

VTK Finance Tab

Troop Volunteer Training



Goals

- Overview of council troop finance procedures
- Step-by-step training on the Finance Tab in the VTK
- Key dates



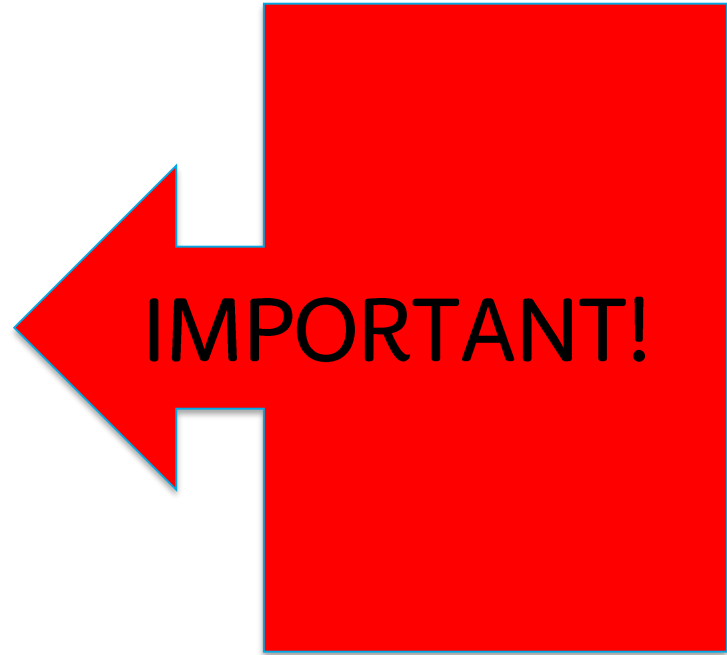
Annual Troop Financial Reporting Procedures

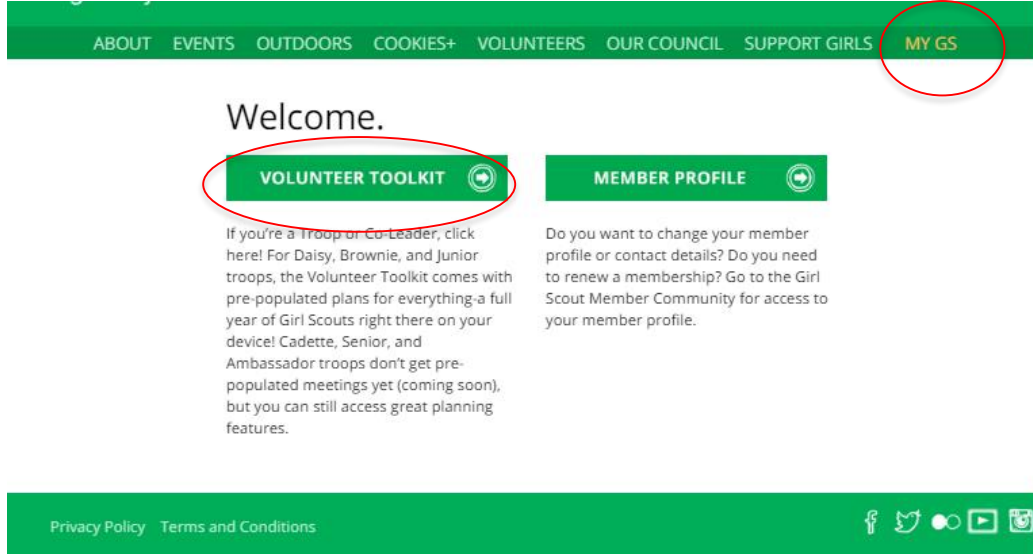


- All troops must submit a finance report by June 1 of each year.
- Troops with a large outstanding balance must provide information about how the troop plans to use the funds.
- Troops must inform council when bank signers need to be added or removed.
- For audit purposes, troops should retain receipts for one full year.

You can make edits to your finance tab at any point in the year, but you may only submit the report to council ONCE. Once submitted, the report cannot be edited.

Please do not submit the report until you are completely ready, on or before June 1.





Log in to your Volunteer Toolkit (VTK) through the MyGS link on our council's website. Click on "Volunteer Toolkit."

If the troop treasurer is not a leader or co-leader, you will need to assist them, or they can provide the information to you to submit.

If this is your first time logging in to the VTK, you may need to add at least one activity to your year plan before you can access the Finance Tab. A 30-minute webinar is available to review all features and benefits of the VTK. It is found under the "Volunteer Training" tab on the website.



Now we will take a brief look at the Finance Tab in the VTK so you can see the big picture before we show you how to use this new tool.

Welcome.

VOLUNTEER TOOLKIT



Access badges and Journeys for all levels, and much more from the Girl Scout National Program Portfolio. Plus, find meeting planning tools and resources for groups of all sizes. It's your virtual Girl Scout assistant!

Troop Leaders & Co-Leaders can co-plan activities, email caregivers in your troop and enter troop finances at the end of the year.

MEMBER PROFILE



Do you want to change your member profile or contact details? Do you need to renew a membership? Go to the Girl Scout Member Community for access to your member profile.




MY TROOP EXPLORE YEAR PLAN MEETING PLAN RESOURCES

FINANCES EVENT CALENDAR

Annual Troop Finance Report 2019 - 2020

Troop #####

 Financial Tips and Information

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

Annual GSUSA Membership Fee	\$	<input type="text" value="0.00"/>
Troop Dues	\$	<input type="text" value="0.00"/>
Individual Donations	\$	<input type="text" value="0.00"/>
Cookie Program	\$	<input type="text" value="0.00"/>
Mags & Munchies Program	\$	<input type="text" value="0.00"/>

Click on the “Finances” tab to begin.

Please note, many of the screenshots in this training are samples. They do not represent the actual report.



Annual Troop Finance Report 2019 - 2020

Troop #####

 [Financial Tips and Information](#)

INCOME

Your updates are automatically saved but not submitted to the Council.

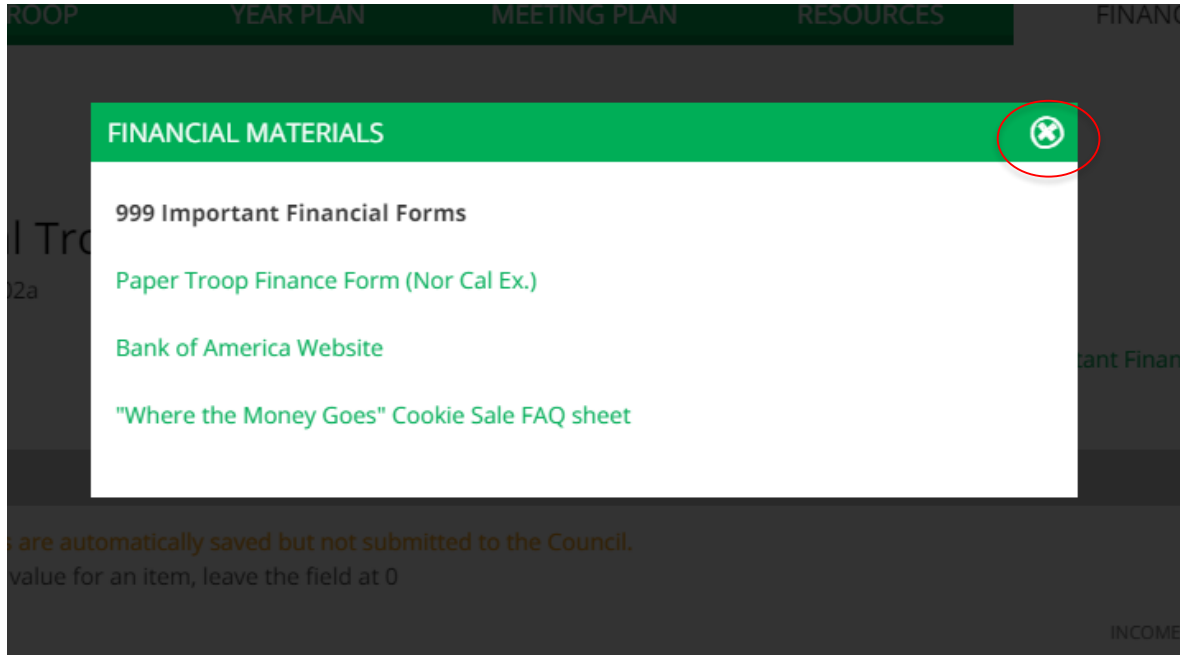
If there is no value for an item, leave the field at 0.00

Annual GSUSA Membership Fee	\$	0.00
Troop Dues	\$	0.00
Individual Donations	\$	0.00
Cookie Program	\$	0.00
Mags & Munchies Program	\$	0.00

Locate the hyperlink on the upper right side to find important documents or instructions to help you complete the finance report.

Here you will find detailed information about how to download and save your transaction history for your troop from Wells Fargo.





1. Click to open a pop-up window with important forms and information.
2. Click each green link to open the document or visit the website.
3. Click the X to go back to the troop finance form.



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

Monthly Troop Dues

 [Council Detail](#)

Summary of annual collection of girl troop dues.

Cookie Income

Parent Donations

 [Council Detail](#)

Total Income

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

INCOME LAST UPDATE
03/29/2017, 1:59:29 PM
MICHAELA TEST

Enter in your troop's annual income in the provided categories. Check for council details by clicking on the green arrows to the right of the income field to show an expanded description.

The time stamp will update automatically (the form is auto-saved.)

Click the + sign on "Add a note" (in green) to add additional information

Do not enter any special characters (such as commas) in the income fields.



You can enter transaction information at any point in the year, and totals will be tallied automatically. You can only **submit** the report once per year, however. In the future, if you enter and track transactions as they happen, your report will be ready to submit at the end of the troop year with just a few clicks.

Money Earning Projects

\$ 0.00

▼ Council Detail

This field is for income from APPROVED money earning projects, for Brownies and up.

Other Income- specify below

\$ 0.00

Total Income

\$ 0.00

⊕ Add a note on Troop INCOME (optional)

If needed, you can enter a note at the bottom about your troop's annual income or any unusual transactions.



EXPENSES

If there is no value for an item, leave the field at 0.00

Annual GSUSA
Membership Fee

\$ 0.00

Recognitions

\$ 0.00

▼ Council Detail

Awards, pins, badges, patches, other insignia

Events

\$ 0.00

Permanent Troop
Supplies

\$ 0.00

▼ Council Detail

Flags, camping equipment, storage bins, cookie booth
table, etc.

Program supplies

\$ 0.00

▼ Council Detail

Badge/Journey activity supplies, craft materials, troop
meeting snacks, etc.

INCOME LAST UPDATE
01/31/2020, 3:54:31 PM
MEGHAN CAMPBELL

Enter in your troop's annual expenses in the provided categories. Click on the green arrow for "Council Detail" to the right of the income field to show an expanded description.

The Last update time stamp will update automatically (the form is auto-saved.)

Do not enter any special characters (such as commas) in the expense fields.



Cookie Program council
proceeds

\$ 0.00

▼ Council Detail

The amount paid to council for cookies.

Mags & Munchies
council proceeds

\$ 0.00

▼ Council Detail

The amount paid to council for the Mags and Munchies
items.

Other Expenses- Specify
Below

\$ 0.00

▼ Council Detail

Click the + below to enter any notes about additional
expenses.

Total Expenses

\$ 0.00

+ Add a note on Troop EXPENSES (optional)

If needed, enter a note
at the bottom about
your expenses. Use
this box to explain any
unusual transactions.



FINANCIAL SUMMARY

2019 - 2020

Starting Balance	\$	0.00
Income	\$	0.00
Expenses	\$	0.00
Ending Balance	\$	0.00

From the Council

Troops with an ending balance of more than \$500.00 for Daisies or more than \$1,000.00 for Brownies and up will need to share what the troop plans to do with the funds.

 [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.

Review your financial summary and look for instructions from the council about ending balances.

If your ending balance exceeds \$500.00 for Daisies, or \$1,000.00 for Brownies and up, please indicate your troop plans for the funds.



Submit the Troop Finance Report by June 1, 2020

BANK INFORMATION

Checking Account *Required*

Bank Name

Branch Name

Last 4 accounts #s

Signers on Checking Account

First Name

Last Name

 Add Another Signer

 Add another bank account

Note the due date of your troop's finance report here.

Enter your troop banking account information, as well as all signers on your account. All accounts should be at Wells Fargo, and you can list the nearest cross streets for the "Branch Name."

You can click the + symbol to add more signers.

All troops should have only one account, so do not add accounts for sister troops here. Submit an individual report for each account.



Signers on Checking Account

First Name

Last Name

First Name

Last Name

Checking Account

Bank Name

Branch Name

Last 4 accounts #s

Checking

Savings



You can also click the **x** symbol to remove signers and the additional bank account, if needed.



COUNCIL NOTES AND QUESTIONS FOR TROOPS

Troop Status Required

What is the status of Troop ##### 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

Is your troop graduating/bridging to adult in June 2020?

 Your response to the council

Required

Indicate your troop's status for next year by selecting the appropriate radio button here. If your troop is graduating you can indicate below, but select "Disbanding" in the "Troop Status" field.

If your troop is disbanding or graduating be sure to spend troop funds before wrapping up troop activities for the year.

You will also need to enter your service unit name & number, such as Manatee 4, 604. A full listing of our service unit names and numbers are on the next slide.



Service Unit Names and Numbers

Manatee 1, 601
Manatee 4, 604
Manatee 5, 502
Sarasota 11, 605
Sarasota 12, 606
Sarasota 14, 608
Sarasota 15, 609
Charlotte 11, 610
Charlotte 12, 618
Desoto, 612



Hardee, 653
Highlands, 651
Lee 11, 613
Lee 12, 621
Lee 13, 629
Lee 13, 630
Hendry/Glades 628,
Collier 11, 634
Collier 12, 619
Collier 13, 620



Council Note for all Troops

How many boxes of cookies does your troop still have on hand (unsold after March 15, 2020)? Enter 0 if you have no cookies left.

+ Your response to the council

Required

Council Note for all Troops

Will your troop have any leadership changes for the 2020-2021 year? If you are adding, removing, or changing a role please indicate below so we can contact the volunteer(s) or adjust volunteer roles on the troop catalog. Include first and last names.

+ Your response to the council

Council Note for all Troops

What specific grade levels will your troop serve in the 2020-2021 troop year? (ie. 2nd grade only, 3rd and 4th grade, 6th-8th grades, etc.) We will update the catalog to reflect your response.

+ Your response to the council

Required

Council Note for all Troops

Will your troop be changing their troop meeting location for the 2020-2021 troop year? Please indicate your plans, and if you already have a new location, enter it below. If no changes, indicate "no changes".

+ Your response to the council

Required

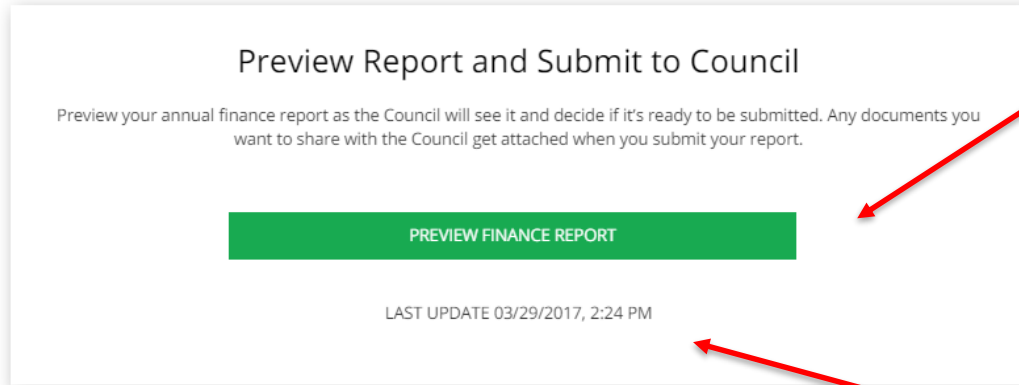
The finance report will also take the place of the summer Troop Changes Form. In the early fall we will contact you to update your troop for the catalog.

Look for any special council notes (information or questions that require responses) for your troop.

You will see “Required” in red if you must respond. Click “+ Your response to the council” to open a text box to enter your response.



YOU'RE DONE ENTERING INFORMATION – IT'S TIME TO PREVIEW!



Preview Report and Submit to Council

Preview your annual finance report as the Council will see it and decide if it's ready to be submitted. Any documents you want to share with the Council get attached when you submit your report.

[PREVIEW FINANCE REPORT](#)

LAST UPDATE 03/29/2017, 2:24 PM

The screenshot shows a white rectangular box with a title, a paragraph of text, a green button with white text, and a timestamp. Two red arrows point from the text on the right to the green button and the timestamp.

Click the green button to preview your finance report on the next page. You'll be able to edit it again if you need to.

Note the timestamp reflects when you last updated the report.



NOW YOU'RE IN PREVIEW MODE AS TROOP LEADER

Preview and send report to Council

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

EDIT REPORT

LAST UPDATE 03/29/2017, 2:31 PM

Click the “**EDIT REPORT**” button at any time to return to editing mode and make additional changes.



Annual Troop Finance Report 2016 - 2017

Troop 999202a

INCOME

Monthly Troop Dues	\$48
Cookie Income	\$1500
Parent Donations	\$145
Total Incomes	\$1693.00

Troop Income Note

Enter in any note or additional information here that you would like to share with the council about your troop's annual income reporting above

EXPENSES

Uniforms and Badges	\$78
Troop Meeting Supplies	\$187
Local Trips & Council Events	\$225
2018 Renewal Registration Fees	\$200
Total Expenses	\$690.00

Troop Expense Note

Enter in any note or additional information here that you would like to share with the council about your troop's annual expense reporting above

You will see your troop's income and expense entries listed here, as well as any notes you entered on the previous pages.



FINANCIAL SUMMARY

2016 - 2017

Starting Balance	\$0
Income	\$1693.00
Expenses	\$690.00
Ending Balance	\$1003.00

From the Council

Review your troop's financial summary and any notes you entered.



Submit the Troop Finance Report by **June 1**

BANK INFORMATION

Checking Account required

Bank Name Bank of America

Branch Name North America

Last 4 accounts #s 1234

Signers on Checking Account

First Name Jane

Last Name Doe

Review the bank account and signer information you entered.



Troop Status *Required*

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

- Returning Merge With Another Troop Disbanding Not Sure

Troop Service Unit

Service Unit Name

Manatee 4

Number

604

Council Note for all Troops

Is your troop graduating/bridging to adult in June 2020? Click the + below to enter your response.

 [Your response to the council](#)

Review your troop's status for the following year, your service unit name and number, and responses to the council's questions.



Publish Financial Report 2019 - 2020

Person who is publishing the Council's financial report.

Name	Meghan Campbell
Report Published	01/31/2020, 4:17:42 PM



Check that your information is correct. You cannot change the finance report once it's been published.

Select [Edit Report](#) to continue working.

PUBLISH REPORT

Your information is safe 

Be sure to check that all information is correct.

You can attach documents from your computer after you click “PUBLISH REPORT.”

Once you hit “PUBLISH REPORT,” you cannot change the finance report information.




SUBMIT TO COUNCIL



Are you ready to submit the 2016-2017 Financial report for troop to Council? You can not change the financial report once it has been sent.

If you are ready, now is the time to attach any documents you wish to send.

 **Attach a document**
Max combined file size 25MB

NO, DON'T SUBMIT

YES, SUBMIT NOW

If you have a correction after the report is sent, contact the Council.

A pop-up window will appear after you hit “**PUBLISH REPORT.**” This is the last step before you send the report to council.

You can click “**Attach a document**” to attach your last bank statement and transaction history, as required by our council. If you have not already saved this to your computer, click “**No, Don't Submit,**” and you can come back to upload it.



<input type="checkbox"/>	2020-01-21 18.59 Troop Pathway Training...	1/21/2020 7:51 PM	GoToMeeting Acti...	106,712 KB
<input type="checkbox"/>	2020-01-21 11.00 Troop Pathway Training...	1/21/2020 12:00 PM	GoToMeeting Acti...	279,160 KB
<input type="checkbox"/>	2020-01-21 08.58 Troop Pathway Training...	1/21/2020 9:50 AM	GoToMeeting Acti...	82,774 KB
<input type="checkbox"/>	2020-01-17 16.08 Troop Pathway Training...	1/17/2020 4:43 PM	GoToMeeting Acti...	149,596 KB
<input type="checkbox"/>	2020-01-17 13.30 thought partner work g...	1/17/2020 2:36 PM	GoToMeeting Acti...	219,170 KB

A pop-up window will help you browse files on your computer to upload. Select the files you wish to upload (max combined file size is 25 MB).

Troops must upload their most recent bank statement, which reflects the troop balance and the transaction history.

Instructions on how to download and save the transaction history are included in the “Financial Tips” at the top of the finance report.



SUBMIT TO COUNCIL



Are you ready to submit the 2016-2017 Financial report for troop to Council? You can not change the financial report once it has been sent.

If you are ready, now is the time to attach any documents you wish to send.

Attach a document

Max combined file size 25MB

KPI VTK 2017-02.xlsx (30.1 K)



KPI VTK December 2016-12 (1).pdf (318.2 K)



Template - VTK_Admin_Finance Tab 2.0.docx (2 MB)



NO, DON'T SUBMIT

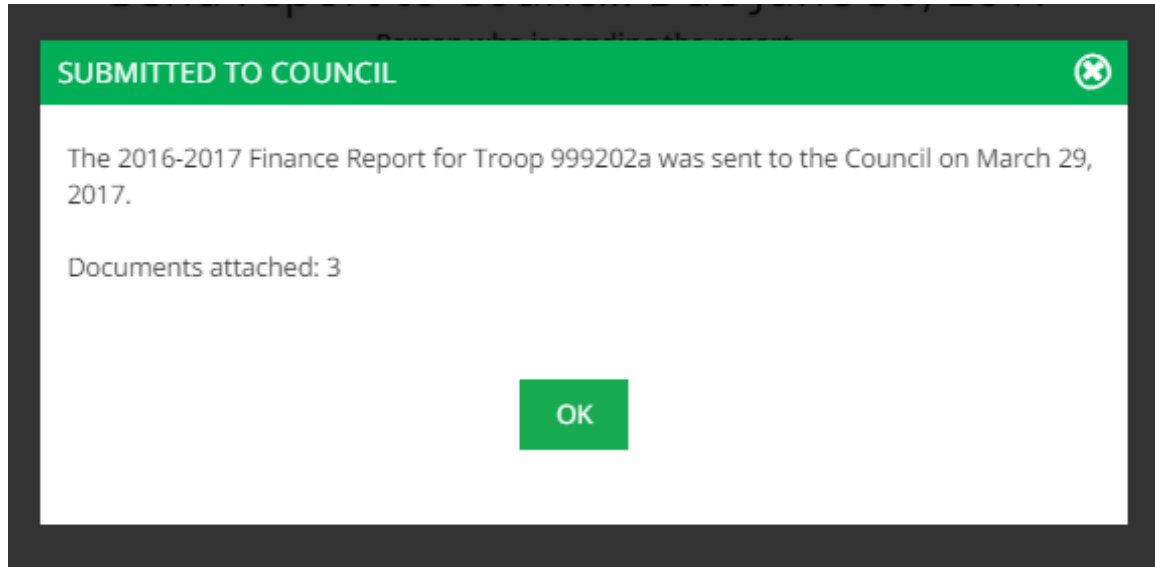
YES, SUBMIT NOW

If you have a correction after the report is sent, contact the Council.

View your attached files here.

Click “Yes, Submit Now” to submit or “No, Don’t Submit” to return to preview mode.





You will receive a pop-up confirmation of your finance report submission.

Click “OK” to return to your finance tab in the VTK.



Thank you

Thank you for submitting your Troop's financial report along with the 4 document(s) that were attached. It was sent on 03/29/2017, 2:46 PM by Test Michaela, Service Unit - Magical Dreamers SU 321

Annual Troop Finance Report 2016 - 2017

Troop 999202a

INCOME

Monthly Troop Dues

€ 10

Once back on your finance tab in the VTK, you will see a confirmation message at the top.

You will see all of your submitted troop finance information on this page (minus the attached documents).



Remember, troop funds belong to the girls. Troop members should be aware of how much money is in the troop account, and make choices about how to spend it.

If you have an update or correction to this financial report, please contact the Council for assistance.

Parents only see the Troop income, expenses and financial summary data. They do not see troop notes, bank information, attachments or other information the Troop has provided to the Council.

At the very bottom of the page, you will now see this message.

Parents are able to track financial information for the troop, but do not have access to full details.



Thank you!



Thank you for submitting your finance report. We sincerely appreciate all that you do for the girls! Your time and efforts do not go unnoticed! If you have questions, please contact your service unit treasurer or customercare@gsgcf.org for assistance.