

GSNorCal VTK Finance Tab NOTICE OF ACTIVATION

GSNorCal will be activating the VTK Finance Tab on **April 28, 2020** in time for troops to submit their Annual Troop Finance Report for 2019-2020. Once the VTK Finance Tab is activated, troop leaders can begin entering their final finance report information before the May 31, 2020 due date (extended from normal May 15 due date).

What is changed/different about the process?

Instead of completing the Troop Finance Report (TFR) and submitting it in person using the paper Troop Finance Report form, you will enter all your income and expenses online using the VTK Finance Tab. We have extended the due date to May 31, 2020 to give you more time to prepare.

Who can manage the Volunteer Toolkit (VTK) Finance Tab?

- Only active GSNorCal troop leaders with a current membership and approved background check on file with GSNorCal can manage the VTK for their troop.
- How you and your troop treasurer choose to organize and track the troop finances throughout the year is up to you. We recommend using the [Troop Finance Report Tracking Sheet](#) as it will help you track your income and expenses and help you prepare to complete and submit your troop financials. **NOTE:** There is no change to the income and expense categories from previous years.
- Only troop leaders will have access to edit the VTK Finance Tab fields, so they will need to work with their troop treasurer, and other bank account signers to reconcile the troop's income and expenses. Once the income and expense totals reconcile with the April bank statement, the troop leader will enter the troop's financial information into the VTK Finance Tab and submit it electronically with the April bank statement.

Why are we using the VTK Finance Tab to submit our TFR?

- Our rollout of the VTK Finance Tab was moved up out of concern for the health and well-being for our volunteers and staff during the COVID-19 Pandemic. Launching the VTK Finance Tab will provide an easy and secure way for troops to submit their Annual Troop Finance Report electronically to GSNorCal.
- This electronic process will be the new and ongoing method for reporting the annual troop/group finances to GSNorCal in 2020 and in all subsequent years.

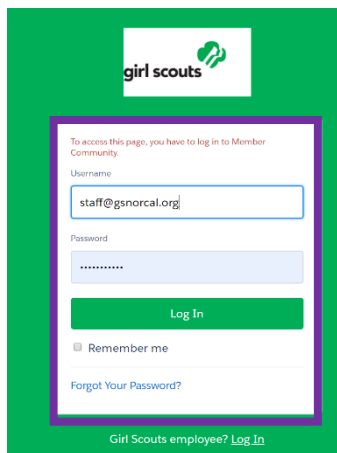
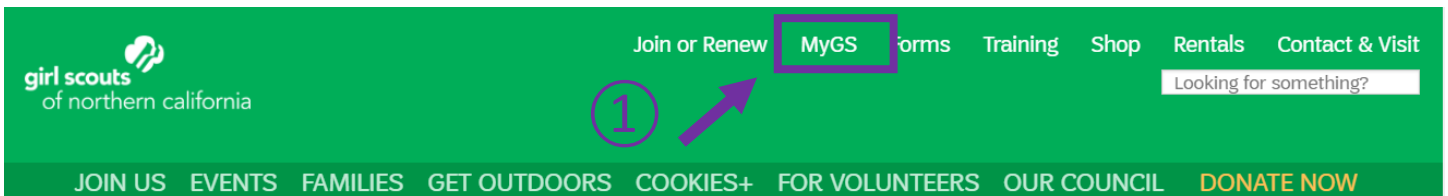
What is included in the VTK Finance Tab?

The VTK Finance tab will meet your troop's annual financial reporting needs. Here is what you'll be able to do:

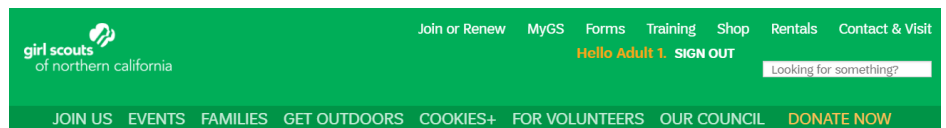
- Access instructions and links to helpful council financial documents
- Enter your troop's income and expenses in detailed categories
- View your troop's finance summary (automatically calculated)
- Add detailed notes on your troop's finances
- Timestamp and autosave information, so multiple **troop leaders** can work on the financial report and see who last saved the information
- Add your troop's bank account information, including the bank name, branch, last four digits of the account number, and all authorized signers for the troop's checking account
- Preview before submitting the troop financial report
- Indicate your troop's status for the next year (returning, merging, disbanding, or unsure)
- Indicate your [service unit name and number](#).
- Attach any documents you are required to send (April bank statement and supporting documentation)
- Once you submit your troop's finance report, parents and troop support adults will have a read-only view of your income, expenses, and financial summary.

What can I do now (April) to prepare?

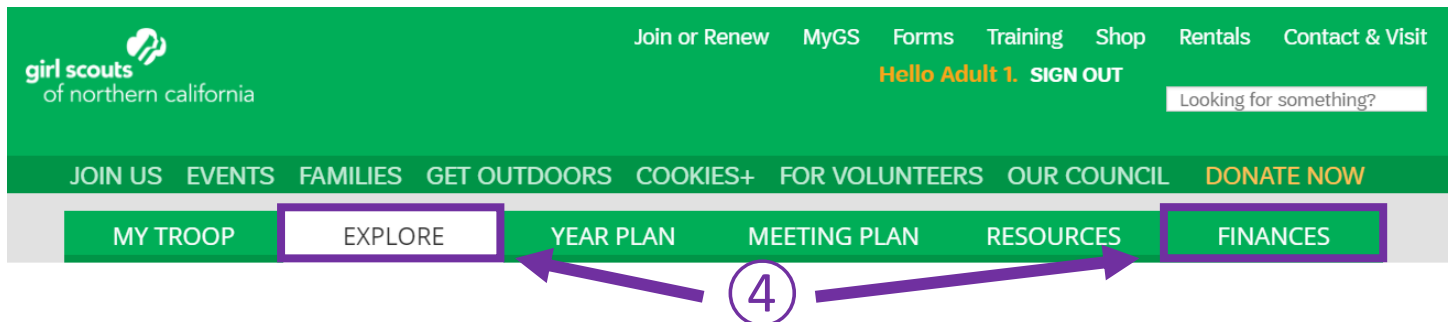
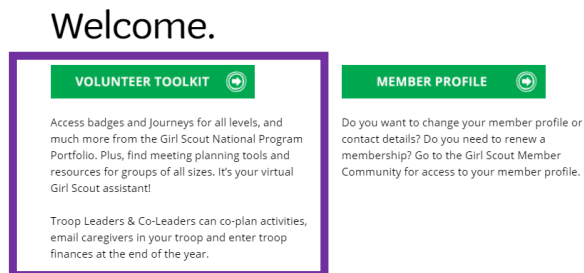
- **Verify Your VTK Access.** It is important for troop leaders to verify they have the proper access to manage the Volunteer Toolkit. To verify access, follow these steps.
 - 1.) Go to www.gsnorcal.org and click on **MyGS**
 - 2.) Log in using your username and password
 - 3.) Once logged in, select Volunteer Toolkit
 - 4.) Within the Volunteer Toolkit verify that you can see the “Explore” tab which will be a good indicator that you have the proper permission.
- If you aren't sure if you have the right permission or need assistance, please contact our member services team via email at info@gsnorcal.org or call M-F 9am-5pm at 800-447-4475 ext. 0.



Log in using your username and password. Your email is your username. Click “forgot password” if you don’t remember your password. If you need help logging, in contact Member Services via email at info@gsnorcal.org or call 800-447-4475 ext. 0.



Once you are logged in, select the option for the Volunteer Toolkit.



Within the VTK, you will be able to verify that you have the proper permission to manage the VTK by verifying that you can see the “**Explore**” tab. While you are here, note the location of the “**Finance**” tab. The Finance tab will be activated on April 28, 2020. When it is active, troop leaders with proper permission (current registration and background check) will see editable financial fields and begin to enter financial information.

What can I do now (April) to prepare? [Continued]

- **Gather financial documentation and reconcile troop financials.** Troop treasurer's troop leaders, and other bank account signers should work together to gather all troop income and expense documentation which means gathering all receipts, reconciling your check register, and totaling income and expense categories. We recommend that troops use the [Troop Finance Report Worksheet](#) to assist you in calculating your troop income and expenses which will make it easy for you to enter your troop financials into the VTK Finance tab for submission.
- **Download a copy of your April 2020 bank statement.** Save a copy to your local computer or device for easy uploading as an attachment to your VTK Finance tab submission.

NOTE: You will only be able to submit your troop financial information in the VTK Finance Tab once for each membership year! It is important that you have all your income and expense totals ready to enter and that your ending balance matches your April Bank statement BEFORE you enter your final financials and submit your report to GSNorCal.

How can I learn more about using the VTK Finance Tab?

- Read the [VTK Finance tab FAQs](#).
- Watch out for an email notification from GSNorCal on April 28, 2020 advertising the launch/activation of the VTK Finance tab. Within that email we will link to some additional resources (VTK Finance Tab Step-By-Step Instructions and Tutorial Video) to help you use the Finance tab when it launches. We will also advertise a series of webinars and Q and A sessions so we can assist you when the VTK Finance tab is active.

How do I access the Volunteer Toolkit?

To access the Volunteer Toolkit, go to www.gsnorcal.org and click on **MyGS**. After signing in, click on the green Volunteer Toolkit option, then click the "**Finance**" tab. Remember, the Finance tab will not go live until April 28, 2020.

What if I still need help?

If you need help accessing your VTK account, need help completing your Annual Troop Finance Report through the VTK Finance Tab, or have questions? Contact our Member Services Team via email info@gsnorcal.org or by phone M-F 9am -5pm at 800-447-4475 ext. 0.