter Survey & Project Reports	Chp	Reports Chapter health	March	June 1	E & P	

* Chapters are required to hold one initiation per year (usually in the fall), but most hold two (again in the winter or spring)

+ Reports are not required for a Secretary's Commendation, but are important for Convention attendance purposes

General Notes

The IRS requires all Tau Beta Pi Chapters to complete form 990-N by the 15th day of the fifth month after the close of the Chapter's fiscal year.

An up-to-date list of advisors should be recorded in the online system. Chapters will be ineligible for a Secretary's Commendation if this list is not up-to-date.

If the Chapter Survey indicates that projects were done during the year, submitting the reports is a requirement to receive a Secretary's Commendation.

With the exception of the Ratification Ballot, the Top Portion of the Credentials, and the IRS-Form 990-N, extensions are available for all reports. Contact Headquarters to get an extension.

Due dates are either the postmark date or the date it was submitted electronically. Reports must be on time and correct to receive full credit towards a Secretary's Commendation.