

SC PTA Steps to Upload Compliance Documents

Budget & Minutes Approving Budget Submissions:

To upload your budget and the minutes documenting the vote to approve the budget, make sure both the budget and the minutes are in a single file (scan them in, take a side-by-side photo, combine them into a single pdf file, take screenshots and paste the photos into a single Word document, etc.).

Log into Givebacks and click on COMPLIANCE from the menu along the left side. Then click on ENTER SUBMISSIONS.

The screenshot shows the Givebacks MemberHub interface. On the left is a navigation menu with the following items: Dashboard, Directory, Calendar, YOUR TOOLS (with sub-items: Communications, Contacts, Fundraisers, Store Management, Website Builder, Membership, Compliance, Update Officers, View Unit Data, Enter Submissions (Form 990s, Financials), View Documents, Settings), and Shop to Give. The 'Compliance' and 'Enter Submissions (Form 990s, Financials)' items are circled in yellow. The main content area is titled 'Compliance' and 'Compliance Submissions'. It includes a 'School Year' dropdown set to '2023 - 2024'. Below this is a list of submission categories with 'Submit' buttons and due dates:

Submission Category	Due Date
Budget & Minutes Approving Budget Submissions	Due: 10/01/2023
Insurance	Due: 06/30/2024
Financial Review & Financial Checklist Submissions	Due: 10/01/2023
ByLaws/Standing Rules Submissions	Due: 07/24/2024
Form 990 Confirmations	

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X

To submit your annual budget, please follow the steps below.

1. Enter the budget amount.
2. Select "Add Document" to add your local unit's approved current year's budget.
3. Enter your first name, last name, and email for submission purposes.

2022 - 2023



The screenshot shows a dialog box titled "Add New Document". Inside, there is a button labeled "Add Document" and the text "or drop Document to upload" below it. The button and text are highlighted with a yellow oval.

Kristin

Bailey

district1president@gmail.com

Any School PTA

Any School PTA

Submit

Close

Financial Review & Financial Checklist Submissions:

To upload your Financial Review, click on the SUBMIT button to the right of FINANCIAL REVIEW & FINANCIAL CHECKLIST SUBMISSIONS.



MemberHub is now Givebacks

Any School PTA

Dashboard

Directory

Calendar

YOUR TOOLS

> Communications

> Contacts

> Fundraisers

> Store Management

> Website Builder

> Memberships

> Compliance

Update Officers

View Unit Data

Enter Submissions (Form 990s, Financials)

View Documents

> Settings

Shop to Give

QUICK LINKS

Workshops

Current Organiz

Any School PTA

Compliance

Compliance Submissions

Enter your compliance submissions like Form 990s and Financial reviews.

View

School Year

2023 - 2024

Budget & Minutes Approving Budget Submissions

Submit

Due: 10/01/2023

Insurance

Submit

Due: 06/30/2024

Financial Review & Financial Checklist Submissions

Submit

Due: 10/01/2023

ByLaws/Standing Rules Submissions

Submit

Due: 07/24/2024

Form 990 Confirmations

Submit

Select the date the review was completed. Select the appropriate date in the box for DATE FINANCIAL REVIEW COMPLETED. Click ADD DOCUMENT and select your file. Tick the box to confirm the statement. Check that your name and email address that were auto-filled are correct. Click SUBMIT.

Financial Review & Financial Checklist Submissions

Each local PTA unit is required to submit their Financial Review **AND** their Financial Checklist on or before October 1 of each year.

To submit the Financial Review & the Financial Review Checklist, please follow the steps below.

1. Enter date the Financial Review & the Financial Review Checklist was completed.
2. Select "Add Document" to add your local unit's completed Financial Review & the completed Financial checklist
3. Confirm with checkbox that you have completed the financial review for the required year.
4. Enter your first name, last name, and email for submission purposes.

Fiscal Year Ending
June 30, 2022
Due 2022-10-01. Reported for School Year 2022 - 2023

Date Financial Review Completed *

Document *

☐ I confirm my PTA, Any School PTA's annual financial review has been completed on the date provided and results reported to my PTA's Board of Directors. A copy of this review is being kept with our PTA's permanent records.

First Name
Kristin

Last Name
Bailey

Email Address
district1president@gmail.com

Unit Name
Any School PTA

National ID

Insurance:

To upload your proof of Insurance, click on the SUBMIT button to the right of INSURANCE.

The screenshot displays the Givebacks MemberHub interface for Greenville High School. The left sidebar contains navigation links: Dashboard, Directory, Calendar, and a section for 'YOUR TOOLS' including Communications, Contacts, Fundraisers, Store Management, Website Builder, Memberships, Compliance (selected), Update Officers, Enter Submissions (Form 990s, Financials), View Documents, Settings, and Shop to Give. The main content area is titled 'Compliance' and includes a 'Compliance Submissions' section with a 'View' link. Below this, a 'School Year' dropdown is set to '2023 - 2024'. The 'Insurance' submission row is highlighted with a yellow circle, showing a 'Submit' button and a due date of '06/30/2024'. Other submission rows include 'Budget & Minutes Approving Budget Submissions' (due 10/01/2023), 'Financial Review & Financial Checklist Submissions' (due 10/01/2023), 'ByLaws/Standing Rules Submissions' (due 07/24/2024), and 'Form 990 Confirmations'.

givebacks
MemberHub is now Givebacks

Workshops

Current Organiz
Greenville High TA

Any School PTA

Dashboard
Directory
Calendar

YOUR TOOLS

- > Communications ⓘ
- > Contacts ⓘ
- > Fundraisers ⓘ
- > Store Management ⓘ
- > Website Builder ⓘ
- > Memberships ⓘ
- ✓ **Compliance**
 - Update Officers
 - View Unit Data
 - Enter Submissions (Form 990s, Financials)
 - View Documents
- > Settings
- Shop to Give **New!**

Compliance

Compliance Submissions [View](#)

Enter your compliance submissions like Form 990s and Financial reviews.

School Year 2023 - 2024 ▼

Budget & Minutes Approving Budget Submissions [Submit](#)
Due: 10/01/2023

Insurance [Submit](#)
Due: 06/30/2024

Financial Review & Financial Checklist Submissions [Submit](#)
Due: 10/01/2023

ByLaws/Standing Rules Submissions [Submit](#)
Due: 07/24/2024

Form 990 Confirmations [Submit](#)

Enter your insurance POLICY NUMBER. Select the appropriate POLICY EXPIRATION DATE. Click ADD DOCUMENT and select your file. Tick the box to confirm the statement. Check that your auto-filled name and email address are correct. Click SUBMIT.

Insurance



School Year

2023 - 2024



Policy Number *

Policy Expiration Date *

Select Date

Document

Add Document

or drop Document to upload

☐

I confirm my PTA, Any School PTA, purchased an insurance policy that will expire on the date provided.

First Name

Last Name

Email Address

Unit Name

Any School PTA

National ID

Submit

Close

Form 990 Confirmations:

To upload your Form 990 confirmation, click on the SUBMIT button to the right of FORM 990 CONFIRMATIONS.

givebacks

MemberHub is now Givebacks

Greenville High School

PTSA

Dashboard

Directory

Calendar

YOUR TOOLS

Communications

Contacts

Fundraisers

Store Management

Website Builder

Memberships

Compliance

Update Officers

View Unit Data

Enter Submissions (Form 990s, Financials)

View Documents

Settings

Shop to Give

QUICK LINKS

View Store

Givebacks Store FAQs

Contact Store Admin

Workshops

Current

Green

Compliance

Compliance Submissions

Enter your compliance submissions like Form 990s and Financial reviews.

School Year2023 - 2024

Budget & Minutes Approving Budget Submissions

Submit

Due: 10/01/2023

Insurance

Submit

Due: 06/30/2024

Financial Review & Financial Checklist Submissions

Submit

Due: 10/01/2023

ByLaws/Standing Rules Submissions

Submit

Due: 07/24/2024

Form 990 Confirmations

Submit

Due: 11/15/2023

Select the type of 990 filing from the drop-down menu. Select the appropriate DATE FORM 990 FILED. Enter the unit's total revenue (income) in the GROSS RECEIPTS box. Click ADD DOCUMENT and select your file. Tick the box to confirm the statement. Check that your auto-filled name and email address are correct. Click SUBMIT.

Form 990 Confirmations

X

Each local PTA unit is required to submit their 990 OR 990EZ on or before November 15th of each year to the IRS.

1. From the dropdown, choose the 990 Filing by your local unit.
2. Enter the date the Form 990 was filed.
3. Enter gross receipts number.
4. Select "Add Document" to add your local unit's completed Form 990s.
5. Confirm with checkbox that you have filed a 990 for the required year.
6. Enter your first name, last name, and email for submission purposes.

Please note: This confirmation does not replace the actual filing of Form 990 with the IRS, due by November 15 of each year.

[Click here](#) to determine the type of 990 your PTA is required to file

Fiscal Year Ending

June 30, 2023

990 Filing *

Date Form 990 Filed *

Select Date

Gross Receipts *

Document *

Add Document

or drop Document to upload

☐ I confirm my PTA, Greenville High School PTSA, filed a 990 tax return with the IRS on the date provided above.