

ShareFile – New Audit Request Platform

New Audit Request Tool

ShareFile will be replacing Engagement Organizer

Easier to view and upload requests

More user friendly and runs faster

Ability to limit access for users

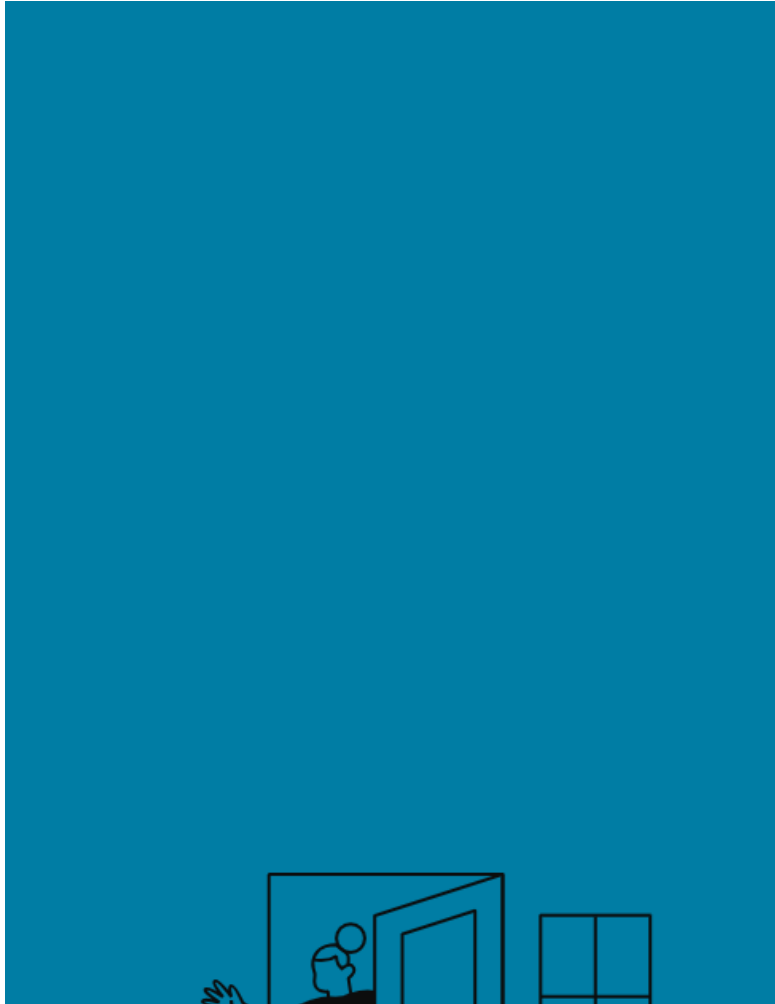
No file size limits

New feature updates

How to Login

- Receive an email to set up your account
 - Create password
- Make sure you activate your account BEFORE clicking on any email links for shared documents
- If you do not receive an activation email, reach out to your audit contact to have them re-send

https://hmcpas.sharefile.com



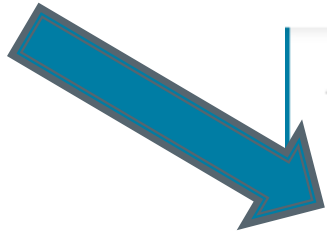
Welcome!

Enter your details to sign in to ShareFile

* Email

Remember me

Dashboard / Projects




The screenshot shows a navigation sidebar on the left and a main content area on the right. The sidebar contains the following items:


- Dashboard (with a house icon)
- Projects (with a square and triangle icon, highlighted by a blue arrow)
- Workflows (with a puzzle piece icon and a right-pointing chevron)
- Inbox (with an envelope icon and a right-pointing chevron)
- Personal Settings (with a gear icon)


The main content area displays a user profile header with a grey circular placeholder containing "CC", the text "Hello Client", and a link that says "Add profile picture".

Projects/Client FY25




 Dashboard

 Projects

 Workflows >


 Inbox >

 Personal Settings

Projects

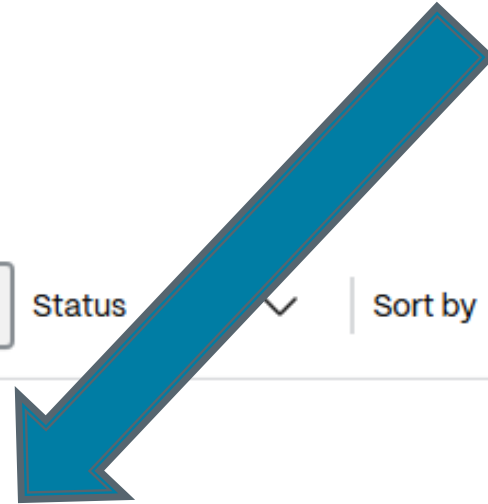
 

Status 

Sort by **Date created (Newest)** 

Sample Audit FY25

[Open](#)



Client FY25 / Document Requests

The screenshot displays the HeinfeldMeech web application interface. At the top left is the HeinfeldMeech logo. To its right is a search bar with a magnifying glass icon and the text 'Search'. Below the logo is a vertical navigation menu with the following items: Dashboard, Projects (highlighted with a blue bar), Workflows, Inbox, and Personal Settings. The main content area shows the breadcrumb 'Projects > Sample Audit FY25' and the title 'Sample Audit FY25' with an 'Open' button and a three-dot menu. Below the title is a horizontal navigation bar with tabs: Home, Tasks, Document requests (underlined in blue), Information requests, Files, Comments, and a plus sign. The main content area contains three document request cards, each with an 'Open' button and a due date:

- In Advance**: Open Due 06/06/2025
- Selection Backup**: Open Due 06/11/2025
- Student Attendance**: Open Due 06/12/2025

A large blue arrow with a dark outline points from the bottom right towards the 'Open' button of the 'In Advance' document request card.

Select item and see “Details” for description of items needed

Items Attachments

Items (39)

Assign

Edit

Download

People All

All

Details

Comments

Adv-15 Student activities transaction report

Due 06/06/2025

CC

Open

0

0

Adv-16 Journal entry report

Due 06/06/2025

CC

Open

0

0

Adv-17 Data requests (4 files)

Due 06/06/2025

CC

Open

1

0

Adv-18 Credit card and/or procurement card listing

Due 06/06/2025

CC

Open

0

0

Adv-19 Monthly credit/procurement card statements

Due 06/06/2025

CC

Open

0

0

Adv-20 Vendor total listing – federal grants

Due 06/06/2025

CC

Open

0

0

Adv-21 Vendor total listing

Due 06/06/2025

CC

Open

0

0

Adv-17 Data requests (4 files)

Open

Assigned to Client Clients

Due date 06/06/2025

Last updated 06/05/2025

Description

Provide the following reports: (See the attached instructions for how to run the reports):

1. PO Details
2. Employee and Vendor Data – Part 1
3. Employee and Vendor Data – Part 2
4. Employee and Vendor Data – Part 3

Add files

Add files

The screenshot displays the HeinfeldMeech software interface. At the top left is the logo and name 'HeinfeldMeech'. A search bar is located at the top center. On the right side of the top bar are navigation links for 'Help', 'Apps', and 'Log Out'. A left-hand navigation menu includes 'Dashboard', 'Projects', 'Workflows', 'Inbox', and 'Personal Settings'. The main content area is titled 'Sample Audit FY25 > In Advance'. It features a status summary with 'Open 39' items, 'In review' items, and 'Approved' items. A progress bar shows '0 of 39 items approved' at 0%. Below this is a list of items under the 'Items' tab, with 'Adv-1 Contact list' selected. The right-hand panel shows details for 'Adv-1 Contact list', including 'Assigned to Client Clients', 'Due date 06/06/2025', and 'Last updated 06/05/2025'. A description box contains the text 'Complete the attached contact list.' and an 'Add files' button. At the bottom of the right panel, there is a section for 'Select items to see actions' with a table listing a file named 'Request - Contact List.docx'.

HeinfeldMeech

Search

Help Apps Log Out

Dashboard Projects Workflows Inbox Personal Settings

Sample Audit FY25 > In Advance

In Advance Open Due 06/06/2025

Open 39 In review Approved

0 of 39 items approved 0%

Items Attachments

Items (39) Assign Edit People All Status All

Item	Due Date	CC	Open	Attachments	Comments	More
<input checked="" type="checkbox"/> Adv-1 Contact list	Due 06/06/2025	CC	Open	1	0	:
<input type="checkbox"/> Adv-2 Chart of accounts	Due 06/06/2025	CC	Open	0	0	:
<input type="checkbox"/> Adv-3 Revenue budget	Due 06/06/2025	CC	Open	0	0	:
<input type="checkbox"/> Adv-4 FY25 audit file	Due 06/06/2025	CC	Open	1	0	:
<input type="checkbox"/> Adv-5 FY25 detailed general ledger	Due 06/06/2025	CC	Open	1	0	:
<input type="checkbox"/> Adv-6 FY26 detailed general ledger	Due 06/06/2025	CC	Open	1	0	:
<input type="checkbox"/> Adv-7 Payroll journal reports	Due 06/06/2025	CC	Open	0	0	:

Adv-1 Contact list

Open

Assigned to **Client Clients**

Due date **06/06/2025**

Last updated **06/05/2025**

Description

Complete the attached contact list.

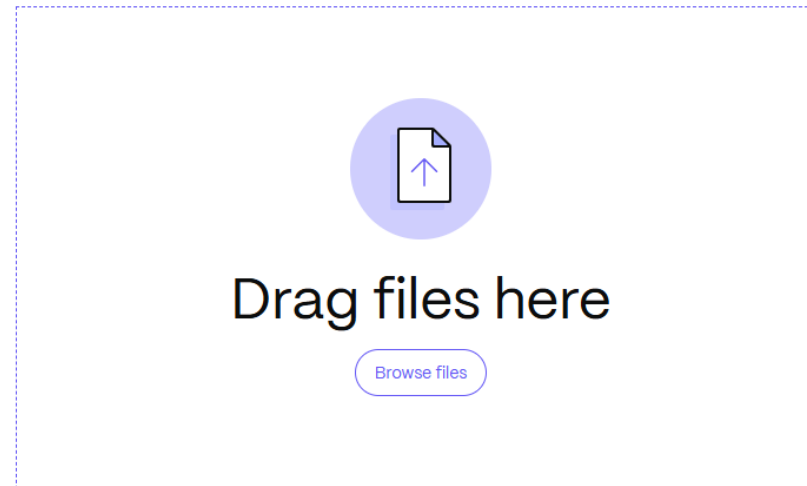
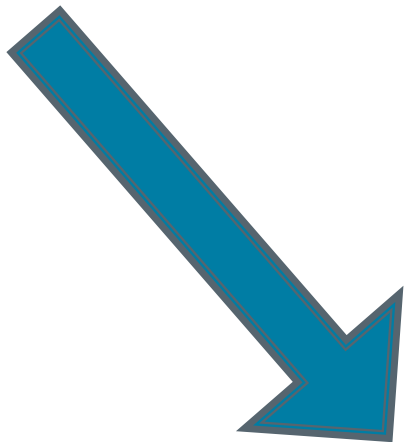
Add files

Select items to see actions

<input type="checkbox"/>	Name
<input type="checkbox"/>	Request - Contact List.docx

Browse for files or drag and upload

Upload from your computer



Upload

Cancel

Or just drag items here

Items Attachments

Items (39)

Assign Edit People All Status All

<input type="checkbox"/> Adv-33 Student Attendance – High school students – gr...	Due 06/06/2025	CC	Open	0	0	:
<input type="checkbox"/> Adv-34 Stewardship listing	Due 06/06/2025	CC	Open	0	0	:
<input checked="" type="checkbox"/> Adv-35 Capital Assets listing	Due 06/06/2025	CC	Open	0	0	:
<input type="checkbox"/> Adv-36 Disposed property listing	Due 06/06/2025	CC	Open	0	0	:
<input type="checkbox"/> Adv-37 Income applications listing	Due 06/06/2025	CC	Open	0	0	:
<input type="checkbox"/> Adv-38 Compensated leave policy	Due 06/06/2025	CC	Open	0	0	:
<input type="checkbox"/> Adv-39 Compensated leave plans	Due 06/06/2025	CC	Open	0	0	:

Details Comments

Provide the Capital Asset List (all assets with an initial cost of \$5,000 or greater) for SITE 2.

There aren't any attachments yet

Drag files here

Upload files to share them with others in the project.

+ Copy

Add files

Submit without attachments Edit item

Auditor Uploaded Template/Instructions

Items Attachments

Items (39)

Assign Edit Download People All Status All

<input type="checkbox"/> Adv-1 Contact list	Due 06/06/2025	CC	Open	1	0	
<input type="checkbox"/> Adv-2 Chart of accounts	Due 06/06/2025	CC	Open	0	0	
<input type="checkbox"/> Adv-3 Revenue budget	Due 06/06/2025	CC	Open	0	0	
<input checked="" type="checkbox"/> Adv-4 FY25 audit file	Due 06/06/2025	CC	Open	1	0	
<input type="checkbox"/> Adv-5 FY25 detailed general ledger	Due 06/06/2025	CC	Open	1	0	
<input type="checkbox"/> Adv-6 FY26 detailed general ledger	Due 06/06/2025	CC	Open	1	0	
<input type="checkbox"/> Adv-7 Payroll journal reports	Due 06/06/2025	CC	Open	0	0	

Details Comments

Last updated 06/05/2025

Description

Provide us with a copy of the year-end general ledger file.

Add files

1 selected Download

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Visions Instructions - Sending Audit File.docx

< 1 > 10 / page

Submit for review

Edit item

Leave "Comments"

Sample Audit FY25 > In Advance

In Advance

Open

Due 06/06/2025

...

Open

39

In review

Approved

0 of 39 items approved

0%

Items

Attachments

Items (39)

Assign

Edit

People

All

Status

All

Adv-26 Student Attendance - Sign in/out logs (Novemb...

Due 06/06/2025

CC

Open

0

0

Adv-27 Student Attendance - High school students - en...

Due 06/06/2025

CC

Open

0

0

Adv-28 Student Attendance - AOI student listing

Due 06/06/2025

CC

Open

0

1

Adv-29 Student Attendance - CTED satellite student listi...

Due 06/06/2025

CC

Open

0

0

Adv-30 Student Attendance - CTED central student listi...

Due 06/06/2025

CC

Open

0

0

Details

Comments

Write a comment

Comment

CC

Client Clients 2 minutes ago

N/A - The District does not have AOI students.

Submit for Review

Sample Audit FY25 > Expenditures

Expenditures

Open

Due 06/27/2025

CC KC

Open
2

In review
2

Approved
2

2 of 6 items approved

33%

Items Attachments

Items (6)

Assign

Edit

Download

People All

Status All

Exp-1 Voucher cover sheets

Due 06/27/2025

CC

In review

2

0

Exp-2 Voucher cover sheets

Due 06/27/2025

CC

Open

2

0

Exp-3 Listing of liabilities

Due 06/27/2025

CC

In review

1

0

Exp-4 Prepaid expenses

Due 06/27/2025

CC

Open

0

1

Exp-5 Inventory listing

Due 06/27/2025

CC

Approved

1

0

Exp-6 Inventory listing

Due 06/27/2025

CC

Approved

1

0

Details

Comments

Description

Copies of fiscal year 2025-2026 voucher cover sheets for all expenditure vouchers processed during the period 7/1/25 to 8/31/25.

Add files

Select items to see a

<input type="checkbox"/>	Name
<input type="checkbox"/>	AU 2025 cover sheets.pdf
<input type="checkbox"/>	AU 2025 cover sheets.pdf

< 1 >

10 / page

Submit for review

Edit item

Status Labels

Open

Not yet ready for auditor review

In review

Files are uploaded and ready for auditor review

Approved

Auditor has downloaded this item and will review

Overall Status by Section

Projects > Sample Audit FY25

Sample Audit FY25 [Open](#) ...



Home Tasks Document requests Information requests Files

In Advance Closed				
Selection Backup Open Due 06/11/2025	Items approved	3/30		
		15 items in review		
Information Technology Open Due 06/20/2025	Items approved	0/10		
		4 items in review		

Forgot to upload something?

Sample Audit FY25 > Selection Backup

Selection Backup

Open

Due 06/11/2025

CC KC

Open
25

In review
1

Approved
4

4 of 30 items approved

13%

Items Attachments

Items (30)

Edit

Download

People All

Status All

Select-1 Disbursements

Due 06/11/2025

CC

Approved

40

0

Select-2 Disbursements - Travel

Due 06/11/2025

CC

Approved

5

0

Select-3 Disbursements - CTED

Due 06/11/2025

CC

Approved

5

0

Select-4 Disbursements - Tax Credit

Due 06/11/2025

CC

Approved

5

0

Select-5 Disbursements - Bond Building

Due 06/11/2025

CC

In review

5

0

Select-6 Disbursements - Revolving

Due 06/11/2025

CC

Open

0

0

Select-7 Journal entries

Due 06/11/2025

CC

Open

0

0



Details Comments

Add files

Select items to see actions

- | <input type="checkbox"/> | Name |
|--------------------------|--------------|
| <input type="checkbox"/> | Item (1).pdf |
| <input type="checkbox"/> | Item (2).pdf |
| <input type="checkbox"/> | Item (3).pdf |
| <input type="checkbox"/> | Item (5).pdf |
| <input type="checkbox"/> | Item (4).pdf |

< 1 >

10 / page

Edit item

New Upload – Changed Status

Sample Audit FY25 > Selection Backup

Selection Backup

Open

Due 06/11/2025

CC KC

Open
25

In review
2

Approved
3

3 of 30 items approved 10%

Items Attachments

Items (30)		Assign	Edit	Download	People	All	Status	All
<input type="checkbox"/>	Select-1 Disbursements	Due 06/11/2025	CC	Approved	40	0		
<input checked="" type="checkbox"/>	Select-2 Disbursements – Travel	Due 06/11/2025	CC	In review	6	0		
<input type="checkbox"/>	Select-3 Disbursements – CTED	Due 06/11/2025	CC	Approved	5	0		
<input type="checkbox"/>	Select-4 Disbursements – Tax Credit	Due 06/11/2025	CC	Approved	5	0		
<input type="checkbox"/>	Select-5 Disbursements – Bond Building	Due 06/11/2025	CC	In review	5	0		
<input type="checkbox"/>	Select-6 Disbursements – Revolving	Due 06/11/2025	CC	Open	0	0		
<input type="checkbox"/>	Select-7 Journal entries	Due 06/11/2025	CC	Open	0	0		

Details Comments

Description
Travel Reimbursements

Add files

Select items to see actions

- Name
- Item (6).pdf
- Item (1).pdf
- Item (2).pdf
- Item (3).pdf
- Item (5).pdf
- Item (4).pdf

Uploaded the Wrong Item?

Sample Audit FY25 > Selection Backup

Selection Backup

Open

Due 06/11/2025

Open
25

In review
2

Approved
3

3 of 30 items approved

10%

Items Attachments

Items (30)

Edit

Download

People

All

Status

All

Details

Comments

Select-1 Disbursements

Due 06/11/2025

CC

Approved

40

0

Select-2 Disbursements - Travel

Due 06/11/2025

CC

In review

6

0

Select-3 Disbursements - CTED

Due 06/11/2025

CC

Approved

5

0

Select-4 Disbursements - Tax Credit

Due 06/11/2025

CC

Approved

5

0

Select-5 Disbursements - Bond Building

Due 06/11/2025

CC

In review

5

0

Select-6 Disbursements - Revolving

Due 06/11/2025

CC

Open

0

0

Select-7 Journal entries

Due 06/11/2025

CC

Open

0

0

Important!! If Status is "Approved" and you need to delete an item, please do not name the new file the same as the deleted file! Please re-name it "XX-revised" or something similar.

1 selected Download Delete

Name
Item (1).pdf
Item (2).pdf
Item (3).pdf
Item (4).pdf
Item (5).pdf

1 10 / page

Due Dates

Sample Audit FY25 > Information Technology

Information Technology

Open

Due 06/20/2025

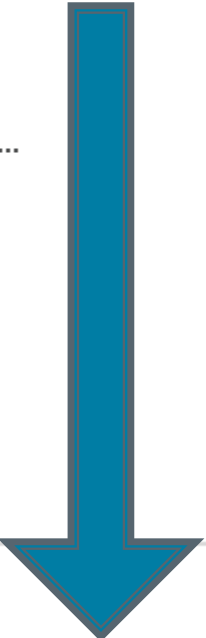
Open
10

In review
--

Approved
--

0 of 10 items approved 0%

Items Attachments



Items (10)

People All Status All

IT-1 IT Questionnaire (see attached)

Due 06/13/2025

CC

Open

0

0

:

IT-2 IT policies and procedures

Due 06/20/2025

CC

Open

0

0

:

IT-3 Vendor contracts or data sharing agreements

Due 06/20/2025

CC

Open

0

0

:

Access to ShareFile

Main district
contact



Access to
entire Project

Assignees



Access to specific
sections or line
items

Assignees

- District can assign users to specific areas or line items
- Can assign as many users as you like!
- Assigned users will only be able to access the area they were assigned and cannot view other sections

Assign Staff to Items

Sample Audit FY25 > In Advance

In Advance

Open

Due 06/06/2025

Open
39

In review
--

Approved
--

0 of 39 items approved

0%

Items Attachments

Items (39)

People All

Status All

Adv-1 Contact list

Due 06/06/2025

CC

Open

1

0

:

Adv-2 Chart of accounts

Due 06/06/2025

CC

Open

0

0

:

Adv-3 Revenue budget

Due 06/06/2025

CC

Open

0

0

:

Adv-4 FY25 audit file

Due 06/06/2025

CC

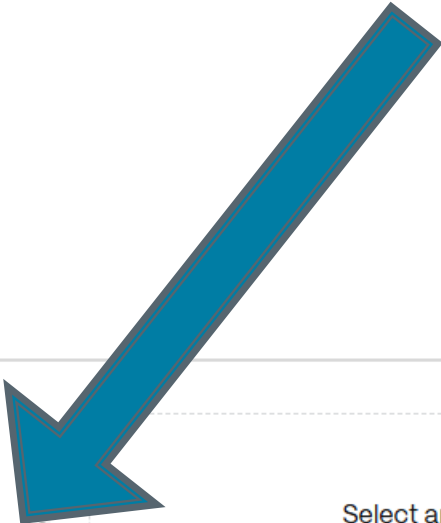
Open

1

0

:

Select an item



- Edit item
- Assign users
- Manage users

Assign Staff to Items (select all)

Sample Audit FY25 > In Advance

In Advance

Open Due 06/05/2025

Open 39 In review --- Approved ---

0 of 39 items approved 0%

ns Attachments


Items (39) Assign Download People All Status All

<input checked="" type="checkbox"/> Adv-1 Contact list	Due 06/05/2025	CC	Open	1	0	:
<input checked="" type="checkbox"/> Adv-2 Chart of accounts	Due 06/05/2025	CC	Open	0	0	:
<input checked="" type="checkbox"/> Adv-3 Revenue budget	Due 06/05/2025	CC	Open	0	0	:
<input checked="" type="checkbox"/> Adv-4 FY25 audit file	Due 06/05/2025	CC	Open	1	0	:
<input checked="" type="checkbox"/> Adv-5 FY25 detailed general ledger	Due 06/05/2025	CC	Open	1	0	:
<input checked="" type="checkbox"/> Adv-6 FY26 detailed general ledger	Due 06/05/2025	CC	Open	1	0	:

39 items selected

Deselect all items

Download attachments



Assign Staff to Items (select multiple)

Sample Audit FY25 > In Advance

In Advance

Open

Due 06/05/2025

CC KC

Open

39

In review

Approved

0 of 39 items approved

0%

Items Attachments

Items (39)

Assign

Download

People

All

Status

All

Adv-1 Contact list

Due 06/05/2025

CC

Open

1

0

Adv-2 Chart of accounts

Due 06/05/2025

CC

Open

0

0

Adv-3 Revenue budget

Due 06/05/2025

CC

Open

0

0

Adv-4 FY25 audit file

Due 06/05/2025

CC

Open

1

0

Adv-5 FY25 detailed general ledger

Due 06/05/2025

CC

Open

1

0

Adv-6 FY26 detailed general ledger

Due 06/05/2025

CC

Open

1

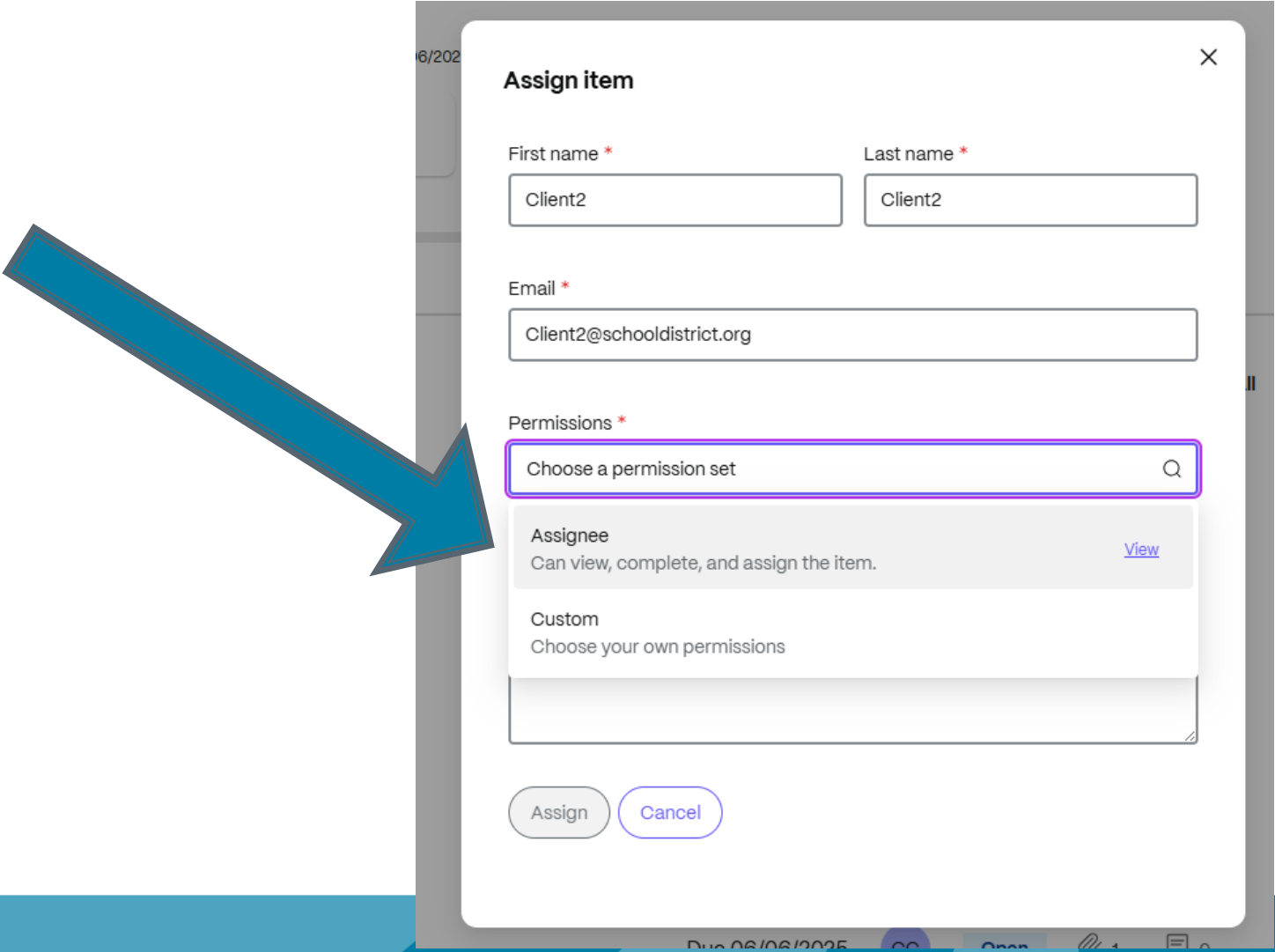
0

4 items selected

Deselect all items

Download attachments

Assign Staff to Items



6/202

Assign item ✕

First name * Last name *

Email *

Permissions *

Assignee
Can view, complete, and assign the item. [View](#)

Custom
Choose your own permissions

Filtered Views (sort by assignee)

Sample Audit FY25 > In Advance

In Advance

Open

Due 06/05/2025

Open
39

In review
--

Approved
--

0 of 39 items approved

0%

Items

Attachments

Items (39)

Adv-1 Contact list

Adv-2 Chart of accounts

Adv-3 Revenue budget

Adv-4 FY25 audit file

Due 06/05/2025

CC

People

All

Status

All

Client Clients

Kara Curtis

Open

Due 06/05/2025

CC

Open

0

0

Due 06/05/2025

CC

Open

0

0

Due 06/05/2025

CC

Open

1

0

Filtered view (sort by status)

Sample Audit FY25 > In Advance

In Advance

Open

Due 06/05/2025

Open
39

In review

Approved

0 of 39 items approved

0%

Items

Attachments

Items (39)

People All

Status All

Adv-1 Contact list

Due 06/05/2025

CC

Open

1

0

Adv-2 Chart of accounts

Due 06/05/2025

CC

Open

0

0

Adv-3 Revenue budget

Due 06/05/2025

CC

Open

0

0

Adv-4 FY25 audit file

Due 06/05/2025

CC

Open

1

0

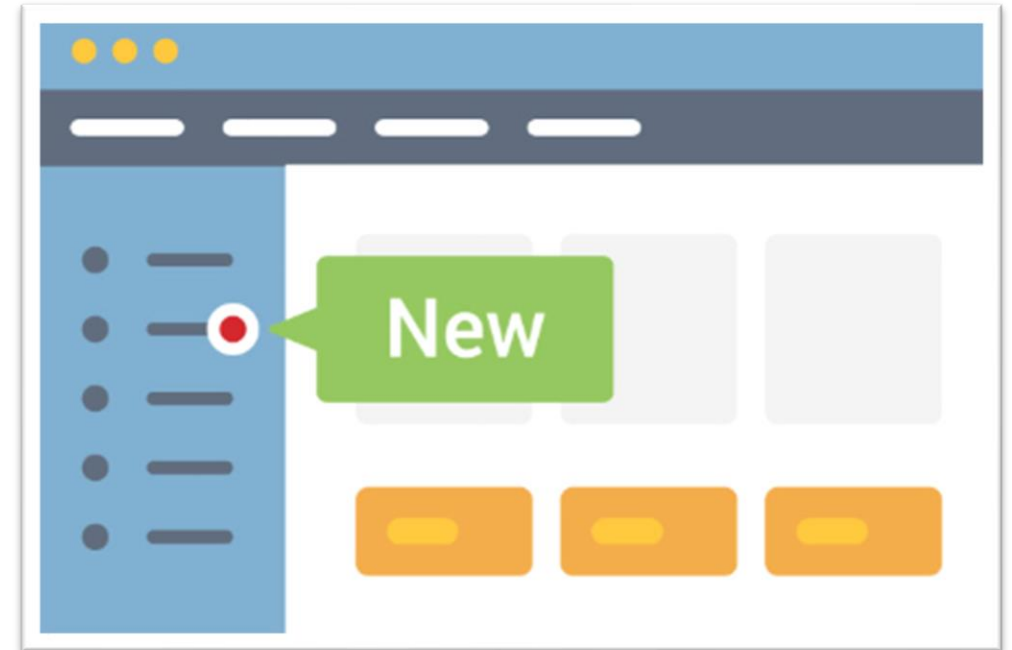
- Open
- In review
- Approved

FY25 Process

- Auditor will most likely upload prelim and final audit requests at the same time
 - Be sure to review due dates!
 - You will receive an email every time a section is set up (so a lot of emails!)
 - If you are not receiving emails, check your spam and firewall settings
- Auditors receive a notification email once the ENTIRE section has been marked "In Review"
- Selections will either be emailed or uploaded to the Selection Backup section

Going Forward

- ShareFile is constantly making feature updates
- Please let us know:
 - Troubleshooting issues
 - Functions that would be helpful to have



Questions?

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