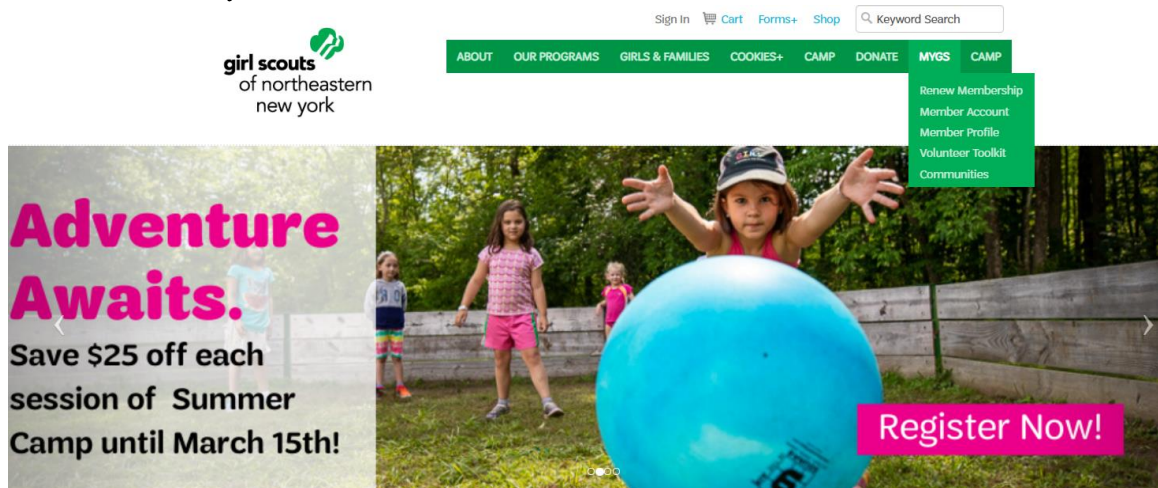


Finance Reports in the Volunteer Toolkit

Finance Reports are now live in the Volunteer Toolkit and will help making filing easier! Follow along with these step by step instructions to help your submission process. If you have any questions reach out to the Girl Scouts of NENY Volunteer Services Team at volunteering@girlscoutsneny.org

1. Go to the Girl Scouts of Northeast New York website, girlscoutsneny.org
2. Hover over the MyGS Tab and select Volunteer Toolkit.

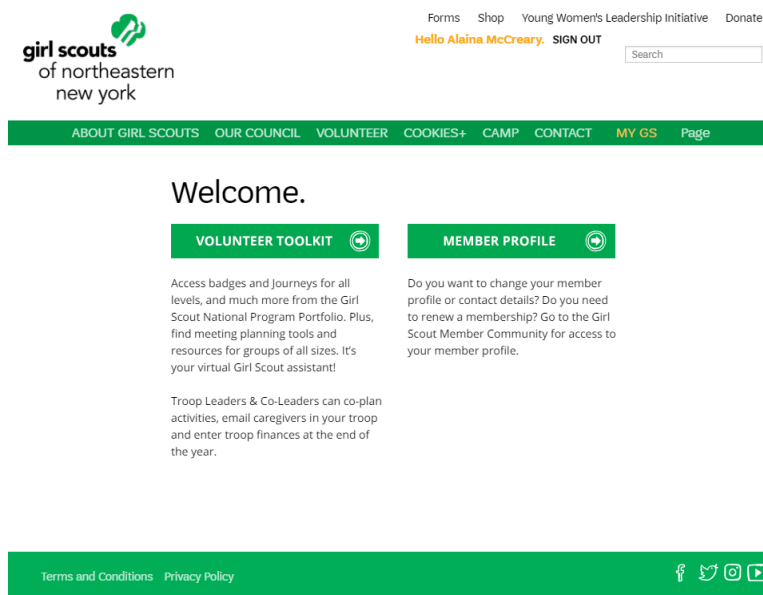


3. Log into your account. If you don't know your information you can click Forgot Your Password at the bottom.

The screenshot shows the Girl Scouts login page. It has a green background with the Girl Scouts logo at the top. Below the logo is a white box containing the login form. The form has fields for "Username" and "Password", a "Log In" button, a "Remember me" checkbox, and a "Forgot Your Password?" link. At the bottom of the page, there is a link for "Girl Scouts employee? Log In".

Finance Reports in the Volunteer Toolkit

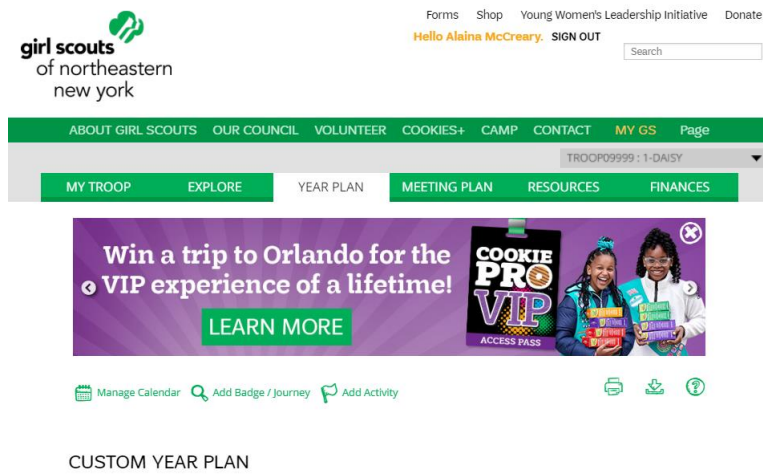
- You'll be brought to the welcome page. Select the Volunteer Toolkit button.



- You're now in the Volunteer Toolkit!

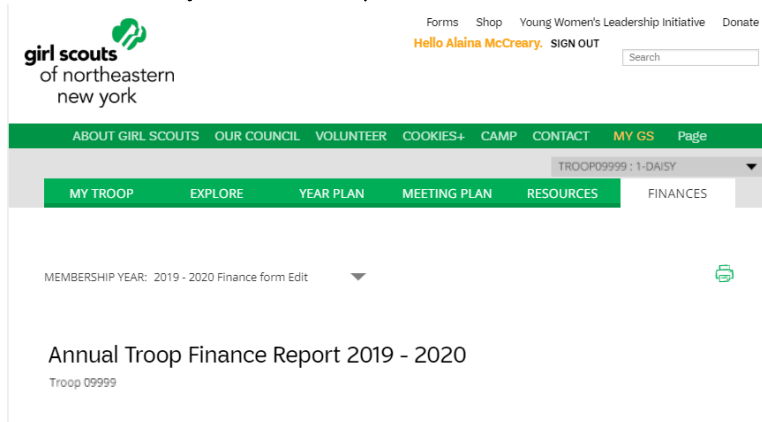
If you'd like more information about using the Volunteer Toolkit to organize your year reach out to our Volunteer Services Team at volunteering@girlscoutsneny.org!

To start your Finance Report Form, click the Finances tab.

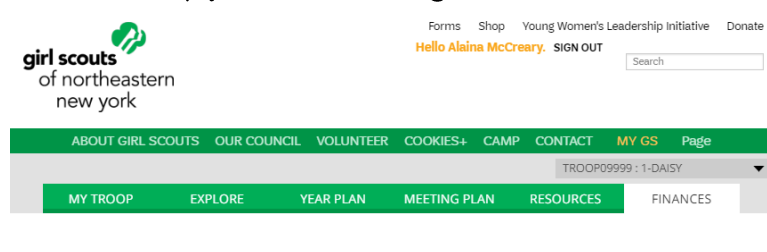


Finance Reports in the Volunteer Toolkit

6. In the top left-hand corner, you'll see the year that you are submitting the finance form for. This should say "Membership Year: 2020-2021 Finance Form Edit."



- a. If you run more than one troop, make sure to check in the top right-hand corner to see what troop you are submitting for.



7. For income and expenses, remember that your finances go from your last submission, if you are a returning troop this means that you should be reporting on your finances from June 2020-May 2021. If you are a new troop your finances are when your troop first started until May 2021.

Finance Reports in the Volunteer Toolkit

8. The first section is for your income, this is for all the money that came into the troop for that year. Click the “Council Detail” button next to a line item if you’d like the definition.
 - a. If you don’t have a value for a line item, leave the field at 0.00.
 - b. If you have an amount for Other Income, make sure to select “Add a Note on Troop INCOME” to outline what that money came from.
 - c. Your income will auto calculate for you – make sure this matches with your records

INCOME

Your updates are automatically saved but not submitted to the Council.
If there is no value for an item, leave the field at 0.00

INCOME LAST UPDATE

Previous Balance	\$ 0.00	► Council Detail
GSUSA Registration Collected	\$ 0.00	► Council Detail
Troop Dues Collected	\$ 0.00	
Sweets and Treats Profits	\$ 0.00	► Council Detail
Cookie Profits	\$ 0.00	► Council Detail
Other Money Earning Projects	\$ 0.00	► Council Detail
Day Trips and Special Events	\$ 0.00	► Council Detail
Overnight Trips and Camping	\$ 0.00	► Council Detail
Council Sponsored Programs	\$ 0.00	► Council Detail
Community Events	\$ 0.00	► Council Detail
Other Income/Not Listed Above	\$ 0.00	► Council Detail
Total Income	\$ 0.00	

[+ Add a note on Troop INCOME \(optional\)](#)

Finance Reports in the Volunteer Toolkit

9. The second section is for your expenses, this is for all the money that you spent on the troop for that year. Click the “Council Detail” button next to a line item if you’d like the definition.
 - a. If you don’t have a value for a line item, leave the field at 0.00
 - b. If you have an amount for Other Expense, make sure to select “Add a Note on Troop EXPENSES” to outline what that money came from.
 - c. Your expenses will auto calculate for you – make sure this matches with your records

EXPENSES		
If there is no value for an item, leave the field at 0.00		
		EXPENSES LAST UPDATE
GSUSA Registration Paid	\$ 0.00	Council Detail
Bank Charges	\$ 0.00	Council Detail
Postage	\$ 0.00	Council Detail
Supplies and Snacks	\$ 0.00	Council Detail
Permanent Troop Equipment	\$ 0.00	Council Detail
Insignia and Recognitions	\$ 0.00	Council Detail
Day Trips and Special Events	\$ 0.00	Council Detail
Overnight Trips and Camping	\$ 0.00	Council Detail
Council Sponsored Programs	\$ 0.00	Council Detail
Service Unit Events	\$ 0.00	Council Detail
Service Projects	\$ 0.00	Council Detail
Other Expenses/Not Listed Above	\$ 0.00	Council Detail
Total Expenses	\$ 0.00	

[Add a note on Troop EXPENSES \(optional\)](#)

10. The third section is the summary of your Finances, “Financial Summary”
 - a. Your income and expenses will auto calculate, please check these amounts and the ending balance to make sure it matches the record.

FINANCIAL SUMMARY		
		LAST UPDATE
2019 - 2020		
Starting Balance	\$ 0.00	
Income	\$ 0.00	
Expenses	\$ 0.00	
Ending Balance	\$ 0.00	
From the Council		
Please make a personal note on what your ending balance is so you have an accurate number for next year's report.		
Add a note on the Troop's financial summary		

Parents see the Troop income, expenses, and financial summary. They do not see your troop notes or any information that appears below. Your information is saved, but has not been submitted to the Council.

Finance Reports in the Volunteer Toolkit

11. The fourth section is your bank information. Please list all information.
 - a. Once you enter your first signer's name you will have the ability to enter your second signer using the "Add Another Signer" button. This will only appear after you put your first signer's information in.

Submit the Troop Finance Report by June 30, 2020

BANK INFORMATION

Checking Account *Required* LAST UPDATE
10/03/2019, 6:00:25 PM
ALAINA MCCREARY

Bank Name

Branch Name

Last 4 accounts #'s

Signers on Checking Account

First Name

Last Name

[+ Add Another Signer](#)

[+ Add another bank account](#)

12. The fifth section is about Council Notes and general questions.
 - a. It will ask for your Service Unit Name, there are no formal names for Service Units, you can include the township or school district covered. If you do not know your Service Unit number, you can check this in your Member Account or ask the Volunteer Service Team.
 - b. There are three questions that must be answered at the end, including your use of unused funds (materials for next year, planning for a trip, etc.), the contact information for your signers, and if your co-signers have reviewed

COUNCIL NOTES AND QUESTIONS FOR TROOPS

Troop Status *Required* LAST UPDATE

What is the status of Troop su144 for the next membership year?

☐ Returning
☐ Merge With Another Troop
☐ Disbanding
☐ Not Sure

Troop Service Unit

Service Unit Name

Number

Council Note for all Troops

Please state plans for unused funds below:

Troop Response

[+ Your response to the council](#)

Required

Council Note for all Troops

Please list the other people who are on your account. Include their full name, email, and phone number.

Troop Response

[+ Your response to the council](#)

Required

Council Note for all Troops

Have all signers reviewed this information prior to submission?

Troop Response

[+ Your response to the council](#)

Finance Reports in the Volunteer Toolkit

13. For the final section click Preview & Add Attachments. You will be brought to a preview of your submission, if you'd like to edit it again see the "edit report" at the top of the page. If everything looks correct at the bottom press the "Add Attachments & Send to Council" button.

Preview and Publish

Preview your finance report as Volunteers will see it and decide if you're ready to publish.

PREVIEW & ADD ATTACHMENTS

LAST UPDATE 02/25/2020, 2:13 PM

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Hello Alaina McCreary. [SIGN OUT](#)

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MEMBERSHIP YEAR: 2019 - 2020 Finance form Edit

Preview and send report to Council

This is the Troop's financial report as the Council will see it.

EDIT REPORT

LAST UPDATE 02/25/2020, 2:21 PM

Annual Troop Finance Report 2019 - 2020

- a. If you have not completed all required sections, the "Add Attachments & Send to Council" button will be grey, and you won't be able to submit your report.

Send report to Council: Due June 30, 2020

Person who is sending the report

Name	Alaina McCreary
Troop	Troop 09999
Report Sent	February 25, 2020

Check that your information is correct. You cannot change the finance report once it's been sent. If you have a correction, you'll have to contact the Council.

Any documents you want to send can be attached after you select "Add Attachments & Send to Council"

ADD ATTACHMENTS & SEND TO COUNCIL

Your information is safe

Finance Reports in the Volunteer Toolkit

- b. Once your submission is ready and you click “Add Attachments & Send to Council” button you will have the ability to add document, like a copy of your bank statement or if you are a dropped troop, your dropped troop form.
- 14. Your submissions will be emailed to the Volunteer Services Team and you will receive a copy of this email to the email we have on file for you.
 - a. If any changes need to be made after your submission please email the Volunteering Team.

Questions? Reach us at volunteering@girlscoutsneny.org or call the office at 518.489.8110. If you submit your finance report on the Volunteer Toolkit, you do not need to submit an additional copy to the Service Unit Manager. Volunteer Services will provide them with a downloaded copy.