

2018-2019 Annual Report Review Procedure

It's that time again: Time for Annual Reports! While many of you have reviewed Annual Reports in the past, **it is important that everyone carefully read through these instructions to ensure that all reports are processed correctly.** Regardless of whether you are an ARC, State or Area Coordinator, or a Chapter Big Sister, these instructions are for **YOU!**

All Annual Reports are submitted via MIMI (our new improved system that has replaced ChIP) and are automatically sent to the Regional Coordinator (RC) or Conference Coordinator (CC). The RC or CC will confirm the report is complete and forward it on to the appropriate reviewers. Every report should be reviewed by at least two people.

To see which reports are been assigned to you, follow these simple steps:

- 1) Log in to MIMI (www.momsclub.org/mimi).
- 2) Using the menu on the left side, select "Year End Reports" and then "Financial Reports to Review."
- 4) You will see a list of chapters in your chain. To the right of each chapter name is the name of the assigned reviewer. **Only review reports that have been assigned to you.** Please DO NOT review a report for which you are NOT the assigned reviewer. This will help us keep track of where everyone is in the review process.
- 5) When you see a chapter that shows you are the assigned reviewer, click on the button to the left of it that says "Review".
- 6) You are now into the chapter's report. Scroll up to the top of the page and you are ready to go!

NOTE: You can also access a specific chapter's report by finding them in your **Chapter List** and visiting their chapter page. At the bottom of the page, you'll notice two new buttons to allow you to view their board report (listing of their board members for next year) and financial report (financial report for last year). Pressing one of these buttons will allow you to view the submitted information.

If you have questions regarding the review process please follow this link for specific instructions [Reviewing Report FAQ's](#)

For an overview of the review process, please check below. There are specific directions for first and second reviewers, as well for the RCs and CC.

Regional or Conference Coordinator (Verify):

- Make sure all documents have been submitted
 - Complete Roster (excel format ONLY)
 - 990N for tax year 2018 (confirm the dates are July 1, 2018 – June 30, 2019) with correct EIN
 - Bank Statement
- Check ending balance
 - Verify Treasury ending balance matches bank reconciliation.
 - Verify no deposits or expenses paid after June 30, 2019 are included.
- Make notes in MIMI
 - Donated to M2M Fund

- Verify annual registration paid, how many members
- Did they make a sustaining chapter donation?

IMPORTANT! The financial report will be “unsubmitted” if chapter is missing required documents, and/or their ending balances are not within \$25.00. They will be responsible for getting the documents uploaded and revising their report. COORDINATORS ARE NOT ALLOWED TO EDIT THE REPORT, THIS IS ON THE CHAPTER.

Chapters who are fully compliant will then be assigned to be reviewed by the Primary Coordinator.

Primary Coordinator (1st Review):

You will want to check regularly (weekly at least) to see if any reports have been assigned it to you. If this is your 1st time reviewing you will be working closely with your Supervising Coordinator, so be sure to ask as any questions come up!

- Read “3 steps to reviewing the Annual Report”
- Review the AR’s
- Make notes using the spaces provided on the report form. Remember to “save” whenever you add notes.
- Make a note of award nominations you would like to make for the chapter. When you are done reviewing all reports, send your RC your list of nominations. (If you RC has a specific format she’d like this list in, she will let you know.)
- Follow up with the chapter, making notes in the reviewer notes section. If you wonder if you should ask a question, talk to your Supervising Coordinator.
- Once finished and follow up with the chapter has be done, you will then assign it to the Secondary Coordinator (your Supervising Coordinator) using the drop down menu at the bottom of the page, so she can begin 2nd review

PLEASE DO NOT HIT THE ‘MARK REVIEW AS COMPLETE’ BUTTON, ONLY THE RC OR CC SHOULD DO THIS AS IT TELLS THE SYSTEM ALL REVIEWS ARE DONE, THE RC WILL HIT THE REVIEW COMPLETE BOTTON ONCE SHE HAS BEEN NOTIFIED THAT THE 1ST AND 2ND REVIEW ARE COMPLETE.

Supervising Coordinator (2nd Review):

If you are a Secondary (Supervising) Coordinator, please work closely with your BS/AC that have not reviewed AR’s before.

- Read “3 steps to reviewing the Annual Report”
- Review the AR’s
- Make notes in the designated area on the report form
- Follow up with Primary Coordinator regarding questions you may have that she did not ask before, mark answers on review/report form.
- Make a note of award nominations you would like to make for the chapter. When you are done reviewing all reports, send your RC your list of nominations.
- Once you’ve done the 2nd review, assign the report to the RC to finalize.

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