

Role Guides

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Staff

This page is for office staff and operations support volunteers.

Primary Responsibilities

- Invite new volunteers as external Microsoft users.
 - Ensure invitation is accepted before troubleshooting deeper issues.
 - Maintain committee mailing list membership.
 - Coordinate shared role mailbox access changes during transitions.
 - Route technical issues to ITHelp.
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Monthly Staff Checklist

- Review committee membership updates from chairs.
 - Confirm Board reminder workflow is sending as expected.
 - Verify role mailbox access for current officers/chairs.
 - Escalate unresolved access issues to IT.
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Add a New Volunteer

1. Send Microsoft external-user invitation.
2. Confirm volunteer accepted invitation.
3. Add volunteer to committee mailing list.
4. Provide direct committee SharePoint link.

See also: [SOP: Add a person to a committee mailing list](#)

Shared Role Mailbox Transition

1. Remove prior role holder's access.
2. Grant new role holder access.
3. Confirm mailbox appears in new holder's Outlook.

See also: [SOP: Leadership transition for role inbox](#)

Staff Reminders

- Most volunteers do not need paid licenses.
- SharePoint links are preferred over attachments.
- External users often cannot use direct group-sharing in file dialogs.

Related Pages

- [Overview](#)
- [FAQ](#)
- [Quick Reference](#)
- [M365 Email Groups & Roles](#)
- [Specialty Topics](#)

Volunteer with SHHA Email

This page is for volunteers who already have an SHHA mailbox and may also have role-based inbox access.

What You Should Use

- Your **SHHA email account** for routine communication.
 - **Committee mailing lists** for group communication.
 - **SharePoint links** for committee files.
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Shared Role Inbox Basics

If you hold an officer or chair role, you may be assigned a shared role inbox.

- Open it from your normal account at outlook.office.com.
- Reply from the role inbox for official role business.
- Keep records in the role mailbox for continuity.

See [FAQ — Reply from role mailbox](#) for full instructions, and [FAQ — Can't see shared inbox](#) if the mailbox doesn't appear.

File Sharing Rule

For committee documents:

1. Upload to SharePoint.
2. Copy link.
3. Send link to committee list.

Avoid one-off attachments for files that should remain in committee records.

If You Are Not Seeing Something

- Confirm you are signed in with your SHHA account.
- Confirm your committee membership is current.
- Contact **ITHelp@sandiahomeowners.org** if access is still missing.

Related Pages

- [Overview](#)
- [FAQ](#)
- [Quick Reference](#)

Volunteer without SHHA Email

This page is for volunteers who participate using a personal email address. You usually do **not** need a paid Microsoft license.

First-Time Setup

1. Look for the two Microsoft emails described below.
2. Open the organization invitation email and click **Accept invitation**.
3. Use that same email address when prompted to sign in.
4. Open your committee SharePoint link from the [Quick Reference](#) page.
5. Confirm you receive committee mailing list messages.

The 2 Emails You Should Expect

1) Organization invitation email (expected but confusing)

The subject is usually similar to "**Anna, SHHA invited you to collaborate with SHHA**".

The email usually includes:

- A warning message telling you to proceed only if you trust the sender and organization
- **Sender:** Anna, SHHA (anna.levchuk@sandiahomeowners.org)
- **Organization:** SHHA
- **Domain:** sandiahomeowners.org

This is the important one. Click **Accept invitation** to activate your access.

After you click **Accept invitation**, Microsoft may bring you to a page that does not make much sense. This is normal and is just a Microsoft quirk. Use the direct links on the [Quick Reference](#) page for useful pages and mailing lists.

2) Group/team invitation email (expected but confusing)

You may also get an email with a subject like "**You have been added to a team in Microsoft Teams**".

This is a default Microsoft message and cannot be customized by SHHA.

For external volunteers, we do **not** recommend using Teams for SHHA work. Instead, follow the SharePoint links on the [Quick Reference](#) page for the groups you are part of.

What You Can Expect

- You can receive committee group email at your personal address.
- You can open SharePoint documents you were granted access to.
- You may see references to Microsoft tools SHHA does not use (safe to ignore).
- You may receive Teams-related emails even though your normal workflow is email and SharePoint.

Most Common Mistakes

- **Not accepting the invitation** — until you do, access will fail.
- **Trying to use Teams** instead of using SharePoint links for committee files.
- **Trying to share files directly with groups** instead of sharing links.
- **Sending attachments** when the file belongs in SharePoint.

Correct File Sharing Pattern

1. Upload to SharePoint.
2. Copy link.
3. Email link to committee list.

See [FAQ](#) for step-by-step sharing instructions.

Need Help?

Contact ITHelp@sandiahomeowners.org if you cannot access files or receive committee messages.

Related Pages

- [Overview](#)

- [FAQ](#)
- [Quick Reference](#)