

# The Tau Beta Pi Association

## Checklist of Winter and Spring Reports

<u>Item</u>	<u>Category</u>	<u>Purpose</u>	<u>Due to Headquarters</u>	<u>Submit</u>
<b>Report of Eligibility</b> Electee materials sent from this	Membership	Report scholastically eligible students	First five weeks of the term	Online
<b>Report of Election</b> Must be approved BEFORE initiation	Membership	Report students elected to membership	At least two weeks before initiation	Online
<b>Catalog Cards</b> Keys and certificates are ordered from catalog cards; Write legibly	Membership	Permanent membership record	At least two weeks before initiation; 3-4 weeks to distribute keys and certificates at initiation	Online
<b>Report of Final Action</b>	Membership	Report initiation results	Within two weeks of initiation	Online
<b>Roll Book Signatures</b>	Membership	Legal signatures of membership	Within two weeks of initiation	Mail/Email
<b>Initiation Fees</b> \$55 per initiate	Membership	Pays Association membership fees	Within two weeks of initiation	Mail
<b>Ratification Ballot</b>	Convention	Validates the work of Convention	April 1	Mail
<b>Officer Election Report</b>	Chapter	Contact information for new officers	Within two weeks of election	Online
<b>Convention Credentials</b>	Convention	Due to HQ within 2 weeks after election of delegate		Online
<b>Financial Report</b>	Chapter	Report Chapter's financial status	June 1	Online
<b>IRS Form 990-N</b>	Chapter	IRS requirement	15th day of fifth month after close of the Chapter's fiscal year	IRS website
<b>Chapter Survey</b>	Chapter	Report Chapter's operations	June 1	Online
<b>Project Reports</b>	Chapter	Report Chapter's activity	June 1	Mail/Email
<b>Officer Signatures</b>	Chapter	Legal signatures for Chapter reports	Within two weeks of election	Mail

### General Notes

- The IRS form 990-N due dates varies. Check [www.tbp.org/off/IRS990-N.cfm](http://www.tbp.org/off/IRS990-N.cfm) to determine your due date.
- To receive credit for the IRS 990-N submission, email a copy of the acknowledgment to [tbp@tbp.org](mailto:tbp@tbp.org).
- Your list of advisors should be verified when electing officers. Chapters will lost points toward a Chapter Excellence Award if this list is not up-to-date.
- Extensions are possible for all reports with the exception of the ratification ballot and the IRS form 990-N.
- Due dates are the postmark or the electronic submission date; they must be on time and correct to receive credit towards a Chapter Excellence Award.

# The Tau Beta Pi Association

## Checklist of Summer and Fall Reports

<u>Item</u>	<u>Category</u>	<u>Purpose</u>	<u>Due to Headquarters</u>	<u>Submit</u>
<b>Convention Registration</b>	Convention	Estimate Convention attendance	August 1	Online
<b>Travel Plans</b>	Convention	Confirm Convention attendance	September 1	Online
<b>Expense Report</b>	Convention	Reimburse delegates for expenses	October 28	Online
<b>Fall Contact Information Update</b>	Chapter	Verify Chapter contact information	October 15	Online
<b>Report of Eligibility</b> Electee materials sent from this	Membership	Report scholastically eligible students	First five weeks of the term	Online
<b>Report of Election</b> Must be approved BEFORE initiation	Membership	Report students elected to membership	At least two weeks before initiation	Online
<b>Catalog Cards</b> Keys and certificates are ordered from catalog cards; Write legibly	Membership	Permanent membership record	At least two weeks before initiation; 3-4 weeks to distribute keys and certificates at initiation	Online
<b>Report of Final Action</b>	Membership	Report initiation results	Within two weeks of initiation	Online
<b>Roll Book Signatures</b>	Membership	Legal signatures of membership	Within two weeks of initiation	Mail
<b>Initiation Fees</b> \$55 per initiate	Membership	Pays all TBP membership fees	Within two weeks of initiation	Mail
<b>IRS Form 990-N</b>	Chapter	IRS requirement	15th day of fifth month after close of the Chapter's fiscal year	IRS website
<b>Midterm Officer Elections</b>	Chapter	Contact information for midterm officers	Within two weeks of election	Online
<b>Officer Signatures</b>	Chapter	Legal signatures for Chapter reports	Within two weeks of election	Mail

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- Your list of advisors should be verified when electing officers. Chapters will lose points toward a Chapter Excellence Award if this list is not up-to-date.
- Extensions are possible for all reports with the exception of the ratification ballot and the IRS form 990-N.
- Due dates are the postmark or the electronic submission date; they must be on time and correct to receive credit towards a Chapter Excellence Award.