

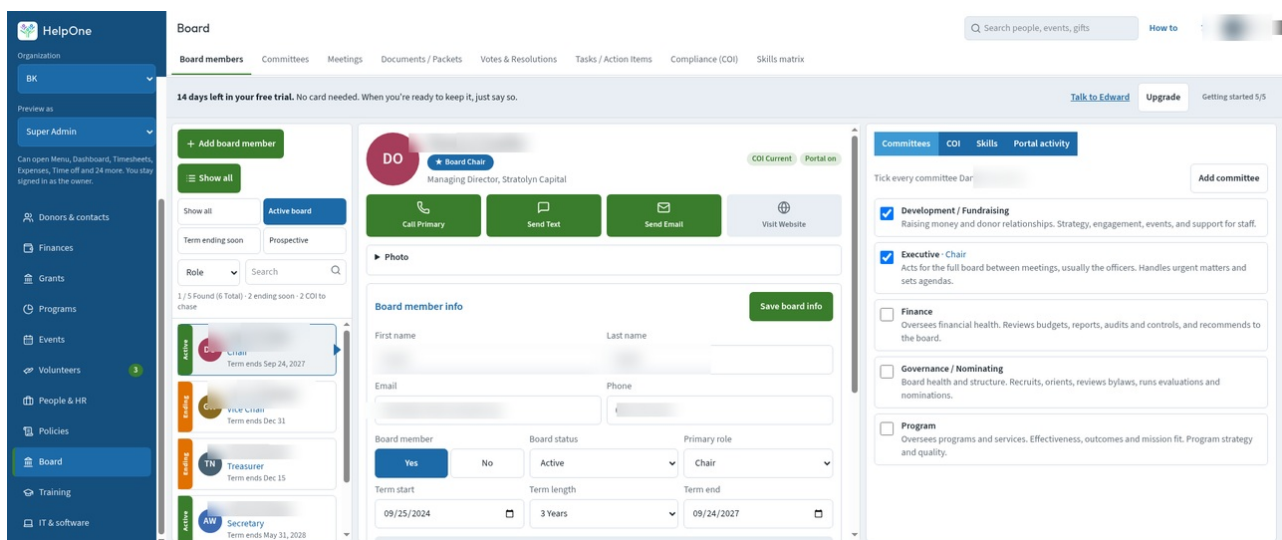
How to manage your board in HelpOne

Last Modified on 10/16/2026 7:17 am EDT

Board work is in the Board area of the sidebar.

Add board members

1. Go to Board > Board members.
2. Click + Add board member.
3. Fill in First name, Last name, Email, and Phone. Set Board member to Yes, then pick the Board status, Primary role, Term start, Term length, and Term end.
4. Click Save board info.



Use Show all, Active board, Term ending soon, and Prospective to filter the list.

On the right, tick each committee the person serves on, or click Add committee. The side tabs also show COI, Skills, and Portal activity.

Contact a member with Call Primary, Send Text, Send Email, or Visit Website.

Committees

On Committees, click New committee. Enter the Committee, Status, Chair, Cadence, Seats, Term years, and Email.

Meetings

On Meetings, click New meeting. Enter the Meeting, Committee, Status, Type, Date, Start, and End.

Switch between upcoming, past, and all.

Documents and packets

On Documents / Packets, click New document. Fill in the Document, Category, Committee, Meeting, Type, Status, Version, Owner, and Review due date.

Votes

1. On Votes & Resolutions, click New vote.
2. Click Add voter for each board member.
3. Each voter's Choice and When are recorded.
4. Click Close vote when it's done.

Other tabs: Tasks / Action Items, Compliance (COI), and Skills matrix.