

# MemberHub Training

May 2023

# Dashboard

The screenshot shows a web browser window displaying the MemberHub dashboard for Franklin High School PTSA. The browser's address bar shows the URL `fhsptsa.memberhub.com/dashboard`. The dashboard features a dark purple sidebar with navigation options: Dashboard, Directory, Calendar, and a 'YOUR TOOLS' section with links to Communications, Contacts, Fundraising, Store Management, Website Builder, Memberships, Compliance, Givebacks (marked as 'New!'), and Settings. The main content area includes a top navigation bar with a help button and the current organization name, 'Franklin High School...'. The central header displays 'Franklin High School PTSA' and 'Since 07/01/2022'. Key statistics are shown: 673 Contacts and 123 Members, with a total Gross Sales of \$2,630.00. A 'Recent Messages' section lists three messages from Kellie Dummer regarding a sock fundraiser, senior scholarship opportunities, and bylaws. An 'Upcoming Events' section is currently empty. A 'Checklist' on the right lists tasks such as updating the subdomain, setting up Stripe, and adding products to the store. A 'Recent Orders' section shows one order for \$31.55. A 'Givebacks' advertisement is also present. The Windows taskbar at the bottom shows the time as 2:14 PM on 4/27/2023.

memberhub

Need some help... from a human? [View Workshops & Meetings](#)

Current Organization  
Franklin High School...

## Franklin High School PTSA

Since 07/01/2022

**673** **123**  
[Contacts](#) [Members](#)

**\$2,630.00**  
[Gross Sales](#)

### Recent Messages

[View All Messages](#)

Franklin PTSA Sock Fundraiser  
Sent 11/21/2022 at 2:51 pm by Kellie Dummer

FHS PTSA Senior Scholarship Opportunities  
Sent 02/20/2022 at 9:38 am by Kellie Dummer

Franklin PTSA Bylaws  
Sent 09/23/2021 at 11:54 am by Kellie Dummer

[New Message](#)

### Upcoming Events

[View Calendar](#)

Manage meetings, events, and volunteers.

### Checklist

- ✓ Update your subdomain and mailing address
- ✓ Set up your Stripe account for online payments
- ✓ Edit your membership listing
- ✓ Add products to your store
- ✓ Your Fundraiser site is ready for you to begin!
- ✗ Subscribe to Product Fundraisers
- ✓ Add or import contacts
- ✓ Send a message

### Recent Orders

[View All Orders](#)

71bfa7a969	Anna Gorman
\$31.55	

7 ?

# Communications - View & Send Messages

memberhub

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Current Organization  
Franklin High School...

## Franklin High School PTSA Messages

Direct email messaging to people and hubs

[View Deleted](#)

Search by name or subject [Search](#)

Franklin PTSA Sock Fundraiser 11/21/2022 at 2:51 pm by Kellie Dummer	<a href="#">Copy</a>	490 Sent	68.2% Opens	6.3% Clicks
FHS PTSA Senior Scholarship Opportunities 02/20/2022 at 9:38 am by Kellie Dummer	<a href="#">Copy</a>	197 Sent	99.5% Opens	10.2% Clicks
Franklin PTSA Bylaws 09/23/2021 at 11:54 am by Kellie Dummer	<a href="#">Copy</a>	180 Sent	52.8% Opens	4.4% Clicks

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12:58 PM  
4/27/2023

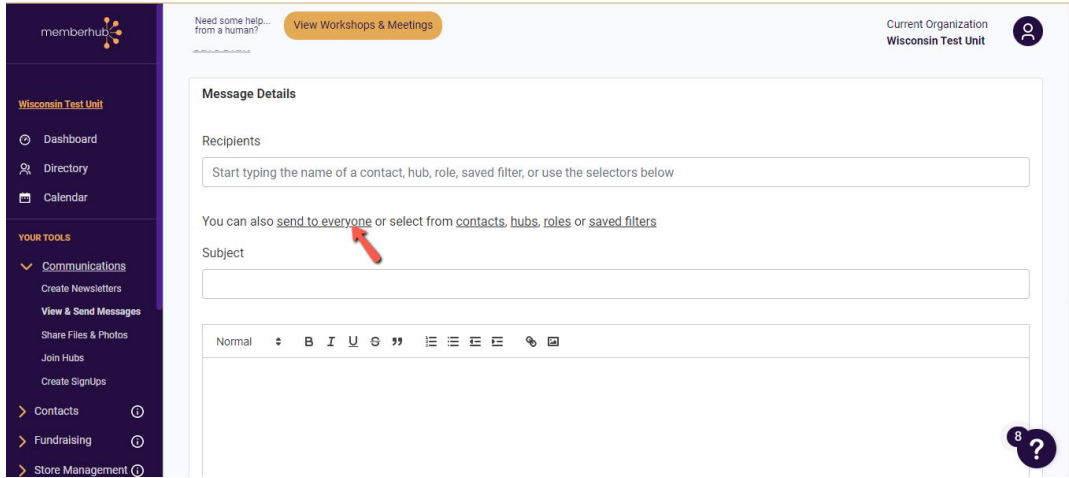
53°F Sunny

Newsletters, Messages, and Events allow you to select recipients using options found under the recipient's box. This is handy for when you want to send a communication to only a certain list of people, such as only paid members. You can send this communication to only your members by choosing the role option under recipients and then member from the drop-down list. Similarly, you can use the hubs or filters option to contact a specific hub list, or filter you have saved on your contacts page.

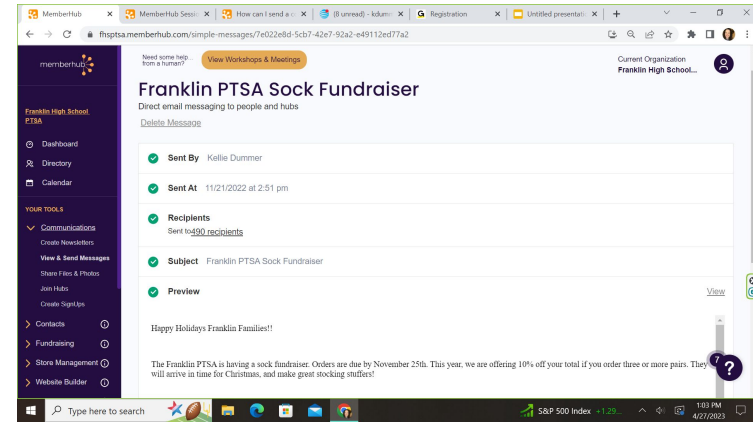
**Find more detailed steps for the recipient list you are trying to message at the links below.**

- [Communicate with everyone in your site](#)
- [Communicate with paid members](#)
- [Communicate with a hub](#)
- [Communicate using a saved filter](#)

# Communications - View & Send Messages cont.



The screenshot shows the 'View Workshops & Meetings' page in MemberHub. The left sidebar contains navigation options: Dashboard, Directory, Calendar, and 'YOUR TOOLS' which includes Communications, Create Newsletters, View & Send Messages, Share Files & Photos, Join Hubs, Create SignUps, Contacts, Fundraising, and Store Management. The main content area is titled 'Message Details' and includes a 'Recipients' field with a placeholder 'Start typing the name of a contact, hub, role, saved filter, or use the selectors below'. Below this is a note: 'You can also send to everyone or select from contacts, hubs, roles or saved filters'. A red arrow points to the 'send to everyone' link. There is also a 'Subject' field and a rich text editor with a toolbar.



The screenshot shows the 'View & Send Messages' page in MemberHub. The left sidebar is the same as in the previous screenshot. The main content area displays a message preview for 'Franklin PTSA Sock Fundraiser'. The preview includes the following details:

- Sent By:** Kellie Dummer
- Sent At:** 11/21/2022 at 2:51 pm
- Recipients:** Sent to 500 recipients
- Subject:** Franklin PTSA Sock Fundraiser
- Preview:** Happy Holidays Franklin Families!!

The preview also includes a short paragraph: 'The Franklin PTSA is having a sock fundraiser. Orders are due by November 25th. This year, we are offering 10% off your total if you order three or more pairs. They will arrive in time for Christmas, and make great stocking stuffers!'.

**Sending to # of recipients** will reflect the number of people who will receive the message. This number excludes blocked emails and unsubscribed emails. You can preview the list of recipients by clicking on **Sending to # recipients**.

Create your message, add attachments, etc. You can schedule the message to send at a later time or press Send Message at the top now. Then there will be a follow up screen showing who sent the message, to how many people and a view of the message.

# Communications - Share Files & Photos

Need some help... from a human? [View Workshops & Meetings](#)

Current Organization: Franklin High School...

## Files & Photos

Upload documents, photos & more. Organize them into folders to share within your organization

[Add Folder](#) [View Archived](#)

Home /

Search by filename

Actions

	Filename	Uploaded By	Uploaded At	Actions
<input type="checkbox"/>	<a href="#">2021 Members</a> /			...
<input type="checkbox"/>	<a href="#">FHS PTSA Board</a> /			...
<input type="checkbox"/>	<a href="#">*FHS PTSA Members</a> /			...
<input type="checkbox"/>	<a href="#">FHS PTSA Membership</a> /			... ?

YOUR TOOLS

- Communications
  - Create Newsletters
  - View & Send Messages
- Share Files & Photos
  - Join Hubs
  - Create SignUps
- Contacts
- Fundraising
- Store Management
- Website Builder

1:07 PM 4/27/2023

# Communications - Share Files & Photos cont.

MemberHub

Need some help from a human? [View Workshops & Meetings](#)

Current Organization: Franklin High School...

## Files & Photos

Upload documents, photos & more. Organize them into folders to share within your organization

[Add Folder](#) [View Archived](#)

Home / Everyone / \*FHS PTSA Members /

Search by filename

<input type="checkbox"/>	Filename	Uploaded By	Uploaded At	Actions
<input type="checkbox"/>	<b>Parents and Students</b> /Everyone/*FHS PTSA Members/			...
<input type="checkbox"/>	<b>FHS PTSA- bylaws22.pdf</b> /Everyone/*FHS PTSA Members/	Kellie Dummer	10/19/2022 at 10:08 am	Public
<input type="checkbox"/>	<b>PTSA Meeting Minutes October 2020.pdf</b> /Everyone/*FHS PTSA Members/	Laura Ulaszek	05/25/2021 at 3:11 am	Private
<input type="checkbox"/>	<b>PTSA Meeting Minutes September 2020.pdf</b> /Everyone/*FHS PTSA Members/	Laura Ulaszek	05/25/2021 at 3:11 am	Private

If you click **Add File** before selecting a Hub everyone in your MemberHub will be able to see it. If you click a Hub first and then **Add File**, only the people in that hub can see the file or photo. Then attach the file or photo that you would like to save.

MemberHub

Need some help from a human? [View Workshops & Meetings](#)

Current Organization: Franklin High School...

## Files & Photos

Upload documents, photos & more. Organize them into folders to share within your organization

[Add Folder](#) [View Archived](#)

Home / Everyone / \*FHS PTSA Members /

Search by filename

### Upload files

Path: /Everyone/\*FHS PTSA Members/

Public: False

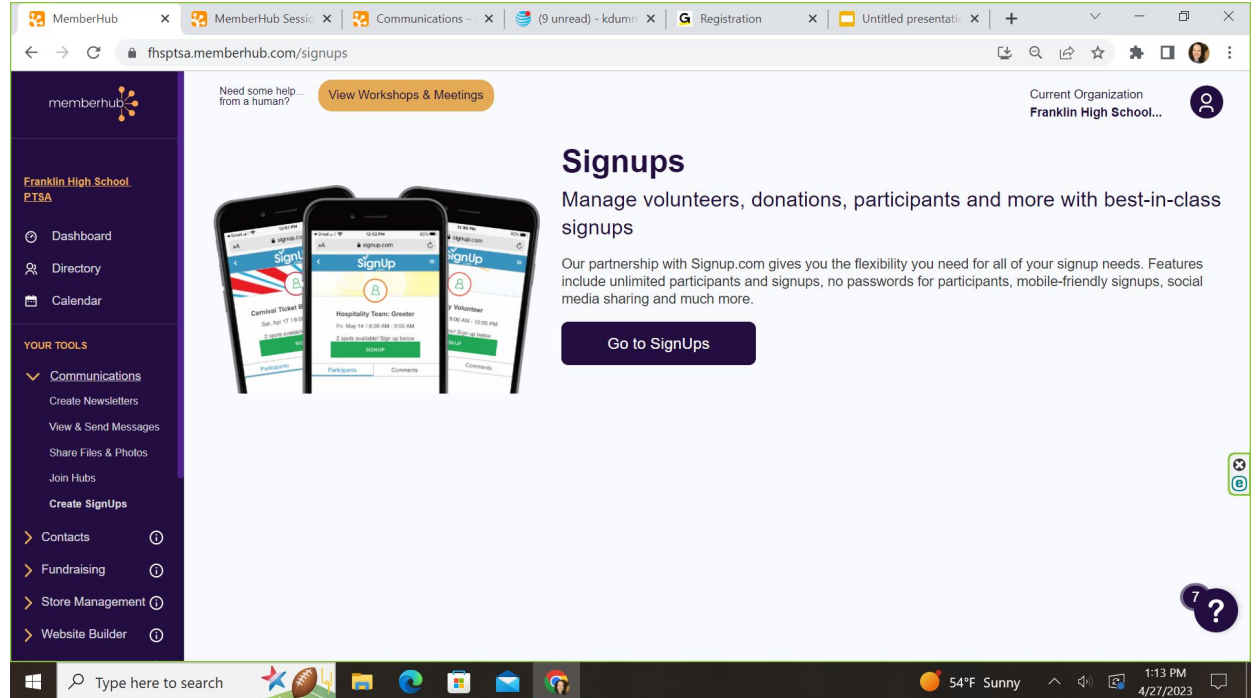
Public will create a public link that can be viewed by anyone. Choose false to limit access to logged in users with access to the organization/hub this file belongs to.

or drop file to upload

Uploaded At	Actions
10/19/2022 at 10:08 am	...
05/25/2021 at 3:13 am	...
05/25/2021 at 3:11 am	...

# Communications - Sign Ups

Very similar to Sign Up Genius. You can create Sign Ups for activities or dances.



The screenshot shows a web browser window with the URL `fhsptsa.memberhub.com/signups`. The page features a dark purple sidebar on the left with the MemberHub logo and navigation options: Dashboard, Directory, Calendar, and a 'YOUR TOOLS' section containing Communications (with sub-options for newsletters, messages, and photos), Create SignUps, Contacts, Fundraising, Store Management, and Website Builder. The main content area has a header with a help button and the current organization name, Franklin High School. The central heading is 'Signups', followed by a sub-heading 'Manage volunteers, donations, participants and more with best-in-class signups'. Below this is a paragraph describing the partnership with SignUp.com and a 'Go to SignUps' button. Three smartphones are displayed, showing the SignUp.com mobile interface for various events like 'Carnival Ticket' and 'Hospitality Team: Greeter'.

# Contacts - Creating and Managing Hubs

The screenshot shows the MemberHub interface for Franklin High School PTSA. The main content area is titled 'Hubs' and includes a search bar labeled 'Search by Name', an 'Add Hub' button, and an 'Active' button with a notification badge. Below these is a table listing existing hubs.

<input type="checkbox"/>	Name	People	Add Contacts	...
<input type="checkbox"/>	2021 Members	21	Add Contacts	...
<input type="checkbox"/>	FHS PTSA Board	7	Add Contacts	...
<input type="checkbox"/>	*FHS PTSA Members	206	Add Contacts	...
<input type="checkbox"/>	→ Parents and Students	177	Add Contacts	...
<input type="checkbox"/>	FHS PTSA Membership	5	Add Contacts	...

The left sidebar contains navigation options: Dashboard, Directory, Calendar, and a 'YOUR TOOLS' section with sub-items like Communications, Contacts, Fundraising, Store Management, Website Builder, and Memberships. The current organization is identified as Franklin High School PTSA.

<https://support.memberhub.com/hc/en-us/categories/360000418053-Communications>

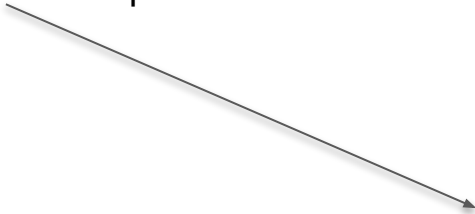


# Fundraising

To learn about all the fundraising options within MemberHub schedule a 1 on 1 with a MemberHub associate. There are options for fun runs, raffles, auctions, crowdsourced funding

<https://info.memberhub.com/book-a-fundraiser-meeting>

Many Fundraising  
Options



MemberHub x MemberHub Sessi x Communications x (5 unread) - kdum... x Registration x Untitled presentati x +

← → ↻ 🔒 fhsptsa.memberhub.com/dashboard

Need some help from a human? [View Workshops & Meetings](#)

Current Organization  
Franklin High School...

## Franklin High School PTSA

Since 07/01/2022

**672** **123**  
[Contacts](#) [Members](#)  
**\$2,600.00**  
[Gross Sales](#)

**Recent Messages** [View All Messages](#)

- Franklin PTSA Sock Fundraiser  
Sent 11/21/2022 at 2:51 pm by Kellie Dummer
- FHS PTSA Senior Scholarship Opportunities  
Sent 02/20/2022 at 9:38 am by Kellie Dummer
- Franklin PTSA Bylaws  
Sent 09/23/2021 at 11:54 am by Kellie Dummer

[New Message](#)

**Upcoming Events** [View Calendar](#)  
Manage meetings, events, and volunteers.

**Checklist**

- Update your subdomain and mailing address
- Set up your Stripe account for online payments
- Edit your membership listing
- Add products to your store
- Your Fundraiser site is ready for you to begin!
- Subscribe to Product Fundraisers
- Add or import contacts
- Send a message

**Recent Orders** [View All Orders](#)

@5c6448ae1	Andrea Hardacre
\$10.85	

65c6448ae1 Andrea Hardacre \$10.85

1:32 PM 4/27/2023

# Store Management

Again there are many online training articles and videos. Have someone on your board become the “MemberHub Expert”. This person can spend time reading articles and developing your MemberHub site and store.

<https://info.memberhub.com/store-setup>

To start you want to make sure you can at least sell Memberships via your store. This should already be set up for most Livonia PTA's. Once this is set up you can use your store to collect donations for staff appreciation or general donations. You can sell tickets to events, t shirts, or fun run tickets. MemberHub allows you to put in start and stop times for certain donations and tracks who has made purchases.


# Store Management cont.


The screenshot shows a web browser window with the URL `fhsptsa.memberhub.com/store?limit=21&live=true`. The browser tabs include MemberHub, Book a Meeting, Communication, (4 unread), Registration, and an untitled print page. The MemberHub logo is in the top left of the page. A dark purple sidebar on the left contains navigation links: Home, Memberships, Donations, QUICK LINKS, View Store, Contact Store Admin, and MH Store FAQs. The main content area features a 'Category' dropdown menu and three product listings. Each listing includes an image, a title, a description, and a price. Below the listings are three large PTSA logos with the tagline 'everychild.onevoice.' and labels for 'Student', 'Staff', and 'Individual'.


memberhub


Home  
Memberships  
Donations  
QUICK LINKS  
View Store  
Contact Store Admin  
MH Store FAQs


Category ▾


  
PTSA Donation  
A donation to the Franklin PTSA  
\$0.00

  
Staff Appreciation Donation 2023  
Make a donation to Franklin High School PTSA for our Staff Appreciation Event!  
\$0.00

  
Senior All Night Party Ticket 2023  
Ticket for the Senior All Night Party 2023. Being held at Zap Zone in Canton on Thursday, June 1st.  
\$55.00

  
Student

  
Staff

  
Individual

Type here to search

54°F Sunny 1:44 PM 4/27/2023

# Store Management cont.

The screenshot displays the MemberHub interface for Franklin High School PTSA. The left sidebar contains navigation options: Dashboard, Directory, Calendar, and a 'YOUR TOOLS' section with links for Communications, Contacts, Fundraising, Store Management (expanded), Website Builder, and Memberships. The 'Store Management' section includes links for View Sales Metrics, Manage Products, Manage Categories, Manage Bundles, Manage Fundraiser Links in Store, Review Orders, View Payouts, and Edit Store Settings. The main content area shows a table of orders with columns for Order ID, Customer Name, Purchase Date, Status, Fulfillment Status, and Total. A search bar and filters are visible above the table. The current organization is Franklin High School.

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Current Organization: Franklin High School...

Search by email or name

Actions Filters

<input type="checkbox"/>	Order ID	Customer Name	Purchase Date	Status	Fulfillment Status	Total
<input type="checkbox"/>	<a href="#">71bfa7a969</a>	Anna Gorman	04/27/2023 at 1:52 pm	Purchased	Not fulfilled	\$31.55
<input type="checkbox"/>	<a href="#">65c6448ae1</a>	Andrea Hardacre	04/27/2023 at 12:46 pm	Purchased	Not fulfilled	\$10.85
<input type="checkbox"/>	<a href="#">05965259ed</a>	Patty Salisbury	04/26/2023 at 8:24 am	Purchased	Not fulfilled	\$57.43
<input type="checkbox"/>	<a href="#">dfb9f76fc8</a>	Jill Diamond	04/26/2023 at 6:11 am	Purchased	Not fulfilled	\$57.43
<input type="checkbox"/>	<a href="#">4630901cc6</a>	danielle Stabler	04/25/2023 at 10:02 pm	Purchased	Not fulfilled	\$16.03
<input type="checkbox"/>	<a href="#">4ba5fa985f</a>	Melissa Hunt	04/25/2023 at 9:18 pm	Purchased	Not fulfilled	\$57.43
<input type="checkbox"/>	<a href="#">20727d1604</a>	Kristin Kostik	04/25/2023 at 4:25 pm	Purchased	Not fulfilled	\$57.43
<input type="checkbox"/>	<a href="#">6cda45280e</a>	cheryl shackelford	04/25/2023 at 1:12 pm	Purchased	Not fulfilled	\$57.43
<input type="checkbox"/>	<a href="#">0252a35139</a>	Benjamin Mocadlo	04/25/2023 at 12:12 pm	Purchased	Not fulfilled	\$57.43

# Website Builder

<https://support.memberhub.com/hc/en-us>

Need some help... from a human? [View Workshops & Meetings](#)

Current Organization: Franklin High School...

- Cleveland Elementary PTA
- Franklin High School PTSA
- Livonia PTSA Council
- Michigan PTA

Using our Website Builder, you can easily create a site for your organization with no experience! Add up to six pages and then click the pencil icon to edit them. Events and Officer pages are not editable and will automatically pull from your MemberHub site. When you're ready to launch your site, toggle the switch on the right to Live.

Name	Path	Layout	Live
------	------	--------	------

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## Dashboard tips:

- Under Current Organization- you can see all the PTA's that you have access too. You can switch between them here.
- In the lower corner you see the ? - if you click that you will see help menus and you can contact MH support.
- In the upper section, the orange box with View Workshops & Meetings is how to get to all the help you need.

# Membership

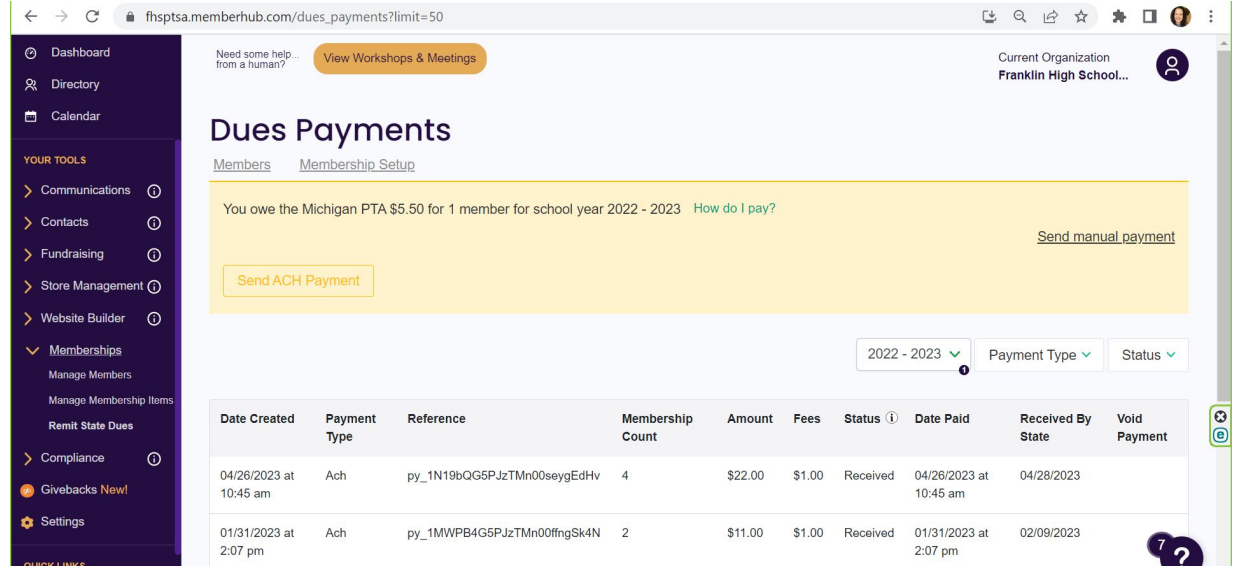
The screenshot shows the MemberHub interface for Franklin High School. The main content area is titled "Members" and includes a search bar and a table of active members. The table has the following columns: Joined At, First Name, Last Name, Email, Member Type, Year, Price Paid, Type, and View Card. Two members are listed in the table.

Joined At	First Name	Last Name	Email	Member Type	Year	Price Paid	Type	View Card
05/04/2023 at 11:01 am	Jamie	Ward	drjamiward@gmail.com	Individual	2022 - 2023	\$10.00	Store Purchase	
04/16/2023 at 7:56 pm	Lily	Poisson	lily.poisson@yahoo.com	Student	2022 - 2023	\$10.00	Store Purchase	

Entering members who pay with cash or check (members who pay via MemberHub store are already in your member list)

- Click Manage Member, then click Add Cash/Check Member
- Click the Type of Membership it is; Individual, Staff or Student
- Enter the required information. Make sure the correct year is in **School Year**

# Membership cont.



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Current Organization  
Franklin High School...

## Dues Payments

[Members](#) [Membership Setup](#)

You owe the Michigan PTA \$5.50 for 1 member for school year 2022 - 2023 [How do I pay?](#)

[Send manual payment](#)

[Send ACH Payment](#)

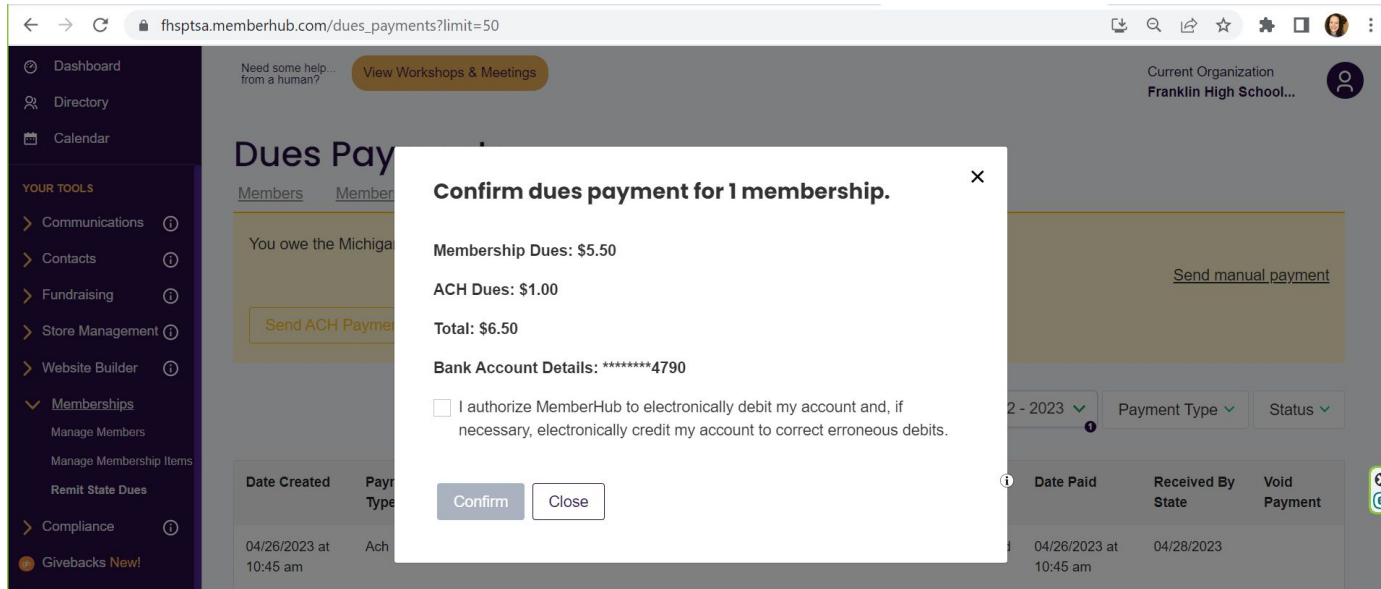
2022 - 2023 ▼ Payment Type ▼ Status ▼

Date Created	Payment Type	Reference	Membership Count	Amount	Fees	Status	Date Paid	Received By State	Void Payment
04/26/2023 at 10:45 am	Ach	py_1N19bQG5PJzTMn00seygEdHv	4	\$22.00	\$1.00	Received	04/26/2023 at 10:45 am	04/28/2023	
01/31/2023 at 2:07 pm	Ach	py_1MWPB4G5PJzTMn00fngSk4N	2	\$11.00	\$1.00	Received	01/31/2023 at 2:07 pm	02/09/2023	

By the 28th of each month you must pay Michigan PTA for the membership that were purchased that month. The preferred method is through MemberHub **Remit State Dues**

- You will see in the yellow box how many members you owe for. Please make sure this number reconciles with your membership income. That includes cash/check & MH income.
- Only the President or Treasurer can make this membership payment via MH.
- **Send ACH Payment** is an electronic payment that is withdrawn from your PTA account.
- If you want to send a check to Michigan PTA for memberships then you need to click **Send Manual Payment**

# Membership cont.



The screenshot shows a web browser window at [fhsptsa.memberhub.com/dues\\_payments?limit=50](https://fhsptsa.memberhub.com/dues_payments?limit=50). The page title is "Dues Payments" and the current organization is "Franklin High School...". A modal dialog box is open, titled "Confirm dues payment for 1 membership." with a close button (X) in the top right corner. The dialog contains the following information:

- Membership Dues: \$5.50
- ACH Dues: \$1.00
- Total: \$6.50
- Bank Account Details: \*\*\*\*\*4790
- I authorize MemberHub to electronically debit my account and, if necessary, electronically credit my account to correct erroneous debits.

At the bottom of the dialog are "Confirm" and "Close" buttons. In the background, a table of dues payments is visible with columns: Date Created, Payment Type, Date Paid, Received By State, and Void Payment. The first row shows a payment created on 04/26/2023 at 10:45 am, with a date paid of 04/26/2023 at 10:45 am and received by state of 04/28/2023.

- There will be a \$1 fee each month.
- More MemberHub Membership Trainings:
- <https://support.memberhub.com/hc/en-us/categories/1500001403101-Memberships>



# Compliance - How To Add New Officers

You will need to enter your PTA officers in MemberHub. Follow these steps below to enter your officers.

1. If you are a Site Administrator for your PTA MemberHub site you will see the **Compliance** link along the left side. When you click on this button you will be taken to the **Compliance Module**.

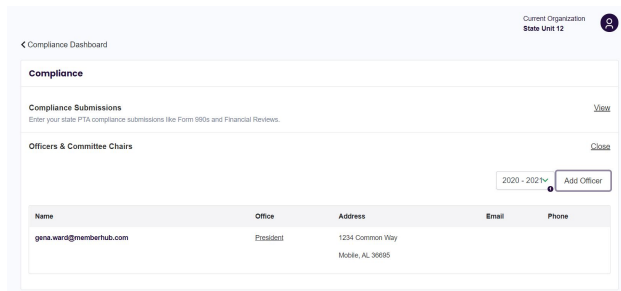
2. Click on **Officers**. You will see the current year's officers as well as officers from previous years.

**Note:** After June 30, past year officer information cannot be updated or removed. Prior year officer information should remain in MemberHub for state-level PTA data record, therefore, you are not able to delete past officer information.

3. **Select the year first**, then click the **Add Officer** button on the right. The resulting popup window will have you select officer role, enter Name, Email and other information. Your State PTA determines what officer roles are listed in this area. If you have officer that is not listed, you can contact your State PTA or add them as Other.

4. **Check the box to Make an Organization Admin** if you want the officer to have admin rights on your site. If not, you can leave this box unchecked.

5. Click the **Save** button on the bottom.



The screenshot shows the 'Compliance Dashboard' for 'Current Organization State Unit 12'. It features a 'Compliance' section with a 'View' link, a 'Compliance Submissions' section with a 'View' link, and an 'Officers & Committee Chairs' section with a 'Close' link. Below these sections is a table with columns for Name, Office, Address, Email, and Phone. The table contains one entry: Name: gena.ward@memberhub.com, Office: President, Address: 1234 Common Way, Mobile, AL, 36695. There is an 'Add Officer' button with a year selector set to '2020 - 2021'.

Name	Office	Address	Email	Phone
gena.ward@memberhub.com	President	1234 Common Way Mobile, AL, 36695		

## Officer Information

Title \*

Add as Organization Admin

2020 - 2021

Expire role at year end

Email Address \*

Email Address

First Name \*

Last Name \*

Street Address

Address

Address 2

City

City

State

AL

Zip

Zip

Country

United States

Phone Number

Phone Number

# Compliance - Uploading SOA Documents

Specific Requirements vary state to state, but all PTA's can submit their required compliance information by going to their Compliance under your tools on the left menu > Enter State Submissions and selecting Submit on one of the different areas on their Compliance Module Dashboard. **For Livonia submissions please follow the due dates outlined in the PEP documents.**

**Officers:** You can click this button to be brought to a page that provides your current and past year officers in your site. You can add new officers and remove current year officers in this area.

**Unit Data:** You can click this button to view all data pertaining to your PTA. If you see any discrepancies on this page, contact your State PTA to update this.

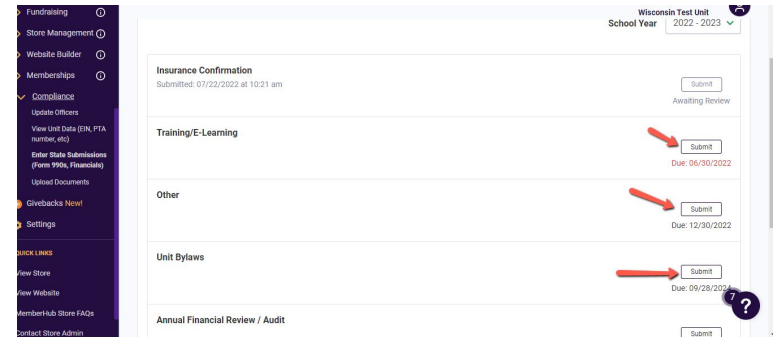
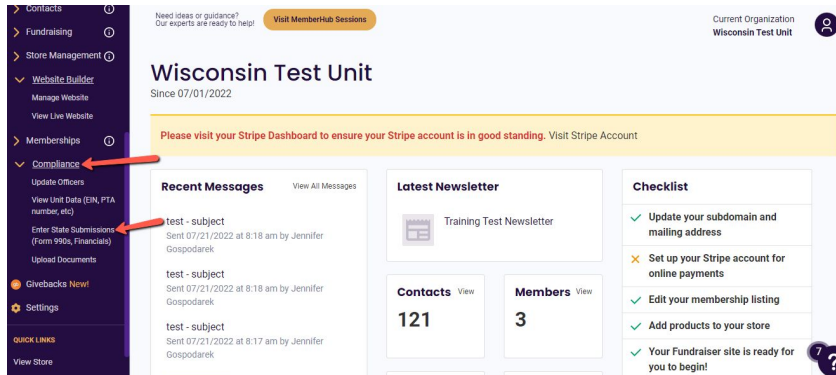
**Enter Submissions(Form 990, Financials):** This section is where you would submit each of your different areas of compliance.

- Insurance Confirmations
- ByLaws Submissions

Form 990  
Audit/Financial Reviews

Budget Submission

**Documents:** Here is where your unit can submit electronic documents to your State PTA.



# Compliance - Uploading SOA Documents cont.

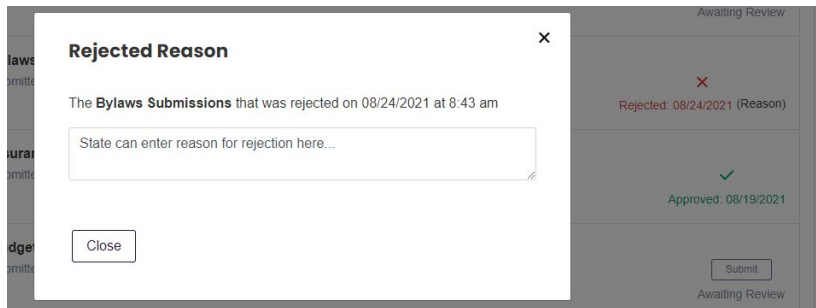
## Approval status:

**Awaiting Review:** Upon completing submission, the status of your Compliance form will display as awaiting review. Your state PTA can then review and approve according to their procedures.

**Approved:** If your State Approves your submission, they will mark it as approved and the status will be indicated in your site. The person who submitted the form will also receive an email notification of the status update.

**Rejected:** If your State Rejects your submission, they will mark it as rejected and can explain the reason. The status will be indicated in your site and the person who submitted the form will also receive an email notification of the status update. Reason for rejection can also be viewed from your Compliance Submissions Page.

**\*\* After a submission is rejected,** you can either choose to Resubmit or Archive the submission to allow you to start over.



Submitted at 08/19/2021 at 8:05 am

**Rejected at 08/24/2021 at 8:43 am**

Resubmit

Close

Archive

# Compliance Document Storage

Compliance Document Storage gives your PTA/PTSA a location to store your compliance documents. No worries as leadership changes. All admins will have access to historical compliance documents. Your State PTA can also access these files to ensure you are in compliance with State PTA policies.

Compliance Document storage sorts your documents into different compliance categories. **Please note:** Your state PTA may have different Compliance Requirements than listed in this article. If you have any further questions on this, please reach out to your State PTA leaders to inquire. **(Follow Livonia PEP guidelines)**

As an **administrator** in your MemberHub site, you will have access to **Compliance**. You can navigate to the Compliance Dashboard using your Quicklinks in the Modules list or navigate directly from the **Sitemap** for quick access to all of your tools.

Click on the Category to view existing documents or upload new ones. Each folder allows you to filter your view by School Year and Upload documents.

Click on the Title of the document to view/download or click on ... to Archive.

Click "Add Upload" button to Upload new documents.

**This is NOT where you upload SOA documents. This is for other unit documents.**

# Compliance Document Storage

Upload your compliance documents

[Compliance](#) /

Select School Year

- Financial Review / Audit  
/compliance
- Form 990 Confirmation  
/compliance
- Budget  
/compliance
- Bylaws / Amendments  
/compliance
- Insurance Confirmation  
/compliance
- General  
/compliance

[Prev](#) [Next](#)

# Compliance Document Storage

Upload your compliance documents

[View Archived](#)

[Compliance](#) / [financial-review-audit](#) /

Select School Year

Basic Template.png  
/compliance/financial-review-audit  
Uploaded by: Jennifer Gospodarek

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[Prev](#) [Next](#)

[Add Upload](#)

## Upload a file

Directory

School Year

You are uploading this file for the year **2020 - 2021**

[Add file](#)

or drop file to upload

[Save](#)