

Ohio Attorney General's

Charitable Law Section

Charitable University User Guide



DAVE YOST
OHIO ATTORNEY GENERAL

Contents

Section 1: Introduction	3
General information about Charitable University	3
Section 2: How to Log on to Charitable University	4
Charitable University location	4
Create an account	4
Log into Charitable University	4
User account is locked or disabled	5
Reset your password	6
Other technical support	6
Section 3: Search For a Course	7
Section 4: Enroll and Take a Course	8
Enroll into a course	8
Access and take a course	9
Course is not restarting at the point where I left off	10
Completed course is not showing as “completed”	11
Replay a completed course	11
Section 5: Certificates	14
View / Print a certificate	14
Certificate is showing the wrong name	15
Section 6: Transcripts	16
View / Print a transcript	16
Section 7: User Account Information	18
View / Edit your user account	18
Not receiving automatic email notifications	18
Section 8: Charitable University Completion Certificate	19
Charitable University completion certificate requirements	19
Enroll into the required Charitable University courses	19
Check your progress	22
Complete all the required courses	25

SECTION 1: INTRODUCTION

GENERAL INFORMATION ABOUT CHARITABLE UNIVERSITY

The Charitable Law section of the Ohio Attorney General's Office has put together a series of video webinars that we call Charitable University. Each video will explain an important facet of running and supervising a charitable enterprise, whether it's a small school booster club or a large non-profit responsible for millions of dollars in donations and allocations.

Our aim with Charitable University is to help you be a faithful steward by teaching you the best practices in:

- Board governance,
- Financial operations,
- Fundraising,
- And Government filings and recordkeeping

If you complete at least one training in each area, you will receive a Charitable University completion certificate. Because laws and best practices continue to evolve, this certificate will expire after three years.

To recognize those who complete our training, we'll post your name and the name of your organization on our web page <https://charitable.ohioago.gov/Charitable-University>. You will be able to point to this public acknowledgement of your commitment to good stewardship.

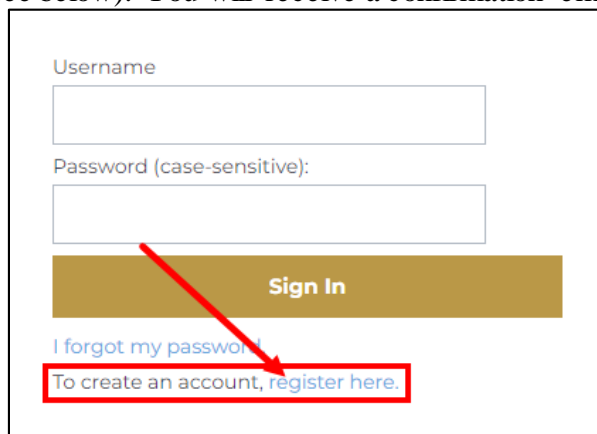
SECTION 2: HOW TO LOG ON TO CHARITABLE UNIVERSITY

CHARITABLE UNIVERSITY LOCATION

From any web browser, visit <https://charitableuniversity.inquisiqlms.com/> to log in or create a new account (directions for both are below).

CREATE AN ACCOUNT

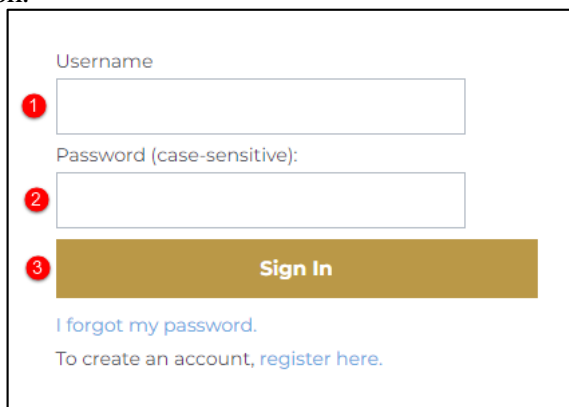
You can create a Charitable University account by using the registration link in the login box on the home page (see below). You will receive a confirmation email after successfully creating an account.



The screenshot shows a login form with two input fields: "Username" and "Password (case-sensitive)". Below the password field is a gold "Sign In" button. Underneath the button, there are two links: "I forgot my password" and "To create an account, register here." A red arrow points from the "Sign In" button to the "register here" link, which is also enclosed in a red rectangular box.

LOG INTO CHARITABLE UNIVERSITY

Enter your username and password, then click the "Sign In" button. Your username is the unique email address you included in your registration form. Your password is the one you provided at the time of registration.

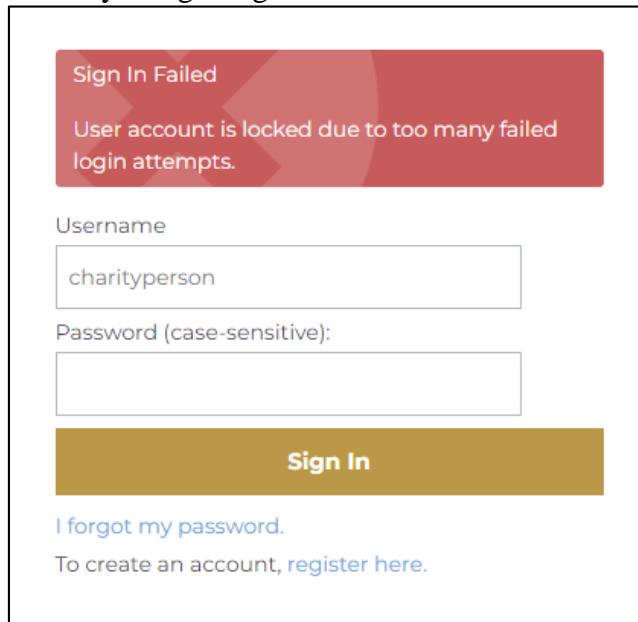


The screenshot shows the same login form as above, but with three red numbered circles indicating the steps: 1. Next to the "Username" input field, 2. Next to the "Password (case-sensitive)" input field, and 3. Next to the gold "Sign In" button. The links "I forgot my password" and "To create an account, register here." are visible below the button.

If you are using the correct username and password but still cannot login, email CharitableLaw@OhioAGO.gov.

USER ACCOUNT IS LOCKED OR DISABLED

If you receive a message that your user account is locked due to too many failed login attempts, wait 15 minutes then try to log in again.



Sign In Failed

User account is locked due to too many failed login attempts.

Username

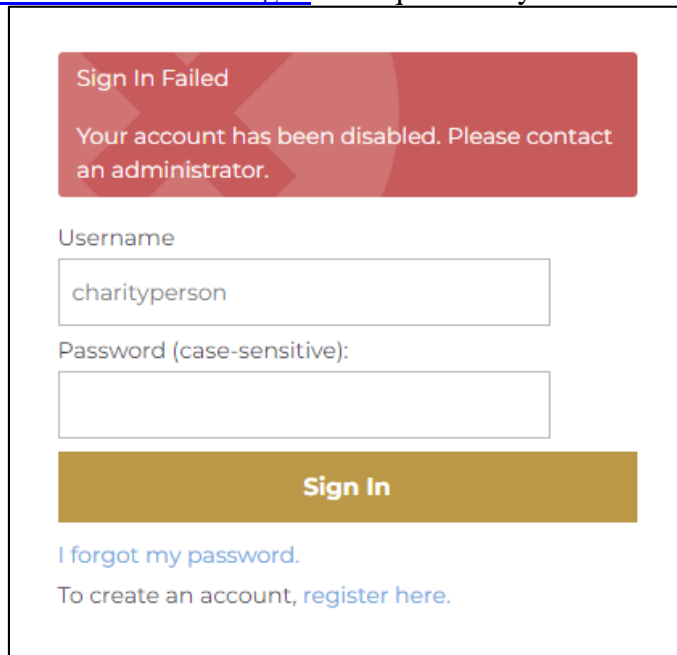
Password (case-sensitive):

Sign In

[I forgot my password.](#)

To create an account, [register here.](#)

If you receive an error message that your account has been disabled (see below), email CharitableLaw@OhioAGO.gov to request that your account be enabled.



Sign In Failed

Your account has been disabled. Please contact an administrator.

Username

Password (case-sensitive):

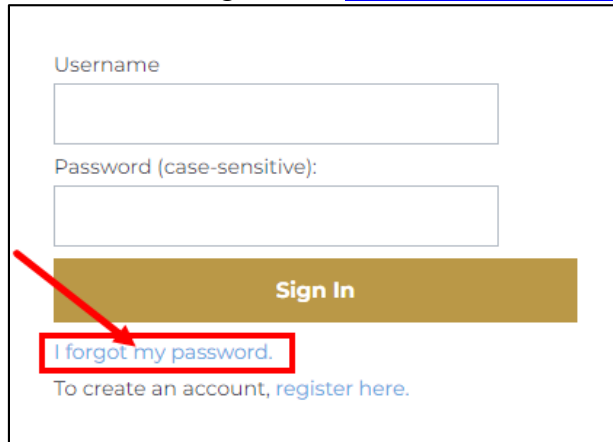
Sign In

[I forgot my password.](#)

To create an account, [register here.](#)

RESET YOUR PASSWORD

If you have forgotten your password, you can reset it using the link in the login box on the home page (see below). You should receive an email with a link to reset your password within a few minutes. If you don't receive this message, email CharitableLaw@OhioAGO.gov.



The image shows a login form with two input fields: 'Username' and 'Password (case-sensitive):'. Below these fields is a gold 'Sign In' button. A red arrow points from the left side of the form to a red-bordered box containing the text 'I forgot my password.'. Below this box is the text 'To create an account, register here.' in blue.

Username

Password (case-sensitive):

Sign In

I forgot my password.

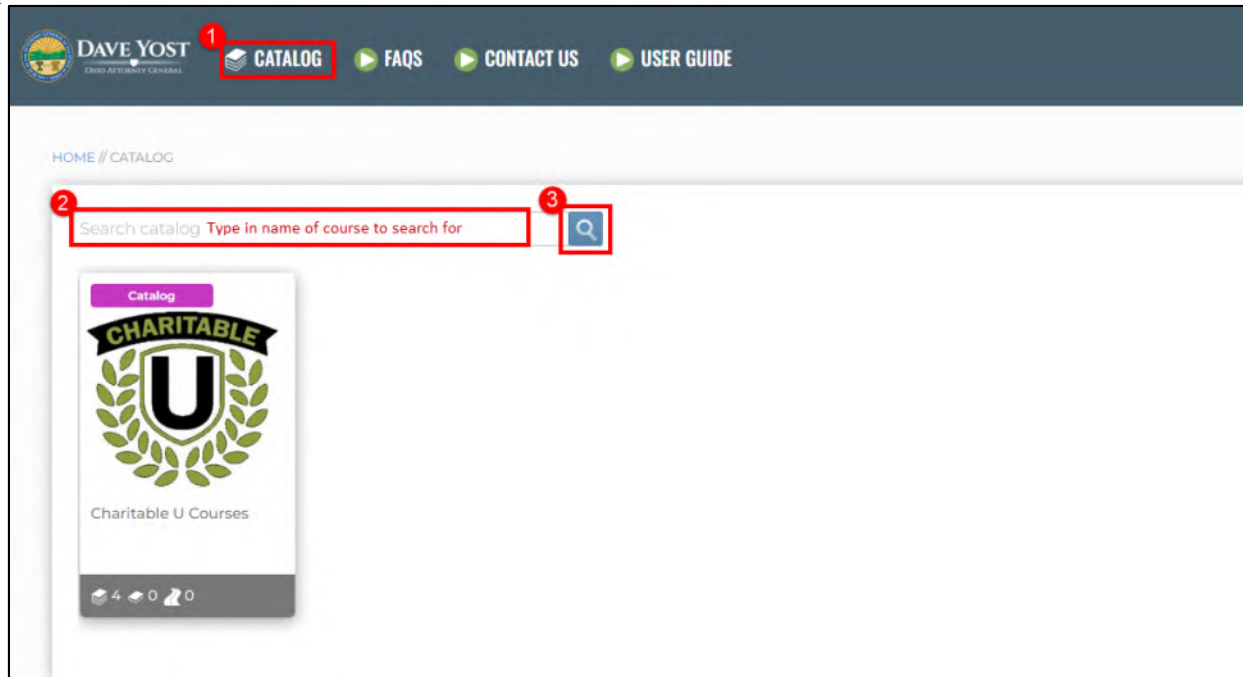
To create an account, [register here.](#)

OTHER TECHNICAL SUPPORT

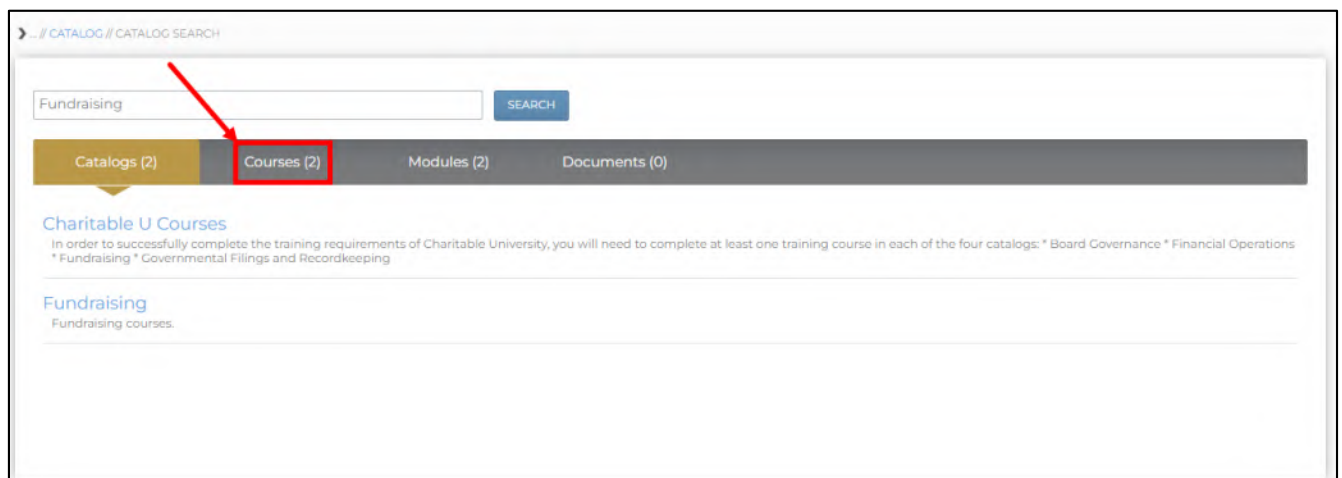
If you experience issues with the website – for example, you cannot access a course or print a certificate – send a message to CharitableLaw@OhioAGO.gov.

SECTION 3: SEARCH FOR A COURSE

Click on “Catalog” in the top menu. Click on the “Search catalog” field to find a specific course by name. Type in name of course to search for.



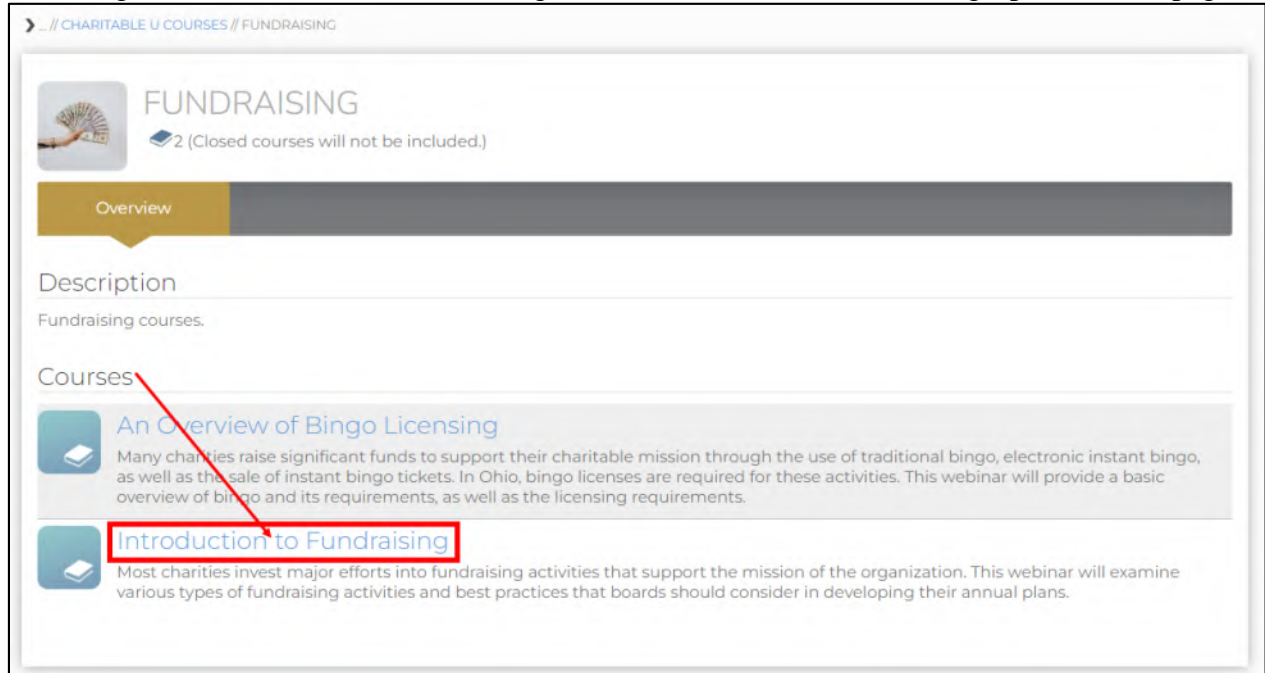
Click on a tab to view the list of catalogs, courses, modules and documents that match the search text. Click on the “Courses” tab. Click on a course to view the course details.



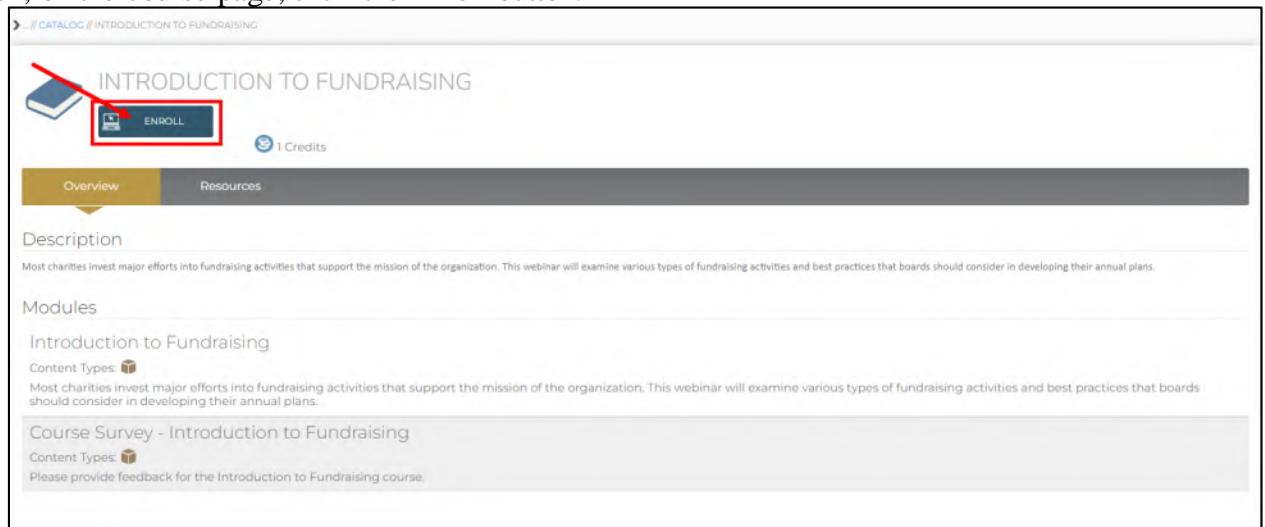
SECTION 4: ENROLL AND TAKE A COURSE

ENROLL INTO A COURSE

After locating the desired course in the catalog, click on the course name to bring up the course page.



Then, on the course page, click the Enroll button.



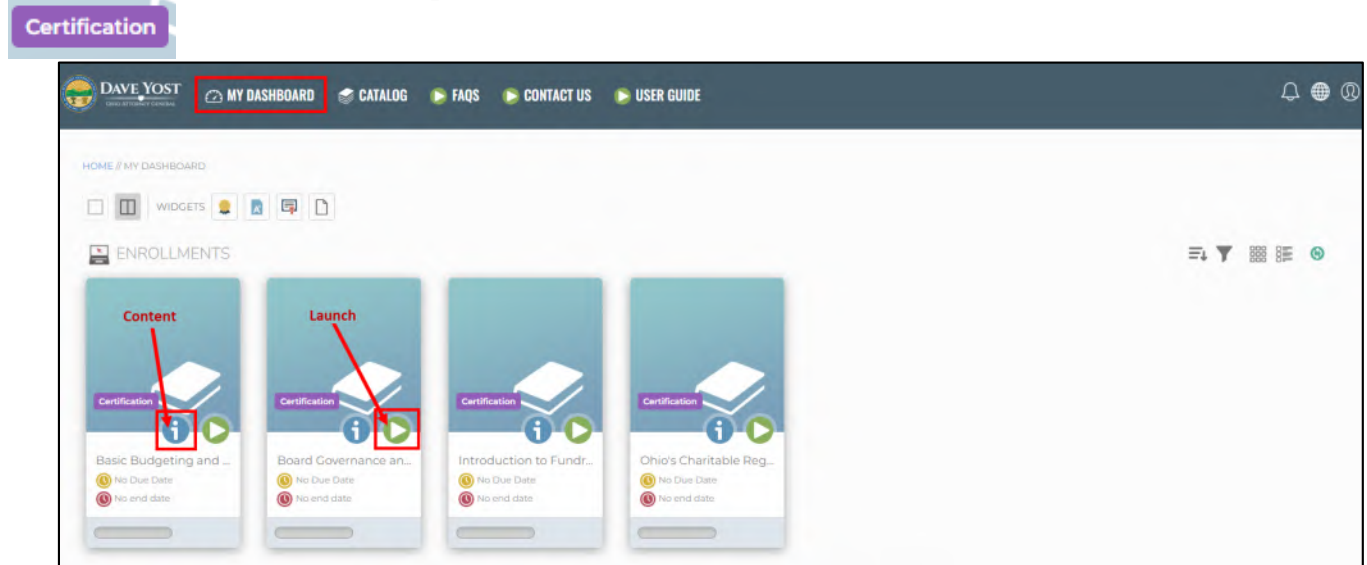
The course will be available momentarily under the Enrollments icon on your My Dashboard page.

ACCESS AND TAKE A COURSE

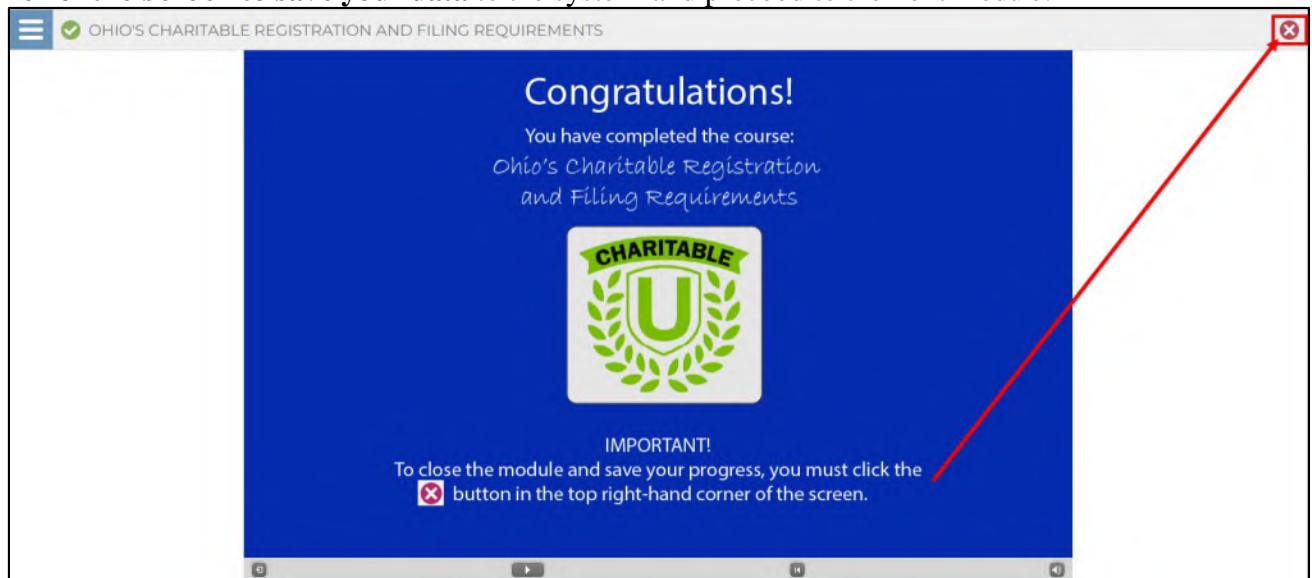
You can access your courses from the My Dashboard tab in Charitable University,
<https://charitableuniversity.inquisiqlms.com/dashboard/>.

Click on the blue circle containing the letter “i” to see all of the content on the course details page.
Click on the green circle with the arrow to launch the next module within the course.

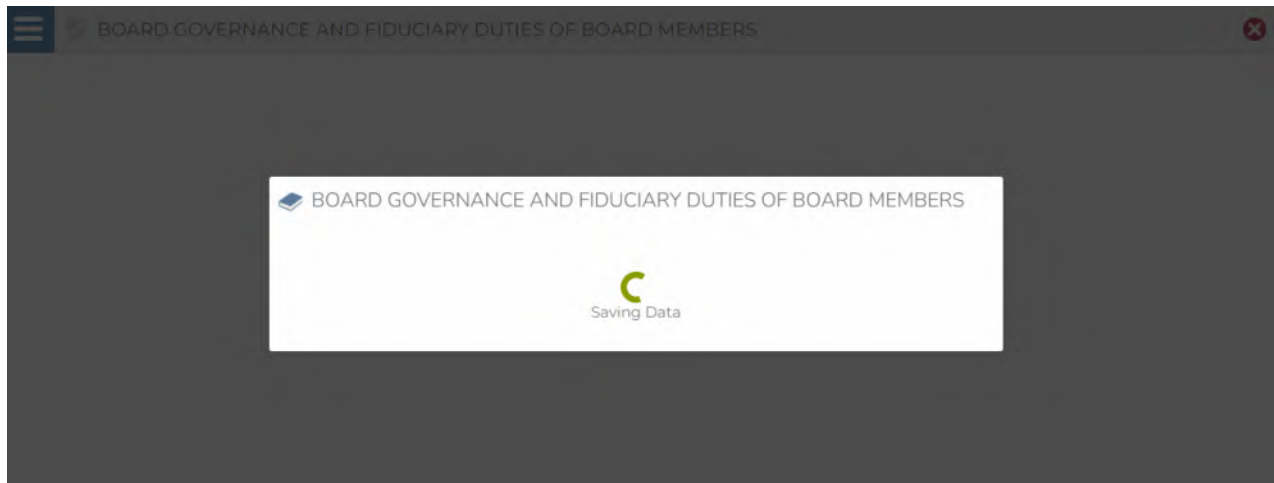
Note: Charitable University Completion Certificate courses are identified by a “Certification” icon



Please note that, at the end of each module within the course, **you must click the red X in the top right corner of the screen to save your data** to the system and proceed to the next module.

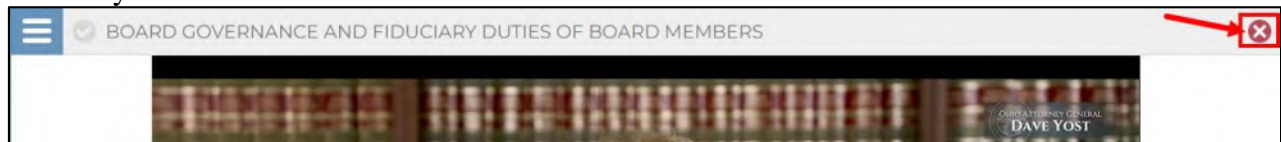


When you click the red X, you should see a “Saving data” message before the system takes you to the course details page. (see screen shot on next page)

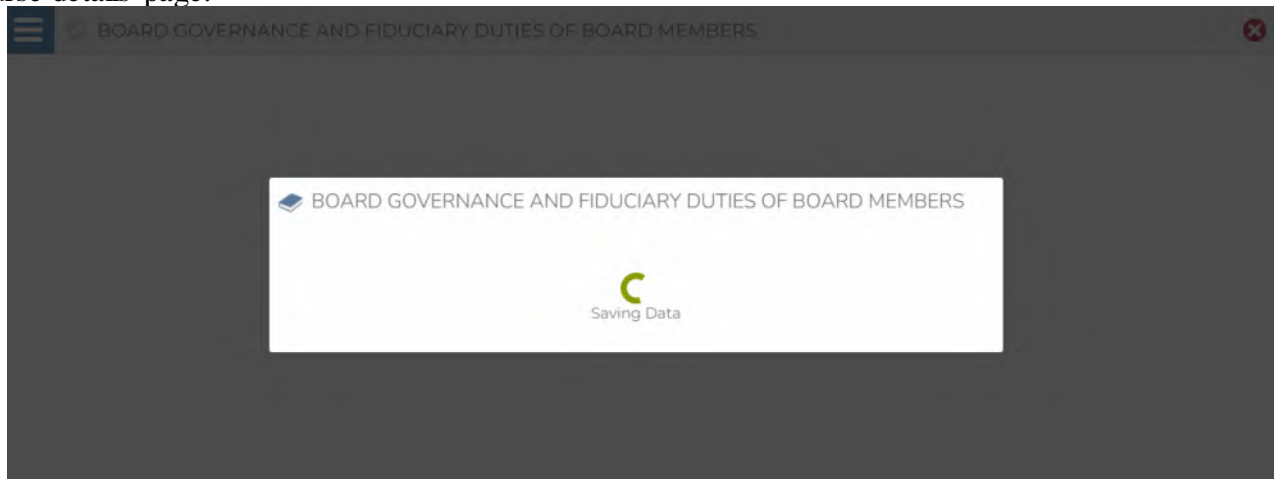


COURSE IS NOT RESTARTING AT THE POINT WHERE I LEFT OFF

Before exiting the course, be sure to click the red X in the top right corner of the screen – this saves your data to the system.

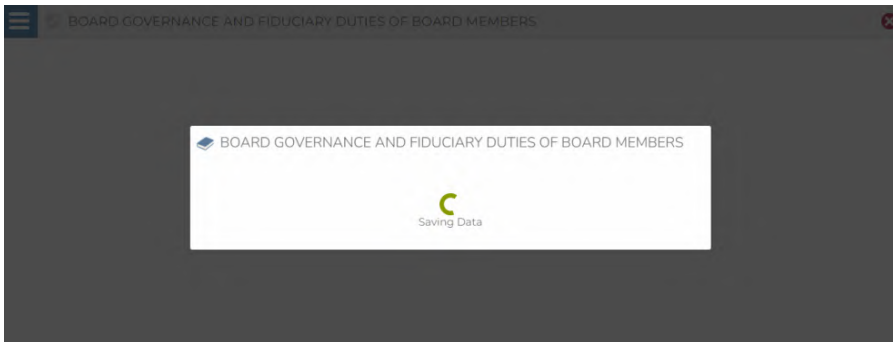
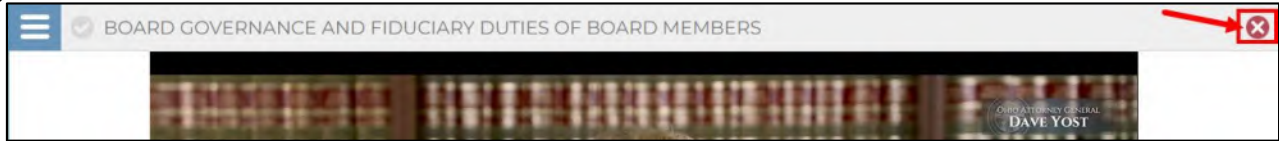


When you click the red X, you should see a “Saving data” message before the system take you to the course details page.



COMPLETED COURSE IS NOT SHOWING AS “COMPLETED”

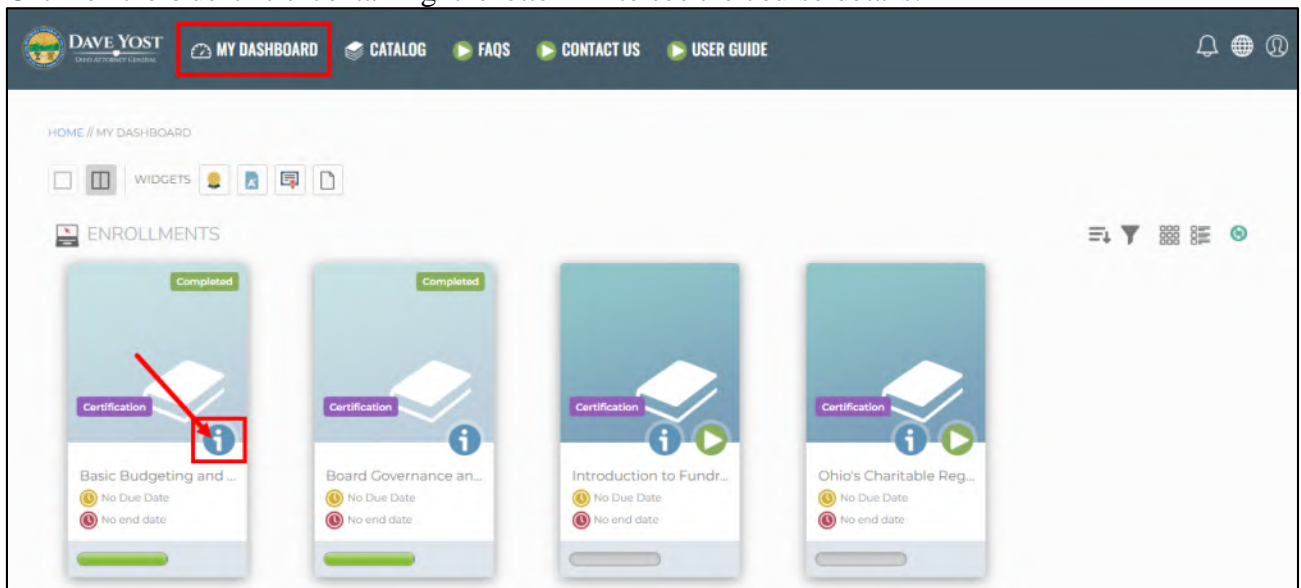
At the end of each module within the course, be sure to click the red X in the top right corner of the screen – this saves your data to the system. When you click the red X, you should see a “Saving data” message before the system returns you to the course details page. If a course isn’t showing as “completed”, you may need to relaunch the course and then click the red X.



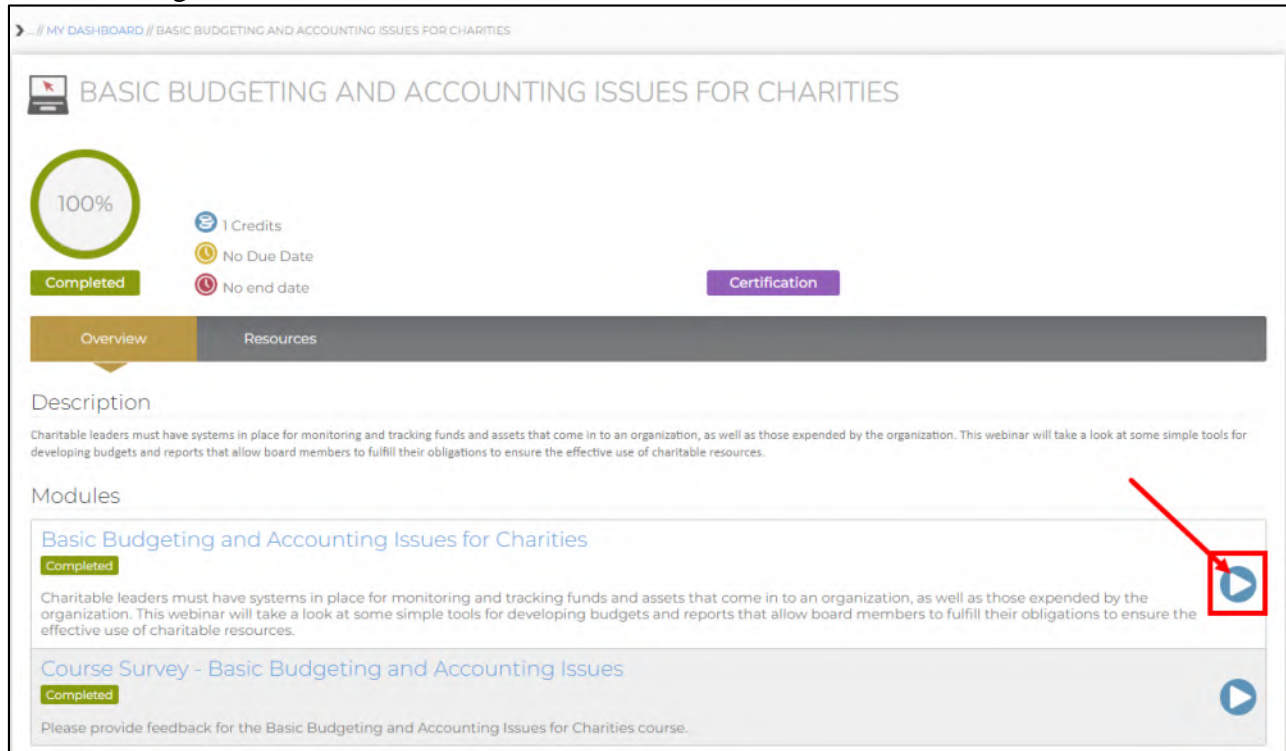
REPLAY A COMPLETED COURSE

Follow the following steps to replay a completed course.

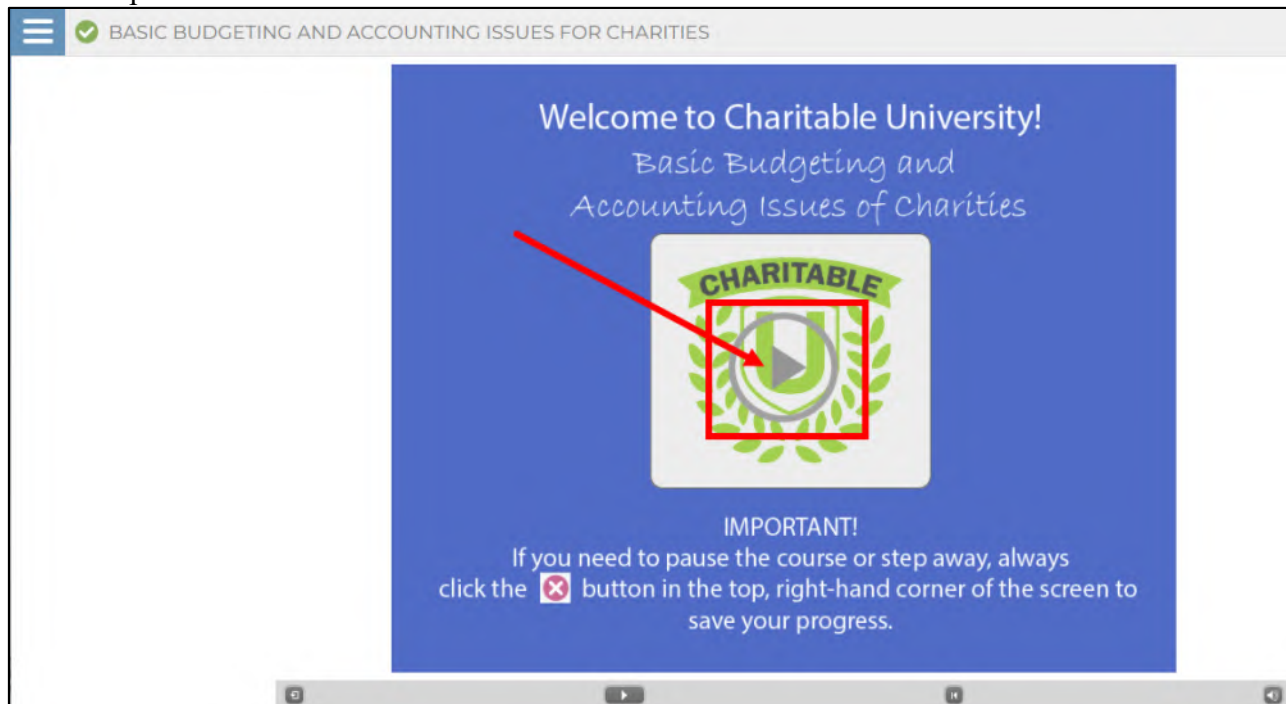
1. Go to My Dashboard. Find the course you wish to replay.
Click on the blue circle containing the letter “i” to see the course details.



2. Click on the green circle with the arrow to launch the course.

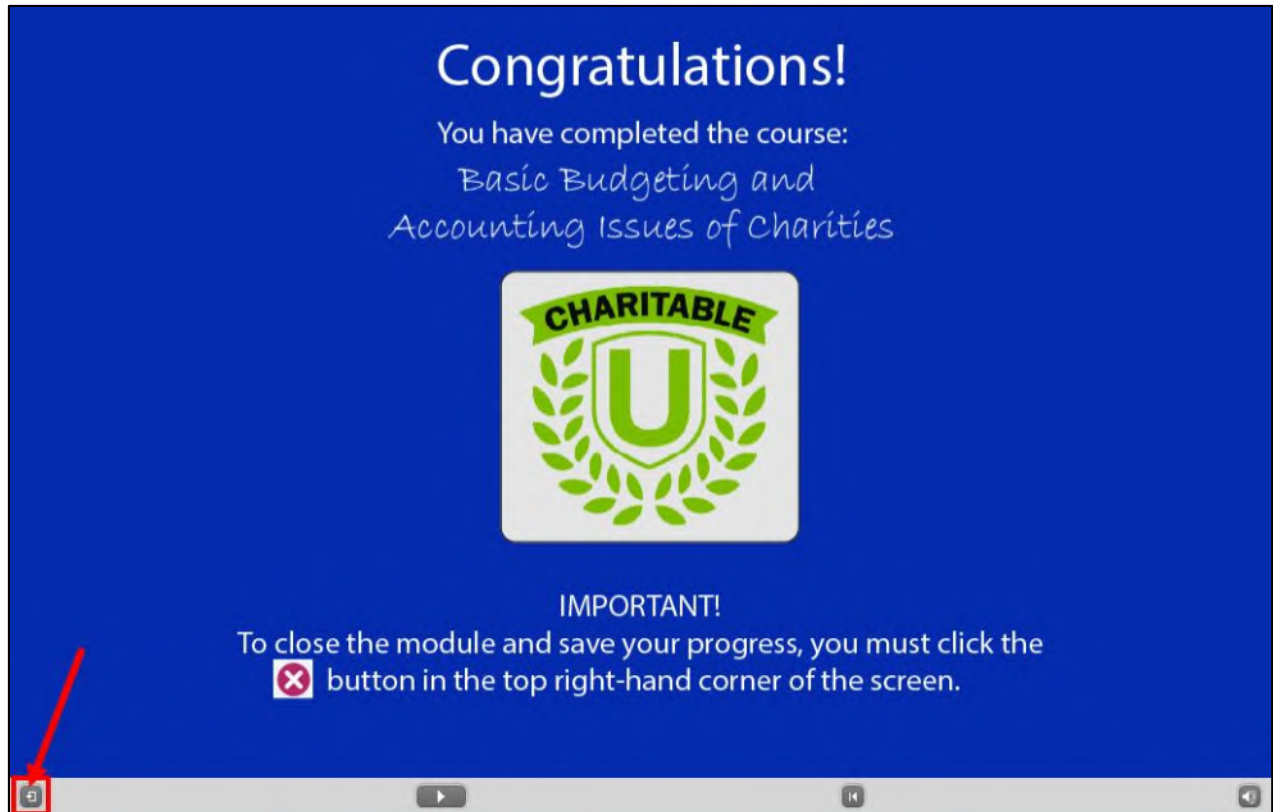


3. Click the “Play” button in the middle of the screen. This will take you to the Congratulations! You have completed the course” screen.



4. Click on the “Rewind” button on the lower left corner of the screen.
The video will start at the beginning.

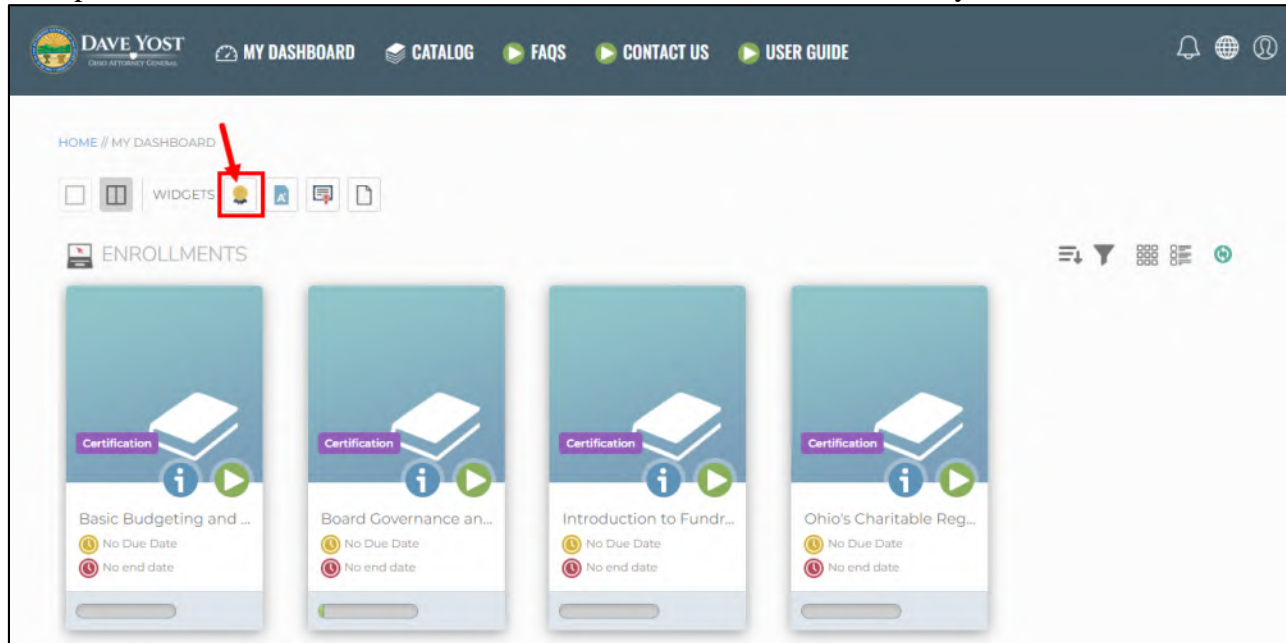
Note: You will not be able to “fast forward” the video.



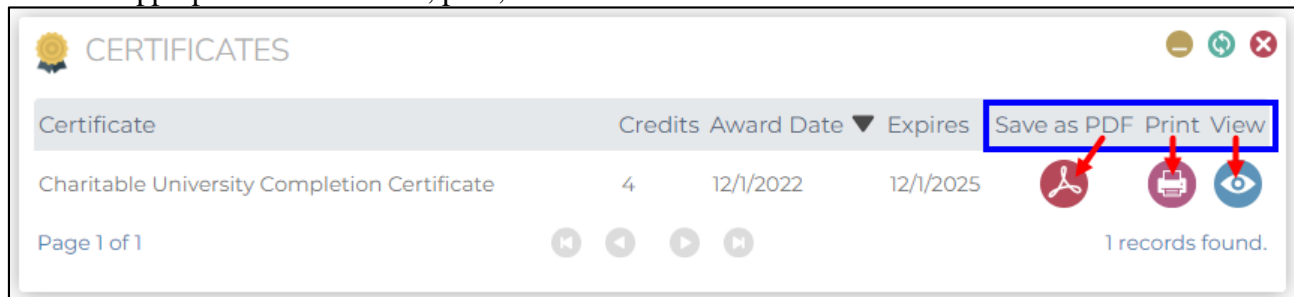
SECTION 5: CERTIFICATES

VIEW / PRINT A CERTIFICATE

To save, print, and/or view a certificate, click on the Certificates icon under My Dashboard.

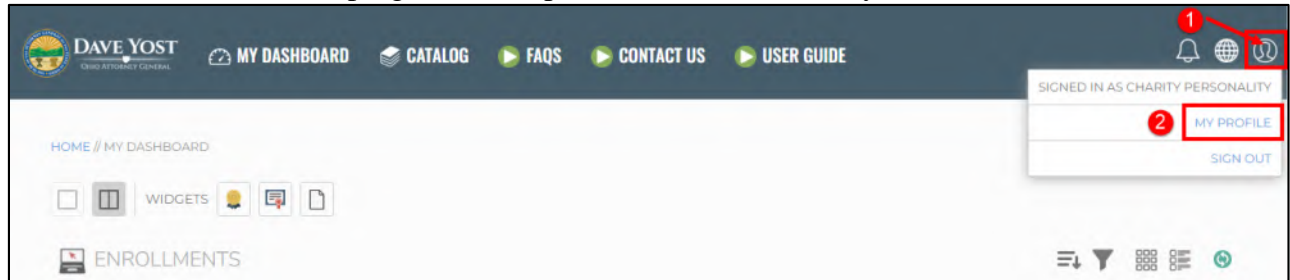


Click on the appropriate icon to save, print, or view the certificate.



CERTIFICATE IS SHOWING THE WRONG NAME

Click on the face icon in the top right of the top menu, then click the My Profile link.



Ensure that your account information accurately reflects the first and last name you want on your certificate. After you change any information, be sure to click “Save Changes” at the bottom of the profile page. If you make changes, it might take a few minutes for them to take effect and see the results on your certificates.

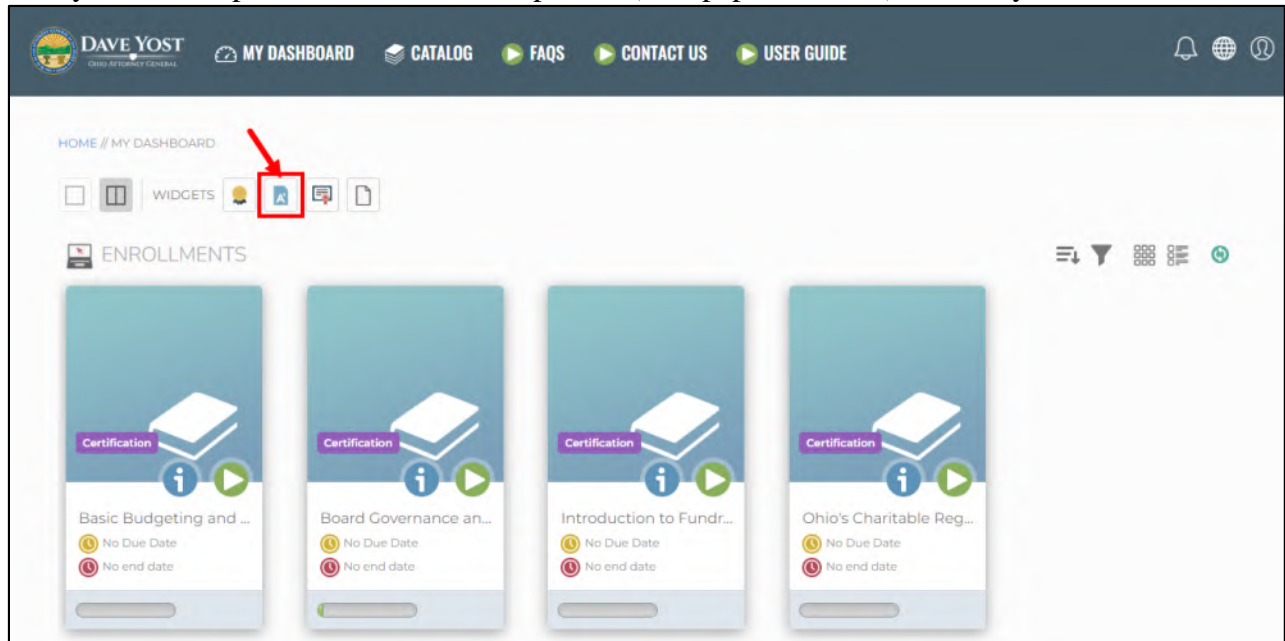
If your account information is correct but you still experience the problem on your certificate, email CharitableLaw@OhioAGO.gov.

A screenshot of the user profile page. At the top, there is a header with a user icon and the text "PERSONALITY, CHARITY". Below this is a blue banner with the text "Modify your information using the form below." Underneath the banner are two tabs: "Properties" and "Files". The "Properties" tab is selected. Below the tabs is a section titled "ACCOUNT". This section contains several form fields. The "First Name" field is labeled "First Name: *" and contains the text "Charity". The "Middle Name" field is labeled "Middle Name:" and is empty. The "Last Name" field is labeled "Last Name: *" and contains the text "Personality". The "Email" field is labeled "Email: *" and is empty. Below the email field is a small text line: "The email address entered here will be the email to which all course communications will be sent". The "First Name" and "Last Name" fields are highlighted with red boxes.

SECTION 6: TRANSCRIPTS

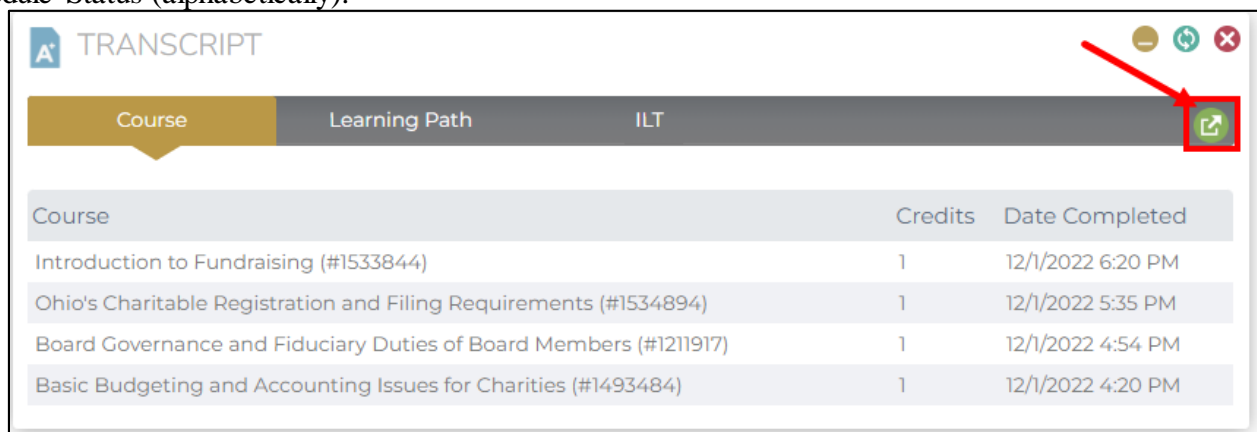
VIEW / PRINT A TRANSCRIPT

To view your transcript, click on the Transcript icon (blue paper with A+) under My Dashboard.



Once the Transcripts widget appears, you may sort your transcript based on Course (alphabetically), Credits (numerically), and/or Date Completed (chronologically). Please note that the widget will display only a limited portion of your transcript.

To view your full transcript, click on the green Open icon in the top right corner of the Transcript widget. This will open a pop-up window where you can use the scroll bar at right to view your entire transcript. Here, you may sort your transcript based on Course (alphabetically), Credits (numerically) and/or Date Completed (chronologically) as well as by Course Status (alphabetically), Module (alphabetically), and Module Status (alphabetically).



To print your transcript, click the purple Print icon in the top right corner of the pop-up window. You may choose to print the current tab or the entire transcript. You can then click the red X to close the pop-up window and return to your My Dashboard page.

TRANSCRIPT

Course

Learning Path

ILT

1

2

3

PRINT TAB

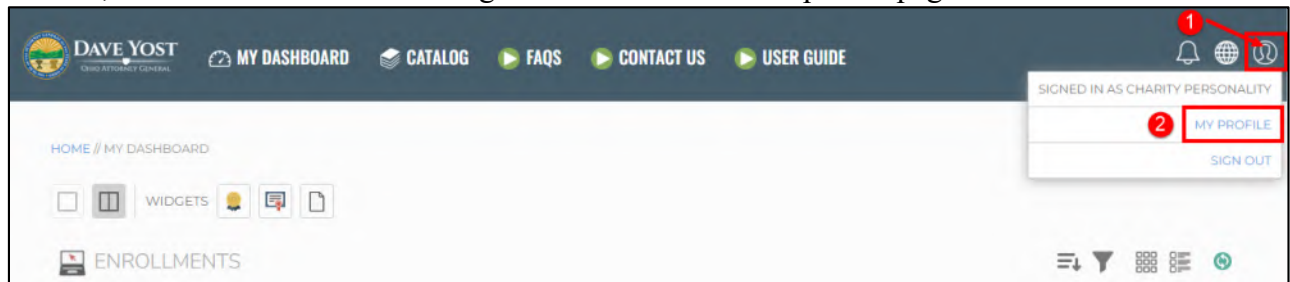
PRINT ALL

Course	Credits	Course Status	Date Completed	Module	
Introduction to Fundraising (#1533844)	1	Completed	12/1/2022 6:20 PM	Course Survey - Introduction to Fundraising	Completed
Introduction to Fundraising (#1533844)	1	Completed	12/1/2022 6:20 PM	Introduction to Fundraising	Completed
Ohio's Charitable Registration and Filing Requirements (#1534894)	1	Completed	12/1/2022 5:35 PM	Course Survey - Ohio's Charitable Registration and Filing Requirements	Completed
Ohio's Charitable Registration and Filing Requirements (#1534894)	1	Completed	12/1/2022 5:35 PM	Ohio's Charitable Registration and Filing Requirements	Completed
Board Governance and Fiduciary Duties of Board Members (#1211917)	1	Completed	12/1/2022 4:54 PM	Board Governance and Fiduciary Duties of Board Members	Completed
Board Governance and Fiduciary Duties of Board Members	1	Completed	12/1/2022 4:54 PM	Course Survey - Board Governance and Fiduciary Duties	Completed

SECTION 7: USER ACCOUNT INFORMATION

VIEW / EDIT YOUR USER ACCOUNT

Click on the face icon in the top right of the top menu, then click the My Profile link. After you change any information, be sure to click “Save Changes” at the bottom of the profile page.



NOT RECEIVING AUTOMATIC EMAIL NOTIFICATIONS

Check your junk or spam folder to ensure the messages, such as confirmations of course enrollments and completions, were not routed there. If so, mark no-reply@inquisiqlms.com as safe senders. If you continue to experience issues with not receiving these notifications, email CharitableLaw@OhioAGO.gov.

SECTION 8: CHARITABLE UNIVERSITY COMPLETION CERTIFICATE

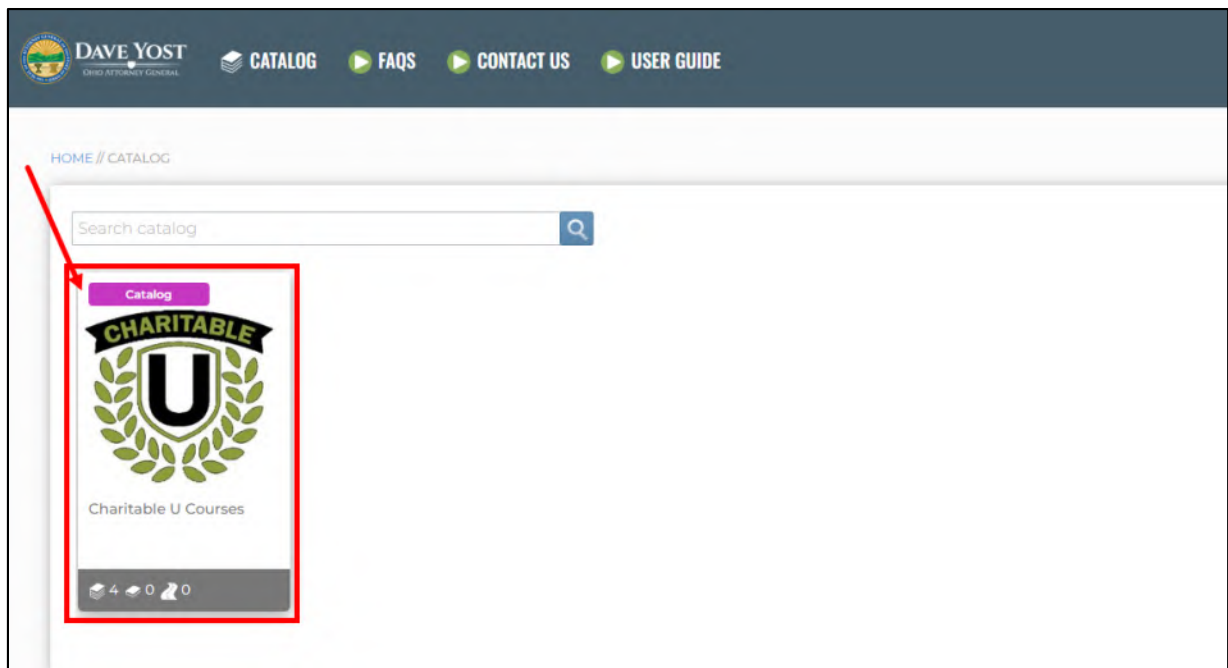
CHARITABLE UNIVERSITY COMPLETION CERTIFICATE REQUIREMENTS

In order to successfully complete the training requirements of Charitable University, you will need to complete at least one training course in each of the four catalogs:

- Board Governance,
- Financial Operations,
- Fundraising,
- And Governmental Filings and Recordkeeping

ENROLL INTO THE REQUIRED CHARITABLE UNIVERSITY COURSES

1. Click on the Charitable University "Charitable U Courses" catalog.



2. Click on one of the following course catalogs to display the list of courses available for the selected course catalog.

- Board Governance
- Financial Operations
- Fundraising
- Governmental Filings and Recordkeeping

CHARITABLE U COURSES
(Closed courses will not be included.)

Overview

Description

In order to successfully complete the training requirements of Charitable University, you will need to complete at least one training course in each of the four catalogs:

- Board Governance
- Financial Operations
- Fundraising
- Governmental Filings and Recordkeeping

After completing these training modules, you will receive a completion certificate that will remain valid for three years. Thank you in advance for your efforts to learn about the various legal obligations and best practices that board members and leaders should know about in running these important organizations.

Catalogs

- Board Governance**
Board Governance courses.
- Financial Operations**
Financial Operations courses.
- Fundraising**
Fundraising courses.
- Governmental Filings and Recordkeeping**
Filings and Records Requirements courses.

3. Click on the course that you would like to enroll into.

FUNDRAISING
(Closed courses will not be included.)

Overview

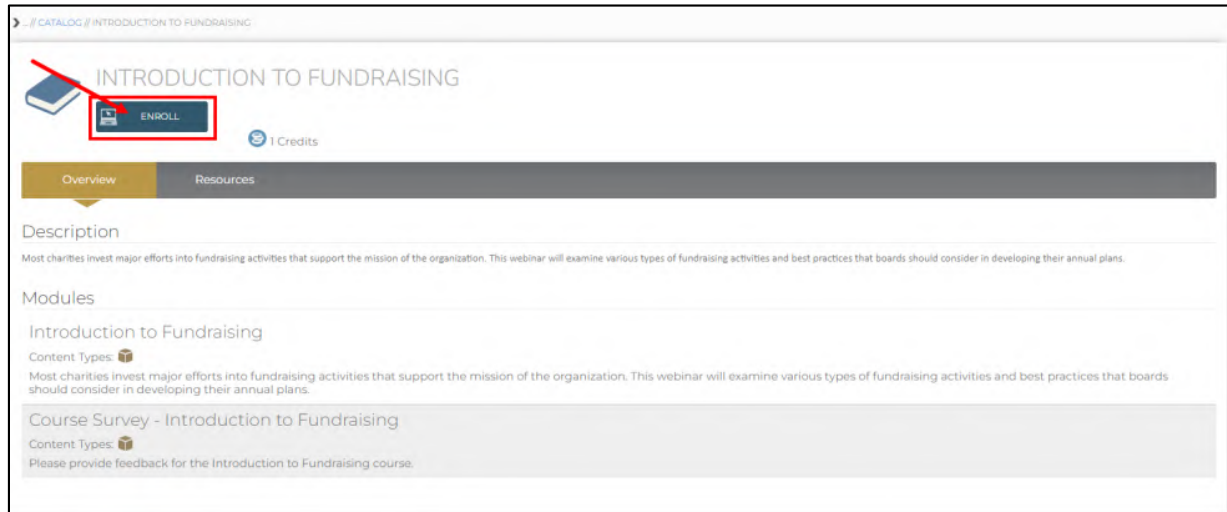
Description

Fundraising courses.

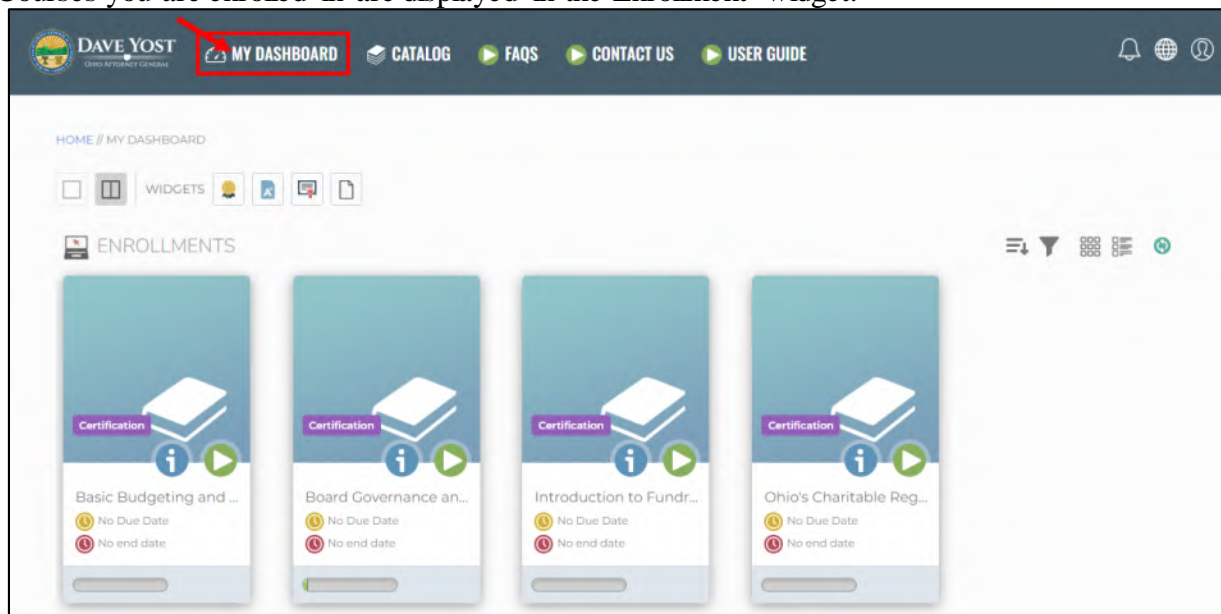
Courses

- An Overview of Bingo Licensing**
Many charities raise significant funds to support their charitable mission through the use of traditional bingo, electronic instant bingo, as well as the sale of instant bingo tickets. In Ohio, bingo licenses are required for these activities. This webinar will provide a basic overview of bingo and its requirements, as well as the licensing requirements.
- Introduction to Fundraising**
Most charities invest major efforts into fundraising activities that support the mission of the organization. This webinar will examine various types of fundraising activities and best practices that boards should consider in developing their annual plans.

4. Click on the “Enroll” button.



5. Repeat steps 1-4 until you have enrolled in one course from each of the course catalogs listed in Step #2.
6. Go to My Dashboard (click “My Dashboard” in the main menu).
Courses you are enrolled in are displayed in the Enrollment widget.

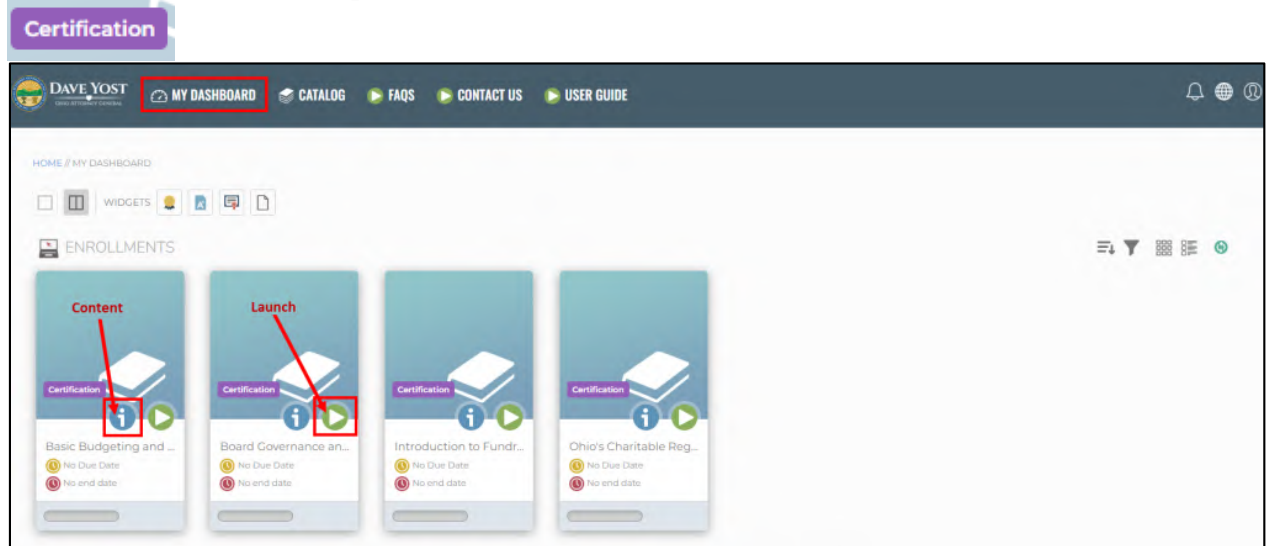


CHECK YOUR PROGRESS

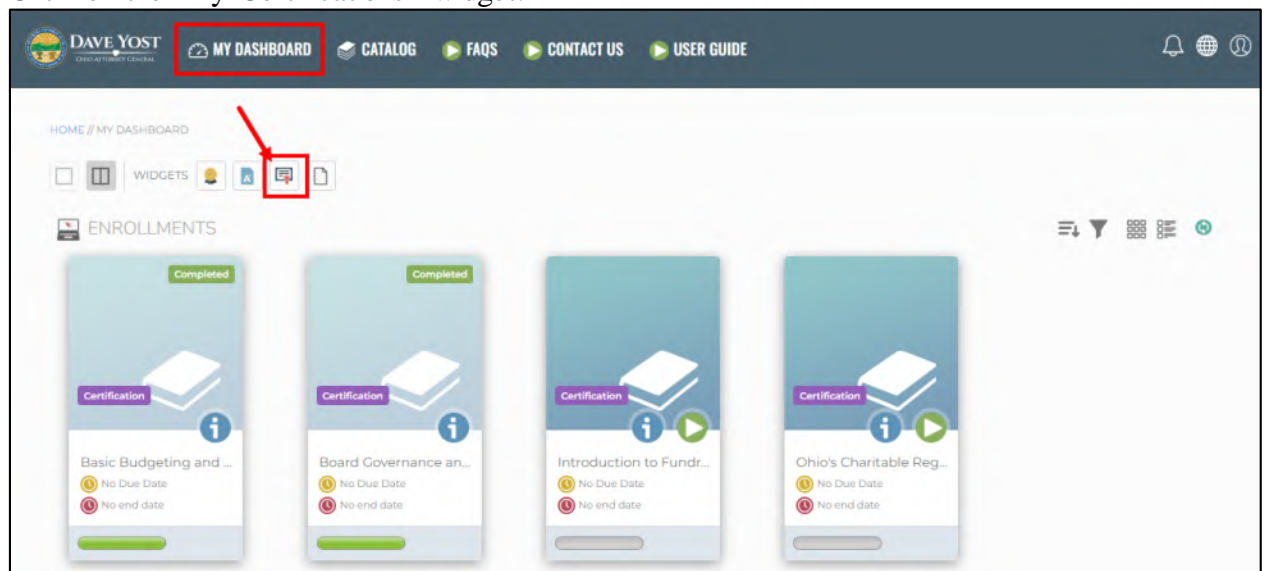
1. Go to My Dashboard.

All courses you are enrolled in and/or completed are displayed.

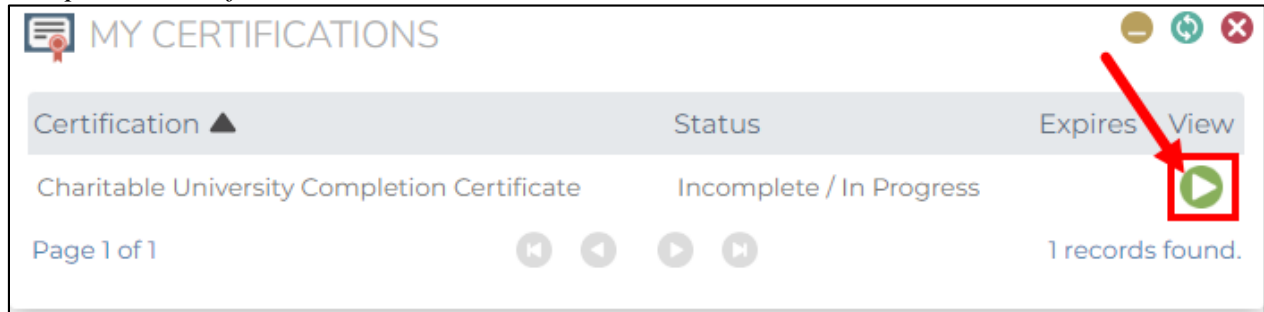
Charitable University Completion Certificate courses are identified by a "Certification" icon



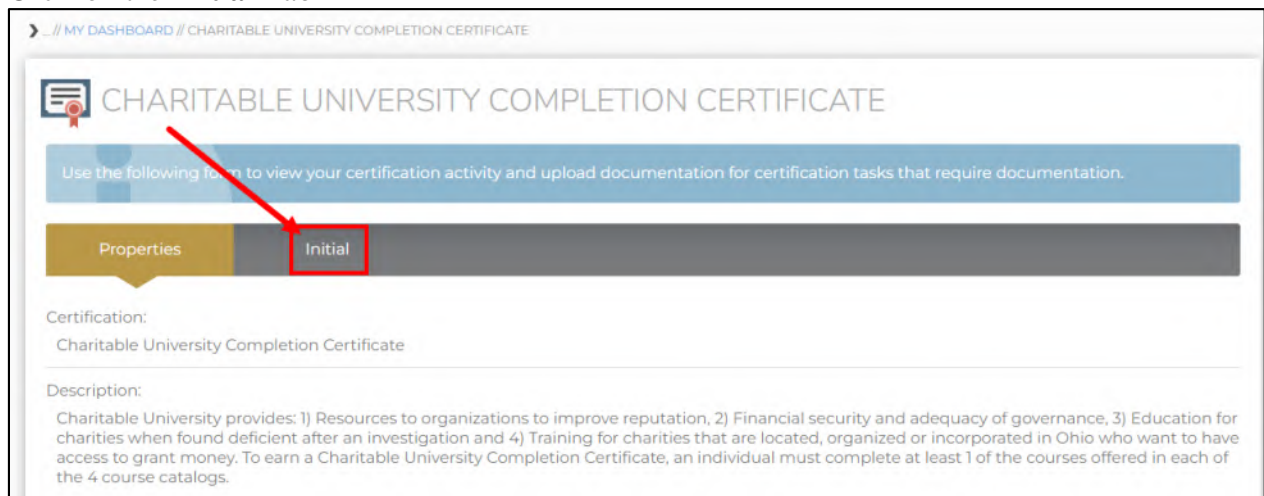
2. Play and complete 1 (or 2) of the Completion Certificate courses you are enrolled in.
Make sure you click the red X in the top right corner of the course window to save your progress as complete. You should see a "Saving data" message before the system returns you to your My Dashboard page.
3. After completing the course, go to "My Dashboard".
4. Click on the "My Certifications" widget.



5. Click on the View icon (green circle with white right arrow) for the *Charitable University Completion Certificate*.



6. Click on the **Initial** Tab



7. The Initial Tab displays the requirements for the Charitable University Completion Certificate. (see screen shot on next page)
- If the "Initial Requirements" field has a green check mark beside it => you have completed the Charitable University Completion Certificate!
 - The Charitable University Completion Certificate has four (4) segments – one for each of the "Charitable U Courses" course catalogs.
 - If the segment is greyed out => you have not completed the segment.
 - If the segment has a green check mark beside it => you have completed the segment.
 - Each segment lists one or more courses.
 - If the course is greyed out => the course is not completed.
 - If the course has a green check mark beside it => you have completed the course.



CHARITABLE UNIVERSITY COMPLETION CERTIFICATE

Use the following form to view your certification activity and upload documentation for certification tasks that require documentation.

Properties

Initial

✓ Initial Requirements

✓ Unit: Charitable University Completion Certificate

To earn a Charitable University Completion certificate, an individual must complete at least 1 of the courses offered in each of the 4 catalogs: 1) Board Governance, 2) Financial Operations, 3) Fundraising, and 4) Governmental Filings and Recordkeeping.

✓ Segment: Financial Operations Segment

✓ Requirement: Accounting and Internal Controls Courses

Complete any of these course(s):

- ✓ Basic Budgeting and Accounting Issues for Charities

AND

✓ Segment: Board Governance Segment

✓ Requirement: Board Governance Courses

Complete any of these course(s):

- ✓ Board Governance and Fiduciary Duties of Board Members

AND

✓ Segment: Fundraising Segment

✓ Requirement: Fundraising Courses

Complete any of these course(s):

- ✓ An Overview of Bingo Licensing
- ✓ Introduction to Fundraising

AND

✓ Segment: Governmental Filings and Recordkeeping Segment

✓ Requirement: Governmental Filings and Recordkeeping Courses

Complete any of these course(s):

- ✓ Ohio's Charitable Registration and Filing Requirements

COMPLETE ALL THE REQUIRED COURSES

1. Go to My Dashboard.

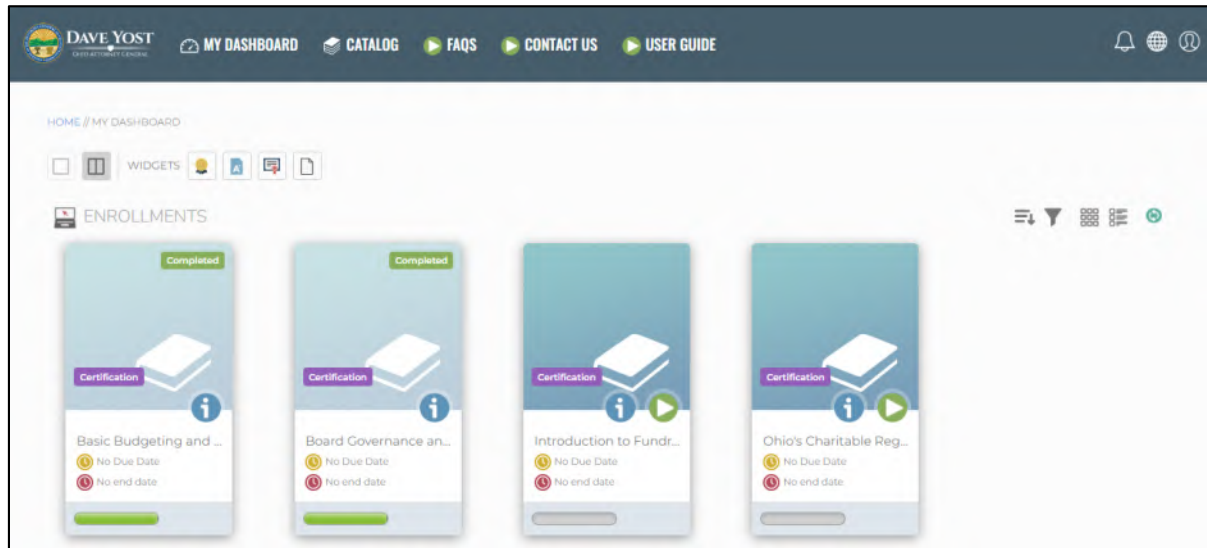
All courses you are enrolled in and/or completed are displayed.

Charitable University Completion Certificate courses are identified by a “Certification” icon

Certification

Completed courses are identified by a “Completed” icon

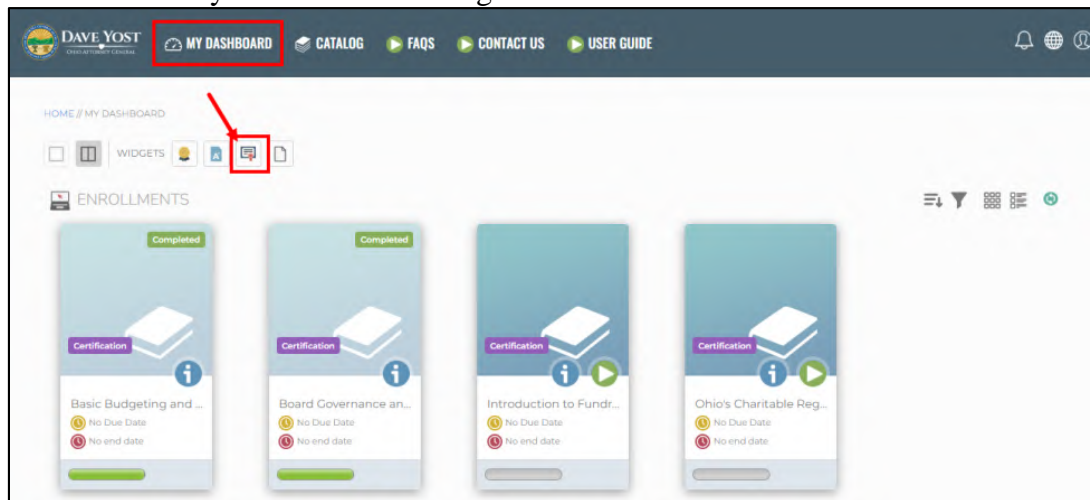
Completed



2. Play and complete each of the 4 courses needed to complete the Charitable University Completion Certificate.

Make sure you click the red X in the top right corner of the course window for the system to save that you have completed the course. You should see a "Saving data" message before the system returns you to the course details page.

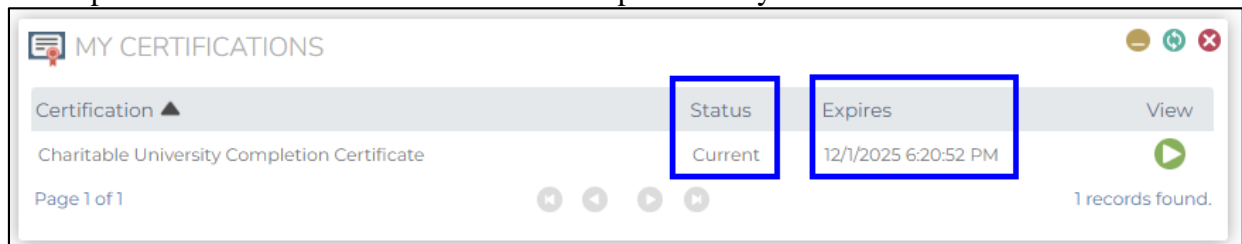
3. After completing the courses, go to "My Dashboard".
4. Click on the "My Certifications" widget.



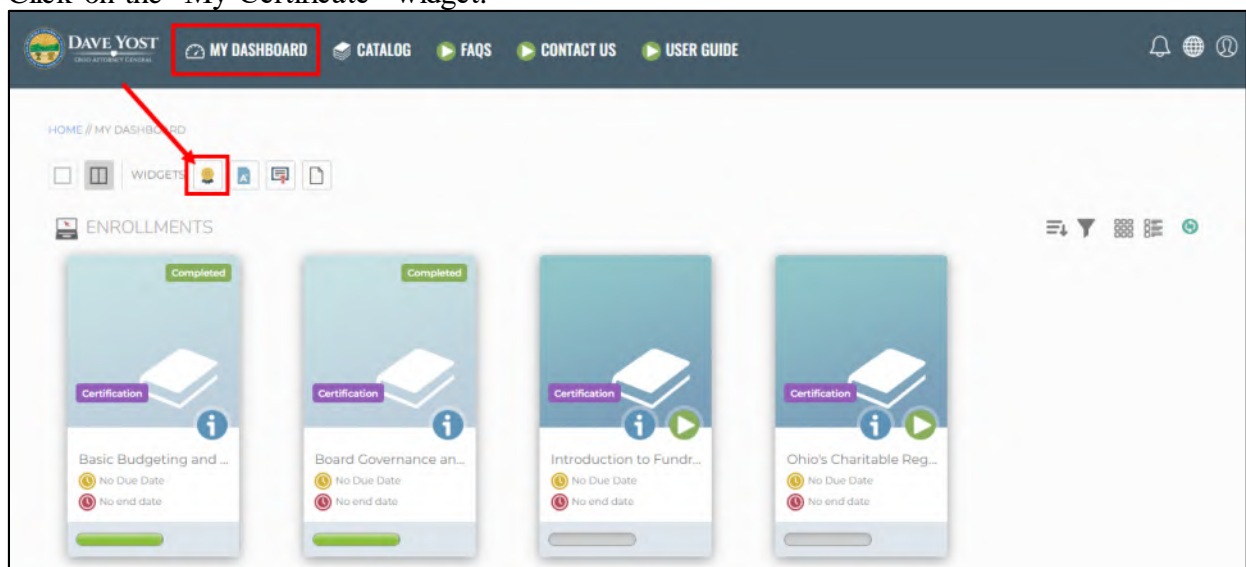
The "Completion Certificate" is listed with the following information:

Status = Current;

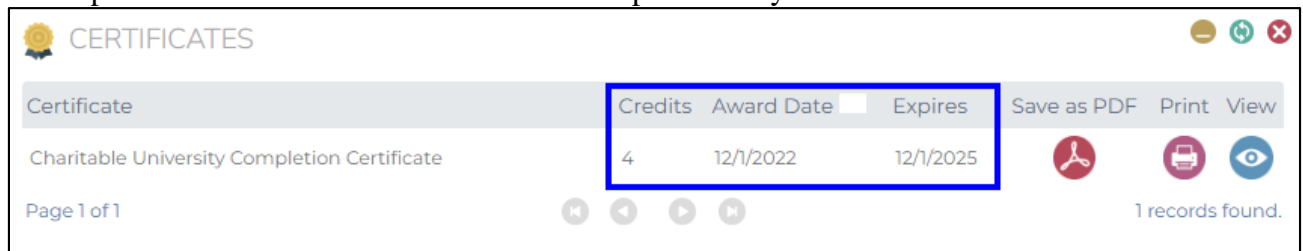
Expires= date when the 4th course was completed + 3 years.



5. Click on the "My Certificate" widget.



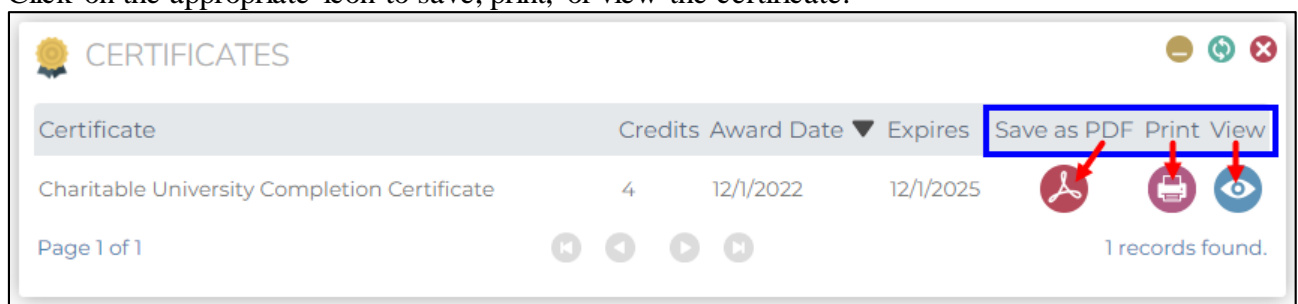
The Charitable University Completion Certificate is listed with the following information:
Credits = 4
Award Date = Date you completed the 4th course
Expires = Date when the 4th course was completed + 3 years



The screenshot shows a web interface titled "CERTIFICATES" with a table of certificates. The table has columns for "Certificate", "Credits", "Award Date", and "Expires". The first row contains the text "Charitable University Completion Certificate", "4", "12/1/2022", and "12/1/2025". To the right of the table are buttons for "Save as PDF", "Print", and "View". The interface also includes a "Page 1 of 1" indicator, navigation arrows, and a "1 records found." status message.

Certificate	Credits	Award Date	Expires
Charitable University Completion Certificate	4	12/1/2022	12/1/2025

6. Click on the appropriate icon to save, print, or view the certificate.



This screenshot is similar to the one above but includes red arrows pointing to the "Save as PDF", "Print", and "View" buttons, indicating the next step in the process. The table and other interface elements remain the same.

Certificate	Credits	Award Date ▼	Expires
Charitable University Completion Certificate	4	12/1/2022	12/1/2025