

GAL25 – Dealing with regular users of one-off Gift Aid envelopes

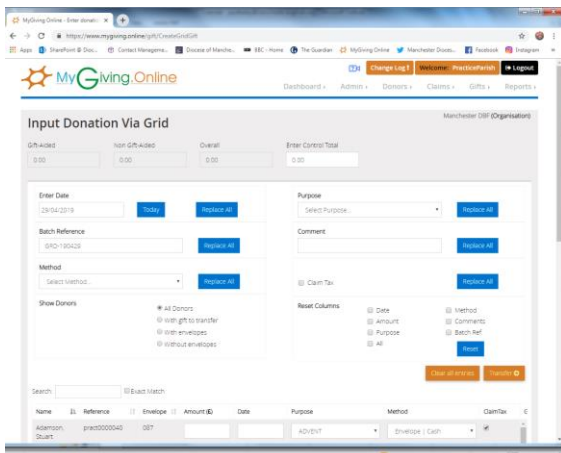
Many Churches have regular attendees who choose to donate using a one-off envelope each week rather than use weekly envelopes and an ongoing Gift Aid declaration. This guide is designed to help you to input their donations.

It is better to try to persuade them to complete and sign an ongoing regular Gift Aid declaration as this will negate the tasks you need to complete in this guide. Additionally, it worthwhile to note each one-off envelope will cost your Church approximately 5p each. If your donor doesn't wish to use a box of weekly envelopes, instead you could buy some small 'wage' envelopes and add a nominal envelope number to each one as they use them each week.

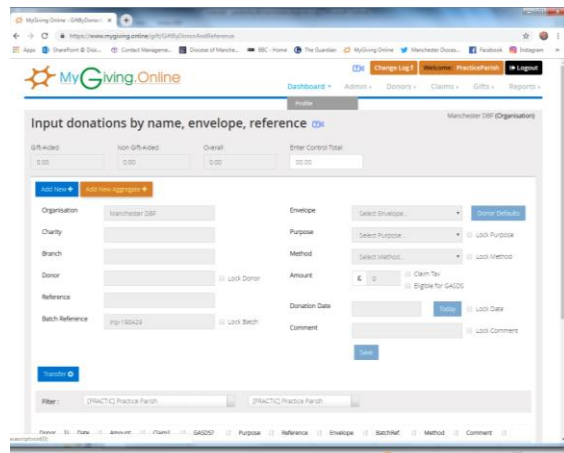
1. Entering your regular one-off donations

- Step 1

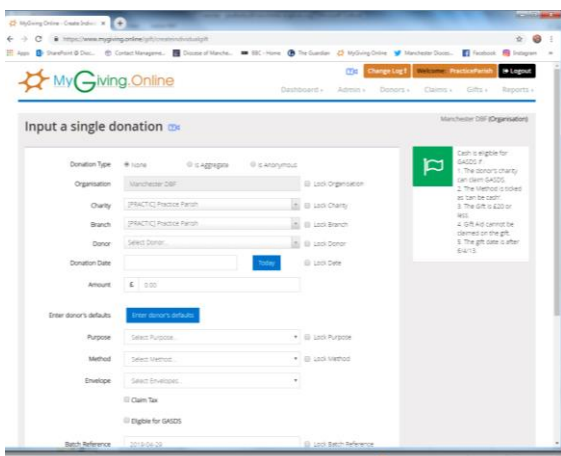
You'll need to add the donations in your preferred method for your regular envelope users, and could be one of the following:



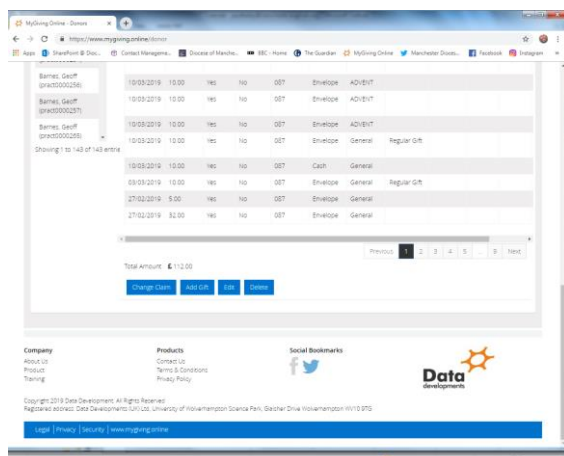
This screenshot shows the 'Input Donation Via Grid' form in MyGivingOnline. It includes fields for 'Enter Date', 'Batch Reference', 'Method', 'Purpose', 'Comment', and 'Claim Tax'. There are also 'Apply All' and 'Reset' buttons. A table at the bottom shows a list of donations with columns for Name, Reference, Envelope, Amount, Date, Purpose, Method, and Claim Tax.



This screenshot shows the 'Input donations by name, envelope, reference' form. It features a 'Add New' button and a 'Add New Organisation' button. The form includes fields for 'Organisation', 'Charity', 'Branch', 'Donor', 'Reference', 'Batch Reference', 'Envelope', 'Purpose', 'Method', 'Amount', 'Donation Date', and 'Comment'. There are also 'Apply All' and 'Save' buttons.



This screenshot shows the 'Input a single donation' form. It includes fields for 'Donation Type', 'Organisation', 'Charity', 'Branch', 'Donor', 'Donation Date', 'Amount', 'Purpose', 'Method', 'Envelope', and 'Batch Reference'. There are also 'Apply All' and 'Save' buttons. A note on the right states: 'Cash is eligible for Gift Aid if: 1. The donor's charity is an SCSO; 2. The method is cash or WU; 3. The gift is £20 or less; 4. Gift Aid cannot be claimed on the gift; 5. The gift date is after 6-4-18'.

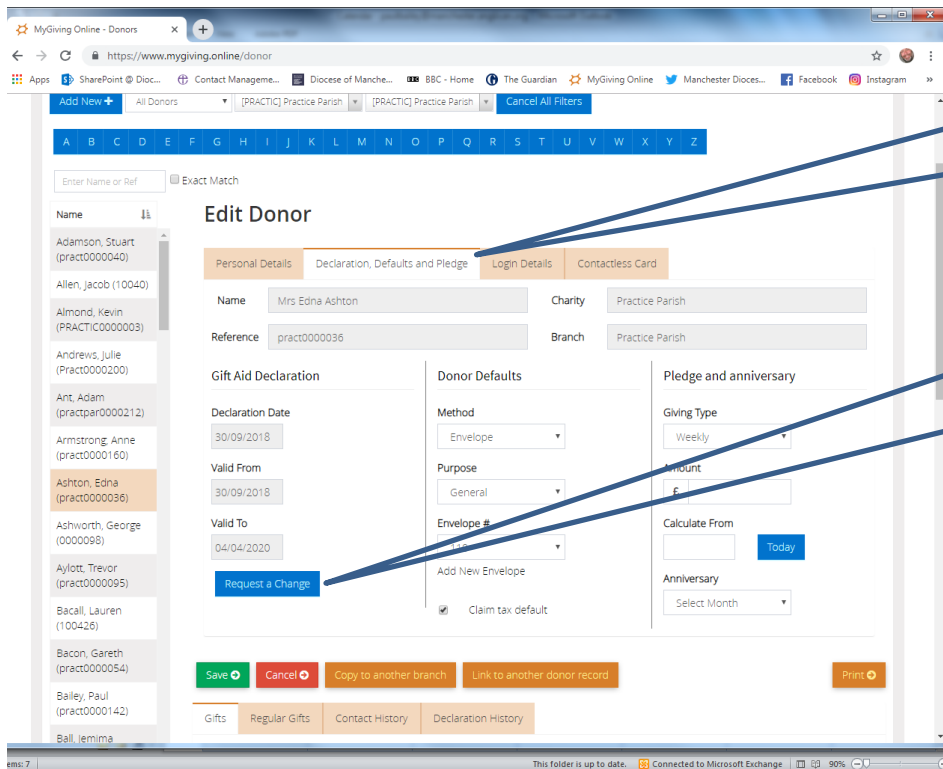


This screenshot shows a list of donations in MyGivingOnline. The table has columns for Date, Amount, Yes/No, Envelope, Purpose, Method, and Regular Gift. The total amount is £112.00.

Date	Amount	Yes	No	Envelope	Purpose	Method	Regular Gift
10/08/2018	10.00	Yes	No	087	Envelope	ADVENT	
10/08/2018	10.00	Yes	No	087	Envelope	ADVENT	
10/08/2018	10.00	Yes	No	087	Envelope	ADVENT	
10/08/2018	10.00	Yes	No	087	Envelope	General	Regular Gift
09/09/2018	10.00	Yes	No	087	Envelope	General	Regular Gift
27/02/2018	5.00	Yes	No	087	Envelope	General	
27/02/2018	32.00	Yes	No	087	Envelope	General	

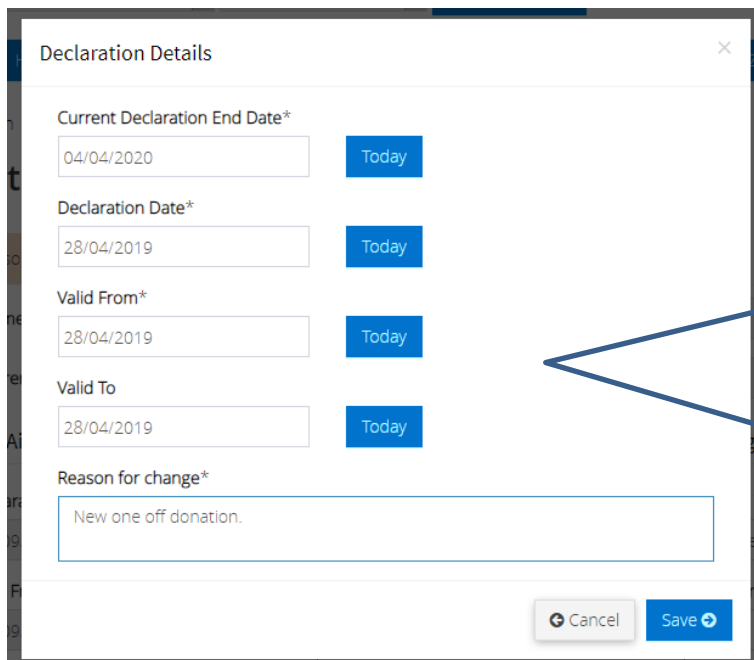
- Step 2

Once the donation(s) have been inputted, you'll need to visit each donor's record and click on the Declaration, Defaults and Pledge tab.

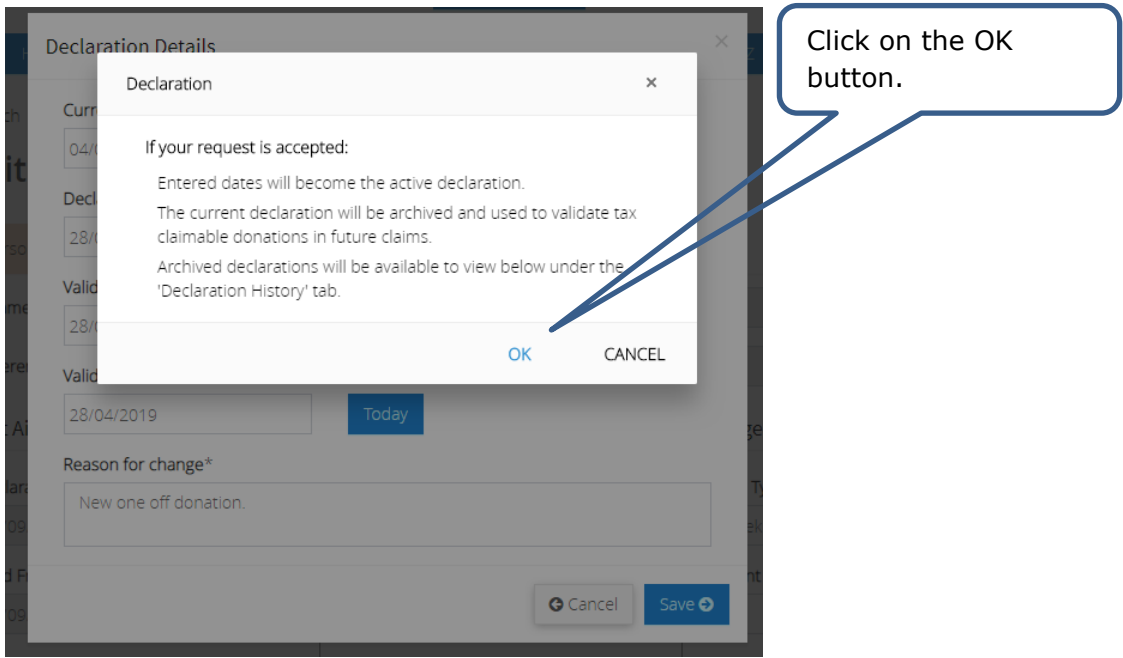


Click on the Declaration, Defaults and Pledge tab.

Click on the Request a Change button and the following pop up window will appear.

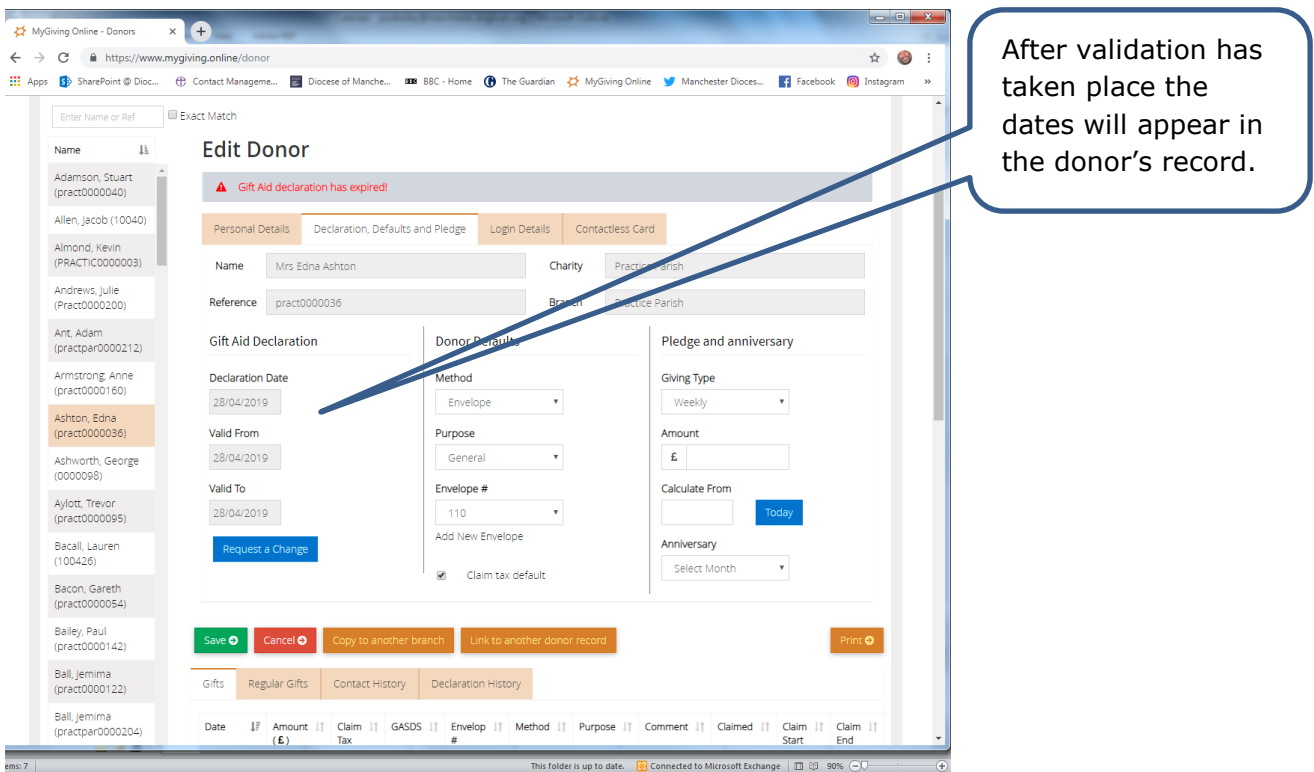


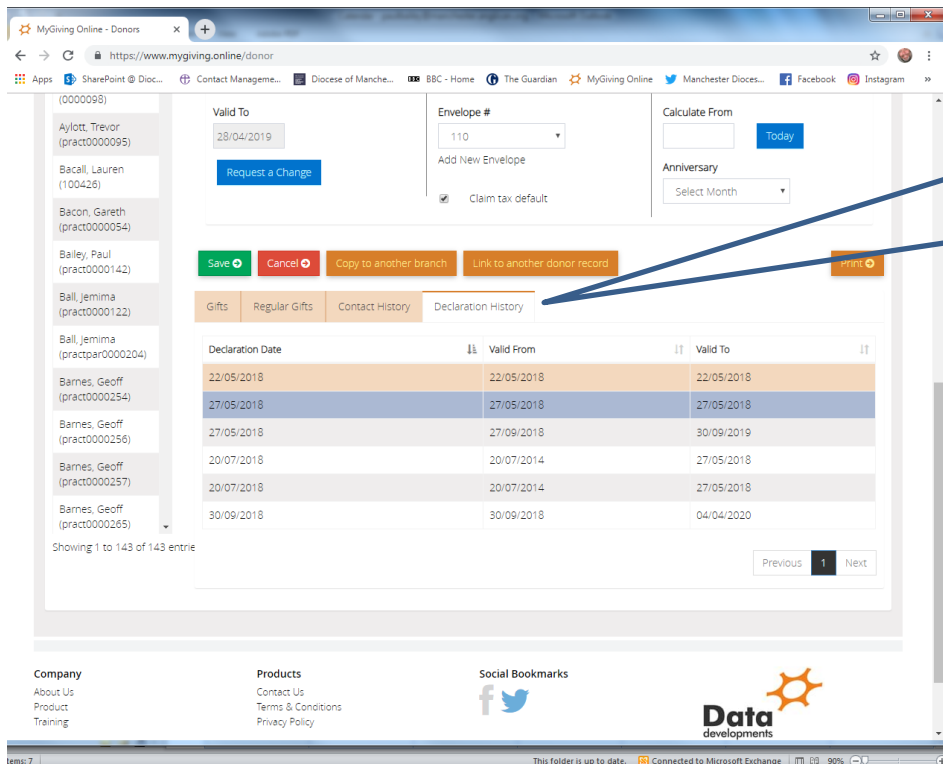
Enter the Declaration Date, Valid From and Valid To dates (they'll all be the same date as the donation). In the Reason for Change box type in a suitable comment, and then click on Save.



The Gift Aid envelopes need to be validated by the Gift Aid Lite team, so you'll need to send it copies via post or email. This is best done as and when you are recording your donations. The declaration dates will only be visible after the declaration process has taken place.

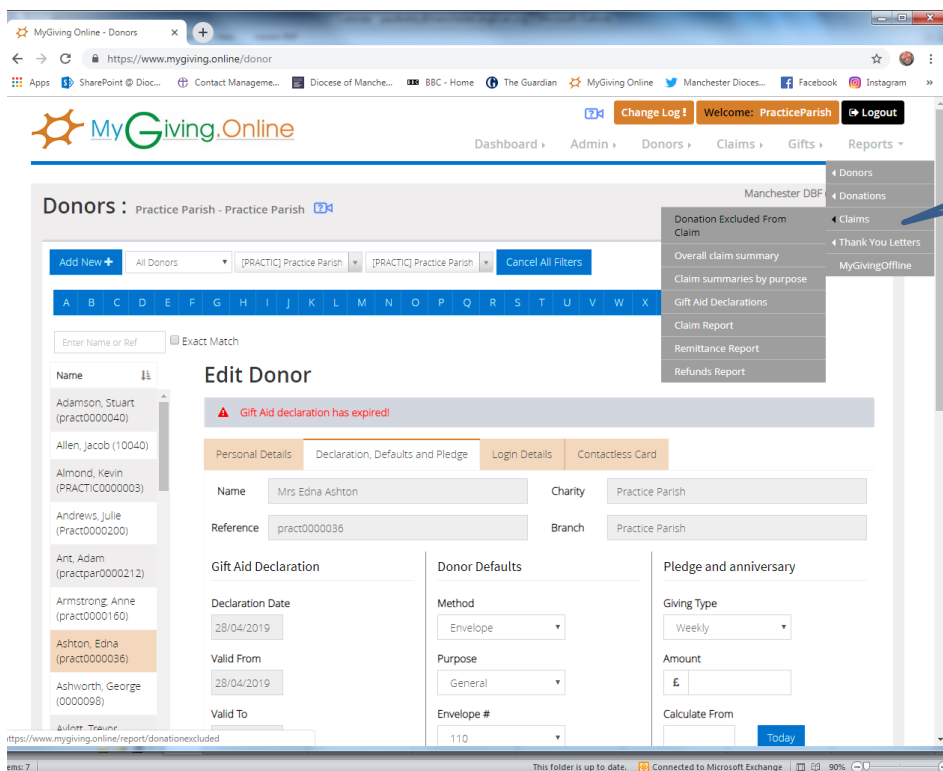
- Step 4



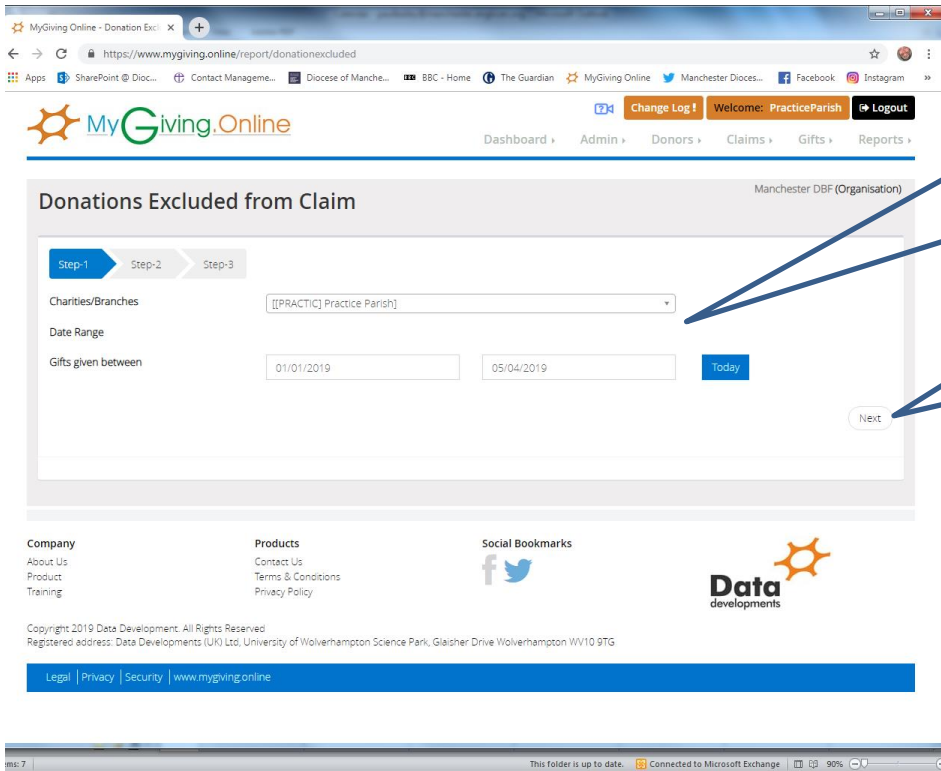


2. How can I find out if my regular one-off donations haven't been included in the claim for my Church?

- Step 1

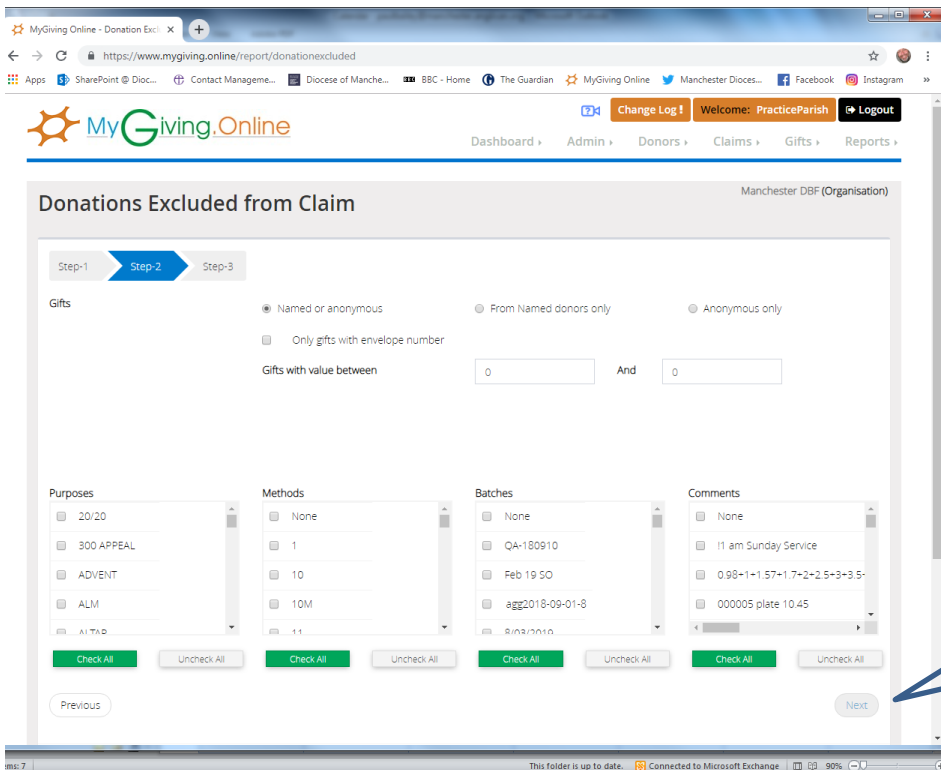


- Step 2

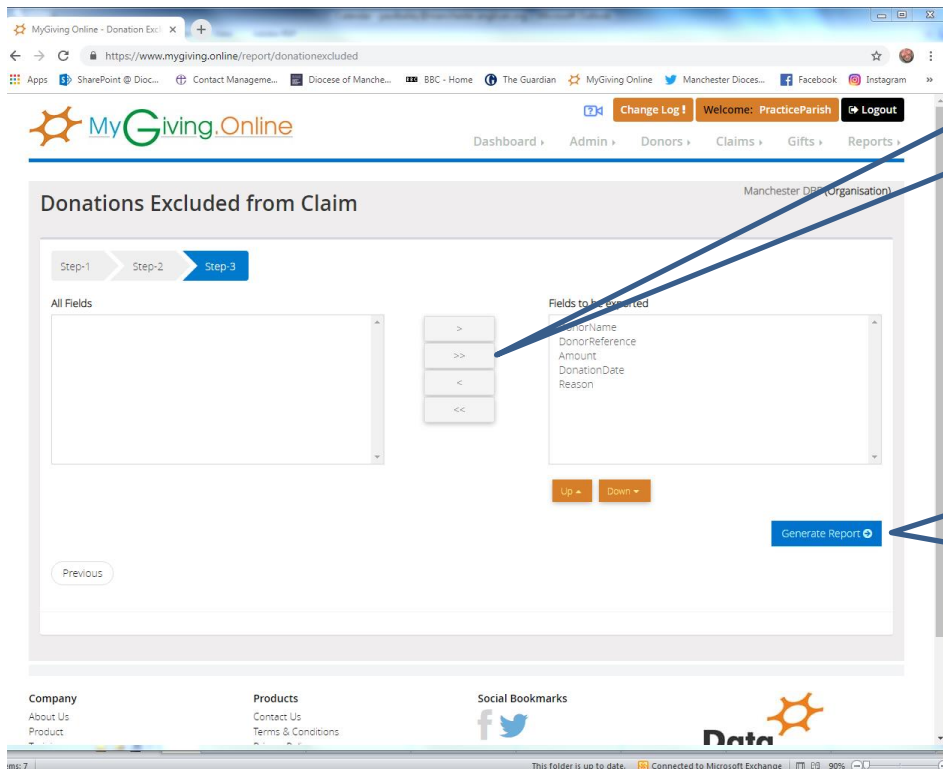


Ensure your Church appears in the Charities/Branches box and select the date range of your choice.

Click on the Next button.



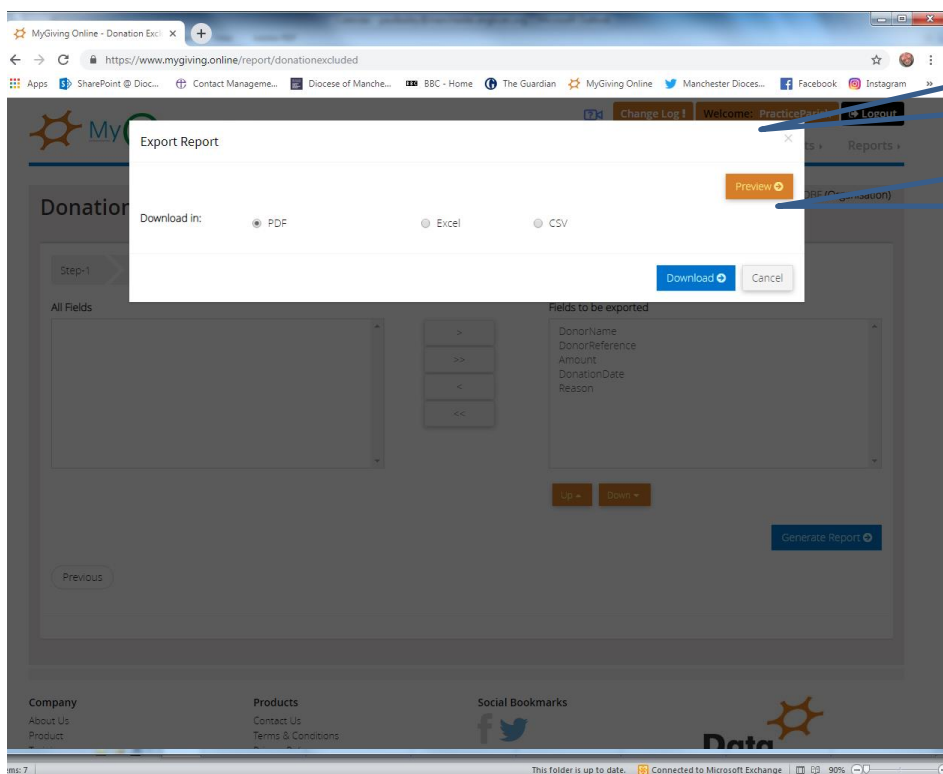
Click on the Next button.



Click on the double arrow to include all of the fields in the report.

Click on the Generate Report button.

- Step 3



This pop up window will appear.

Click on the Preview button.

MyGiving Online - Donation Excl... x Donations excluded from claim - x

https://www.mygiving.online/TempPdfFiles/90915ae5-a390-49c0-ab81-40db5f7433c.pdf

SharePoint @ Dioc... Contact Managem... Diocese of Manche... BBC - Home The Guardian MyGiving Online Manchester Dioces... Facebook Instagram

Donations excluded from claim report 1 / 3

Donations excluded from claim report: Manchester DBF(Organisation)
01 January 2019 - 05 April 2019

Practice Parish	Donor name	Reference	Amount	Date	Reason
Practice Parish	Andrews, Julie	Prac0000200	15.00	27/02/2019	Invalid Declaration Date
	Andrews, Julie	Prac0000200	10.00	27/02/2019	Invalid Declaration Date
	Art, Adam	pracpa0000212	10.00	10/03/2019	Invalid Declaration Date
	Appleton, Jane	00000173	10.00	02/02/2019	Donation Date after valid to date
	Appleton, Jane	00000173	10.00	27/01/2019	Donation Date after valid to date
	Appleton, Jane	00000173	10.00	27/01/2019	Donation Date after valid to date
	Armstrong, Anne	prac0000160	25.00	03/02/2019	Invalid Declaration Date
	Armstrong, Anne	prac0000160	30.00	03/02/2019	Invalid Declaration Date
	Ayott, Trevor	prac0000095	10.00	24/03/2019	Donation Date after valid to date
	Balley, Paul	prac0000142	30.00	02/02/2019	Invalid Declaration Date
	Balley, Paul	prac0000142	100.00	01/02/2019	Invalid Declaration Date
	Ball, Jemima	prac0000122	05.00	27/01/2019	Invalid Declaration Date
	Ball, Jemima	prac0000122	10.00	17/02/2019	Invalid Declaration Date
	Barnes, Geoff	prac0000166	30.00	03/02/2019	Invalid Declaration Date
	Blogg, Lizette	prac0000021	15.00	03/01/2019	Invalid Declaration Date
	Blogg, Lizette	prac0000021	15.00	01/02/2019	Invalid Declaration Date
	Bowden, Philip	10037	20.00	27/01/2019	Donation Date after valid to date
	Bowden, Philip	10037	20.00	27/01/2019	Donation Date after valid to date
	Caldwell, Michaela	prac0000112	05.00	27/01/2019	Invalid Declaration Date
	Clark, Sidney	Prac0000203	10.00	13/02/2019	Invalid Declaration Date
	Collins, Caitlin	prac0000155	05.00	06/02/2019	Invalid Declaration Date
	Crosby, Ursula	prac0000158	05.00	06/02/2019	Invalid Declaration Date
	Cryne, Patrick	prac0000149	60.00	06/02/2019	Invalid Declaration Date
	Dandridge, Martha	prac0000171	25.00	06/02/2019	Invalid Declaration Date
	Dandridge, Martha	prac0000144	25.00	27/01/2019	Invalid Declaration Date
	Davies, Adam	prac0000150	30.00	06/02/2019	Invalid Declaration Date
	Davies, Janet	00000115	20.00	27/01/2019	Donation Date after valid to date

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A copy of a report showing a list (if there are any) of donations which have not been included within the claim because of an issue caused by the Gift Aid declaration dates.

To rectify them you'll need to visit the relevant records in Donors, View and Edit Donors.