SUB-BRANCH
PORTAL USER GUIDE

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Table of Contents

1. Sub-Branch Portal Systems Overview

The RSL NSW sub-Branch Portal is a one stop location for Office Bearers to manage their membership and access all resources needed to successfully operate their sub-Branch, including reporting on membership matters and charitable purpose performance. The Portal provides Office Bearers:

- A one-stop-shop for all sub-Branch administrative functions,
- Streamlined administrative access to update records,
- A Resource Centre providing easy access to a wide range of useful materials such as ANZAC House Communications, SOPs and Policies, Member Recruitment Tools, Branded Materials, Written Directions Framework, Corporate Governance and other Veteran Support and Services resources.

Please note that the portal requires your computer device to have Windows 10 or equivalent.

2. How to Log in

To log into the portal, you must be a sub-Branch Office Bearer, please visit the Member Resources page of the RSL NSW website: https://www.rslnsw.org.au/members-suite/sub-branch-portal/

Click **Sign In**
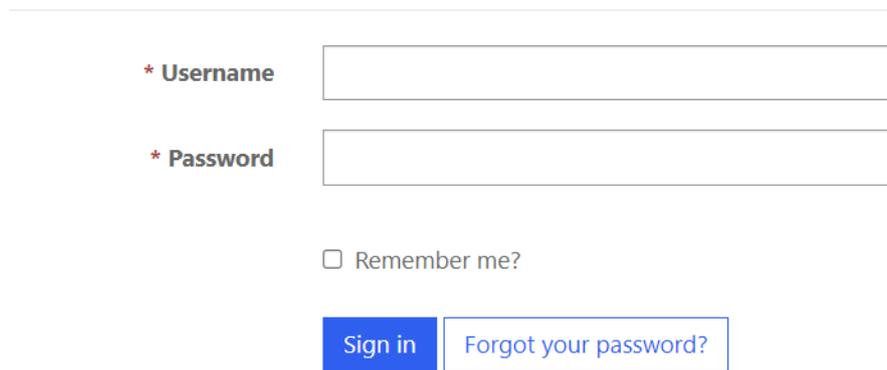
Your Username is the email address provided to you by ANZAC House.
Example: Canterbury-Hurlstone-ParkSB@rslnsw.org.au

2.1 Password Reset

If you have forgotten or need to reset your password, you can do so by clicking the **Forgot your password?** button as seen below. This process will send a password rest link via the nominated sub-Branch email address.
If you have further issues, you can contact ANZAC House, who can reset your password for you.

3.   Portal Navigation

3.1   Site Navigation

🏠 Renewals   Members   Associated Members   Annual Budget   Annual Returns   Compliance Report   Office Bearers   Training   **Sub-Branch name** ▾   🛡️ **RSL** NSW

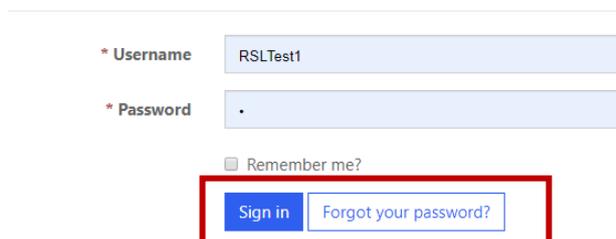| Navigation Item	Description
🏠 Home	Will take you to the homepage and Resource Centre
Renewals	Membership Management: In this tab you will be able to perform annual membership renewals
Members	Member management: In this tab you can view/edit a member's personal details such as: • Address • Contact details (Phone and Email) • Membership • Reveille preferences • And other details
Associated Members	In this tab you will be able to view your associated members and export their data.
Annual Budget	Instructions how Office Bearers complete the sub-Branch's Annual Budget form online.
Annual Returns	Instructions how Office Bearers complete the sub-Branch's Annual Return form online.
Compliance Report	Instructions how Office Bearers complete the sub-Branch's Annual Compliance Return form online.
Office Bearers	In this tab you can view your past and present office bearers and trustees. You can also add new office bearers and remove previous office bearers.
Training	Status of training assigned to Office Bearers and members can be viewed under this tab.
'Your sub-Branch Name' sub-Branch Profile	In this tab you can view/edit your sub-Branch's details such as: • ABN • Address • Contact details (Phone and Email) • sub-Branch meeting details

3.2   Filtering on Views

To change the displayed member list, click the down arrow and select the filter you would like to apply.

Members

☰ All Members ▾   Export Members

All Members
Active Members
Inactive Members
Deceased Members

Name   **Last Name**

Test
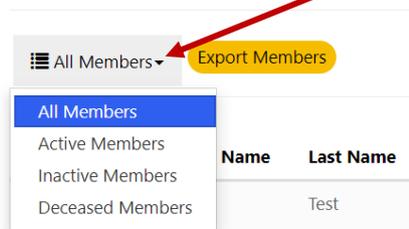
To filter by alphabetical order (A-Z or Z-A) click on the first or last name heading

First Name   **Last Name** ⬇

If the arrow is pointing up it will filter A-Z. If the arrow is pointing down, it will filter Z-A. This can be applied to any heading in a view and allows you to filter in ascending and descending order.

3.3   Search functions

The portal has a search window in each tab. The search function allows you to search by name, number (member number, service number, phone number), member status and member type.

Home > **Members**

Members

☰ All Members▾   Export Members   Search   🔍

Member Number	First Name	Last Name ↑	Mobile	Address Line 1	Suburb	Badge Number	Service Number	Type	Status

4.   Resource Centre

The Resource Centre is the homepage for the sub-Branch Portal and can be navigated to by selecting the 🏠 icon in the top left corner. The Resource Centre is the key location for finding relevant information and materials for operation of RSL NSW sub-Branches.

The homepage contains image tiles of the categories in the Resource Centre. On the next page is a breakdown of the categories and subcategories of information within the Resource Centre. There is also a search bar at the top of the left-hand categories column to quickly lookup the information you require.

ANZAC House Communications	Veteran Support Fund	SOPs and Policies	Written Directions Framework	Training	Finance	Be on Brand	Member Recruitment Toolkit
Board Communique Circulars RSL NSW Strategic Plan 2021-2026 Funding the Future Ask ANZAC House	Links directly to the Veteran Support Fund webpage	Standard Operating Procedures Policies Forms VSF Funding Proposal Form	Office Bearer Roles and Responsibilities Handover Guides Guidance Notes Registers and Templates	Governance Training	Annual Reports and Financial Statements Annual Return Forms Budget forms for sub-Branches Support & Assistance Fund Application Veteran Support Fund Contributions	Member Merchandise Store Recruitment and Event Tools Clubs Engagement Toolkit Veteran Services Card Email Signature Block Sub-Branch Stationery RSL NSW Logos RSL NSW Brand Guidelines	Member Recruitment Toolkit

Sport & Recreation Program	General	Commemorations, Ceremonies and Events	Corporate Governance	Veteran Support and Services		Membership Forms	Grants and Fundraising
Planning Activities Funding & Financial Support Activity Promotion & Storytelling Safety & Risk Smartwaiver Resources	Awards and Certificates Application Forms Email access for sub-Branches Replace a lost RSL Badge Veteran's Covenant, Veteran Card and Lapel Pin Wreath and Funeral Poppy Order Form	Commemorations and ceremonies Congress	2020 Board Election Board Documentation Constitution Annual Return Forms Model Constitutions for sub-Branch Incorporation	Advocating for Veterans Disaster Assistance DVA Claims and VRB Appeals Financial and Housing Assistance Veteran Employment Program RSL LifeCare sub-Branch Pack National Centre for Veterans' Healthcare Royal Commission into Veteran Suicide Education and Training Assistance Hyde Park Inn Loyalty Club Resources		Service Membership Affiliate Membership Transfer Membership Auxiliary Membership	What is Fundraising? Order fundraising tokens Grants Fundraising information for sub-Branches Grant information for sub-Branches How sub-Branches can donate to RSL LifeCare

5. Sub-Branch Profile

To view sub-Branch Profile information, select the icon with your sub-Branch name in the top right corner, then select 'Profile' from the drop-down menu.

ANZAC House ▾

Profile
Renewals
Members
Office Bearers
Invoices

Sign out
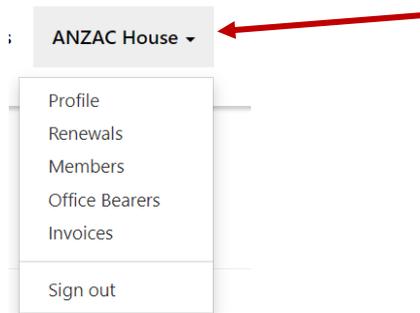
You can view the following sub-Branch details:

Home > RSL NSW Branch Profile

RSL NSW Branch Profile

BRANCH INFORMATION

Sub Branch Name *

Test Account

Main Phone

Provide a telephone number

Email

—

ABN

—

RSL Custodian Trustee

No

District Council

Meeting Details

Meeting Location

Sub Branch Primary Contact

5.1 Updating Sub-Branch Profile

Each sub-Branch can edit the following details:
- Main Phone
- Meeting Details (Day & Time)
- Meeting Location
- Address
- Postal Address – this can be the same as above

To update your sub-Branch details, enter in the information in the free text fields such as the meeting details field above and scroll down to click submit to save the changes.

Submit

To edit or update all other details please contact the ANZAC House Support team.
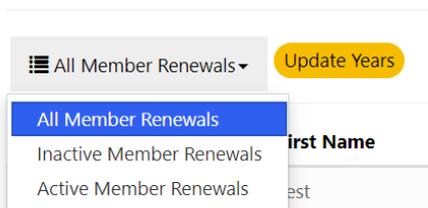
6.   Membership Renewals

6.1   Renewals (Views)

On this page you can see your member list in 3 different views:
- All Member Renewals – will show your active and inactive members
- Inactive Member Renewals – will show you those whose membership is not current
- Active Member Renewals – will show you the those whose membership is current within your sub-Branch

To view a list of all members, select the 'All Members' option.

To view a list of all your current members, select the 'Active Members' option.

To view a list of all those who have not renewed select the 'Inactive Members' option.

6.2   Annual Membership Renewals

From 1 January 2023, all 'Active' (formerly Financial) members will remain Active. Unlike previous years. Members will not default to 'Inactive' (formerly Unfinancial).

The sub-Branch Secretary is NOT required to update the status of members in the sub-Branch Portal. All 'Active' members will automatically remain 'Active' from 1 January 2023.

The sub-Branch Secretary, or other person responsible for maintaining membership records can now cancel a membership if a member no longer wishes to remain active.

6.2.1   How to cancel a Membership

From the Renewals page, Office Bearers are now able to cancel a membership if a member no longer wishes to remain active.

Select the member(s) from the list of members by highlighting the tick box adjacent to the member's name (as per below), then select 'Update Years'. Then select 'Cancel Membership' from the list of options.
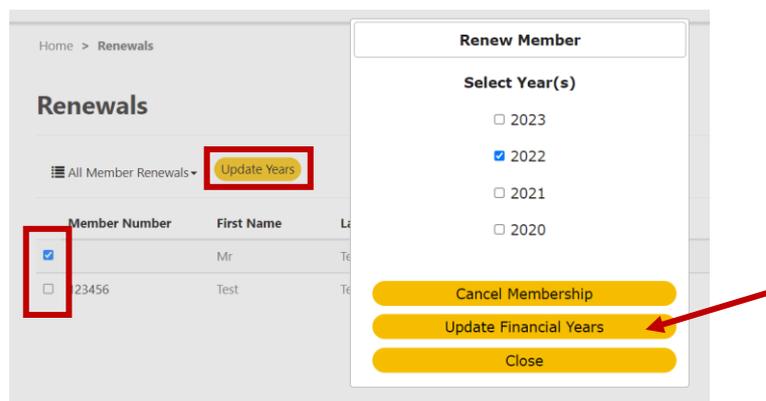
Once a membership is cancelled the member will show as 'Inactive'.

Member Number	First Name	Last Name ↑	Start Date	Member Status	Member Type	Active To
☐	Mr	Test		Inactive ←	Service Member	31/12/2023

6.2.2   How to 'Reactivate' a Membership

If you need to reactivate an 'Inactive' member (change from Inactive to Active Member Status) you can do so:
Select the member(s) from the list of members, and then select 'Update Years'
Select the year to update the membership to, then select 'Update Active Years'
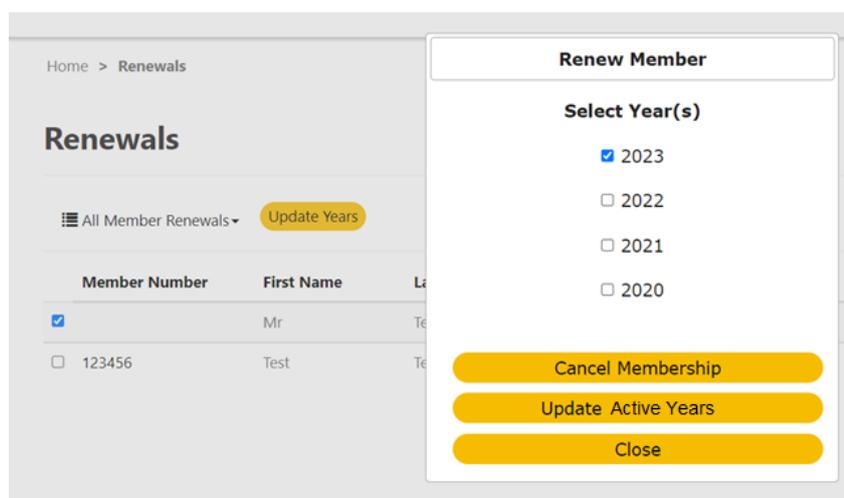
6.3   Membership Payments

In line with the Strategic Plan initiative (1.4) coupled with Goal 3 initiatives including the RSL NSW online application, RSL NSW Membership is fee-free.

7.   Members

7.1   Member (Views)

On this page you can see your member list in 3 different views:
- Active Members – will show you the those whose membership is current within your sub-Branch,
- Inactive Members – will show you the those who are not currently active,
- Deceased Members – Inactive members that have been marked deceased.
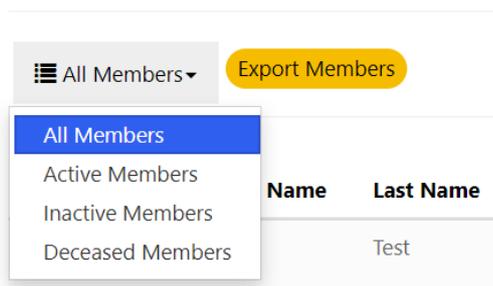
7.2   How to View/Edit Member Details

To view a member's full contact details, search for the member by typing in their name or member number in the top right-hand search bar

Click on their member number to open the member's record.

You can edit the following fields below:
- Member Details
- Address Details
- Membership Details
- Next of Kin
- Deceased status and date

View Membership

Member Details

You can also view and edit certain Membership Details, as seen below:

Once you have made changes to the member profile, scroll down, and Click Submit to save.
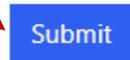
7.3   How to update a Member's Reveille Preference

If a member informs you that they wish to update their Reveille preference you can do so by:
- Searching for the member by typing in their name or member number
- Click on their member number to open their profile – (as above)

Clicking on the Receive Reveille Drop down – (as above image)
- Select Yes or No
- Click Submit to save – (as above)

7.4   How to Mark a Member as Deceased

If you are informed that one of your members has passed away, you are able to update their membership profile by opening their membership profile as above.

Click the Deceased Drop down:
- Select Yes,
- Select a date from the calendar and enter in the next of kin's name and phone number in the box,
- Click Submit to save.

Note: please contact the Support Team if you need to reverse this action.

7.5   How to Export a Member Listing

To export member data, navigate to Members, click Export Member Data. You will be provided with an excel sheet with all active, inactive, and deceased sub-Branch members and their membership data.

If your sub-Branch requires any further exports, please contact the Support Team at ANZAC House.

Members

Member Number ↓	First Name	Last Name	Mobile	Address Line 1	Suburb	Badge Number	Service Number	Type	Status
123456	Test	Test	04					Affiliate Member	Active

8.   Associated Members

All sub-Branches can view data of their Associated Members, however, only the primary sub-Branch is able to edit their details.

In this tab you are also able to export their data into an excel spreadsheet.

8.1   How to View an Associate Member's Data

To view an Associated Member's profile, click the associated member tab.

You can search for a member using the search field on the top right-hand corner as per the image below.

Once you have located the member click on their member number to open their profile.

🏠   Renewals   Members   **Associated Members**   Annual Budget   Annual Returns   Compliance Report   Office Bearers   Training

Home > Associated Members

Associated Members

Export Associated Members

Member Number	Member ↑	Mobile	Address Line 1	Service Number	Type	Status

8.2   How to Export Associated Member Data

To export Associated Member data, navigate to associated members. Click 'Export Associated Members'
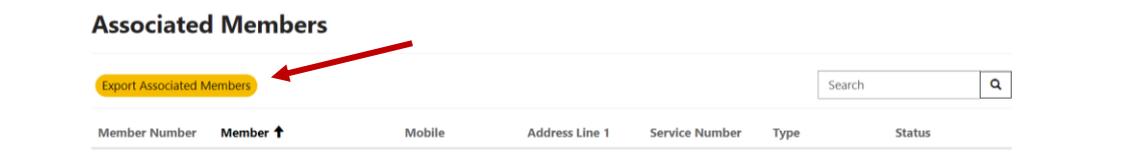
You will be provided with an excel sheet containing all sub-Branch associated members and their membership data. If your sub-Branch requires any further exports, please contact the Support Team at ANZAC House.

9.   Annual Budget

The RSL NSW Constitution requires that each RSL NSW sub-Branch lodge a sub-Branch Annual Budget with ANZAC House by **30 November** each year for the following calendar year (refer to SOP07 - Accounts, Financial Management and Expense Reimbursement).

The sub-Branch Annual Budget form must be completed electronically via the sub-Branch Portal. There is no requirement for the sub-Branch Annual Budget to be emailed or posted to ANZAC House.

An Excel copy of the sub-Branch Annual Budget can be generated at any time before and after submission for review and your sub-Branch records.

Budgeting is the process of preparing a financial plan for future operations with a view to enhancing financial performance, governance, and reporting. It is an estimation of Income and Expenditure over a specified period – in this case, the 12-month period from January to December each year.

Budgets are to be used as a management tool, allowing sub-Branches to compare actual Income and Expenditure against what they have budgeted or forecasted for at the start of the period.

The sub-Branch budget should reflect the requirements of POL01 Funding the Charitable Purpose and SOP01 Funding the Charitable Purpose in determining the net surplus available to donate to the Veteran Support Fund.

Note: If you are planning to purchase capital items, the amounts are not to be included in this Budget (refer to your own sub-Branch policy in relation to capital expenditure). Further, the following information may assist you when preparing your Budget.

*Note: When completing your Budget, all amounts are to be entered in **WHOLE DOLLARS ONLY**.

The annual budget must be presented at a sub-Branch general meeting for approval by the members before it is submitted.

9.1   Site Navigation

🏠   Renewals   Members   Associated Members   **Annual Budget**   Annual Returns   Compliance Report   Office Bearers   Training

Select 'Annual Budget'

Home > Annual Budget

Annual Budget

☰ Active Annual Budgets ▾

| Active Annual Budgets | | | |
| Submitted Annual Budgets | | | |

| | | **Sub-branch** | **Enter Figures** | |
| 2024 | | XXXX   RSL sub-Branch | Yearly | ⌄ |

Select '**20XX**' [the year required to be completed, which will appear as a draft until submitted] under '**Active Annual Budgets'.**

9.2   General information section

Home > Annual Budget > **Draft Annual Budget**

Draft Annual Budget

Download Excel File!

General

Sub-branch *

    XXXX RSL sub-Branch

Enter Figures *

| Yearly | ⌄ |

Who Entered

| | 🔍 |

Step 1: Decide whether you will be entering **Yearly** or **Monthly** budget figures and select at '**Enter Figures**'.

Step 2: Search for the name of the person entering the budget figures.

Next

Step 3: Select '**Next**' to save the information on this

Yearly (enter total amount for each item for the full year)

Category	Total
Income	
Investments	
Interest received – bank & investment	
Dividends & distributions (inc franking credits)	

Monthly (enter amounts by month across the year, total will be automatically calculated)

Category	January	February	March	April	May	June	July	August	September	October	November	December	Total
Income													
Investments													
Interest received – bank & investment													
Dividends & distributions (inc franking credits)													

Draft Excel spreadsheet

If you would like to work with a spreadsheet to prepare the sub-Branch's Annual Budget before entering and submitting your final numbers, please open the Annual Budget then select Yearly or Monthly, enter name of who is entering the data and click on **Next**. In the first field add $1 and scroll to the bottom of the screen and select **Save as Draft**. Once it has saved, re-open the budget and select **Download Excel File!** (yellow button at top) then save the draft Excel in an appropriate location on your computer. Open the Excel spreadsheet and add in the relevant figures for each category before transferring the information to the online form for submission.

9.3   Category – INCOME

List all sources of Income (recurring and one-off) expected for the upcoming year and classify this income into:

- **Investments** [income derived from investing activities, i.e. interest received, dividends, rental income etc.]
- **Members**[#] [income received from members contributions or donations]
- **Appeals** [funds received from appeal activities, i.e. ANZAC appeal, Remembrance Day appeal]
- **Fundraising (donations received)** [i.e. from the general public or businesses, etc.]
- **Other fundraising** [funds received from other fundraising activities performed, i.e. raffles, BBQs etc.]
- **Grants received (non-recourse)** [this subsection includes funds received from bequests, DVA, Clubs, etc.]

  to add **Other grants** received, select the [+] to add each item separately, include the description. [If you wish to delete an **Other** entry, select the [-] at the front of the row.]
- **Other income** [any additional income received that does not fall into one of the above categories, i.e. retail merchandise sales or sale of fixed assets no longer in use etc.]
- **Other comprehensive income** [for unrealised gain/loss on investments and revaluation of property]

[#] Donations or Financial contributions from your sub-Branch members are not classified as Fundraising under the Charitable Fundraising Act 1991 – this is why they are included as an income item in the Members section of the Budget.

9.4   Category – EXPENDITURE

List all expenditures forecasted/expected to be incurred for the upcoming year and classify these expenditure into:

- **Administration** [costs relating to running the sub-Branch, i.e. stationery, rent, insurance etc.]
- **Members** [costs spent on members and member related expenses i.e. district council expenses, meeting expenses etc.]
- **Functions** [costs incurred for putting on a function, i.e. food, room hire etc.]
  to add **Other functions** select the [+] to add each item separately [If you wish to delete an **Other** entry, select the [-] at the front of the row.]
- **Appeals and fundraising** [the costs incurred from running an appeal or fundraising activity, i.e. tokens, refreshments for volunteers, fundraising money buckets etc.]
- **Commemorations** [the costs spent on a commemoration event (i.e. ANZAC day, Remembrance Day) i.e. floral arrangements, audio equipment for speeches etc.]

- **Charitable purpose and welfare** [costs relating to supporting veterans and enacting our charitable purpose, i.e. welfare for veterans and their families or salary and wages or those providing support/ services to veterans and their families etc.]

  to add **Other charitable purpose and welfare activities** select the [+] to add each item separately [If you wish to delete an **Other** entry, select the [-] at the front of the row.]

- **Other expenses** [for all other expenses that don't fit into one of the above subcategories, i.e. cost of merchandise, etc]

9.5   Category – DONATIONS

Apply the provisions of RSL NSW SOP 1 to the Net Income BEFORE Donations calculated in this section to determine the Annual Surplus and upcoming year's charitable purpose Donations and contributions to be made on behalf of the sub-Branch.

Donations to RSL LifeCare Veteran Services, the RSL NSW sub-Branch Support & Assistance Fund, Strategic Plan projects, sport and recreation, etc should be made through the Veteran Support Fund (VSF). To enable the RSL in NSW to take advantage of its scale, demonstrate commitment to working together to achieve its charitable purpose, and through leveraging its resources, sub-Branches will be able to donate to a 'contribution pool' called the RSL NSW Veteran Support Fund. Please click here for more information on the Veteran Support Fund, where you will find the approved Veteran Support Fund initiatives listed on the Veteran Support Fund dashboard.

RSL NSW Veteran Support Fund

- **RSL LifeCare Veteran Services**
- **Other VSF initiatives** – to add Other initiatives select the [+] to add each item separately, [If you wish to delete an **Other** entry, select the [-] at the front of the row.]
- **Local / community donations** – to add Other donations select the [+] to add each item separately [If you wish to delete an **Other** entry, select the [-] at the front of the row.]

9.6   Category – NET INCOME

This section is automatically populated from Total Income, minus Total Expenses to equal Net Income BEFORE Donations then minus Donations to equal Net Income/(Loss) after donations

Totals automatically populated for final totals are:

- **Total income**
- **Total expenditure**
- **Net income/(loss) before donations**
- **Total donations**

9.7   Save draft and review Annual Budget

Once you have entered the budget figures, select '**Save as Draft**' to save the budget. Select this button at the bottom of the form anytime you wish to save your work to come back to later.

Save as Draft   Submit

To review the sub-Branch's Annual Budget, go to **Active Annual Budgets**, click on the relevant year to re-open on the screen or select '**Download Excel File!**' to download and review from the Excel spreadsheet.

9.8   Sub-Branch members must approve the Annual Budget prior to submission

IMPORTANT: The sub-Branch Committee must present the Annual Budget to sub-Branch members for approval prior to submission.

9.9   Submit sub-Branch's Annual Budget

Once the sub-Branch's Annual Budget has been approved by the members, follow 9.7 steps to click on the relevant year to re-open on the screen then select **Next**.

Check the figures are final, edit if required, then at the bottom of the form enter **Date approved by members** before selecting the **Submit** button.

9.10   Download Excel file sub-Branch's Annual Budget

Once the Annual Budget has been submitted, go to '**Submitted Annual Budget**' to open the Annual Budget details, click on the relevant year, then select '**Download Excel File!**', you will find the file in your Download folder on your computer so that you can then save the Annual Budget accordingly.

10.   Annual Returns (sub-Branch Annual (SBA) Returns)

The RSL NSW Constitution requires that each RSL NSW sub-Branch lodge a sub-Branch Annual Return (SBA) with ANZAC House by **31 May** each year for the preceding year.

The sub-Branch Annual Return form must be completed electronically via the sub-Branch Portal. There is no requirement for the sub-Branch Annual Returns to be emailed or posted to ANZAC House.

A PDF copy of your completed sub-Branch Annual Return can be generated as a print copy for your sub-Branch records.

10.1   Site Navigation

Select' Annual Returns'

Select '**20XX**' [the year required to be completed which will appear as a draft until submitted] under '**Current Year Annual Returns**'

10.2   Annual Returns Submission

The following instructions appear at the top of each section to assist in completing your return.

Instructions to complete the Annual Returns form:

- *A user guide is available on the sub-Branch portal with detailed instructions to assist with the completion of the annual return.*
- *The annual return must be presented to the members before being submitted.*
- *The annual return due date is 31 May, as outlined in the Constitution.*
- *The navigation menu to the left lists the sections to be completed as part of the sub-Branch annual return.*
- *At the bottom of each page, there is an option to go to the previous and next page. This is the only way to navigate through the pages.*
- *The generate PDF on each page will only include information from the previous tab (i.e. once the next button has saved that information).*
- *Please read the item descriptions carefully when including the values – for example, in expenditure there are separate areas for salary and wages – admin and salary and wages – welfare related.*
- *There is the option to provide details for other items under various headings. To include other items, click on the +Create button. A separate window will appear. You will need to include the name and the numerical value and click submit. You can edit or delete each line item by clicking on the little arrow to the right of the amount.*
- *The information provided in Notes 2, 3 and 4 will auto-populate to the assets and liabilities page.*
- *Please ensure the form is completed before clicking Submit on the last page.*

The navigation bar on the left indicates where you are up to in completing the form (highlighted in green for complete and blue for current tab). The navigation bar cannot be used to navigate between sections, you will need to use the '**Previous**' and **'Next'** button to navigate between sections. Selecting '**Next**' will save the information on the current tab.

If you wish to print the Form, select '**Generate Annual Form PDF**' button. You can download and print the Form at the beginning to complete by hand, prior to entering it into the portal. All annual returns must be submitted online. The pdf is for the sub-Branch's records only. State Branch does not require the pdf to be submitted.

If your browser does **NOT** have **pop-ups enabled,** the pdf will be blocked and won't generate. You need to turn allow pop-ups in your browser for the pdf to be generated. To see how to disable pop-ups is dependent on the browser you use, go to: https://www.minitool.com/news/how-to-disable-pop-up-blocker.html.

10.3   General Information Section

10.4   Income section

Complete the details for each sub-section:
- Investments
- Members
- Appeals
- Fundraising (Donations Received)
- Other Fundraising
- Grants Received (non-recourse)
- Other Grants Received (non-recourse)
  - Select '**+Create**' button and add Name and Amount of each grant received then select '**Submit**', up to 10 options available.
- Other Comprehensive Income
- Total Income [*calculates automatically and can't be overridden*]

Select '**Next**' to save and move to next section.

10.5   Expenditure section

Salaries and wages for administration should be included under the administration heading. Salaries and wages for welfare related roles should be under the welfare heading.

Complete the details for each sub-section:
- Administration
- Members
- Appeals & Fundraising
- Commemorations
- Charitable Purpose and Welfare
  - Other Welfare Activities you can add additional activities and related expenses by selecting '**+Create**' button and add Name and Amount then select '**Submit**', up to 10 options available.
- Other Expenses
- Total Expenditure [calculates automatically and can't be overridden]

Select '**Next**' to save and move to next section.

10.6   Note 1 – Donations section

Complete the details for each sub-section:
- RSL LifeCare Veteran Services
- Other Donations
  - Select '**+Create**' button and add Name and Amount of each donation then select '**Submit**', up to 10 options available.

Other Donations

Name ↑	Amount	
VSF - Kokoda	$2,000.00	⌄
VSF - NCVH Liaison Officer	$2,000.00	⌄
VSF - Saltwater Veterans	$2,000.00	⌄

Total Other Donations $ 6,000.00

- Total Donations Paid [calculates automatically and can't be overridden]

Select '**Next**' to save and move to next section.

10.7   Net Income/ (Loss) After Donations section

Calculates automatically and can't be overridden.

Select '**Next**' to save and move to next section.

10.8   Note 2 – Land & Buildings section

Complete the details for each sub-section (if sub-Branch doesn't hold any land and buildings select '**Next**' and move onto the next section):

- Note 2 – Land & Buildings
  - o Select '**+Create**' button and add details for each property: **Property Type**, **Property Use**, **Address**, **Valuation Date**, **Lot Number**, **DP Number**, **Valuation Amount** and **Percentage of time the property was used in the pursuit of the charitable purpose** then select '**Submit**', up to 10 options available.
- Total Land & Buildings [*calculates automatically and can't be overridden*]

Select '**Next**' to save and move to next section.

10.9   Note 3 – Grants (Unspent Funds) section

(If not relevant select '**Next**' and move onto the next section)

Complete the details for each sub-section of any grants received for a specific purpose that have not yet been completely applied:

- Note 3 – Grants (Unspent Funds)
  - o Select '**+Create**' button and add details for each grant: **Organisation Funding Body**, **Name of Grant**, **Original Amount**, **Date Received**, **Grant Funding End Date**, and **Unspent Amount** then select '**Submit**', up to 10 options available.
- Total Grants [*calculates automatically and can't be overridden*]

Select '**Next**' to save and move to next section.

10.10 Note 3a – Grants (In Kind Funding) section

In Kind Funding includes any goods and services provided to the sub-Branch which aren't paid for but excludes sub-Branch office bearer volunteer hours.

- Note 3a – Grants (In Kind Funding)
  - o Select '**+Create**' button and add details for each grant: **Organisation providing in-kind funding**, **Description**, **Amount** then select '**Submit**', up to 10 options available.
- Total In Kind Funding [*calculates automatically and can't be overridden*]

Select '**Next**' to save and move to next section.

10.11 Note 4a – Current Investment Asset (Term Deposit) section

Complete the details for each sub-section (if not relevant select '**Next**' and move onto the next section):

- Note 4a – Current Investment Asset (Term Deposit)
  - o Select '**+Create**' button and add details for each term deposits: **Financial Institution**, **Maturity Date**, **Deposit amount,** and **Average interest rate %** then select '**Submit**', up to 10 options available.
- Total Term Deposits [*calculates automatically and can't be overridden*]

Select '**Next**' to save and move to next section.

10.12 Note 4b – Current Investment Asset (Shares and Equities – Portfolio) section

Individual shareholdings do not need to be disclosed if the portfolio is managed by an Investment Manager or Financial Advisor. Where the portfolio is managed, include the market value of the full portfolio and the name of the Investment Manager or Financial Advisor.

Complete the details for each sub-section (if not relevant select '**Next**' and move onto the next section):

- Note 4b – Current Investment Asset (Shares and Equities - Portfolio)
    - o Individual shareholdings aren't required to be disclosed, include the market value for the whole portfolio and the name of the fund manager or advisor. If the sub-Branch holds shares directly, either input the name of the individual shares or total the whole portfolio by inputting the cost and the market value.
    - o Select '**+Create**' button and add details for each investment: **Name of Fund/Portfolio Advisor/Manager**, **Cost**, **Market Value at 31 December, Annual rate of return (%),** and **Investment Management fee (%)** then select '**Submit**', up to 10 options available.
- Total Portfolio [*calculates automatically and can't be overridden*]

Select '**Next**' to save and move to next section.

10.13 Assets and Liabilities section

Complete the details for each sub-section:
- Current Assets – Cash and Cash Equivalents
- Current Assets – Inventory
- Current Assets – Investments [*auto-populated and can't be overridden from Note 4a and 4b*]
- Current Assets – Other Assets
    - o Select '**+Create**' button and add Name and Amount of each asset then select '**Submit**', up to 10 options available.
- Total Current Assets [*calculates automatically and can't be overridden*]
- Non-Current Assets
    - o Land and Buildings [*auto-populated and can't be overridden from Note 2*]
    - o Select '**+Create**' button and add Name and Amount of each non-current asset then select '**Submit**', up to 10 options available.
- Total Non-Current Assets [*calculates automatically and can't be overridden*]
- Total Assets [*calculates automatically and can't be overridden*]
- Current Liabilities
    - o Select '**+Create**' button and add Name and Amount of each liability then select '**Submit**', up to 10 options available.
- Total Current Liabilities [*calculates automatically and can't be overridden*]
- Non-Current Liabilities
    - o Select '**+Create**' button and add Name and Amount of each liability then select '**Submit**', up to 10 options available.
    - o Grants [*auto-populated and can't be overridden from Note 3*]
- Total Non-Current Liabilities [*calculates automatically and can't be overridden*]
- Total Liabilities [*calculates automatically and can't be overridden*]
- Net Assets [*calculates automatically and can't be overridden*]
- Equity and Retained Earnings [this part requires total Equity and Retained Earnings equals net Assets, need to update the Retained Surplus amount to make sure you have the right number for the Balance Sheet to balance.

Select '**Next**' to save and move to next section.

10.14 Trustees Certificate/Declaration section

I / We certify that ALL the Assets – Real and Personal Property as disclosed and shown in this Annual Return are in existence, correctly valued and covered by insurance. The Title Deeds to the land (real property), identified in Note 2, are:

Complete the details for each sub-section:
- Trustees Certificate / Declaration (any Title Deeds to the land are listed here)
- If RSL Custodian of the sub-Branch, the box should be ticked.

Select '**Next**' to save and move to next section.

10.15 Insurance Details section

- Insurance Details
  - Select '**+Create**' button and select from the drop-down menu the type of **Insurance Cover**, **Name of Insurer**, and **Expiry Date** of each insurance then select '**Submit**', up to 10 options available.

Select '**Next**' to save and move to next section.

10.16 Employee and Volunteer Details section

Full-time and part-time employees are **PAID** employees only that the sub-Branch hires directly.
- Number of Full Time Employees
- Number of Part Time Employees
- Number of Volunteers
- Total volunteer hours within the calendar year by the sub-Branch

Volunteer hours can be estimated as the total average number of hours each individual office bearer, Trustee and other sub-Branch volunteers contributes per month and multiplying it by 12 months. If the sub-Branch keeps a log of volunteer hours, use the total number of hours calculated for the calendar year. Select '**Next**' to save and move to next section.

10.17 Submit section

The Annual Return can be downloaded as a PDF by selecting 'Generate Annual Form PDF' button to take it to the sub-Branch Committee to review and approve prior to submission.

Before submitting, click on the calendar button to choose the date of completion.

Select '**Submit**' to finalise the Annual Return and submit.

Once your Form has been submitted you will find it under '**Current Year Annual Returns**' and the '**Status Reasons**' will change to Submitted. You can always go back into the Form to generate a pdf.
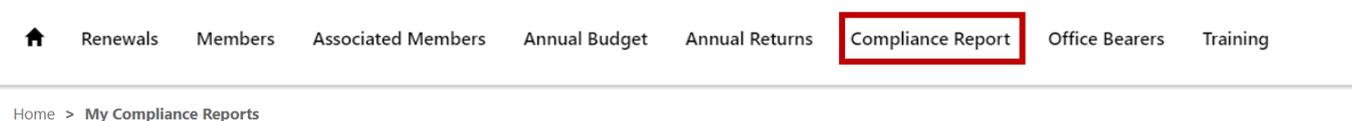
11.   Compliance Annual Report

Please provide your answers for the Compliance Annual Report for the previous calendar year.

As part of RSL NSW's efforts in strengthening its compliance and governance processes, ANZAC House has established an online sub-Branch compliance annual reporting program. Completion of the online report is due by 31 May each year, starting with the report for 2023 calendar year (due date 31 May 2024).

Please note that the Compliance Annual Report must be completed in addition to the sub-Branch Annual Budget and Annual Return.

Given the scope of the questions within the report, it is suggested that the sub-Branch committee collaborate to answer the CAR questions. If this is not practical for your sub-Branch, you are able to save, exit, and return to the report at any stage during completion and before submission, by following the instructions below.

11.1   Site Navigation

| 🏠 | Renewals | Members | Associated Members | Annual Budget | Annual Returns | **Compliance Report** | Office Bearers | Training |

Home > My Compliance Reports

My Compliance Reports

☰ Draft ▾   Search Compliance Reports 🔍

Name	Due Date ⬆	
2023-Compliance Annual Report	31/05/2023	▾

Select '**Compliance Report**'

Select the file '**YEAR-Compliance Annual Report**' under '**Draft**'

11.2   Complete the CAR Form

Please provide a response to each question. All questions are mandatory and can be reviewed prior to submitting your report. Any outstanding items will be highlighted during the review phase, for your attention and action. Questions require either a single response, free text, date picker, or multiple-choice response (through drop-down menus). Please note that some questions require additional information, depending on the response given.

There are three sections to complete:

1   Finance Processes
2   Governance Processes
3   Charitable Purpose
4   Review

For each section answer each question then at the bottom of the page select '**Next**' to save and move to the next section until you have completed all the questions. You can also select '**Previous**' if you want to return to a previous section. The tabs at the top indicate which section you are completing but cannot be used to navigate between categories, you need to use the '**Previous**' button instead.

11.3 Review Section

Once you have selected **'Next'** after completing all sections, you then move to the '**Review**' section which lists your responses to all the questions. You can review your responses and edit if or where required.

After you have completed your review of all your answers, select '**Submit**'.

Once your form has been submitted, the status will change from '**Draft**', and you can find it listed under '**Submitted**'. Once submitted, you will no longer be able to edit your form. Should you require changes to any of your responses, please email support@rslnsw.org.au to discuss your options.

Home > **My Compliance Reports**

My Compliance Reports

≣ Submitted ▾

Name

2022-Compliance Annual Report

11.4 Print Form

If you wish to print your report, select '**Print CAR**' button on the top right of the screen and then select either your printer or 'Print to PDF' to save as a pdf document.

12.   **Office Bearers**

🏠   Renewals   Members   Associated Members   Annual Budget   Annual Returns   Compliance Report   Office Bearers   Training

12.1 Office Bearers (Views)

On this page you can see your sub-Branch current and past Office Bearers, their position, start date and end date.

To change the view, click the down arrow and select current, pending, or previous.

Office Bearers

≣ Current Office Bearers ▾

Current Office Bearers	**Office Bearer Role**
Pending Office Bearers	
Previous Office Bearers	

There are no records to display.

12.2 Office Bearer and Trustee Resignations

If an Office Bearer or Trustee has resigned, you need to update your sub-Branch details by navigating to Office Bearers.

Office Bearers

≣ Current Office Bearers ▾   Search   🔍   New Office Bearer

Office Bearer ↑	Position	Start Date	End Date
Edward Mame	President	02/12/2019	
Jim Peterson	Honorary Secretary	11/03/2020	

Click the person's name to edit as per above.

You will be redirected to the below:

View Office Bearers

Office Bearer

Jim Peterson   [✖] [🔍]

Position

Honorary Secretary   ▼

Appointed Date

11/03/2020   [📅]

Resigned Date

[   ]   [📅]   ⬅

Branch

ANZAC House RSL Sub-Branch   [✖] [🔍]

[Submit]   ⬅

- Enter the date they resigned by clicking the calendar
- Click submit to save

12.3   Adding a New Office Bearer and Trustee

If you need to add a new office bearer following an election or resignation you can do so navigating to Office Bearers.

Click New Office Bearer

Office Bearers

☰ Current Office Bearers ▾		Search [🔍]	[New Office Bearer] ⬅
Office Bearer ⬆	**Position**	**Start Date**	**End Date**

You will be taken to the below screen, click the magnifier icon on the search bar:

Create Offices Bearers

Please Send Supporting Documents to RSL@RSLNSW.com.au for review

Office Bearer

[   ] [🔍]   ⬅

Position

[▼]

Appointed Date

[   ] [📅]

Resigned Date

[   ] [📅]

The below window will pop up and provide you with a list of your service members:

Lookup records

Search [   ] 🔍

Choose one record and click Select to continue

✔	Full Name ↑	Member Number	Primary Sub Branch	Member Type	Member Status	Address 1: Street 1	Service Number	Date of Birth
☐	Mr Test		Test Account	Service Member	Active			01/12/2022
☐	Test Test	123456	Test Account	Affiliate Member	Active			
☐	Tyler McDonald		Test Account					

[Select] [Cancel] [Remove value]

To select a person, click their name and then click the select button.

Once you have selected the person you will be redirected to the below:

Create Office Bearer

Please Send Supporting Documents to Support@RSLNSW.org.au for review

Office Bearer *
[Tyler McDonald   ✖ 🔍]

Position
[∨]

Appointed Date
[DD/MM/YYYY   📅]

Resigned Date
[DD/MM/YYYY   📅]

District Council Delegate
● No   ○ Yes

[Submit]

- Select their position from the drop down,
- Select the date they were appointed by clicking the calendar,
- Click submit to save.

This comes through to ANZAC House as a pending status. Once you have completed the process, please send through a copy of your minutes which capture the new appointment to the Support Team at support@rslnsw.org.au.

Once the Support Team has received the supporting documentation, they can confirm the appointment and the Office Bearer will appear in your portal. Please note that they do not appear in the portal until the Support Team has received the paperwork but can be seen under the 'Pending Office Bearer' view.

13.   Training

13.1   Site Navigation

Select 'Training'

13.2   RSL NSW Governance training

All office bearers (President, Vice President, Secretary, Treasurer and Trustees) have been assigned to the following RSL NSW Governance training:
1. Conflicts of Interest
2. Safety, Risk and Wellbeing
3. Governance and Compliance

Under the **Training** section each office bearer will be listed with each course they have been assigned to do and their completion is recorded under the **Course Status** heading.

Office bearers (as assigned in the sub-Branch Portal by the sub-Branch) are pre-registered for the Governance training and course status will be updated monthly by ANZAC House. If office bearers have changed, please refer to **Change of office bearers** section below.

The **Course Status** options are:
*   Not attempted – the office bearer has not started the course
*   Incomplete – the office bearer has started the course but not completed it
*   Completed – the office bearer has successfully completed the course having passed the quiz with 80% or more.

Change of office bearers
If there has been a change to the office bearer, please refer to **Section 12** in this User Guide for instructions on how to retire or add new office bearers. Once the new office bearer has been assigned to their new role in the office bearer section in the portal, please contact the Member Support Team via email at support@rslnsw.org.au or call **1300 679 775** with the name(s) of the retired and new office bearers so that login details can to be sent to the office bearer.

To access the RSL NSW Governance training go to https://rslnsw-elearn.com.au/.

14.   Further Assistance

If you require further assistance, please contact the RSL NSW Member Support Team via email: support@rslnsw.org.au or phone 1300 679 775.