Volunteer Toolkit (VTK) Finance Tab

Step-By-Step Instructions

Troop leaders and troop treasurers will complete the Annual Troop Finance Report using the For Volunteers . This document will provide step-by-step instructions and screenshots showing how to enter your troop's financials. If you have questions or need help logging in or completing your Troop Finance Report through the VTK Finance tab, please contact your volunteer support specialist, email customer care at customercare@girlscoutsnyc.org or call (212)645-4000.

Make sure you can access the Volunteer Toolkit and can add troop financial information into the VTK Finances tab fields. The VTK Finance tab will be available from May through June 30th. After July 1st, previously completed finance reports can be viewed from the drop-down menu at the top of the Finances tab page.

Before you enter troop financial information into the VTK Finance tab, you'll want to prepare the following:

- Download the Troop Finance Report Tracking Sheet.
- Gather all income and expense documentation and receipts.
- Download and save as a PDF copy of your April bank statement when it becomes available.
- Enter all your income and expense categories into the Troop Finance Report Tracking Sheet for easy entry into the VTK Finance Tab.

Please note that you'll be **required** to submit the following documents:

- April and May bank statements

Who can manage the Volunteer Toolkit (VTK) and enter the troop's annual troop finance report information in the VTK Finance Tab?

- Only active GSGNY troop leaders and troop treasurers, with a current membership and an approved background check on file with GSGNY, can enter and submit troop financial information in VTK.
- How you and your troop treasurer choose to organize and track the troop finances throughout the year is up to you. We recommend that the troop treasurer and troop leader have discussions in March-May to review and reconcile all income and expense receipts, outstanding checks, payments, and cash on hand with the troop's April and May bank statements. Use the Troop Finance Report Tracking Sheet to help manage and balance your income and expense categories and financial summary for easy transfer to the VTK Finance tab.
- Share the end of year financials with any additional bank account signers. Once all signers agree, the troop leader and/or troop treasurer can enter the final troop financials into the Volunteer Toolkit Finance tab.

8 Steps to Complete Your Finance Report Through the VTK Finance Tab

1. Log in to the **VTK** and access the **Finance** tab
2. Review information and download resources
3. Enter "Income" category totals
4. Enter "Expense" category totals
5. Complete financial summary information
6. Enter ALL bank and signer information
7. Review council notes and answer questions
8. Add attachments (April and May Bank Statement) and submit the report to GSGNY

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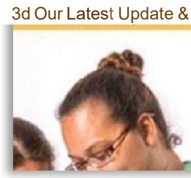
Step 1: Log in to the VTK and Access the Finance Tab -

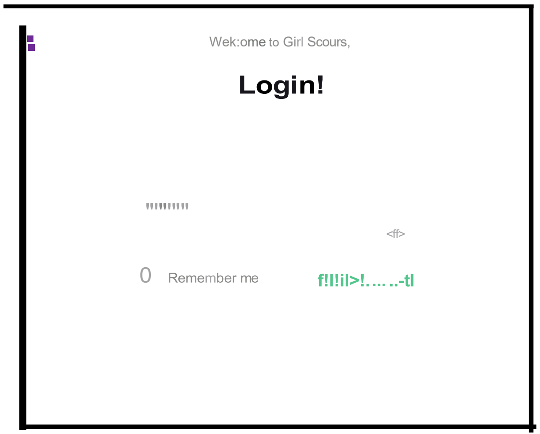
and click **MyGS** at the top.

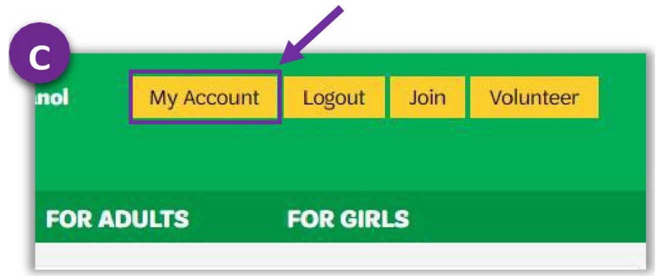
B. Log in using the username and password you created wh our Girl Scout Member Account.

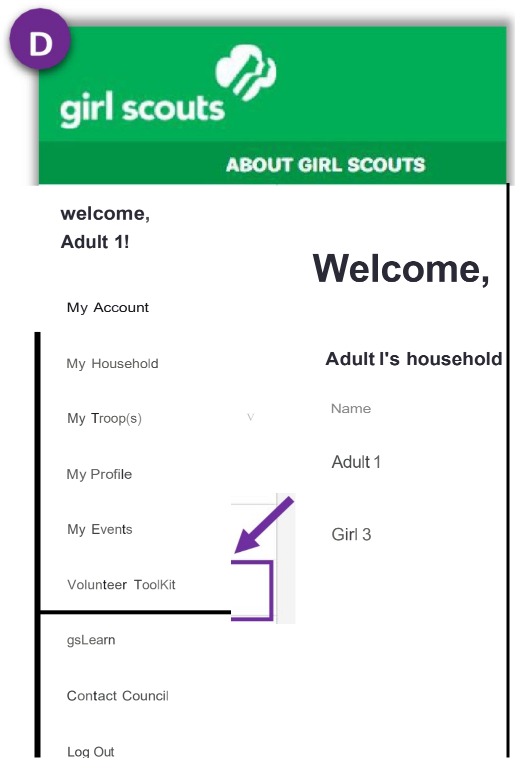
C. Once logged in, click **My Account** in the upper right- hand corner Select **Volunteer Toolkit** from the left side menu.



D. Within the VTK, click the **Finances** tab and familiarize yourself with the income and expense category fields and the troop financial information that you will need to submit by June 30"".







VTK Troubleshooting

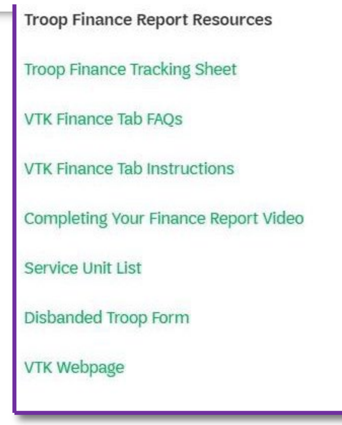
For best results, use a VTK-friendly browser such as Chrome, Firefox, or other browser with a cleared cache.

NOTE: ***Avoid using Internet Explorer.***

Steps to resolve VTK access issues on a desktop/laptop:

- Clear browser cache and browsing history
- Ensure cookies are enabled
- Add cdns.gigya.com as a safe URL to any privacy/security extensions or settings on your device and/or browser
- Still need assistance? Contact your volunteer support

A. Begin on the GSGNY website at www.girlscoutsnyc.org

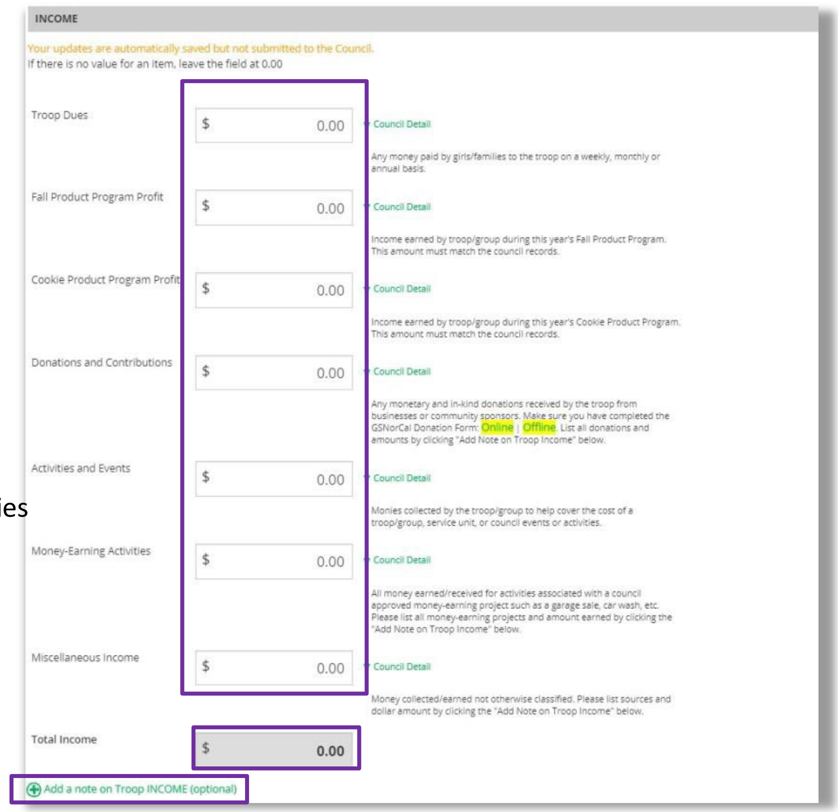


Step 2: Review Information and Download Resources

- Read the information from GSGNY at the top of the page.
- Click on the Troop Finance Report Resources on the right side.
- Use the Troop Finance Report Tracking Sheet to calculate your income and expense category totals if you haven't already completed.

Step 3: Enter Income Category Totals

- Enter all your Income totals for each category from May 1 – April 30. Enter "0" for any category with no value.
- The following categories are included:
  - Troop Dues
  - Fall Product Program Profit
  - Cookie Product Program Profit
  - Donations and Contributions
  - Activities and Events
  - Money-Earning Activities
  - Miscellaneous Income
- Total Income will <u>auto-calculate</u>
- Click **Add a note on Troop INCOME** to
- explain any totals above 0 in these categories Donations and Contributions, Money-Earning Activities, Miscellaneous Income. Or to explain or make a note on Troop Income to share with GSGNY, troop parents/volunteers and girls.



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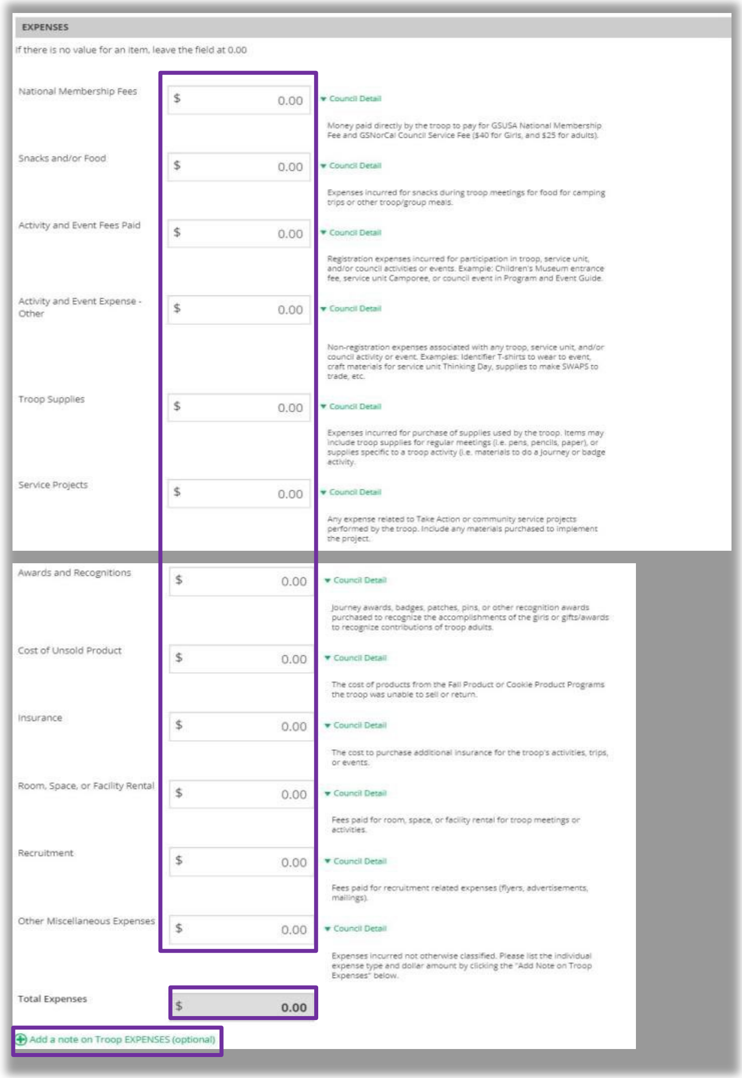
Step 4: Enter Expense Category Totals



- Enter all your Expense totals for each category from May 1 – April 30. Enter "0" for any category with no value.

- The following categories are included:
  - National Membership Fees ○ Snack and/or Food ○ Activity and Event Fees Paid ○ Activity and Event Expense – Other ○ Troop Supplies ○ Service Projects ○ Awards and Recognitions ○ Cost of Unsold Product ○ Insurance , room, Space, or Facility Rental ○ Recruitment
  - Other Miscellaneous Expenses

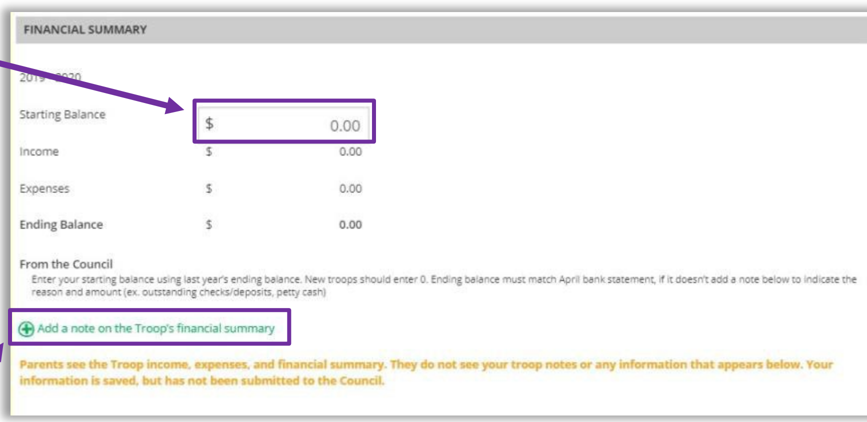
- Total Expenses will <u>auto-calculate</u>

- Click **Add a note on Troop EXPENSES** to explain any totals above 0 in this category. Other Miscellaneous Expenses Or to explain or make a note on Troop Income to share with GSGNY, troop parents/volunteers and girls.

Step 5: Complete Financial Summary Information

Enter your troop's starting balance for the year.

- Existing troops, your starting balance will be your ending balance from last year's troop finance report



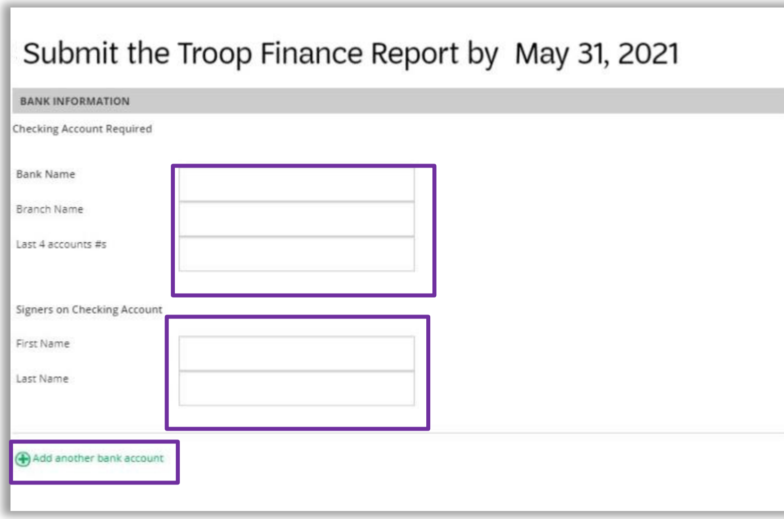
Your income and expenses will auto populate from the income and

Your Ending Balance should match your April bank statement

- Click **Add a note on the Troop's financial summary** to explain any <u>outstanding checks/deposits or petty cash on hand that is not included in the April bank statement</u> that would enable your financials to balance. Add a note to share any additional information with GSGNY (new troops with bank account in process).

Step 6: Enter Bank and Signer Information

- Enter your bank name, branch name, and last 4 #s of your account number
- Enter the first and last name of **ALL signers** on your troop bank account.
- Once you add the first name, click **Add another signer** to open additional signer fields.
- Most troops only have one bank account, so you can skip over the “Add another Bank Account” link. If you have an additional bank account that you need to add, click **Add another bank account** and enter the bank account information.

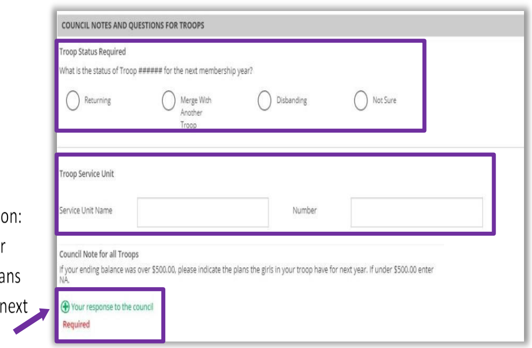


Step 7: Review Council Notes and Answer Questions In this last

section, you will answer a few questions.

- Choose the status of your troop for the next membership year
  - Returning
  - Merge with Another Troop
  - Disbanding
  - Not Sure
- Enter your service unit name and number.
  If you aren’t sure, reach out to your service unit Manager or volunteer support specialist to confirm the information.

You will then answer the question: If your ending balance was over $500.00, please indicate the plans the girls in your troop have for next



- Click **your response to the council**
  - Balance over $500.00, enter the girl’s plans to spend the money next year
  - Balance under $500, enter NA

Preview & Edit

- Your entries are auto-saved, so you can do some work and come back to it, but once you submit, **you will no longer be able to make changes.**
- Review all your entries with all the signers on your bank account and ensure that your ending balance is the same as your May bank statement. If not, be ready to explain the discrepancy.
- Make sure you have downloaded a copy of your April bank statement and have it saved to your device as you will need to upload/attach it to your submission.
- Remember to submit your financials on time! Make sure you submit your Troop Finance Report through the VTK Finance tab by June 30th.
- Any troop that hasn’t submitted its financials by June 30th may face closure of their troop bank account and troop disbandment.

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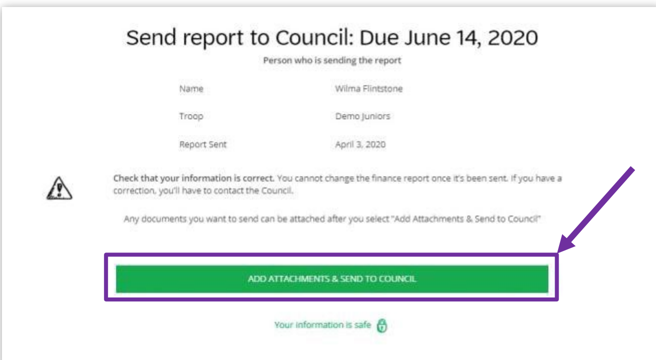
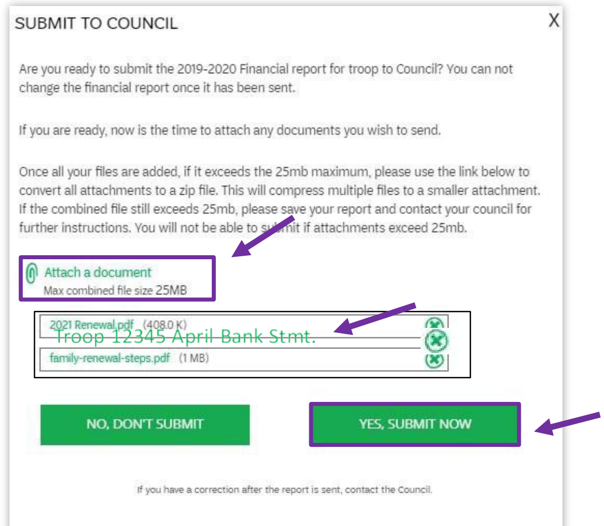
Step 8: Add Attachments and Submit to GSGNY

Once the troop leader, troop treasurer, and all bank account signers have reviewed and confirmed that the financials are true and correct, you are ready to submit to GSGNY. **You can only submit your Troop Finance Report once, ensure your financials are accurate, and you have attached your May bank statement before submitting.**

- Click **Add Attachments & Send to Council**
- Click the **Attach a document** link. Browse your computer or device for your saved copy of your May bank statement and attach/upload it.
- Click **No, Don't Submit** to return to the editing page, if you are not ready to submit.
- Once your April Bank Statement is attached and you are ready to submit, Click **Yes, Submit Now** to finalize your submission.





What Happens Next?

- Once submitted, you can download or print a copy of your report for your records using Download or **Print** icons at the top of the page. A copy is also saved within the **Finance Tab** and can be viewed at any time.
- Once your report is submitted, troop parents will have "View Only" access to view the troop's financial information through the VTK Finance tab. You can also choose to email troop parents the downloaded copy or give them a printed copy when sharing year-end financials.
- Make sure to share the troop finances with girls and involve girls in regular discussions on their troop finances and when planning money earning and money spending activities.

If you need to make changes (e.g., attaching your May Bank Statement or revising entries), contact your volunteer support specialist or email us at customer care at 212.645.4000.