

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

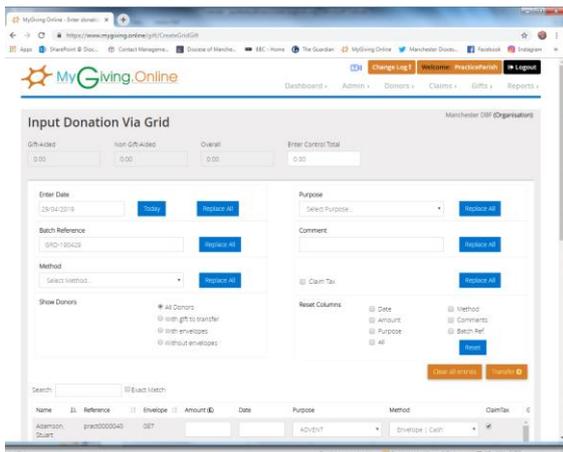
Many Churches have regular attendees who choose to donate using a one-off envelope each week rather than use weekly envelopes and an ongoing Gift Aid declaration. This guide is designed to help you to input their donations.

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.

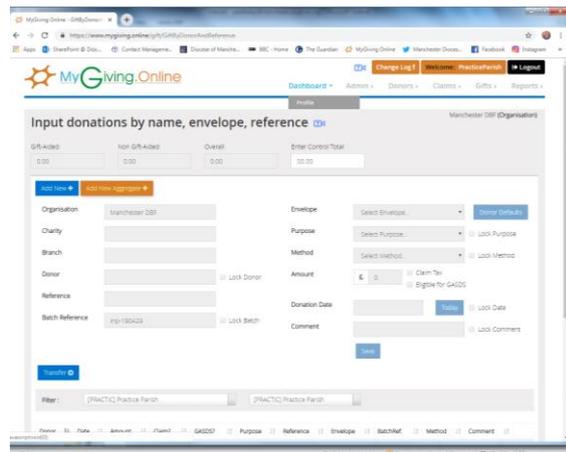
### 1. Entering your regular one-off donations

- Step 1

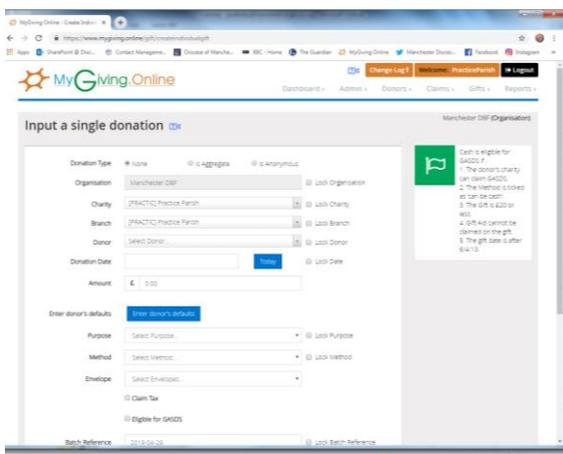
You'll need to add the donations in your preferred method for your regular envelope users, and could be one of the following:



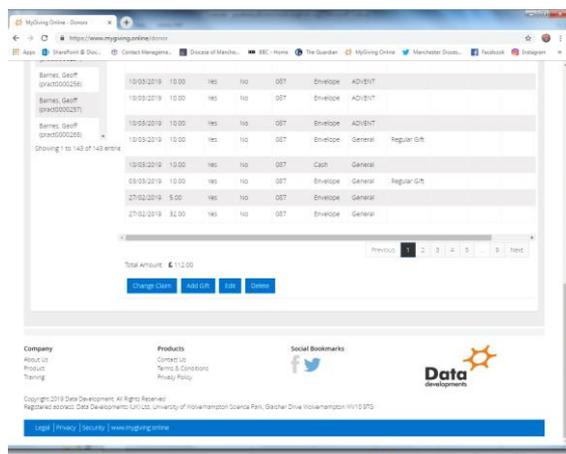
This screenshot shows the 'Input Donation Via Grid' form in MyGivingOnline. It includes fields for 'Enter Date', 'Batch Reference', 'Method', 'Purpose', 'Comment', and 'Claim Tax'. There are also checkboxes for 'All Donors', 'With gift to transfer', 'With envelopes', and 'Without envelopes'. A search bar is at the bottom.



This screenshot shows the 'Input donations by name, envelope, reference' form. It features a 'Add New' button and a 'Add New Organisation' button. Fields include 'Organisation', 'Charity', 'Branch', 'Donor', 'Reference', 'Batch Reference', 'Envelope', 'Purpose', 'Method', 'Amount', 'Donation Date', and 'Comment'. There are also checkboxes for 'Lock Donor', 'Lock Batch', 'Lock Purpose', 'Lock Method', 'Lock Amount', 'Lock Date', and 'Lock Comment'.



This screenshot shows the 'Input a single donation' form. It includes fields for 'Organisation', 'Charity', 'Branch', 'Donor', 'Donation Date', 'Amount', 'Purpose', 'Method', 'Envelope', and 'Batch Reference'. There are also checkboxes for 'Lock Organisation', 'Lock Charity', 'Lock Branch', 'Lock Donor', 'Lock Date', 'Lock Purpose', 'Lock Method', 'Lock Envelope', and 'Eligible for GAGDS'.



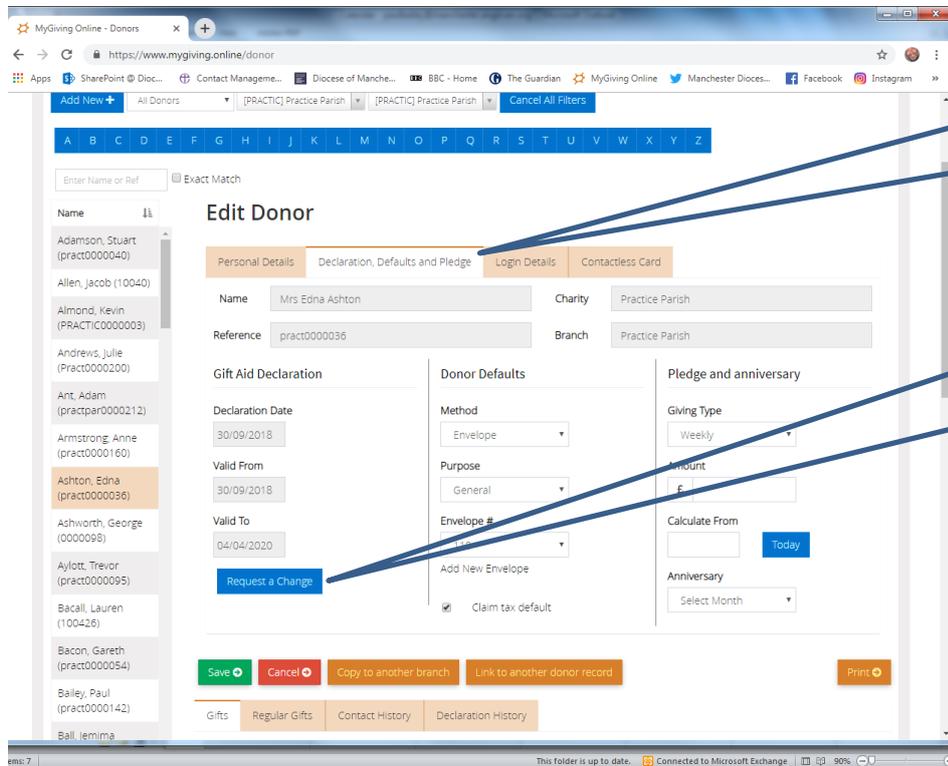
This screenshot shows a list of donations in MyGivingOnline. The table has columns for Date, Amount, Yes/No, Envelope, Purpose, and Method. A total amount of £112.00 is shown at the bottom.

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

Total Amount: £112.00

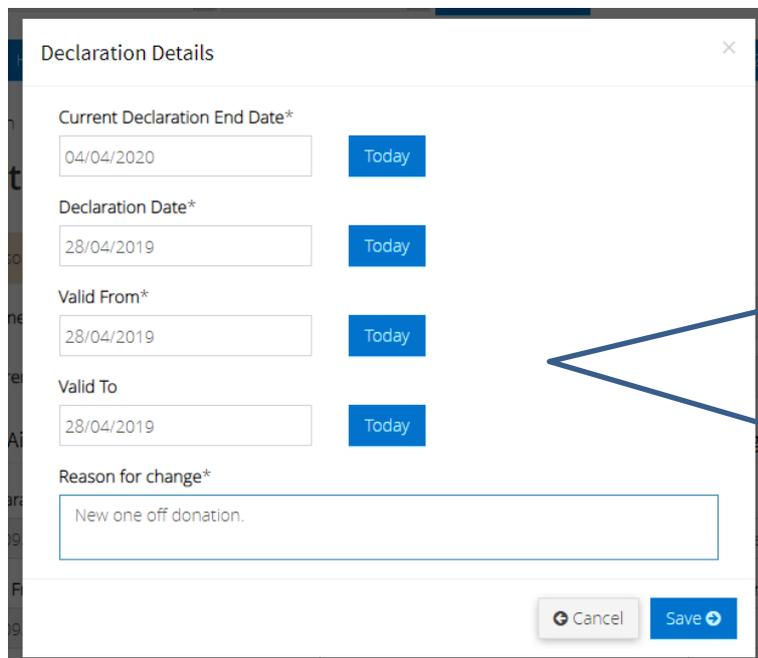
- Step 2

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.

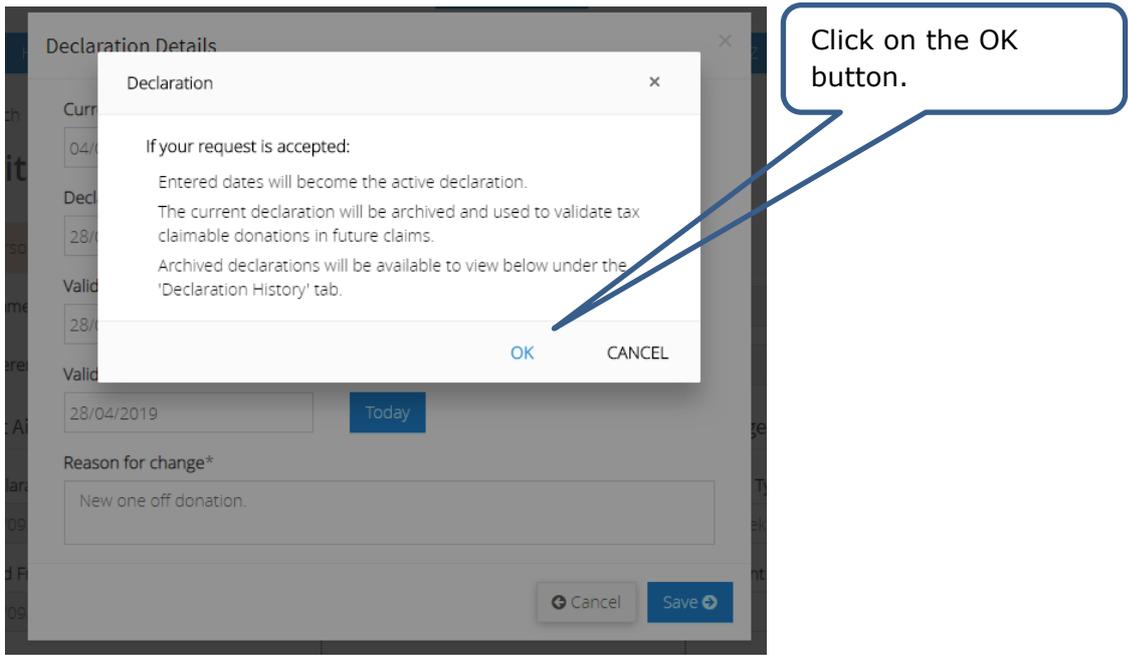


Click on the Declaration, Defaults and Pledge tab.

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

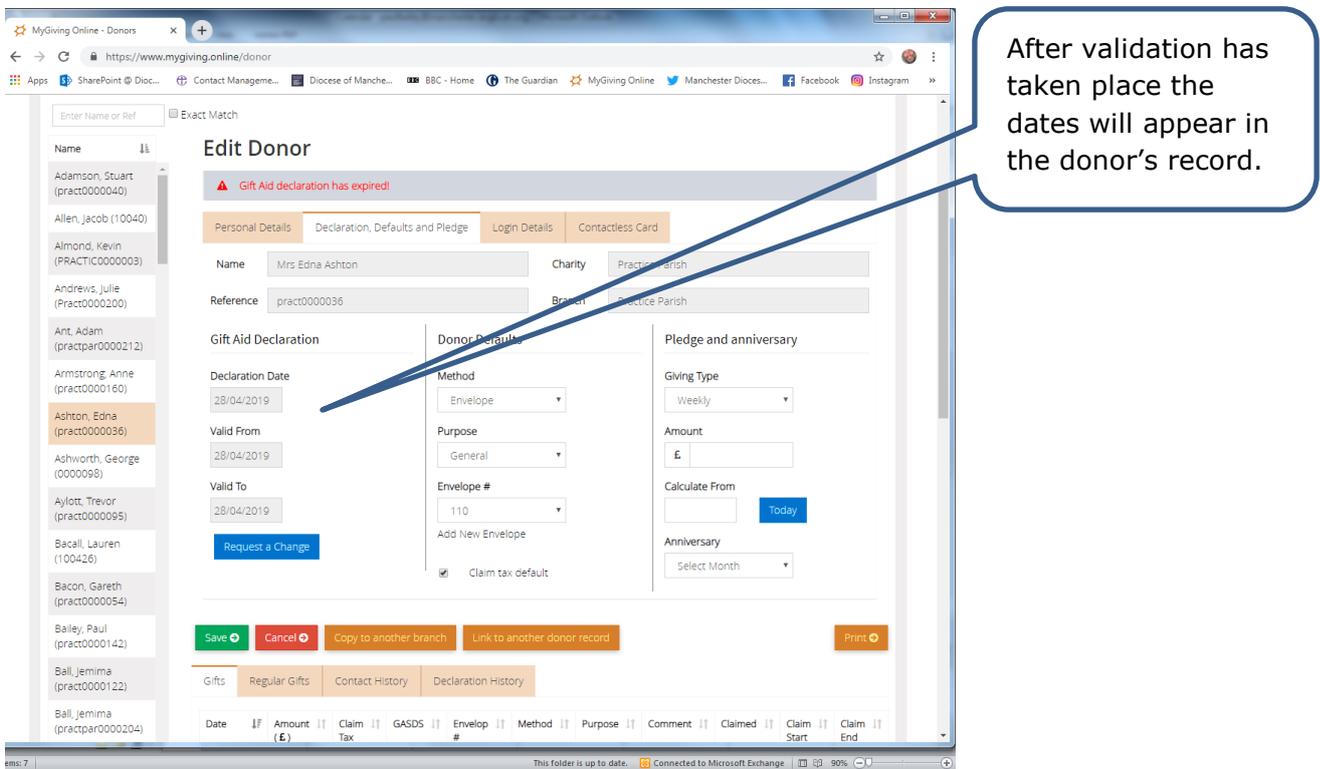


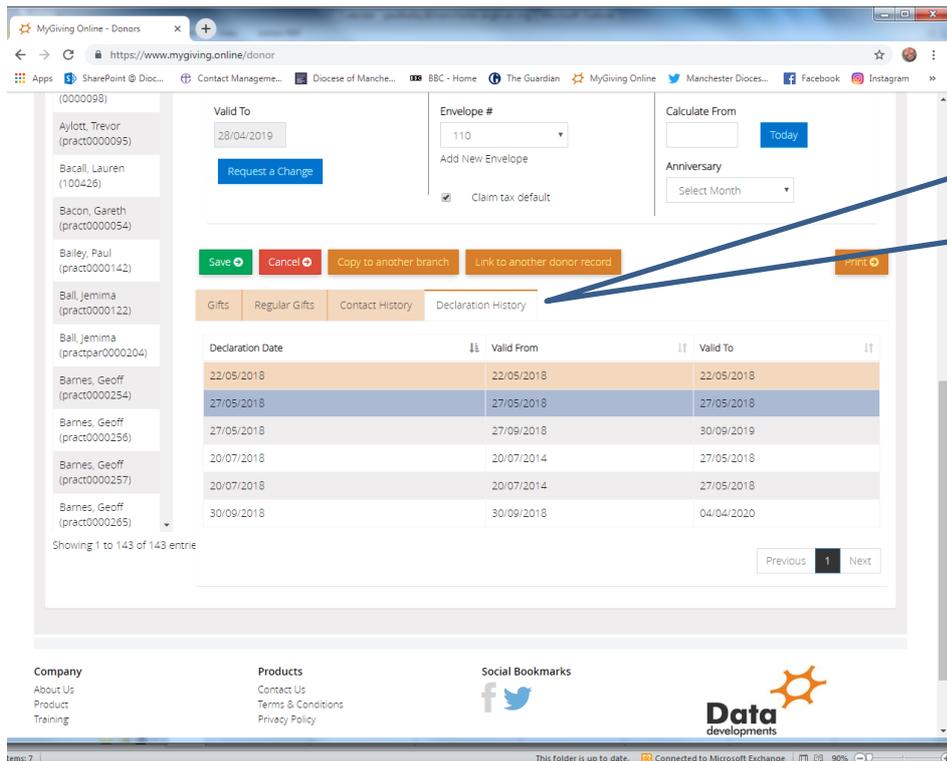
Enter the Declaration Date, Valid From and Valid To dates (they'll all be the same date as the donation). In the Reason for Change box type in a suitable comment, and then click on Save.



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.

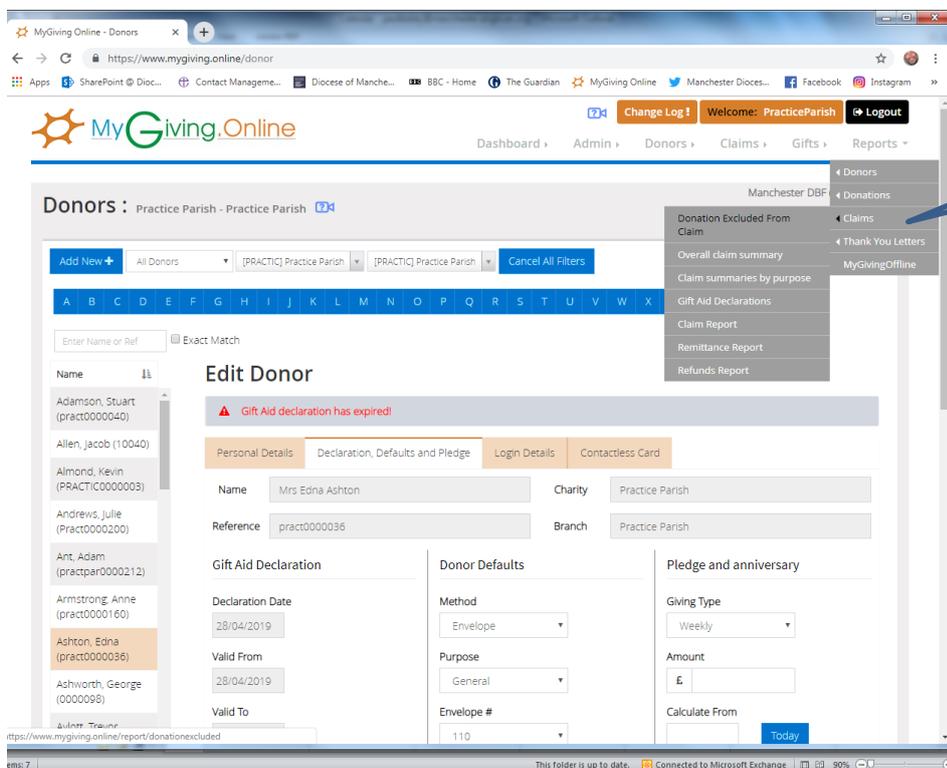
- Step 4



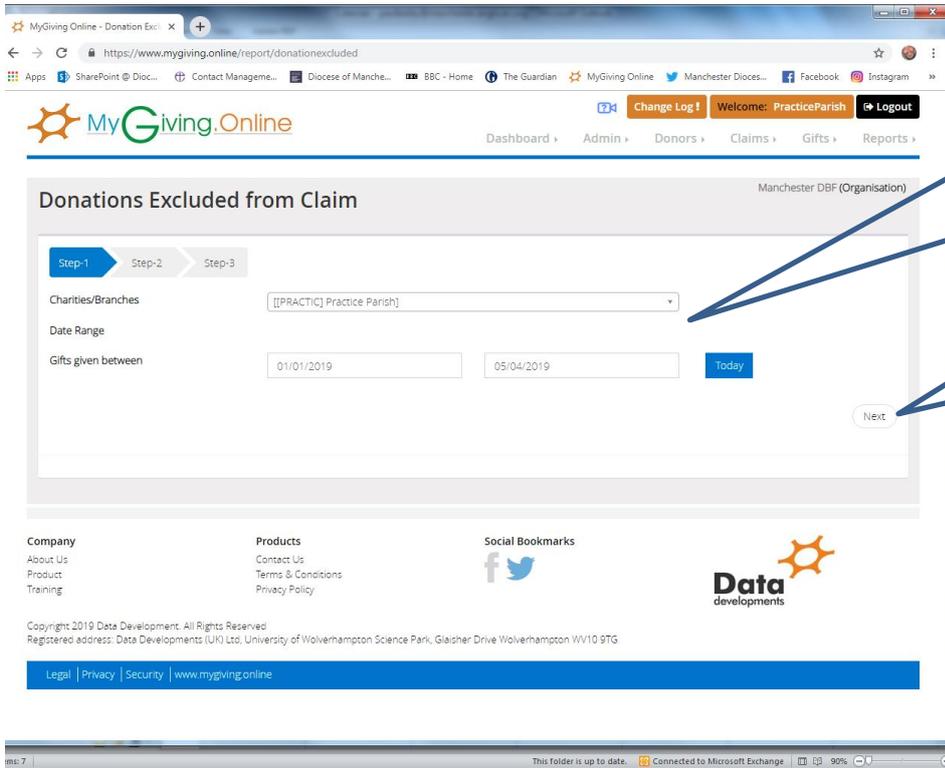


## 2. How can I find out if my regular one-off donations haven't been included in the claim for my Church?

- Step 1

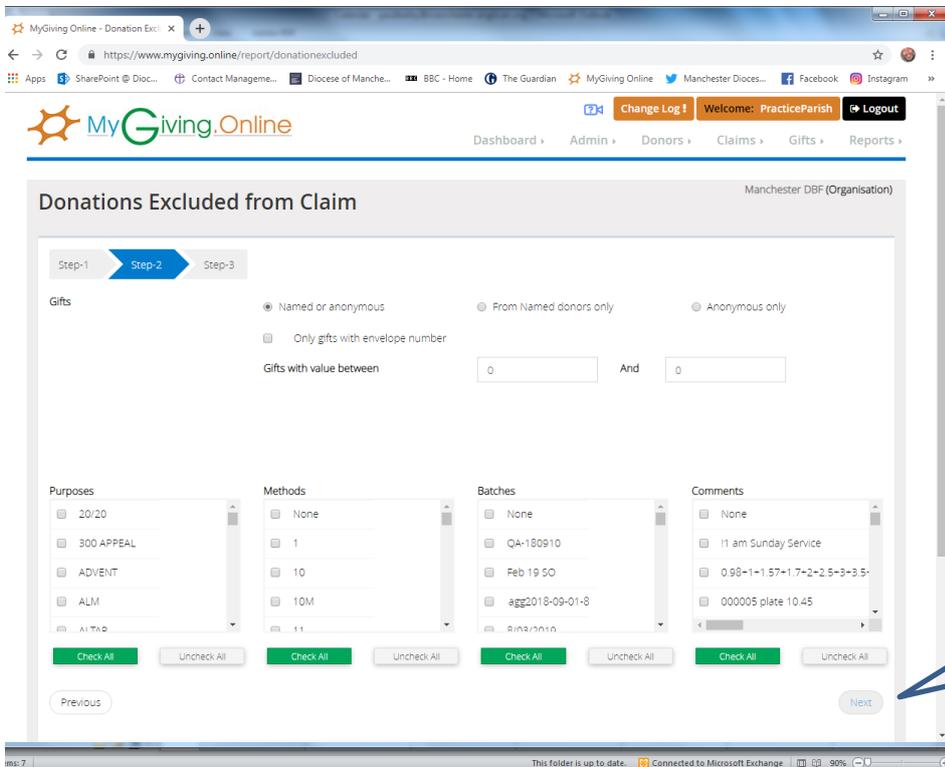


- Step 2

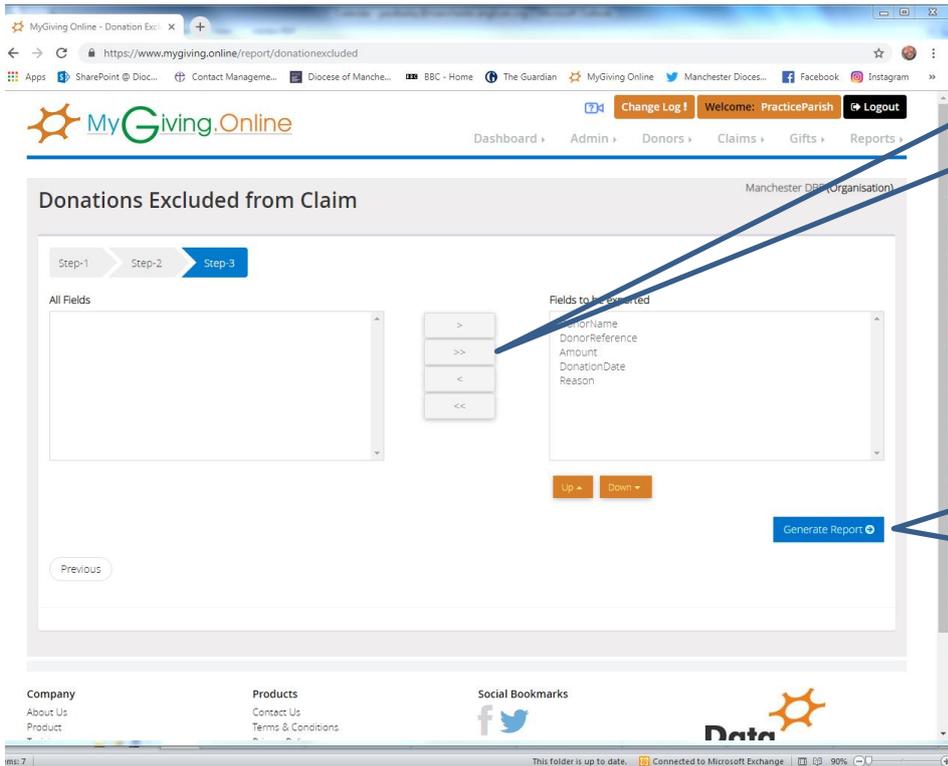


Ensure your Church appears in the Charities/Branches box and select the date range of your choice.

Click on the Next button.



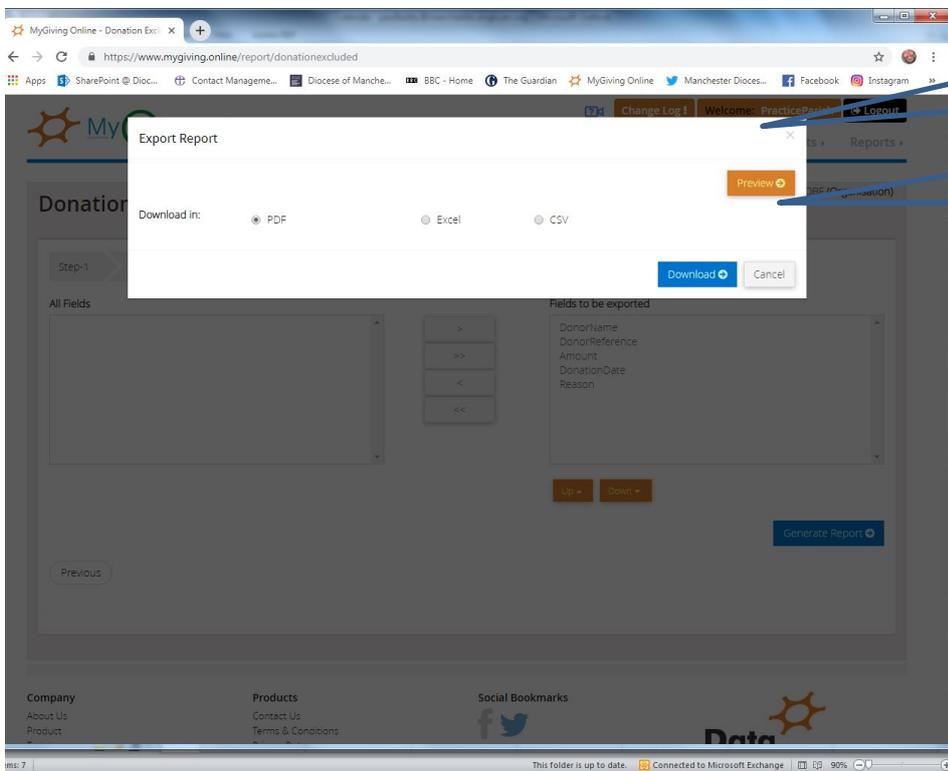
Click on the Next button.



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-ab81-40dbb5f7433c.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, Lizze	prac0000021	15.00	03/01/2019	Invalid Declaration Date
	Blogg, Lizze	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.