



## **A HOW TO GUIDE:**

# **UPLOADING COMPLIANCE DOCUMENTS INTO MEMBERHUB FOR GOOD STANDING**

“Good Standing” allows local units to participate in FCCPTA-sponsored events and programs, leadership trainings, Reflections, scholarship and grant programs, as well as vote in general membership meetings.

In order for Virginia PTA to include your local unit under the group exemption, they must be able to provide the IRS with specific data about your PTA if needed.

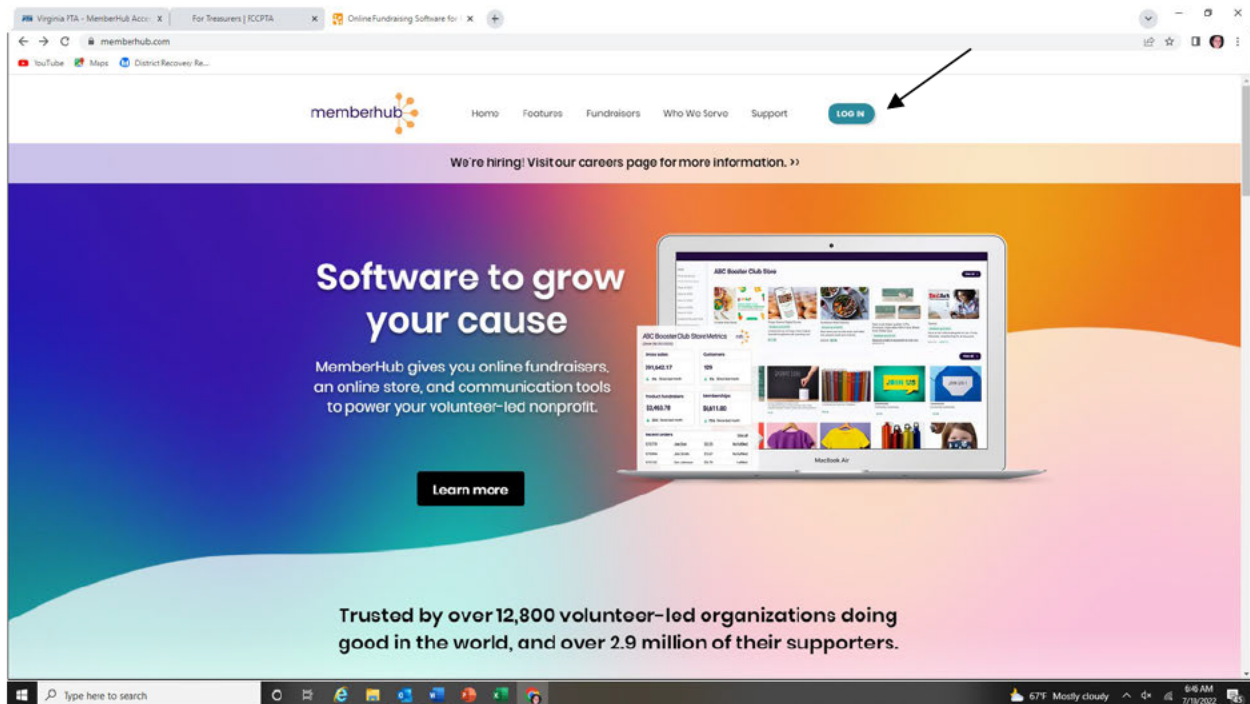
Therefore, it's critical that you keep your PTA in "Good Standing" by annually providing the Virginia PTA with documentation that enables them to maintain your 501(c)3 status.

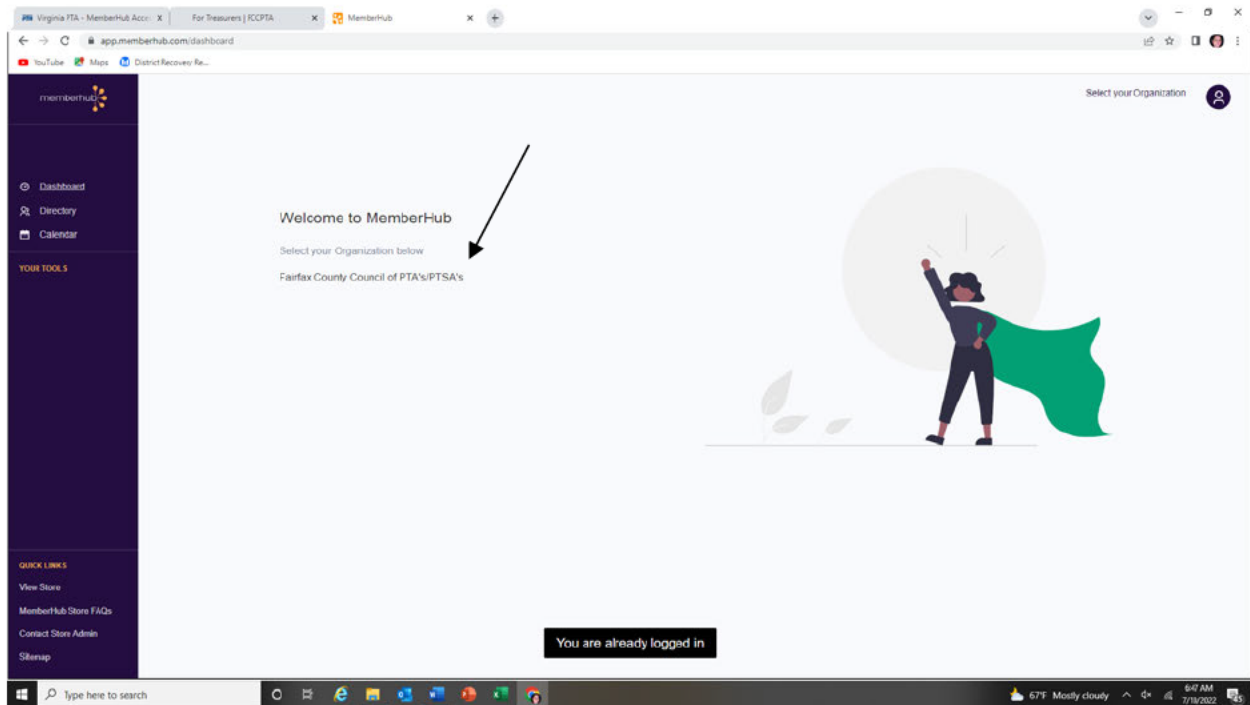
Annually, local PTAs are required to upload the following documents into Member Hub for compliance:

1. Annual Financial Reviews
2. Bylaws Organizational Structure Form (if/when changes are made only)
3. Form 990 Confirmations
4. Insurance Confirmations
5. Officers & Committee Chairs

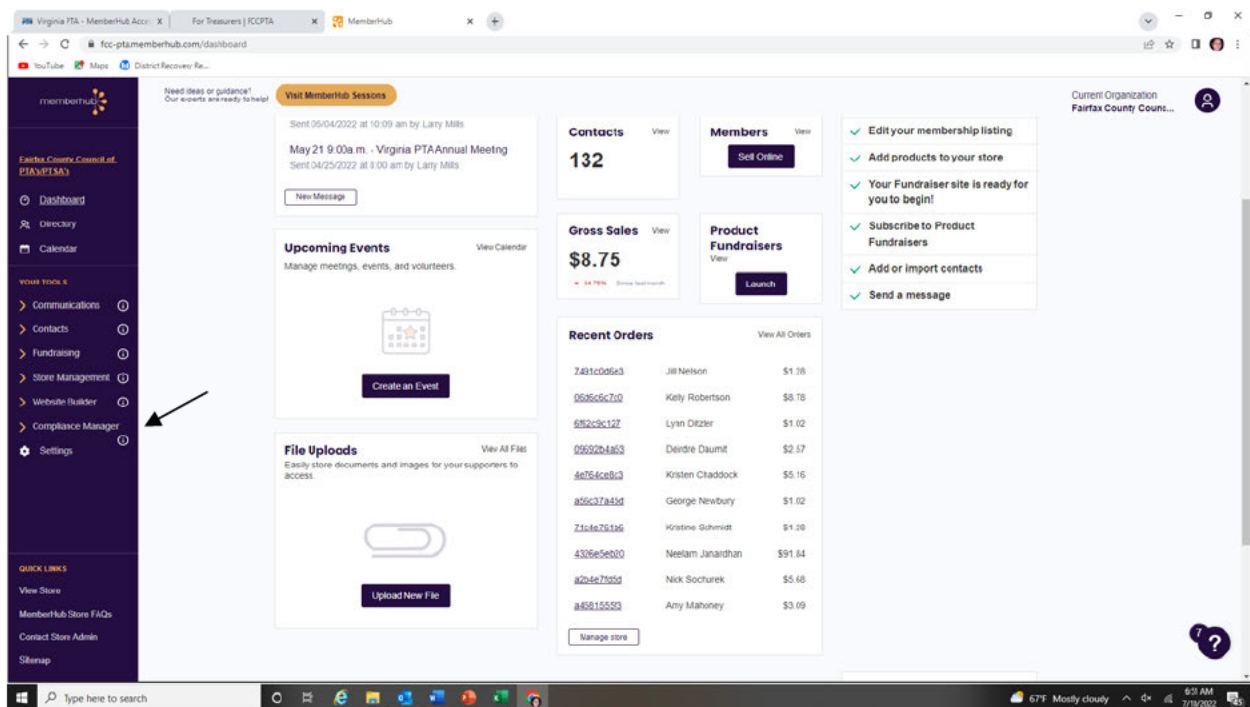
This is a step-by-step guide on how to make your compliance submission through Member Hub.

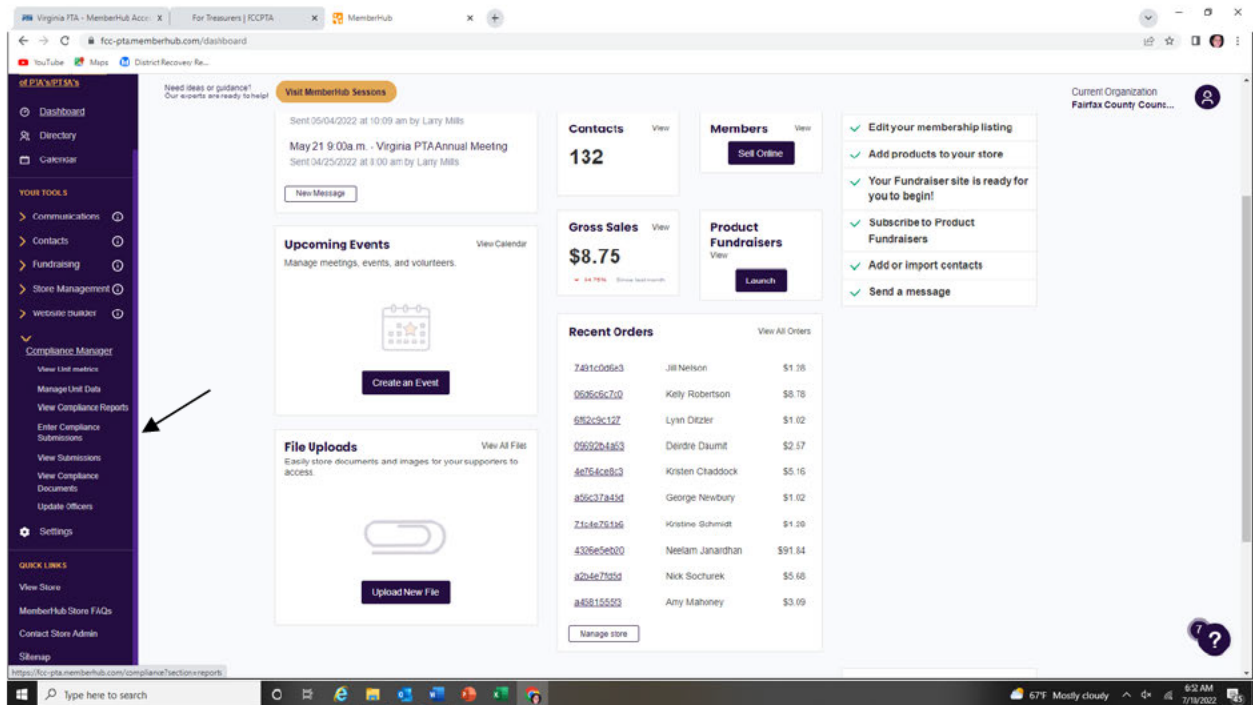
**Step 1:** Log into Member Hub and select your PTA. (NOTE: If you do not have a Member Hub account, you can submit an access request from VA PTA at <https://vapta.org/memberhub-access>)



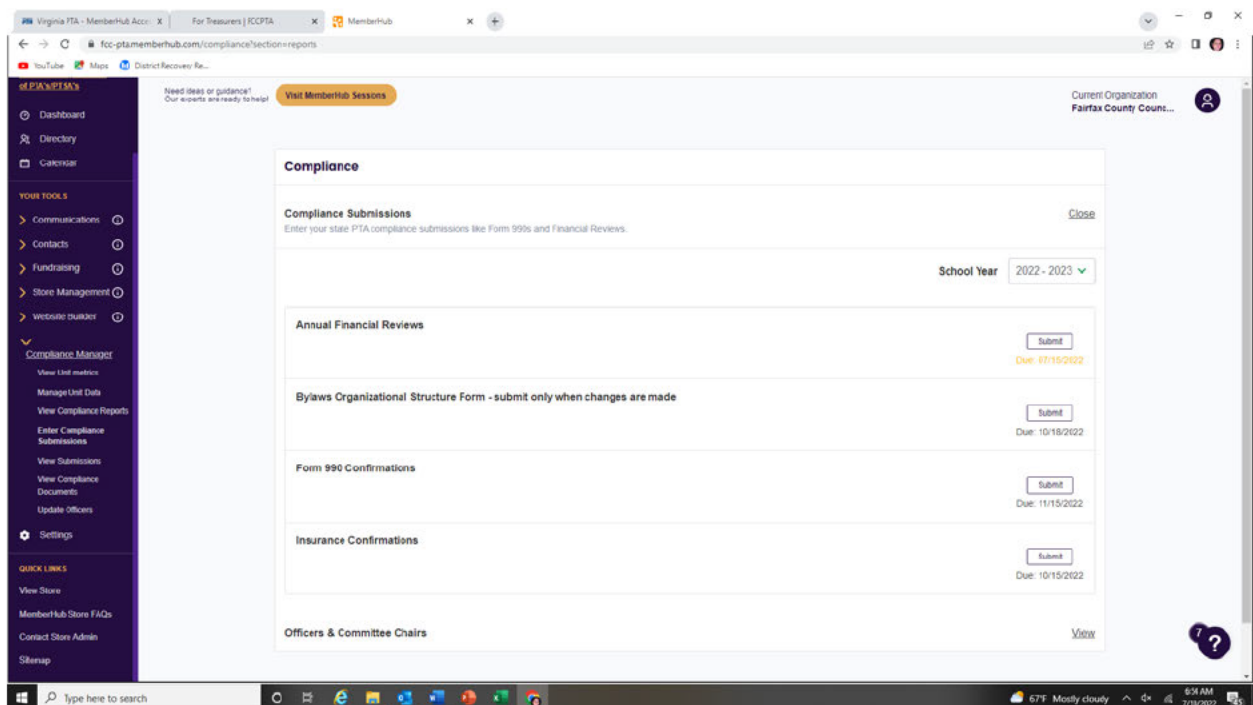


**Step 2:** Choose the Compliance Manager from the right-hand tab, then select enter compliance submissions





### Step 3: Select which compliance document you would like to upload



## Step 4: Fill out the compliance form and upload your document

The screenshot shows the MemberHub interface with the Compliance section selected. The main form area displays instructions for uploading the 2021 Audit/Financial submission. The form includes fields for Fiscal Year Ending (June 30, 2022), Date Financial Review Completed (Select Date), and a document upload area. A sidebar on the left lists navigation options like Dashboard, Directory, and Compliance Manager. The right sidebar shows the current organization as Fairfax County Council of PTA's/PTSA's.

Virginia PTA - MemberHub Acc... For Treasurers | FCCPTA MemberHub

fcc-ptamemberhub.com/compliance/ca09ee3-ac27-4579-96c2-4fb8622d15d/new

memberhub

Need ideas or guidance? Our experts are ready to help! Visit MemberHub Sessions

Fairfax County Council of PTA's/PTSA's

Dashboard Directory Calendar

YOUR TOOLS

- Communications
- Contacts
- Fundraising
- Store Management
- Website Builder
- Compliance Manager
- Settings

QUICK LINKS

- View Store
- MemberHub Store FAQs
- Contact Store Admin
- Signup

Compliance

Compliance Submissions

Enter your state PTA compliance...

Annual Financial Reviews

Bylaws Organizational Str...

Form 990 Confirmations

Insurance Confirmations

Officers & Committee Chairs

1. Upload your 2021 Audit/Financial submission - No need to Email if Uploaded

2. Audit will be Approved or Rejected when received

3. Contact liaison@vapta.org if you have questions

Fiscal Year Ending

June 30, 2022

Due 2022-07-15. Reported for School Year 2022 - 2023

Date Financial Review Completed \*

Select Date

Document \*

Add Document

or drop Document to upload

☐ I confirm my PTA, Fairfax County Council of PTA's/PTSA'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 Last Name

Jaime Yanussi

Email Address Position

treasurer@fccpta.org Treasurer

Unit Name National ID

Fairfax County Council of PTA's/PTSA's 00053828

Current Organization Fairfax County Council of PTA's/PTSA's

School Year 2022 - 2023

Submit

Due: 07/15/2022

Submit

Due: 10/15/2022

Submit

Due: 10/15/2022

Submit

Due: 10/15/2022

View

67°F Mostly cloudy 8:32 AM 7/16/2022

**Step 5:** Repeat for each type of compliance document you are uploading. Note, each will require a different set of information for the form.

## Annual Financial Review

The screenshot shows the MemberHub interface with the Annual Financial Review form open. The form includes instructions for completing the annual audit/financial review. It features fields for Fiscal Year Ending (June 30, 2022), Date Financial Review Completed (Select Date), and a document upload area. A sidebar on the left lists navigation options like Dashboard, Directory, and Compliance Manager. The right sidebar shows the current organization as Fairfax County Council of PTA's/PTSA's.

Virginia PTA - MemberHub Acc... For Treasurers | FCCPTA MemberHub

fcc-ptamemberhub.com/compliance/ca09ee3-ac27-4579-96c2-4fb8622d15d/new

memberhub

Need ideas or guidance? Our experts are ready to help! Visit MemberHub Sessions

Fairfax County Council of PTA's/PTSA's

Dashboard Directory Calendar

YOUR TOOLS

- Communications
- Contacts
- Fundraising
- Store Management
- Website Builder
- Compliance Manager
- Settings

QUICK LINKS

- View Store
- MemberHub Store FAQs
- Contact Store Admin
- Signup

Compliance

Compliance Submissions

Enter your state PTA compliance...

Annual Financial Reviews

Bylaws Organizational Str...

Form 990 Confirmations

Insurance Confirmations

Officers & Committee Chairs

Each unit is required to complete an annual audit/financial review after the end of the fiscal year. The audit must be submitted and logged within 15 days of your General Membership adopting it each year.

You may only log one entry for each school year. To log a resubmission, you must first delete the existing log for that school year below.

1. Upload your 2021 Audit/Financial submission - No need to Email if Uploaded

2. Audit will be Approved or Rejected when received

3. Contact liaison@vapta.org if you have questions

Fiscal Year Ending

June 30, 2022

Due 2022-07-15. Reported for School Year 2022 - 2023

Date Financial Review Completed \*

Select Date

Document \*

Add Document

or drop Document to upload

☐ I confirm my PTA, Fairfax County Council of PTA's/PTSA'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 Last Name

Jaime Yanussi

Email Address Position

treasurer@fccpta.org Treasurer

Unit Name National ID

Fairfax County Council of PTA's/PTSA's 00053828

Current Organization Fairfax County Council of PTA's/PTSA's

School Year 2022 - 2023

Submit

Due: 07/15/2022

Submit

Due: 10/15/2022

Submit

Due: 10/15/2022

Submit

Due: 10/15/2022

View

67°F Mostly cloudy 8:38 AM 7/16/2022

## Bylaws and Organizational Structure

The screenshot shows a web browser window with the URL `fcc-ptamemberhub.com/compliance/b73b7a43-c2d8-48f3-8b34-448305dae996/new`. The page displays a sidebar with navigation links and a main content area. A modal window titled "Bylaws Organizational Structure Form - submit only when changes are made" is open. The modal contains the following text:

Each unit is required to submit the Organizational Structure Form each year. You may only log one entry for each school year. To log a resubmission, you must first delete the existing log for that school year below.

Upload Organizational Structure Form (only) - Attach form to your Uniform Bylaws for your records.

No need to Email if Uploaded

Document \*

Add Document or drop Document to upload

First Name: Jaime, Last Name: Yarusi, Email Address: treasurer@fccpta.org, Position: Treasurer, Unit Name: Fairfax County Council of PTA's/PTSA's, National ID: 90053028

Buttons: Submit, Close

## Form 990 Tax Filing Confirmations

The screenshot shows a web browser window with the URL `fcc-ptamemberhub.com/compliance/c2567777-a511-404b-b2a0-3a707631161/new`. The page displays a sidebar with navigation links and a main content area. A modal window titled "Form 990 Confirmations" is open. The modal contains the following text:

Each unit is required to file a Form 990 with the IRS by the 15th day of the 5th month after fiscal year end. You may only log one entry for each school year. To log a resubmission, you must first delete the existing log for that school year below.

1. Upload your 2020 990 submission - No need to email if uploaded  
2. 990 Postcard submissions should have CONFIRMATION in top left hand corner  
3. Contact baksun@vaptg.org if you have questions

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, 2022

990 Filing \*

Date Form 990 Filed \*

Gross Receipts \*

Document \*

Add Document or drop Document to upload

☐ I confirm my PTA, Fairfax County Council of PTA's/PTSA's, filed a 990 tax return with the IRS on the date provided above.

First Name, Last Name

## Insurance Confirmations

The screenshot shows a web browser window with the URL `fcc-ptamemberhub.com/compliance/770e1ec6-460a-4de2-0bea-e6aad4ed193/new`. The page is titled "Insurance Confirmations" and contains the following sections:

- Compliance**: A sidebar menu with options like "Compliance Submissions", "Annual Financial Review", "Bylaws Organizational", "Form 990 Confirmations", "Insurance Confirmation", and "Officers & Committee Chairs".
- Insurance Confirmations**: The main content area with a "Log your policy information upon renewal each year" instruction. It includes a "School Year" dropdown set to "2022 - 2023", a "Policy Number" field, a "Policy Expiration Date" field, and a "Document" upload area. Below these is a checkbox for "I confirm my PTA, Fairfax County Council of PTAs/PTSA's, purchased an insurance policy that will expire in the date provided." and a "Submit" button.
- Form 990 Confirmations**: A section with a "Submit" button and a "Due 10/15/2022" date.
- Insurance Confirmation**: A section with a "Submit" button and a "Due 10/15/2022" date.

Once your submission(s) is made, the notation on your compliance will note "awaiting review"

The screenshot shows the "Compliance Submissions" page in the MemberHub interface. The page lists several submissions with their status and due dates:

- Annual Financial Reviews**: Status "Submitted", Due "07/15/2022".
- Bylaws Organizational Structure Form - submit only when changes are made**: Status "Submitted", Due "10/15/2022".
- Form 990 Confirmations**: Status "Submitted: 07/15/2022 at 7:01 am", Due "10/15/2022".
- Insurance Confirmations**: Status "Submitted", Due "10/15/2022".

An arrow points to the "Form 990 Confirmations" row, which has a status of "Submitted" and a "Due 10/15/2022" date. The "Insurance Confirmations" row also shows a "Submitted" status and a "Due 10/15/2022" date.



If you still need to update your officers you would do the following:

**Step 1:** Choose the Compliance Manager from the right-hand tab, then select Update Officers

Virginia PTA - MemberHub Acc... For Treasurers | FCCPTA MemberHub

fcc-ptamemberhub.com/dashboard

Need ideas or guidance? Our experts are ready to help. Visit MemberHub Sessions

Current Organization Fairfax County Council...

### Fairfax County Council of PTA's/PTSA's

Since 07/01/2022

#### Recent Messages

View All Messages

Virtual Fairfax County PTA Training  
Sent 06/09/2022 at 2:30 pm by Larry Mills

Parent Voices Needed in FCPS for Next School Year!  
Sent 05/04/2022 at 10:09 am by Larry Mills

May 21 9:00a.m. - Virginia PTA Annual Meeting  
Sent 04/29/2022 at 9:01 am by Larry Mills

New Message

#### Latest Newsletter

Create beautiful newsletters with no design skills

Get Started

#### 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

#### Contacts

View

132

Get Started

#### Members

View

Get Started

#### Gross Sales

View

\$8.75

Get Started

#### Product Fundraisers

View

Launch

#### Upcoming Events

View Calendar

Manage meetings, events, and volunteers

Create an Event

#### File Uploads

View All Files

Easily store documents and images for your supporters to access

Upload New File

#### Recent Orders

View All Orders

Order ID	Customer	Amount
749100893	Jill Nelson	\$1.21
060606000	Kelly Robertson	\$8.71
090209117	Lynn Zicker	\$1.01
090209463	Deirdre Drouin	\$2.51
067806063	Kristen Chaddock	\$5.16
050070066	George Newberry	\$1.01
710407006	Kristine Schmidt	\$1.21
030806020	Heather Jaraman	\$91.84
020607006	Nick Soudurek	\$5.61
050105072	Arly Mahoney	\$3.01

#### Settings

#### UNAVAILABLE

View Store

MemberHub Store FAQs

Contact Store Admin

Settings

**Step 2:** Select the correct year you are making submission for from the drop down menu (currently set for the 2022-2023 school year).

Virginia PTA - MemberHub Acc... For Treasurers | FCCPTA MemberHub

fcc-ptamemberhub.com/compliance/section-officers

Need ideas or guidance? Our experts are ready to help. Visit MemberHub Sessions

Current Organization Fairfax County Council...

### Compliance

Compliance Submissions  
Enter your state PTA compliance submissions the Form 990 and Financial Reviews

View

Officers & Committee Chairs

2022 - 2023 Add Officer

Name	Office	Address	Email	Phone
Larry Mills	President	PO Box 3135 Manassas	president@fccpta.org	
Jaime Yencel	Treasurer		treasurer@fccpta.org	
Colleen Coggins	Secretary	PO Box 3135 Manassas	secretary@fccpta.org	
Gayle Brink	Vice President		vp.programs@fccpta.org	
Kara Jenkins	Vice President		vp.training@fccpta.org	
Robert Rigby	Vice President		vp.advocacy@fccpta.org	
Debbie Kilpatrick	Vice President	PO Box 3135 Manassas	vp.outreach@fccpta.org	
Jenna White	Vice President		vp.communications@fccpta.org	

©2022 MemberHub, Inc.

About Support Privacy Policy Terms of Use



**Step 3:** If you are adding an officer, select add officer and fill in the required information.

The screenshot shows the MemberHub interface for the Fairfax County Council of PTA. The 'Officers & Committee Chairs' section is active, displaying a table of current officers for the 2022-2023 term. A dropdown menu is open, showing the current term and an 'Add Officer' button. An arrow points to the 'Add Officer' button.

Name	Office	Address	Email	Phone
Larry Mills	President	PO Box 3135 Manfield	president@fcpta.org	[REDACTED]
Jaime Yarnall	Treasurer		treasurer@fcpta.org	[REDACTED]
Colleen Coggins	Secretary	PO Box 3135 Manfield	secretary@fcpta.org	[REDACTED]
Dwynn Brink	Vice President		vp.programs@fcpta.org	[REDACTED]
Kara Jenkins	Vice President		vp.training@fcpta.org	[REDACTED]
Robert Rigby	Vice President		vp.advocacy@fcpta.org	[REDACTED]
Debbie Kiparick	Vice President	PO Box 3135 Manfield	vp.outreach@fcpta.org	[REDACTED]
Jenna White	Vice President		vp.communications@fcpta.org	[REDACTED]

The screenshot shows the MemberHub interface with the 'Officer Information' modal window open. The modal contains the following fields and options:

- Title \*
- Expire role at end of year: 2022 - 2023
- If you are adding existing contacts to this hub, begin typing First Name, Last Name, or email address and autofill options will appear.
- Email Address \*
- First Name
- Last Name
- Phone Number
- Phone Number
- Add as Organization Admin (checkbox)
- Notify contacts by email (checkbox)
- Close
- Save

If you are removing an officer, simply select the officer you are changing and make your changes.

Virginia TTA - MemberHub Acc... For Treasurers | ECPTA MemberHub

fcc-ptamemberhub.com/compliance/section-officers

memberhub

Need help or guidance? Our experts are ready to help! Visit MemberHub Sessions

Current Organization Fairfax County Council...

### Compliance

Compliance Submissions  
Enter your 500c PTA compliance submissions like Form 990s and Financial Reviews

Officers & Committee Chairs

2022 - 2023 Add Officer

Name	Office	Address	Email	Phone
Larry Mills	President	PO Box 3135 Manfield	president@fccpta.org	
Jaime Yarocci	Treasurer		treasurer@fccpta.org	
Colleen Coggins	Secretary	PO Box 3135 Manfield	secretary@fccpta.org	
Dwyn Brink	Vice President		vp.programs@fccpta.org	
Kari Jenkins	Vice President		vp.training@fccpta.org	
Robert Rigby	Vice President		vp.advocacy@fccpta.org	
Debra Kiperick	Vice President	PO Box 3135 Manfield	vp.outreach@fccpta.org	
Jenna White	Vice President		vp.communications@fccpta.org	

©2022, MemberHub, Inc.

About Support Privacy Policy Terms of Use

10:08 AM 7/19/2022

72°F Mostly cloudy

Virginia TTA - MemberHub Acc... For Treasurers | ECPTA MemberHub

fcc-ptamemberhub.com/compliance/section-officers

memberhub

Need help or guidance? Our experts are ready to help! Visit MemberHub Sessions

Current Organization Fairfax County Council...

### Compliance

Compliance Submissions  
Enter your 500c PTA compliance submissions like Form 990s and Financial Reviews

Officers & Committee Chairs

2022 - 2023 Add Officer

Name	Office	Address	Email	Phone
Larry Mills	President	PO Box 3135 Manfield	president@fccpta.org	
Jaime Yarocci	Treasurer		treasurer@fccpta.org	
Colleen Coggins	Secretary	PO Box 3135 Manfield	secretary@fccpta.org	
Dwyn Brink	Vice President		vp.programs@fccpta.org	
Kari Jenkins	Vice President		vp.training@fccpta.org	
Robert Rigby	Vice President		vp.advocacy@fccpta.org	
Debra Kiperick	Vice President	PO Box 3135 Manfield	vp.outreach@fccpta.org	
Jenna White	Vice President		vp.communications@fccpta.org	

#### View Contact Role

User: Jaime Yarocci Profile

Officer Type: Treasurer

Organization Name: Fairfax County Council of PTAs/PTSA's

Starting At: 07/01/2022 at 12:00 am Expires At: 06/30/2023 at 11:59 pm

Renew Expire Close

©2022, MemberHub, Inc.

About Support Privacy Policy Terms of Use

10:10 AM 7/19/2022

72°F Mostly cloudy