

Accessing Your PTA Memberhub Site

Effective May 1, 2018, Illinois PTA local units will be required to report officers, member dues, audits, 990 submissions, bylaws, and insurance certificate through the MemberHub site.

Open your browser and enter www.memberhub.com

1. Open your browser and enter www.memberhub.com
2. Click **Login**.
3. **Enter your e-mail address.**

First Time User:

4. If this is your first time entering Memberhub, select **I need to create a password**.
5. Click **Next**.
STOP! Check your email
6. Confirmation Code: **Enter Confirmation Code from email**
7. Choose a Password: **Create your password**; Re-type your password.
Click **Next**. **Complete your Profile** (*Complete now or later*), Click **Next**.



Returning User:

8. Click **My password is**: enter your previously created password.
9. Click **Next**.

After logging in you will arrive at your Dashboard. Here you will see Recent Activity, Upcoming Events and more. You will only see information related to your hubs (or groups).

Your Profile

Click on your name in the upper right-hand corner and a drop-down menu will appear. Here you can edit personal and family details, email addresses, passwords, change your time zone, switch between organizations and access your membership card. Under Your Profile you can adjust your profile visibility so you control what other people can see about you.

Enter PTA Officers

Add your PTA Officers into MemberHub and they will automatically be synced with your state-level PTA. Access your PTA administration pages by clicking on the **Admin Console** button located to the left of your name, then the **PTA** tab below the PTA's name.

1. Click **Add Officers** button. The resulting popup window will allow you to search by name to *find an existing person in your MemberHub site*.

Complete popup form:

2. Enter the person's name and click **Search**.
NOTE: *If you see a matching person select it from the dropdown. Otherwise just fill in each field manually.*
3. Click on Officer* dropdown menu, **select position**. **Note:** Only officer positions recognized by Illinois PTA are included in this list.
4. Click on Term* drop down menu, **select term**. Make sure you select the correct term.



Add Officer [X]

Start typing the officer's name and, if you see a matching person, select it from the drop-down list. Otherwise just fill in each field.

First Name*

Last Name*

Email*

Office*

Term*

Give Access to Admin Console and Store Admin

5. **Give Access to Admin Console.** Note: check only if officer is to have full access, uncheck if reporting without Admin Access.
6. Click on Add Officer button.
Note: To remove an officer added incorrectly, click on X on officer line. You will be unable to remove previous year officers after June 1, as this is historical data for Illinois PTA.
7. Repeat to add all Officers and Committee Chairs.
Note: Officers not previously in Memberhub will receive an email to sign into Memberhub and create a password.

Congratulation! You Have Completed your 2020-2021 Registration.

Upload Audit

Each local PTA unit and council is required to complete an Audit by December 1 of each year. Confirmation of the completed Audit must be submitted on or before December 1.

To file your audit with the Illinois PTA access your PTA administration pages by clicking on the [Admin Console](#) button located to the left of your name, then the [PTA](#) tab below the PTA's name.

1. Click **Add Audit Submission** button at the bottom of the page. The resulting popup window will allow you to confirm an audit has been completed.

Complete popup form: Some fields will already be populated with your information. Verify all information is correct.

2. Fill in any boxes not populated.
3. Click the **Submit** button at the bottom of the pop-up. This will close the pop-up window. You can now see the Audit Submission information in the box in the center of the page.

Add Submission

First Name	Last Name
<input type="text" value="SysAdmin"/>	<input type="text" value="L"/>
Email Address	Position*
<input type="text" value="sys.admin@ptanet.org"/>	<input type="text" value=""/>

Date Audit Completed*

Membership Year of Financial Review*

Unit/Council Name	National Unit ID
<input type="text" value="ARMSTRONG PTA - HOFFMAN"/>	<input type="text" value=""/>

I confirm my PTA, **ARMSTRONG PTA - HOFFMAN**'s annual audit 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.*

Congratulation! You Have Now Completed your Audit Submission.

IRS Requirements

Each local PTA unit and council is required to file a 990 tax return each year. Confirmation of the completed Tax Return must be submitted on or before December 1.

To confirm your tax filing access your PTA administration pages by clicking on the **Admin Console** button located to the left of your name, then the **PTA** tab below the PTA's name.

1. Click **Add IRS Requirement** button at the bottom of the page. The resulting popup window will allow your to confirm an 990 tax filing has been completed.

Complete popup form: Some fields will already be populated with your information. Verify all information is correct. **Please Note: This submission does not replace the actual filing of the Form 990 with the IRS due by 15 day of the fifth month following the end of your fiscal year.**

2. Fill in any boxes not populated.
3. Click the **Submit** button at the bottom of the pop-up. This will close the pop-up window. You can now see the IRS reported information in the box in the center of the page.

The screenshot shows a web browser popup window titled "Add Submission". At the top, a red warning message states: "This submission does not replace the actual filing of Form 990 with the IRS." Below this is a link: "Click here to determine the type of 990 your PTA is required to file." The form contains several input fields: "First Name*" (pre-filled with "SysAdmin"), "Last Name*", "Email Address*" (pre-filled with a redacted email), and "Position*" (a dropdown menu). A horizontal line separates the user information from the tax filing details. These include: "Fiscal year*" (a dropdown menu), "990 Filing*" (a dropdown menu), "Date Form 990 Filed*" (a date picker set to 30), and "Gross Receipts*" (an empty text box). Below these are "Unit/Council Name" (pre-filled with "ARMSTRONG PTA - HOFFMAN") and "National Unit ID" (a redacted field). At the bottom, there is a checkbox with the text: "I confirm my PTA, ARMSTRONG PTA - HOFFMAN, filed a 990 tax return with the IRS on the date provided.*". The popup has a "Submit" button and a "Cancel" button at the bottom right.

Congratulation! You Have Now Completed your IRS Requirement Report to Illinois PTA.

Bylaw Submission

Each local PTA unit and council are governed by a set of bylaws. Illinois PTA units are required to update or reaffirm their bylaws every 2 years. Bylaws need to be reviewed and approved by your Illinois PTA representative and General Membership prior to submission.

To file your approved and adopted bylaws with the Illinois PTA access your PTA administration pages by clicking on the **Admin Console** button located to the left of your name, then the **PTA** tab below the PTA's name.

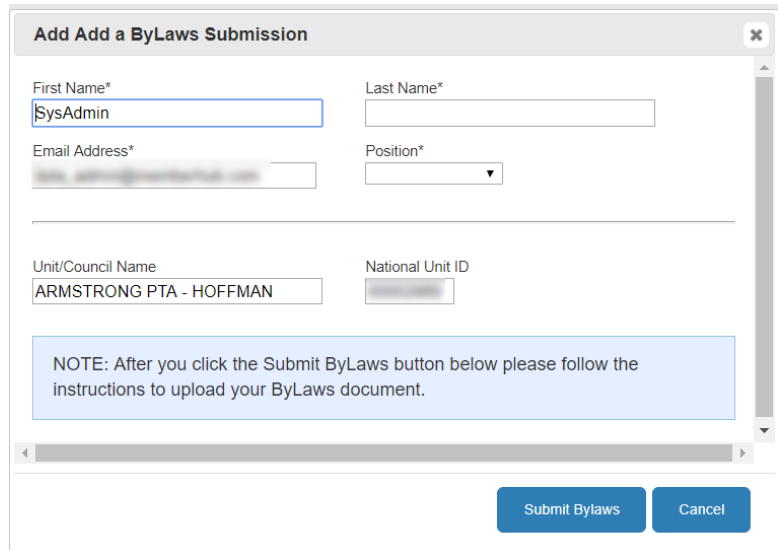
1. Click **Add Bylaws Submission** button at the bottom of the page. The resulting popup window will allow enter you to record person submitting the bylaws.

Complete popup form: Some fields will already be populated with your information. Verify all information is correct. **Please Note: This submission does not replace bylaw approval procedures.**

2. Fill in any boxes not populated.
3. Click the **Submit Bylaws** button at the bottom of the pop-up. This will close the pop-up window. You can now see your bylaw reported information in the box in the center of the page.

Continue to Step 5!

Continue to Step 5 to upload your bylaws to the file folder.



The screenshot shows a popup window titled "Add Add a ByLaws Submission". It contains the following fields and controls:

- First Name*: SysAdmin
- Last Name*: (empty)
- Email Address*: (empty)
- Position*: (dropdown menu)
- Unit/Council Name: ARMSTRONG PTA - HOFFMAN
- National Unit ID: (empty)
- A note box: "NOTE: After you click the Submit ByLaws button below please follow the instructions to upload your ByLaws document."
- Buttons: "Submit Bylaws" and "Cancel"

4. Email your Bylaws Submission to the State Office by clicking on [clicking this link](#) located above the box in the middle of the page. This will take you to your email screen.
5. On the **Subject Line**, enter your PTA name, city and year followed by the word Bylaw.
6. Click your **file attachment icon** and attach the audit.
7. Click **SEND**.

Congratulation! You Have Now Completed your Bylaws Submission.

Insurance Submission

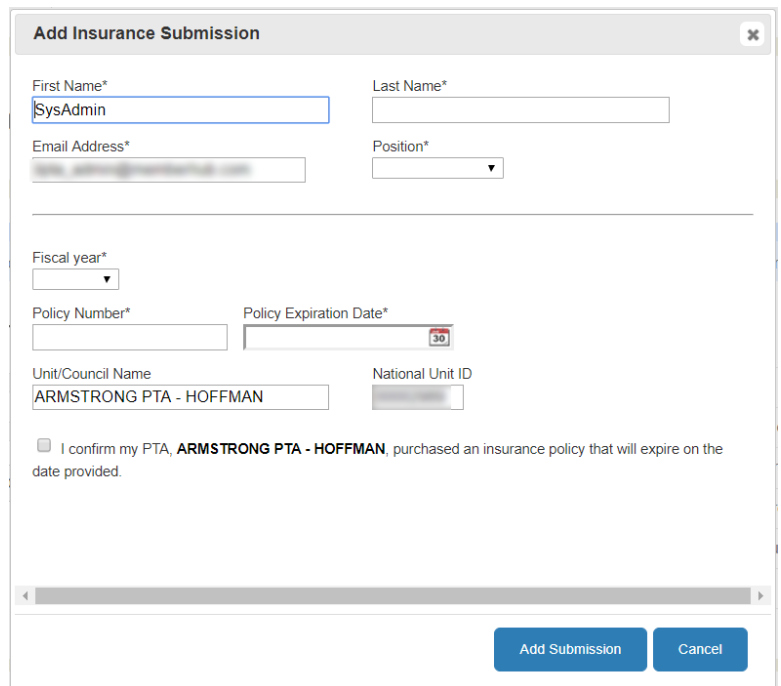
Each local PTA unit and council is required to secure liability insurance or submit a waiver form by October 1.

To submit your Insurance information to Illinois PTA, access your PTA administration pages by clicking on the [Admin Console](#) button located to the left of your name, then the [PTA](#) tab below the PTA's name.

1. Click **Insurance Submission** from the PTA Pages listed on the right-side of the screen.
2. Click **Add Insurance Submission** button at the bottom of the page. The resulting popup window will allow you to enter your insurance information.

Complete popup form: Some fields will already be populated with your information. Verify all information is correct.

3. Fill in any boxes not populated including **Policy Number** and **Policy Expiration Date**. Note: If you are submitting a waiver: Policy Number = presidents last name and Policy Expiration Date = end of president's term.
4. Click box to confirm insurance information has been completed on the date provided.
5. Click the **Submit** button at the bottom of the pop-up. This will close the pop-up window. You can now see the Insurance Submission information in the box in the center of the page.



The screenshot shows a web browser popup window titled "Add Insurance Submission". The form contains the following fields and elements:

- First Name***: Text input field containing "SysAdmin".
- Last Name***: Empty text input field.
- Email Address***: Text input field containing a partially obscured email address.
- Position***: Dropdown menu.
- Fiscal year***: Dropdown menu.
- Policy Number***: Text input field.
- Policy Expiration Date***: Date picker field showing a date in 2030.
- Unit/Council Name**: Text input field containing "ARMSTRONG PTA - HOFFMAN".
- National Unit ID**: Text input field containing a partially obscured ID.
- I confirm my PTA, **ARMSTRONG PTA - HOFFMAN**, purchased an insurance policy that will expire on the date provided.
- Buttons: "Add Submission" and "Cancel".

Congratulation! You Have Now Completed your Insurance Submission.

Payment to State

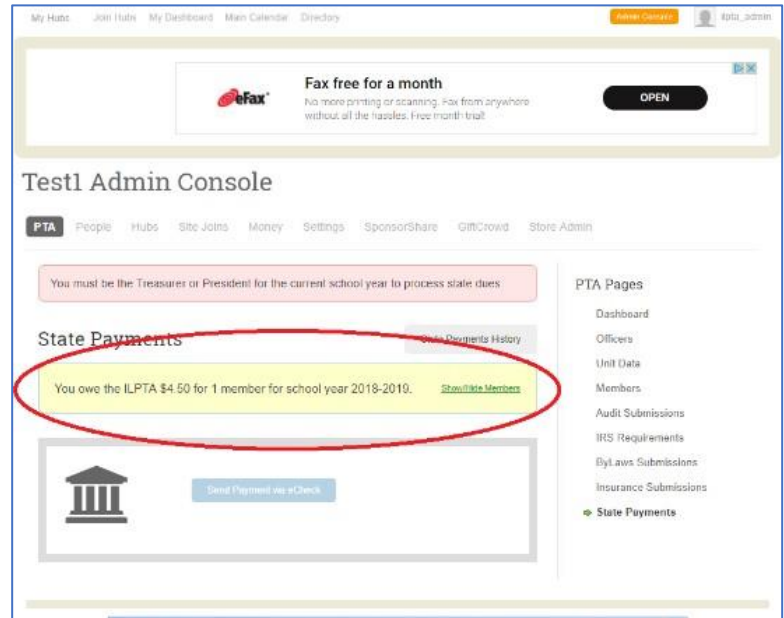
Each local PTA unit is required to remit the Illinois PTA and National PTA portion of dues collected to Illinois PTA.

To submit dues collected to Illinois PTA access your PTA administration pages by clicking on the **Admin Console** button located to the left of your name, then the **PTA** tab below the PTA's name.

1. Click **State Payments** from the PTA pages listed on the right-side of the screen.

Please Note: Only the PTA treasurer or president can remit the state dues.

The amount currently owed along with the number of members will be displayed in the yellow box.



To display list of members you are submitting payment for, click on **Show/Hide Members**. All members with state dues outstanding will be listed at the bottom of the page.

2. Click **Send Payments via e-Check** and follow the step by step instruction to complete the process.

The fee for this ACH transaction is a flat \$1, which will be added to the amount of your remittance. This fee is not collected by Illinois PTA, but by the payment processing company (WePay).

To view past payments remitted, click on **State Payment History**. The treasurer or President should review this page monthly and remit any new dues collected since the last remittance.

Congratulation! You Have Now Completed your Dues Remittance.

Entering Members

Each local PTA unit is required to enter members in order to remit the Illinois PTA and National PTA portion of dues collected to Illinois PTA.

To enter PTA members, access your PTA administration pages by clicking on the **Admin Console** button located to the left of your name, then the **PTA** tab below the PTA's name.

1. Click **Members** from the PTA Pages listed on the right-side of the screen.
2. Click **Add Members** button on the right side of the page. The resulting popup window will allow you to search by name to *find an existing person in your MemberHub site or to add a new member.*

Complete popup form:

3. Enter the person's first name. **Note:** *If the member has a profile on your site a dropdown box will appear with their name, select their name. Otherwise fill in each field manually.*
4. Click on **Member Type*** dropdown menu, select member type. You have 5 options to use in the Member Type field.
 - Parent/Guardian
 - Faculty
 - Student
 - Community
 - Other

The amount listed can be changed in step 5 if incorrect. To update dues amount, refer to page 9, **Setting Your Member Type Dues Amounts.**

5. Enter **Dues Amount***. This is the total dues amount the member paid. **Note:** A report can be exported from the **Members** page for the treasurer to track funds receive and Members.
6. Enter **Extra Donation Amount**, if any.
7. Enter **Check Number**, if paid by check.
8. Click **Add Member** button. **Note:** to remove a member added incorrectly, click on X at the end of the members line on the **Member** page.

Add PTA Member

Use this form to manually add members that joined your PTA and paid via cash, check or other system outside of MemberHub.

Member Information

First Name * [text box] Last Name * [text box]

Email Address [text box] Mobile Phone Number [text box]

You must provide either an email address or a mobile phone number for each non-student member.

Member Type * [dropdown menu]

Memo (e.g., the name, grade, school, and/or section/teacher of the member's student) [text area]

Allow this person to join and access your MemberHub Site ?

Payment Information

School Year [dropdown menu: 2020-2021] Dues Amount* [text box] Extra Donation Amount [text box] Check Number (if paid by check) [text box]

Send Member an Email Receipt ?

Add Member

Congratulation! You Have Now Entered Your Members.

Illinois PTA is providing Members upload. To take advantage of this benefit, you must submit a membership list, of 30 or more members, using the template available online at:

https://illinoispta.org/wp-content/uploads/2018/09/members_template.xls

Please include Unit ID Number, Name and City in the name of the file and saved in a CSV format. Example: 12345-ANYPTA-ANYCITY.

Emailed completed file to info@illinoispta.org

Setting Member Types Dues Amount

Each local PTA/PTSA unit shall collect dues from its members and shall remit the Illinois PTA and National PTA portion of such dues to the Illinois PTA. Each local PTA/PTSA adopts their own local portion of the Membership Dues payable by their members.

To enter PTA membership dues amount, access your PTA administration pages by clicking on the **Admin Console** button located to the left of your name, then the **Store Admin** tab located below the PTA name.

1. Click **Store Admin** from the Store Admin pages listed on the right-side of the screen.
2. Click on **Membership** listed on the left side of the new screen. The resulting screen will show you the current amounts listed for each member type:

To change the amount for each member type:

3. Click **Edit button** at the end of the line of the Member Type you wish to update.
Note: Illinois PTA only recognized 5 types of members:

- Parent/Guardian
- Faculty
- Student
- Community
- Other

4. When the edit page appears, scroll down to **Price*** and enter the total amount a member pays for this type of membership. This amount cannot be less than the current amount due Illinois PTA for each member.
5. Scroll to the bottom of the page and click **Update Membership** button.
6. Repeat steps 2 through 5 to update additional member type dues.
7. Once all member type dues have been completed, Close browser tab Memberhub Store.

If you PTA is using the Store for online membership purchases, you can set the membership types to be visual by using the Hide toggle. NO = Visible; YES = Not Visible.

Name	Short Description	Number Of Members	Price	School Year Ending	Hidden	
Parent/Guardian		1	\$5.00	-	<input type="checkbox"/> No	View Edit
Faculty		1	\$5.00	-	<input type="checkbox"/> No	View Edit
Student		1	\$5.00	-	<input checked="" type="checkbox"/> Yes	View Edit
Community	Aunts, Uncles, Grandparents, Alumni, etc.	1	\$5.00	-	<input type="checkbox"/> No	View Edit
Other		1	\$10.00	-	<input checked="" type="checkbox"/> Yes	View Edit

Edit Parent/Guardian

View Hide this item in the store

Membership Name:*
Parent/Guardian

Short Description:

Long Description:

Number of Members:* Price:*
\$4.50 to state

Your membership level price must be greater than or equal to the number of potential members that are joined multiplied by the amount due to the state for each member(\$4.50).

Available at:

Congratulation! You Have Set Your Member Types Dues Amounts.