SUB-BRANCH PORTAL USER GUIDE

VERSION	2.1
DOCUMENT STATUS	Published
DOCUMENT AUTHOR	
EFFECTIVE DATE	January 2023

Table of Contents

1. Sub-Branch Portal Systems Overview

The sub-Branch Portal will provide sub-Branches with a membership management system that will allow sub-Branches to:

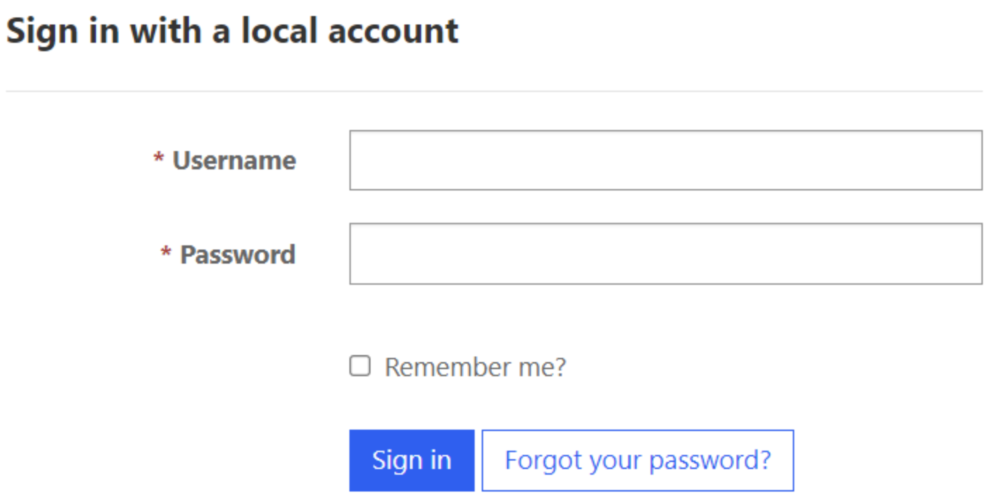
- Manage sub- branch details, office bearers, phone, address, meeting dates
- Manage their member's personal details
- Manage membership & renewals
- View associated members
- Process membership status

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 please visit the Member Suite of the RSL NSW website
https://www.rslnsw.org.au/members-suite/sub-branch-portal/

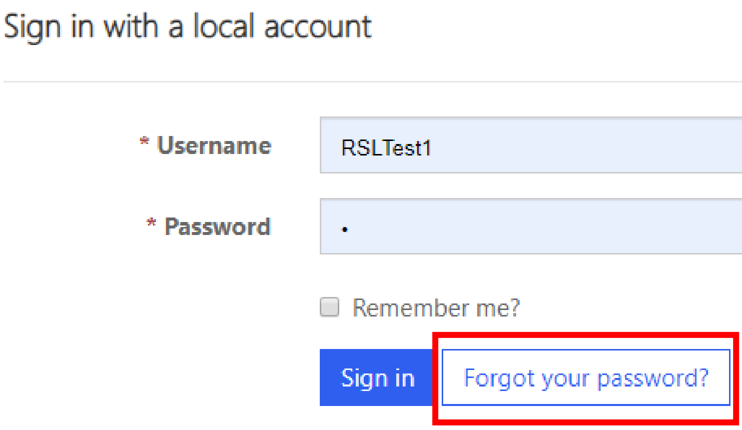
Click **Sign In**



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

2.1 Password Reset

If you need to reset your password, you can do so by clicking the **Forgot your password?** Button below.



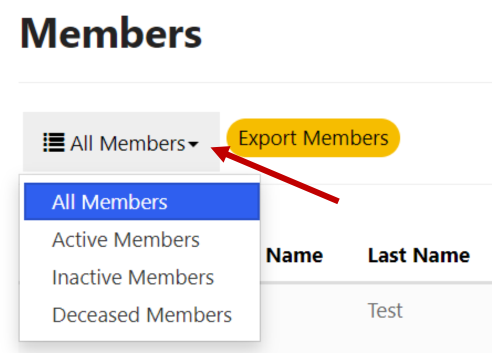
3. Portal Navigation

3.1 Site Navigation

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
Associated Members	In this tab you will be able to view your associated members and export their data.
Annual Returns	Office Bearers can complete their Annual Return form electronically in this section.
Compliance Report	In this tab you will be able to complete the Compliance Annual Report
Office Bearers	In this tab you can view your past and present office bearers and trustees. You will also be able to keep your records current by updating records once office bearers have resigned.
Applications	In this tab you will be able to view and process all members applications who have requested to be attached to your sub-Branch.
ANZAC House 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 a view on a landing page, click the down arrow and select the filter you would like to apply.



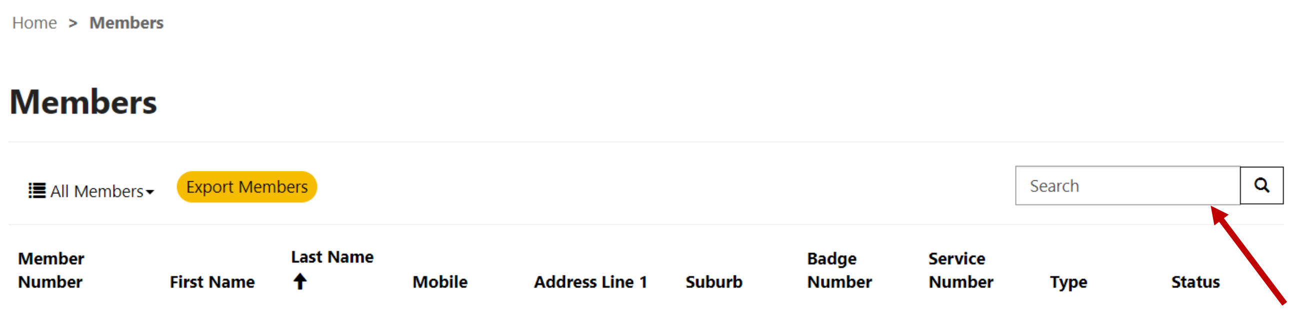
To filter by alphabetical order (A-Z or Z-A) click on the first or last name heading

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 will allow you to filter numbers in ascending and descending order.

3.3 Search functions

The portal will have a search window in each tab. The search function will allow you to search by a name, number (member number, service number, phone number), member status & member type.



4. Resource Centre

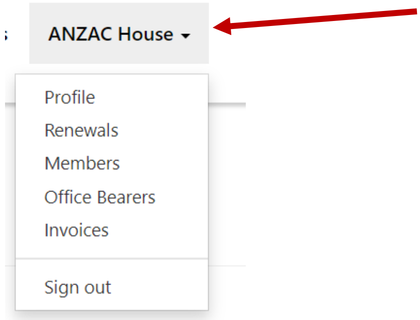
The Resource Centre is the landing page and homepage for the sub-Branch Portal, and can be navigated back to by selecting the 🏠 icon in the top left corner. The Resource Centre is the key location for finding relevant information and materials for operation of the RSL NSW sub-Branches.

On the next page is a breakdown of the categories and subcategories of information within the Resource Centre.

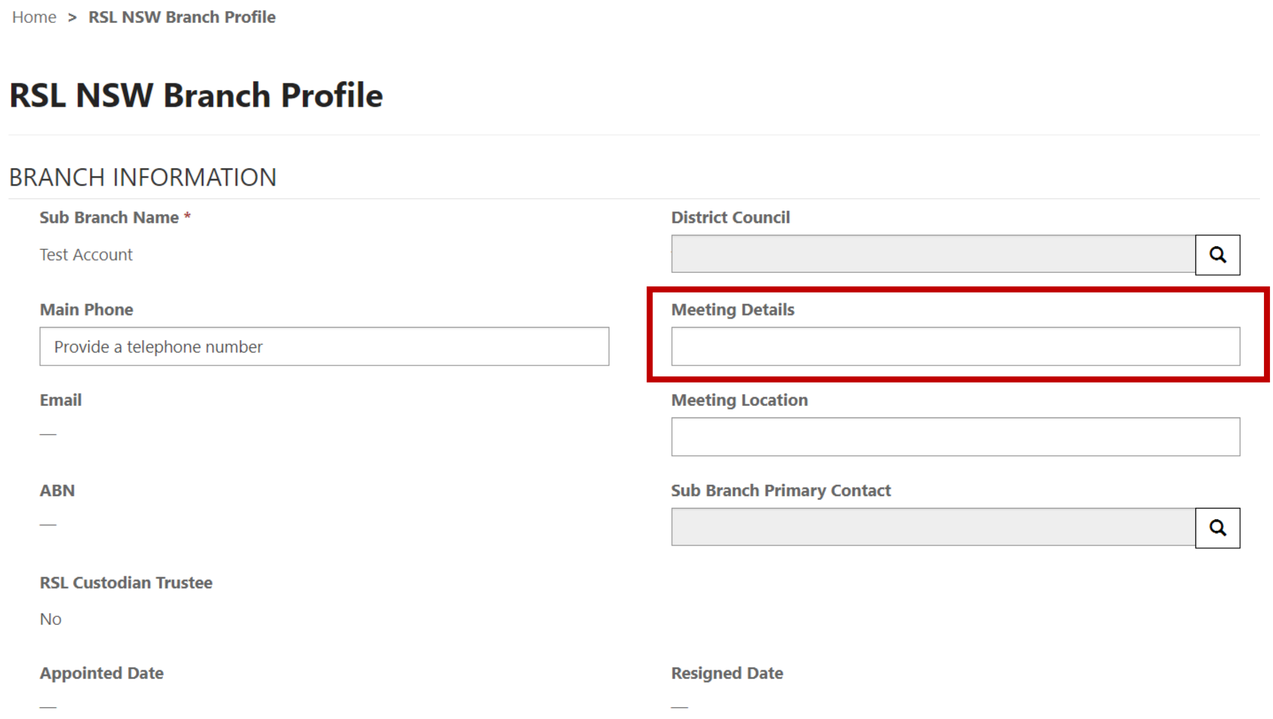
ANZAC House Communications	Commemorations, Ceremonies and Events	Corporate Governance	Written Directions Framework	Training	Finance	General	Veteran Support and Services	Grants and Fundraising	Membership Forms	Be on Brand
Board Communique Circulars RSL NSW Strategic Plan 2021-2026 Funding the Future	Commemorations and ceremonies Congress	2020 Board Election Board Documentation Constitution Annual Return Forms Model Constitutions for sub-Branch Incorporation	Standard Operating Procedures Office Bearer Roles and Responsibilities Handover Guides Guidance Notes Registers and Templates	Training	Annual Reports and Financial Statements Annual Return Forms Budget forms for sub-Branches Veteran Support Fund Contributions	Awards and Certificates Application Forms Definition of Welfare Email access for sub-Branches Replace a lost RSL Badge Veteran's Covenant, Veteran Card and Lapel Pin Wreath and Funeral Poppy Order Form	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	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	Service Membership Affiliate Membership Transfer Membership Auxiliary Membership	Recruitment and Event Tools Email Signature Block Sub-Branch Stationery RSL NSW Logos RSL NSW Brand Guidelines

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.



You will be able to view the following sub-Branch details:



5.1 Updating Sub-Branch Profile

Each sub-Branch will be able to 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.

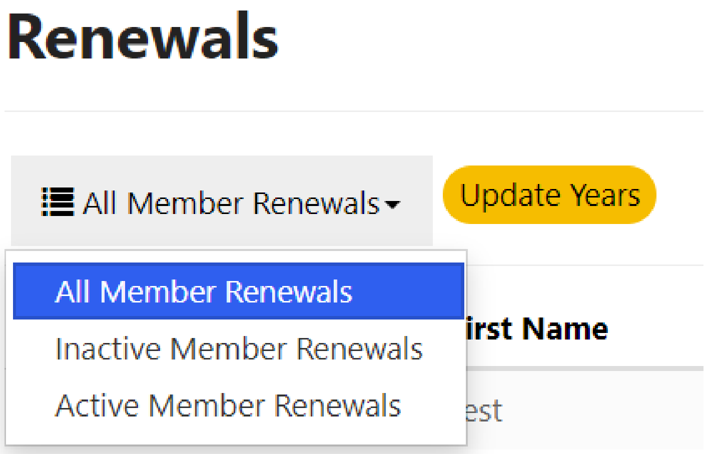
To edit or update all other details please contact the SMS Support Unit.

6. Membership Renewals

6.1 Renewals Landing Page (Views)

On this page you will be able to 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).

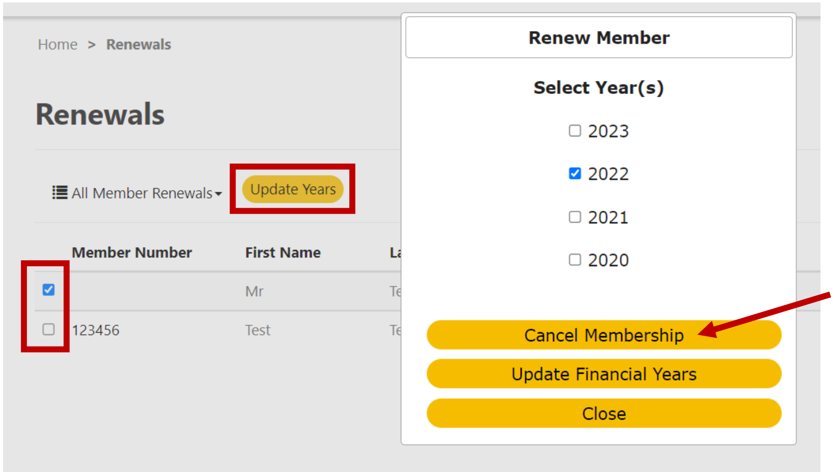
The sub-Branch Secretary is NOT required to update the status of members in the sub-Branch Portal. All 'Active' members will automatically remain 'Active' from 1 January 2023.

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.

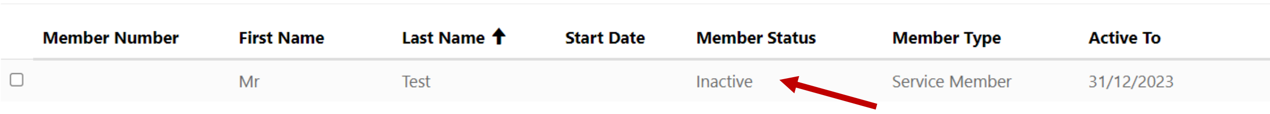
6.2.1 How to cancel a Membership

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, and then select ‘Update Years’
Then select ‘Cancel Membership’ from the list of options.



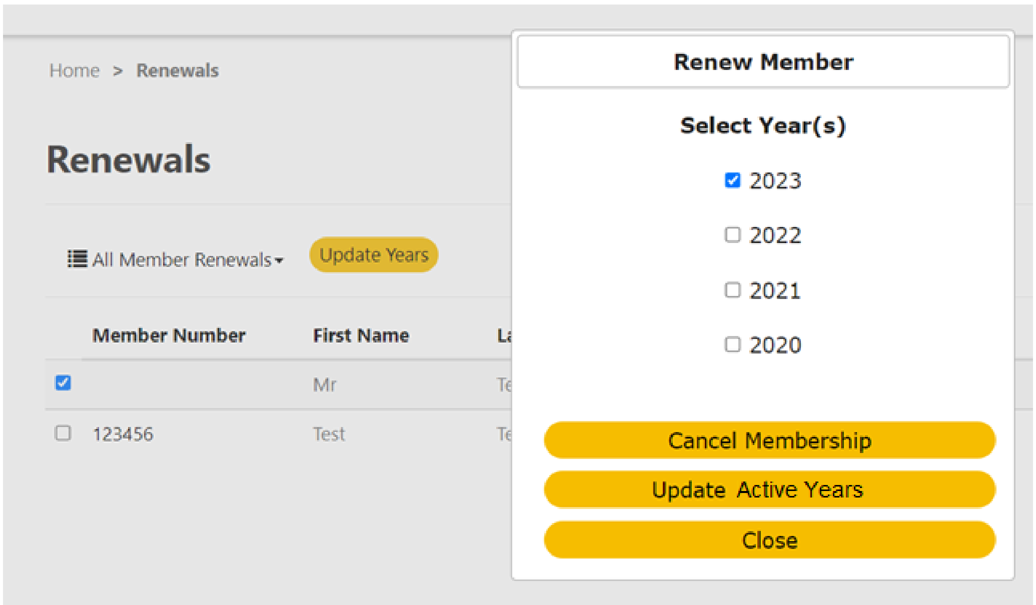
Once a membership is cancelled the member will show as ‘Inactive’



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

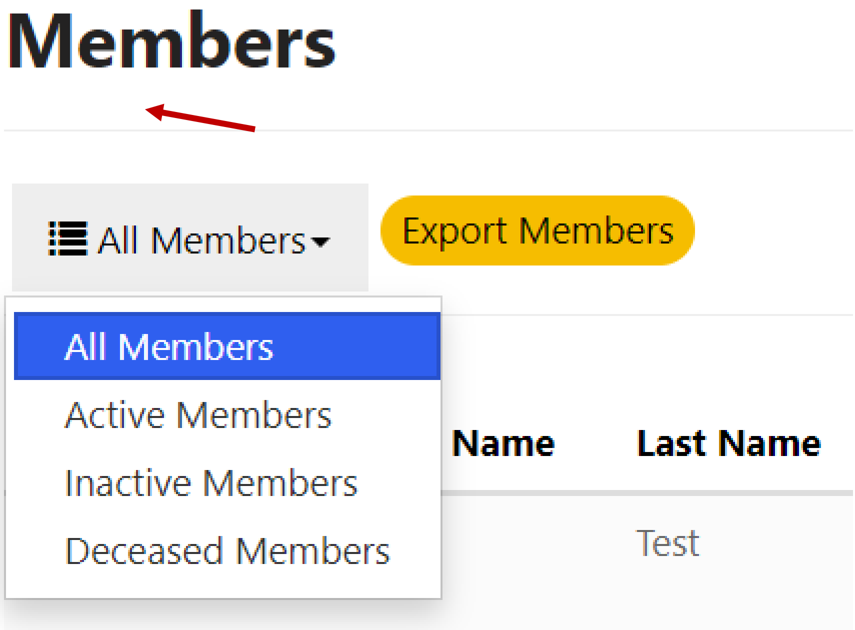
In line with the Strategic Plan initiative (1.4) coupled with Goal 3 initiatives including the RSL NSW online application, RSL NSW Membership is fee-free.

7. Members

7.1 Member Landing Page (Views)

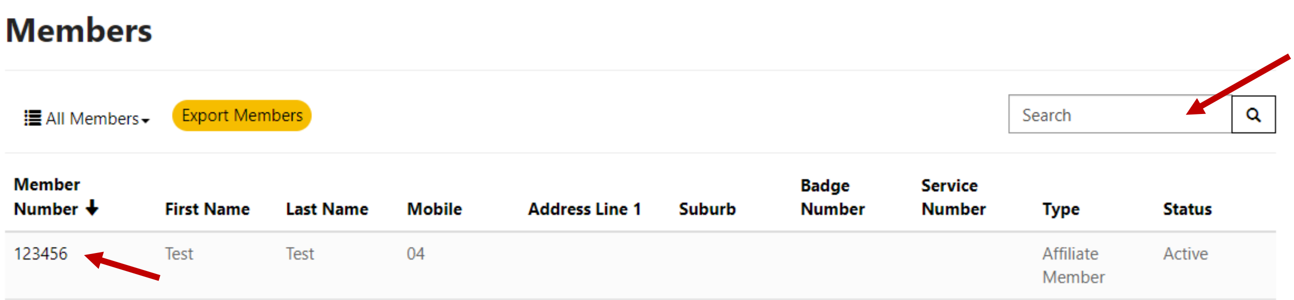
On this page you will be able to see your member list in 3 different views:

- 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

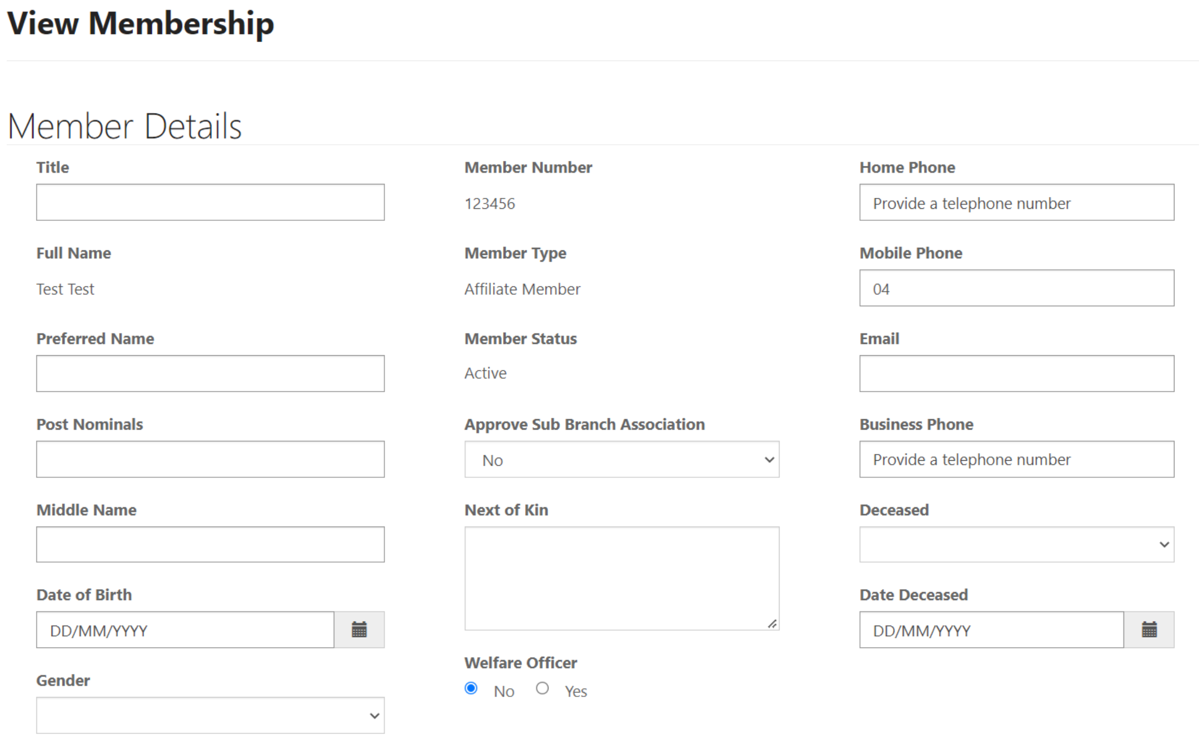
To view a member's full contact details, search for the member by typing in their name or member number in the top right-hand search bar



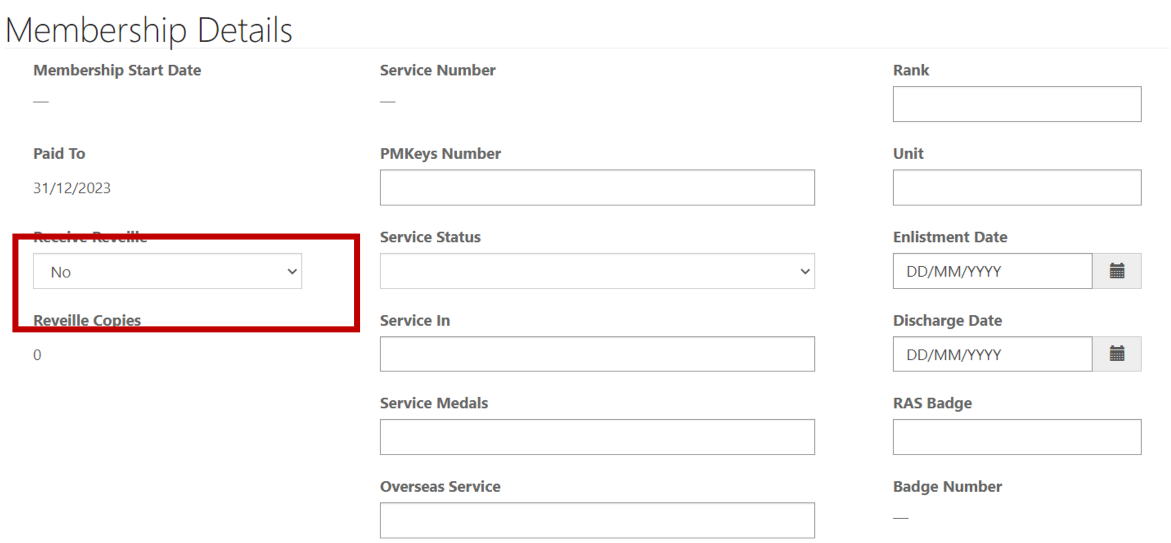
Click on their member number to open the member's record

You will be able to edit the following fields below:

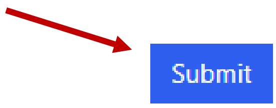
- Phone Numbers
- Email
- Post nominals
- Title
- Date of Birth
- Gender
- Deceased Dates



You will also be able to 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:

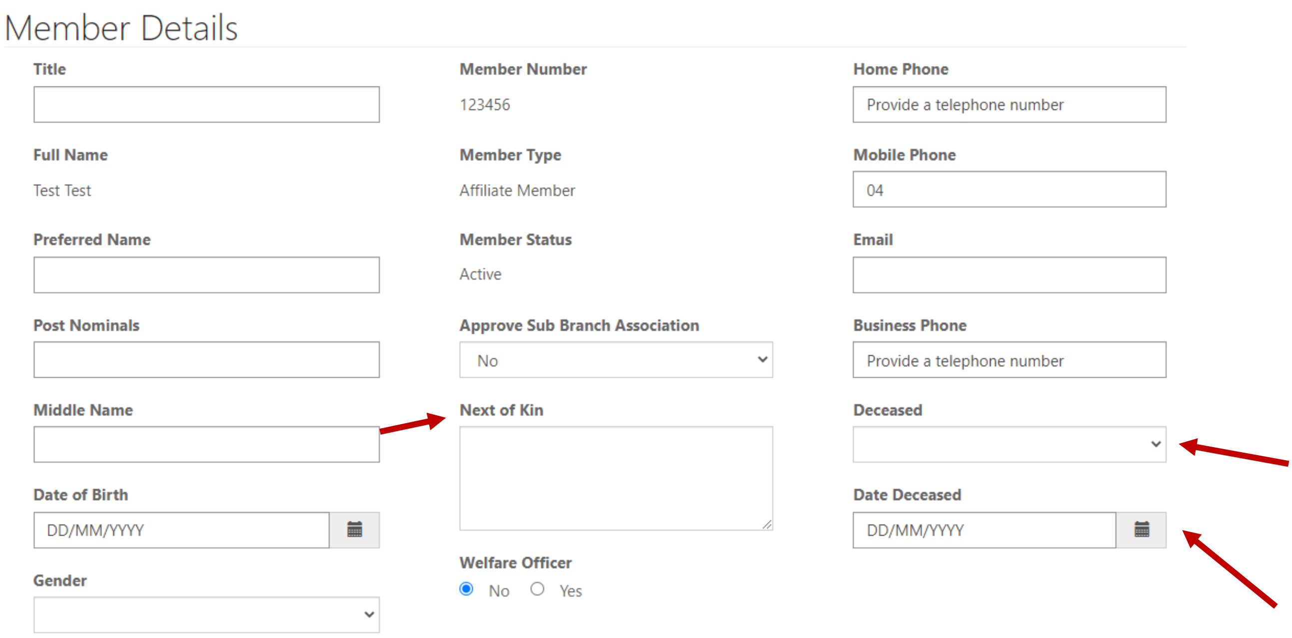
- Searching for the member by typing in their name or member number
- Click on their member number to open their profile – (as above)

Click 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.



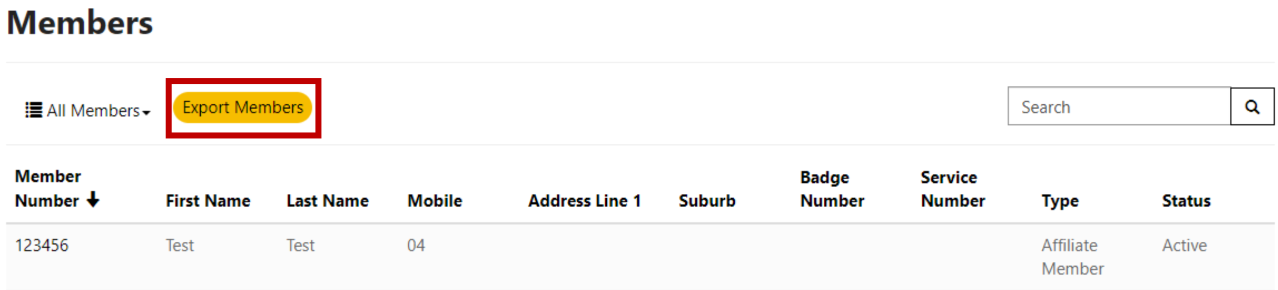
Click the Deceased Drop down

- Select Yes
- Select a date from the calendar & enter in the next of kin’s name and phone number in the box
- Click Submit to save

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

7.5 How to Export a Member Listing

To export member data, navigate to Members. Then click Export Member Data.
This will create an Excel sheet.



You will be provided with an excel with all your member's and their membership data. If your sub-Branch requires any other exports please contact the Support Unit at ANZAC House.

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.

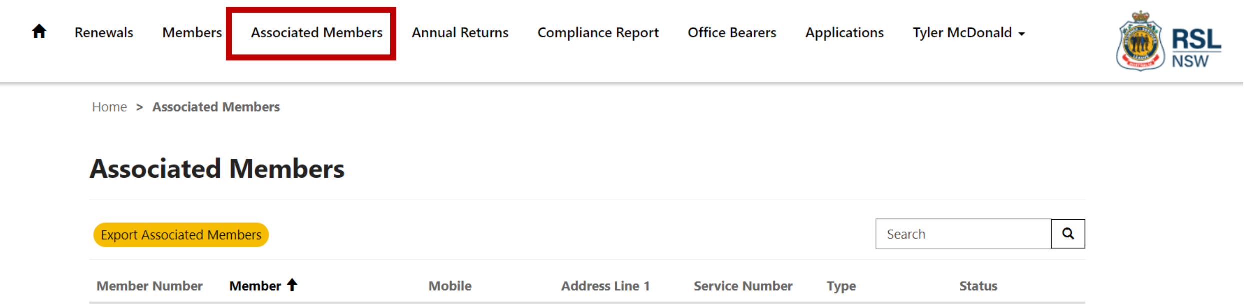
In this tab you are also able to export their data into an excel spreadsheet.

8.1 How to View an Associate Member's Data

To View an Associated member's Profile, click the Associated member tab.

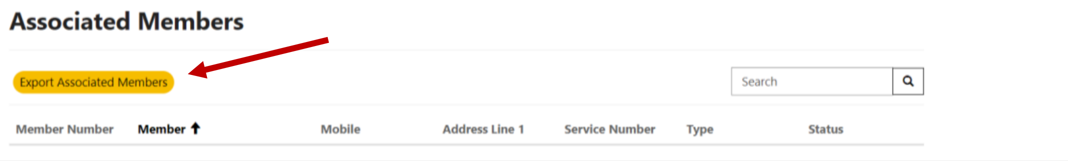
You can search for a member using the Search field on the top right-hand corner as per the image above.

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



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 with all your associated member's and their membership data. If your sub-Branch requires any other exports please contact the Support Unit at ANZAC House.

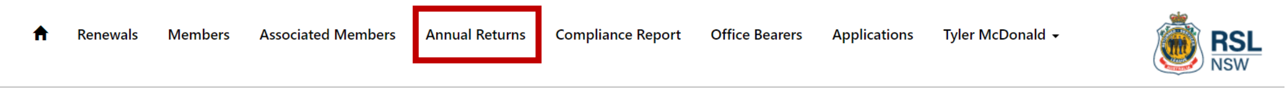
9. Annual Returns

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.

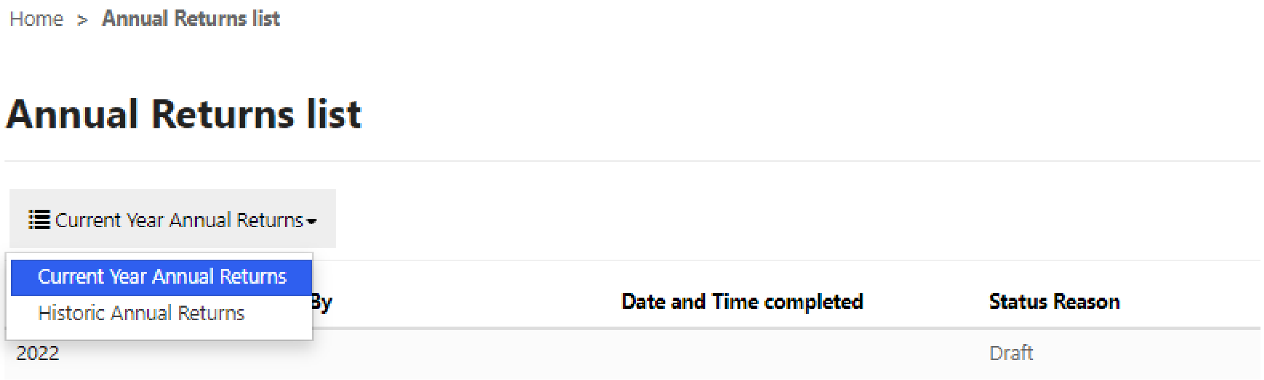
The sub-Branch Annual Return form must be completed electronically via the sub-Branch Portal. There is no requirement for the sub-Branch Annual Returns to be emailed or posted to ANZAC House.

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

9.1 Site Navigation



Select ‘Annual Returns’

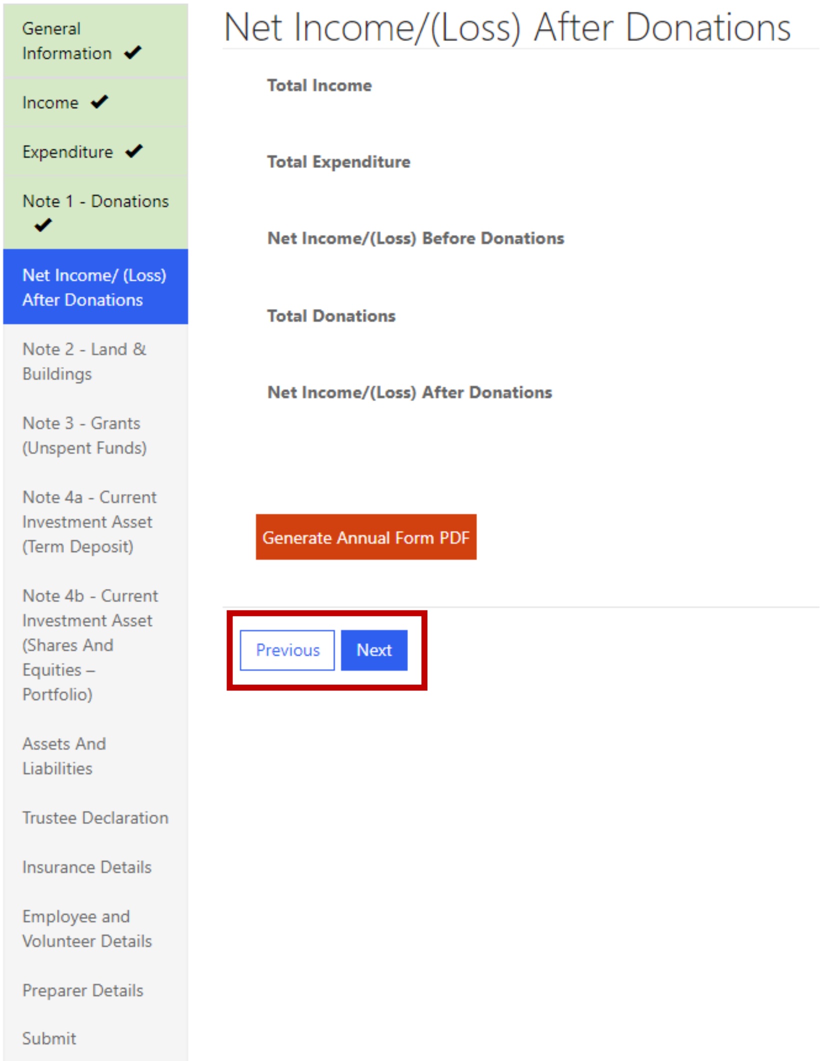


Select ‘**20XX**’ [the year required to be completed which will appear as a draft until submitted] under ‘**Current Year Annual Returns**’
The following instructions appear at the top of each section to assist in completing your return.

Instructions to complete the Annual Returns form:

- *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.*

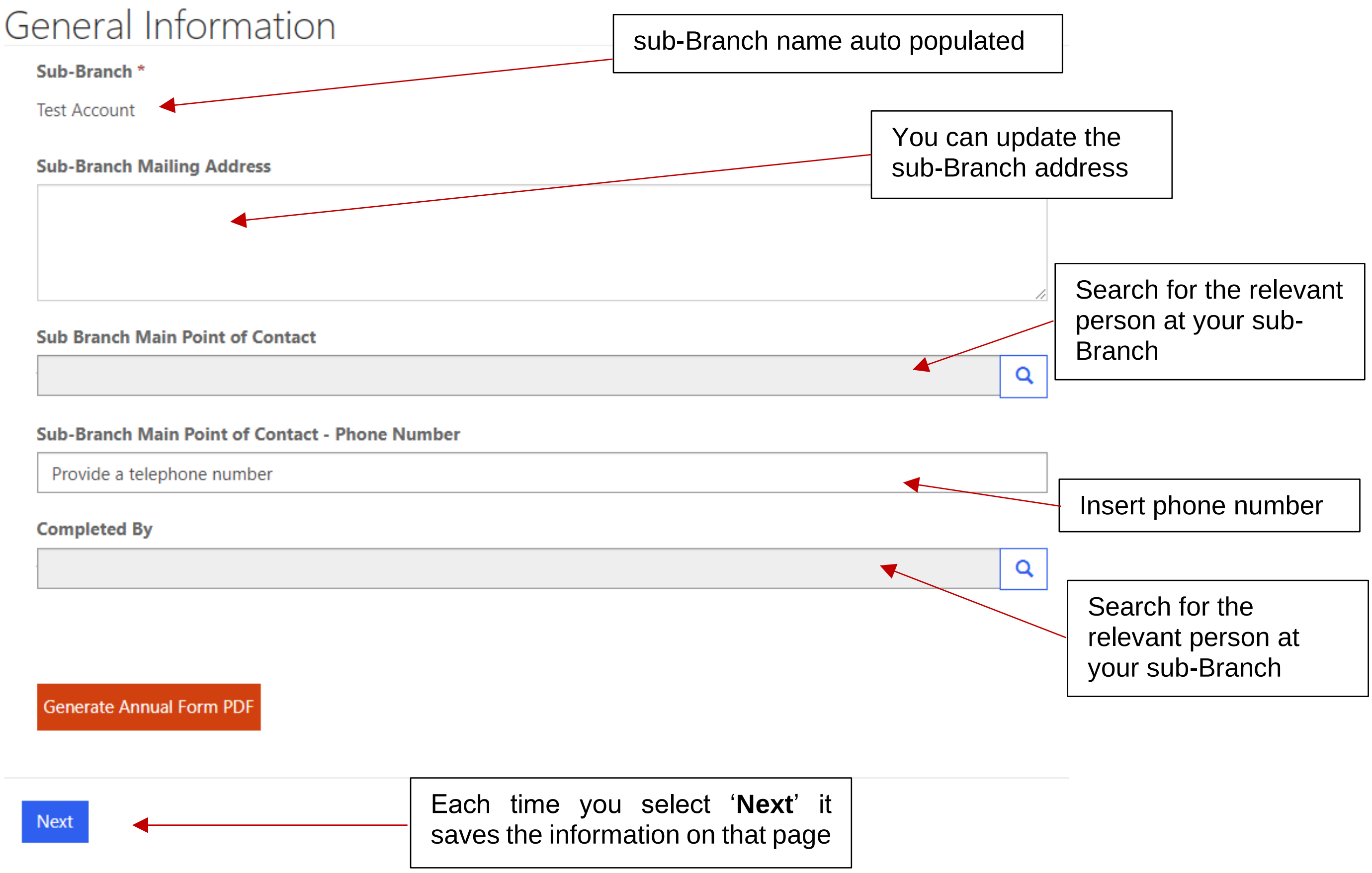
The navigation bar on the left indicates where you are up to in completing the form (highlighted in green for complete and blue for current tab). The navigation bar cannot be used to navigate between sections, you will need to use the ‘**Previous**’ and **‘Next’** button to navigate between sections. 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 has **pop-ups enabled** the pdf will be blocked and won't generate. You need to turn off your pop-up block so the pdf can 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.

9.2 General Information Section



9.3 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.

9.4 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.

9.5 Note 1 – Donations Section

Complete the details for each sub-section:
- RSL Australian Forces Overseas Fund (NSW Division)
- RSL NSW Veteran Support Fund (Includes: RSL LifeCare Veteran Services; NCVH & Fussell House; and other initiatives – RSL NSW Veteran Support Fund Dashboard)
- Memorials: new, repairs, restoration
- Schools: scholarships, books, educational material (aligned with charitable purpose)
- Other Donations
    - Select '**+Create**' button and add Name and Amount of each donation then select '**Submit**', up to 10 options available.
- Total Donations Paid [calculates automatically and can't be overridden]

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

9.6 Net Income/ (Loss) After Donations Section

Calculates automatically and can't be overridden

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

9.7 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
    - Select '**+Create**' button and add details for each property: **Property Type**, **Property Use**, **Address**, **Valuation Date**, **Lot Number**, **DP Number**, and **Valuation Amount** 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.

9.8 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)
    - 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.

9.9 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)
  - Select '**+Create**' button and add details for each term deposits: **Financial Institution**, **Maturity Date**, and **Deposit amount** 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.

9.10 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)
  - 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.
  - Select '**+Create**' button and add details for each investment: **Name of Fund/Portfolio Advisor/Manager**, **Cost**, and **Market Value at 31 December** 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.

9.11 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
  - 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
  - Select '**+Create**' button and add Name and Amount of each non-current asset then select '**Submit**', up to 10 options available.
  - Land and Buildings [*auto-populated and can't be overridden from Note 2*]
- Total Non-Current Assets [*calculates automatically and can't be overridden*]
- Total Assets [*calculates automatically and can't be overridden*]
- Current Liabilities
  - 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
  - Select '**+Create**' button and add Name and Amount of each liability then select '**Submit**', up to 10 options available.

- 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.

9.12 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.

9.13 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.

9.14 Employee and Volunteer Details Section

- Employees are defined any **PAID** employees (full-time or part-time)
- Number of volunteers and estimated volunteers 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.

9.15 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.

10. 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 will be due by 31 May each year, starting with the first report for 2022 calendar year (due date 31 May 2023).

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

10.1 Site Navigation

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

10.2 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 will require either a single response, free text, date picker, or multiple-choice response (through drop-down menus). Please note that some questions will require additional information, depending on the response given.

There are four sections to complete:

1 Finance
2 Legal & Regulatory Compliance
3 Governance Processes
4 Charitable Purpose

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 **'Back**' 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 will need to use the '**Back**' button instead.

10.3 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.

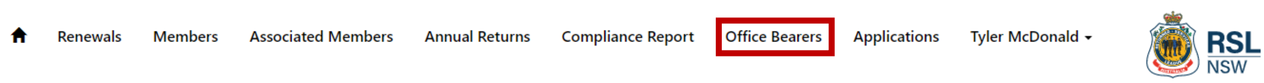
After you have completed your review of all your answers, select '**Submit**'.

Once your form has been submitted, the status will change from '**Draft**', and you will 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.

10.4 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.

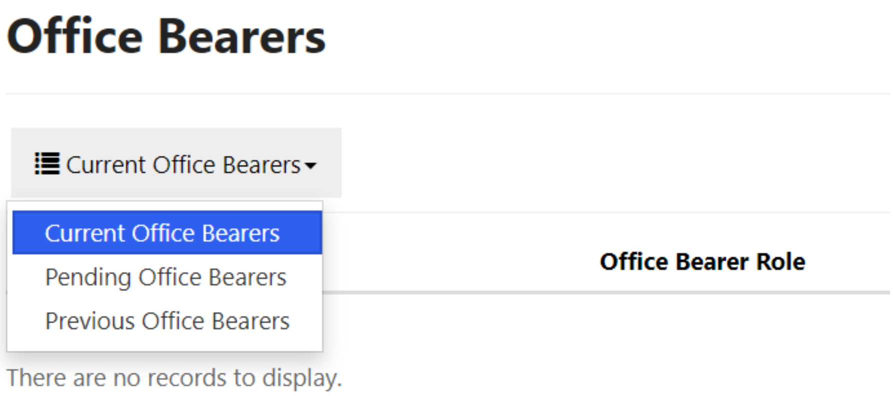
11. Office Bearers & Trustees



11.1 Landing Page (Views)

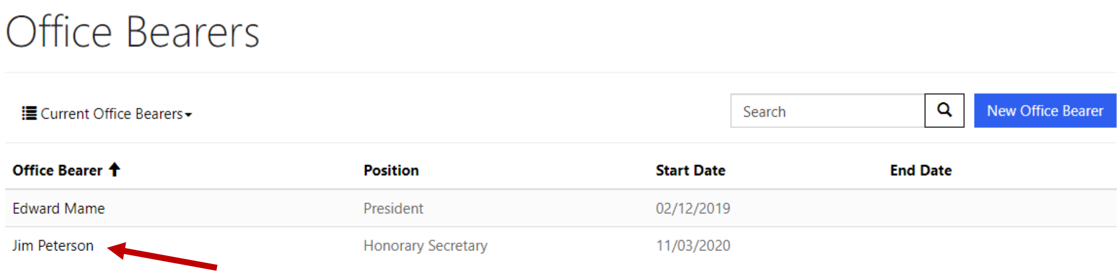
On this page you will be able to see your sub-Branches' current & past Office Bearers, their position, the Start Date & End Date.

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



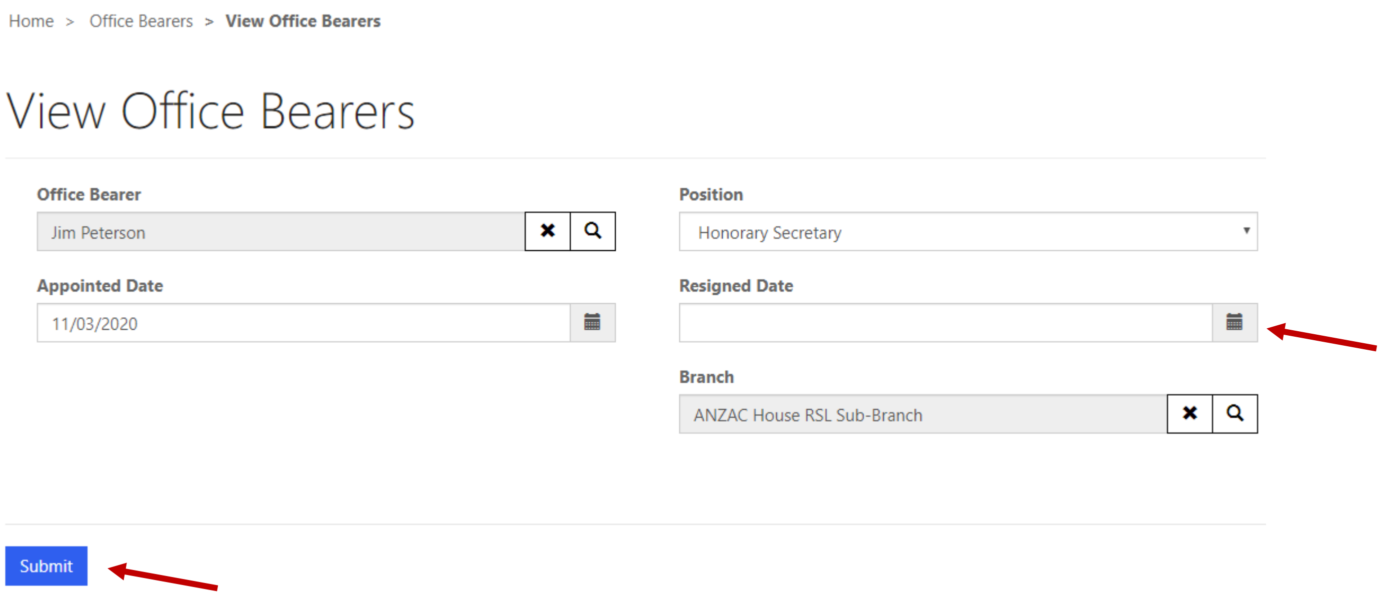
11.2 Office Bearer & Trustee Resignations

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



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

You will be redirected to the below

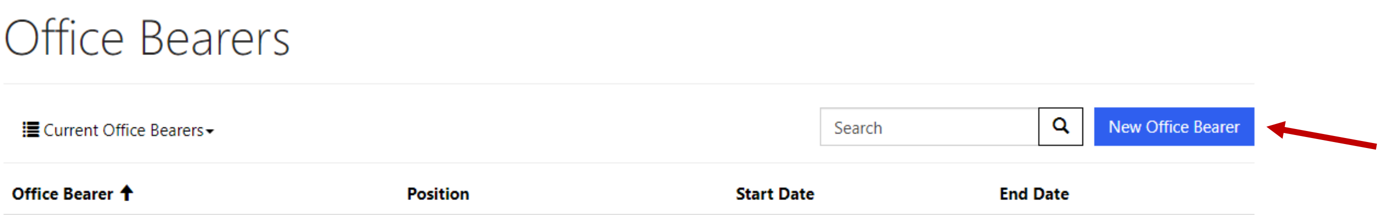


- Enter the date they resigned by clicking the calendar
- Click submit to save

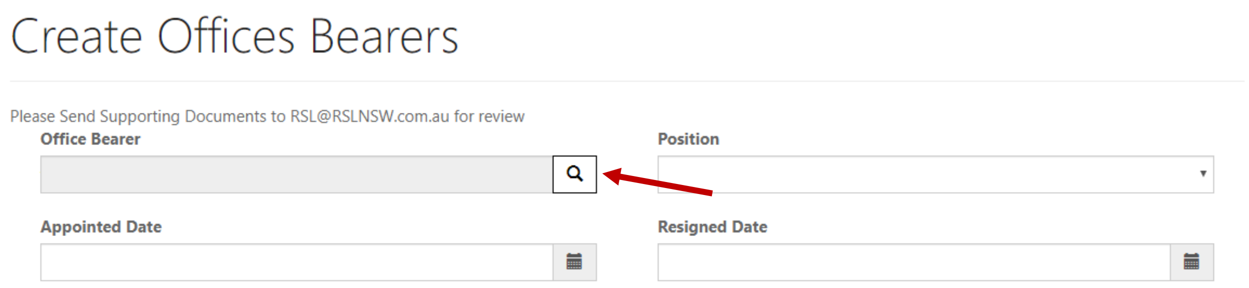
11.3 Adding a New Office Bearer & Trustee

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

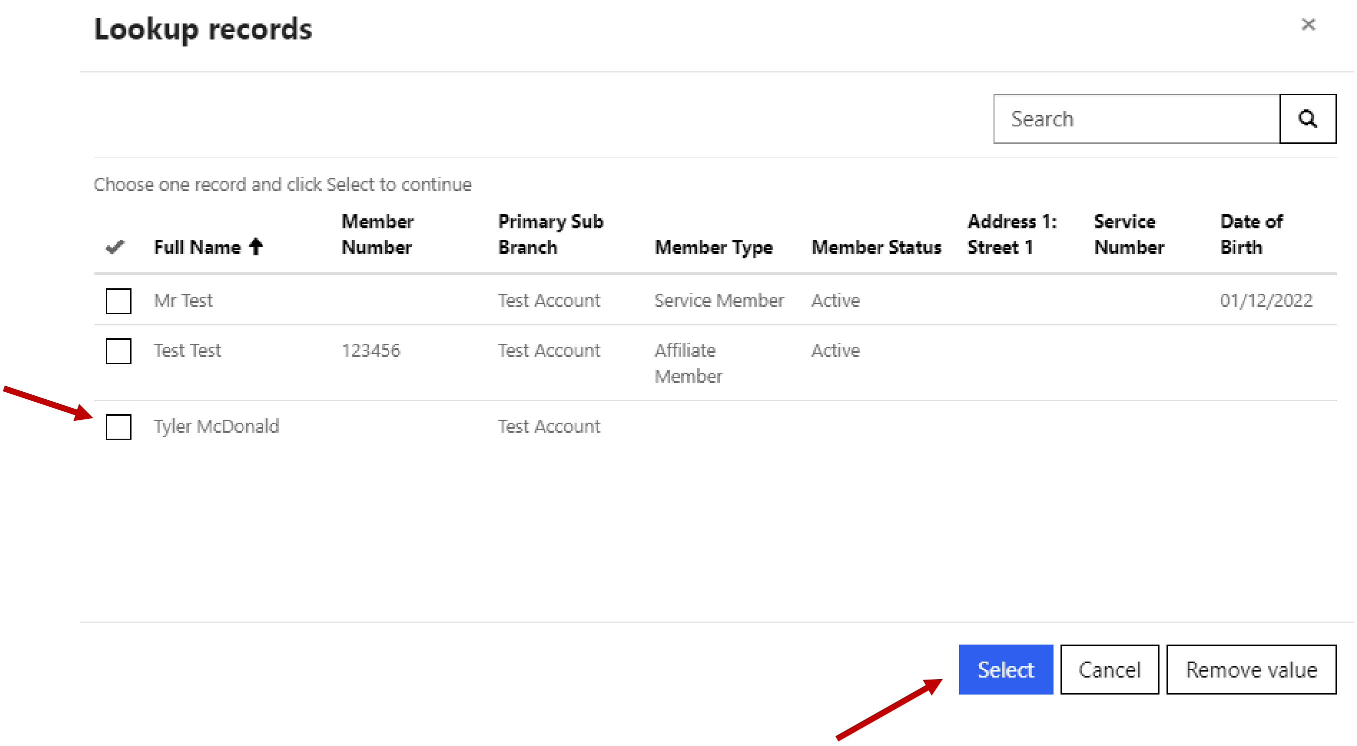
Click New Office Bearer



You will be taken to the below screen, click the Magnifier Icon on the Search bar

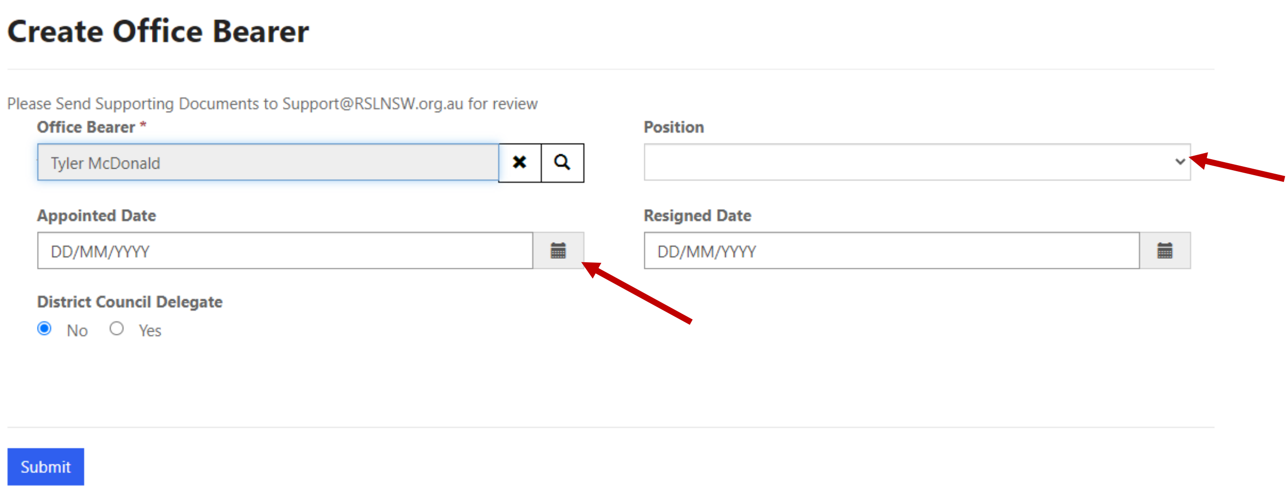


The below window will pop up and provide you with a list of your service members



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

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



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

This will come through to Head Office 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 Unit at support@rslnsw.org.au

Once the Support Unit have received the supporting documentation, they will be able to confirm the appointment and the Office Bearer will appear in your portal. Please note that they will not appear in the portal until the Support Unit have received the paperwork.

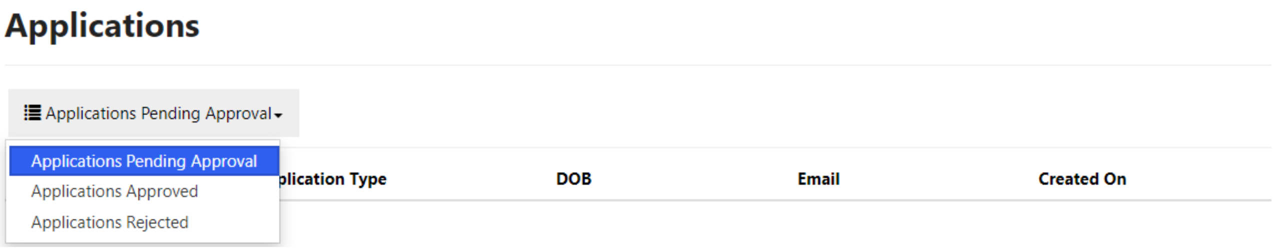
12. New Member Applications - Received Via Sub-Branch Portal

12.1 Sub-Branch Applications

Once an application has been reviewed and approved by the RSL NSW Membership Officer it will appear in your Sub-Branch Portal under the applications tab.

To view all membership applications that have been received by your sub-Branch, click on the **Applications** tab.

The **Applications** tab has three views:



Applications Pending Approval – Need to be processed. Applications have been approved by RSL NSW Membership Officer

Applications Approved – No action required. View previous applications that have been approved by both RSL NSW and the sub-Branch

Applications Rejected – No action required. View previous applications that have been rejected by the sub-Branch.