



**RSL**  
**NSW**

# SUB-BRANCH PORTAL USER GUIDE

<b>VERSION</b>	2.1
<b>DOCUMENT STATUS</b>	Published
<b>DOCUMENT AUTHOR</b>	
<b>EFFECTIVE DATE</b>	January 2023

---

## Table of Contents

1.	Sub-Branch Portal Systems Overview.....	1
2.	How to Log in.....	1
2.1	Password Reset.....	2
3.	Portal Navigation.....	2
3.1	Site Navigation.....	2
3.2	Filtering on Views.....	3
3.3	Search functions.....	3
4.	Resource Centre.....	3
5.	Sub-Branch Profile.....	1
5.1	Updating Sub-Branch Profile.....	1
6.	Membership Renewals.....	2
6.1	Renewals Landing Page (Views).....	2
6.2	Annual Membership Renewals.....	2
6.2.1	How to cancel a Membership.....	3
6.2.2	How to 'Reactivate' a Membership.....	3
6.3	Membership Payments.....	4
7.	Members.....	4
7.1	Member Landing Page (Views).....	4
7.2	How to View/Edit Member Details.....	4
7.3	How to update a Member's Reveille Preference.....	6
7.4	How to Mark a Member as Deceased.....	6
7.5	How to Export a Member Listing.....	6
8.	Associated Members.....	7
8.1	How to View an Associate Member's Data.....	7
8.2	How to Export Associated Member Data.....	7
9.	Annual Returns.....	7
9.1	Site Navigation.....	8
9.2	General Information Section.....	10
9.3	Income Section.....	10
9.4	Expenditure Section.....	10
9.5	Note 1 – Donations Section.....	11
9.6	Net Income/ (Loss) After Donations Section.....	11
9.7	Note 2 – Land & Buildings Section.....	11
9.8	Note 3 – Grants (Unspent Funds) section.....	11
9.9	Note 4a – Current Investment Asset (Term Deposit) Section.....	12
9.10	Note 4b – Current Investment Asset (Shares and Equities – Portfolio) Section.....	12
9.11	Assets and Liabilities Section.....	12

9.12	Trustees Certificate/Declaration Section .....	13
9.13	Insurance Details Section .....	13
9.14	Employee and Volunteer Details Section .....	13
9.15	Submit Section.....	13
10.	Compliance Annual Report .....	14
10.1	Site Navigation.....	14
10.2	Complete the CAR Form .....	14
10.3	Review Section.....	15
10.4	Print Form.....	15
11.	Office Bearers & Trustees .....	15
11.1	Landing Page (Views).....	15
11.2	Office Bearer & Trustee Resignations .....	16
11.3	Adding a New Office Bearer & Trustee .....	16
12.	New Member Applications - Received Via Sub-Branch Portal .....	18
12.1	Sub-Branch Applications.....	18

---

## 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**

### Sign in with a local account

\* Username

\* Password

Remember me?

Sign in

[Forgot your password?](#)

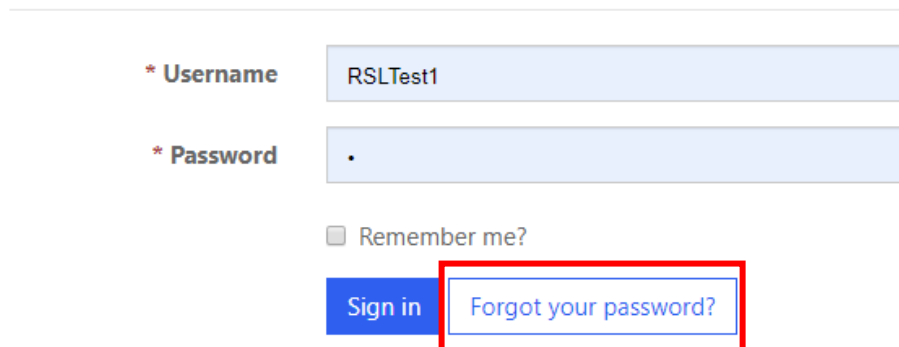
Your Username is the email address provided to you by ANZAC House will.

Example: [Canterbury-Hurlstone-ParkSB@rslnsw.org.au](mailto: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.

Sign in with a local account



The screenshot shows a login form with the following elements:

- \* Username: RSLTest1
- \* Password: [Redacted]
- Remember me?
- Sign in button
- Forgot your password? button (highlighted with a red box)

## 3. Portal Navigation

### 3.1 Site Navigation

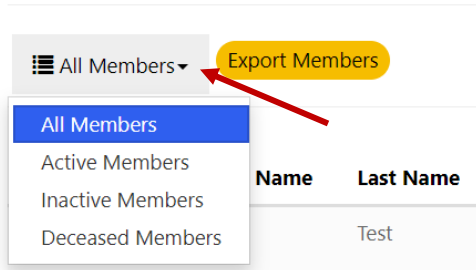
🏠 Renewals   Members   Associated Members   Annual Returns   Compliance Report   Office Bearers   Applications   ANZAC House ▾

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: <ul style="list-style-type: none"><li>• Address</li><li>• Contact details (Phone and Email)</li><li>• Membership</li><li>• Reveille preferences</li></ul>
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: <ul style="list-style-type: none"><li>• ABN</li><li>• Address</li><li>• Contact details (Phone and Email)</li><li>• sub-Branch meeting details</li></ul>

## 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.

### Members



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.

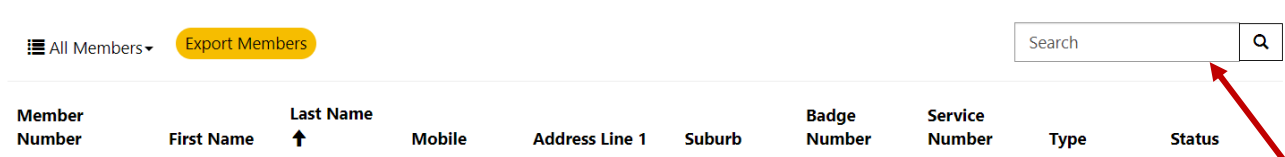
This can be applied to any heading in a view and will allow you to filter numbers in ascending and descending order.

## 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.

Home > Members

### Members



## 4. Resource Centre

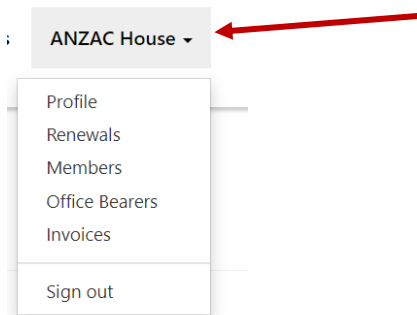
The Resource Centre is the landing page and homepage for the sub-Branch Portal, and can be navigated back to by selecting the 🏠 icon in the top left corner. The Resource Centre is the key location for finding relevant information and materials for operation of the RSL NSW sub-Branches.

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

<b>ANZAC House Communications</b>	<b>Commemorations, Ceremonies and Events</b>	<b>Corporate Governance</b>	<b>Written Directions Framework</b>	<b>Training</b>	<b>Finance</b>	<b>General</b>	<b>Veteran Support and Services</b>	<b>Grants and Fundraising</b>	<b>Membership Forms</b>	<b>Be on Brand</b>
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:

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

**Appointed Date**

—

**District Council**

**Meeting Details**

**Meeting Location**

**Sub Branch Primary Contact**

**Resigned Date**

—

### 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.



---

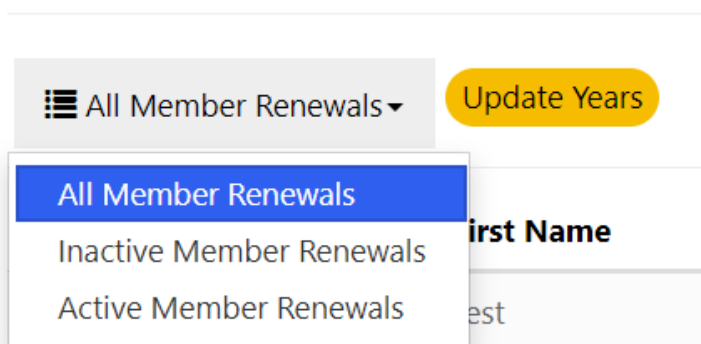
## 6. Membership Renewals

### 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

# Renewals



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).

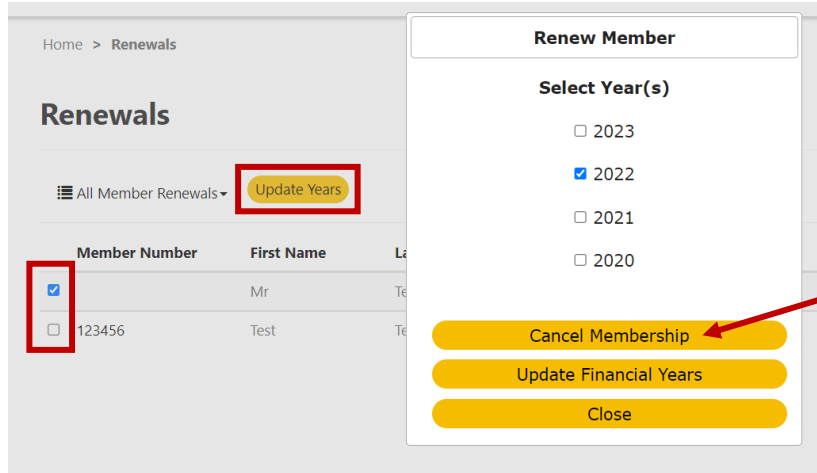
The sub-Branch Secretary is NOT required to update the status of members in the sub-Branch Portal. All 'Active' members will automatically remain 'Active' from 1 January 2023.

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.



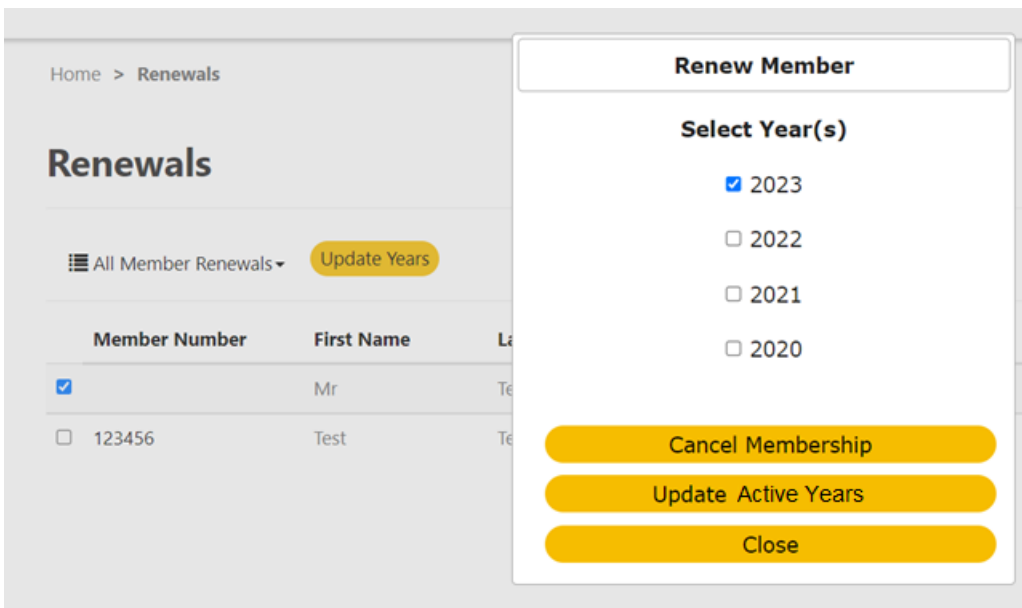
Once a membership is cancelled the member will show as 'Inactive'

Member Number	First Name	Last Name ↑	Start Date	Member Status	Member Type	Active To
<input type="checkbox"/>	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.

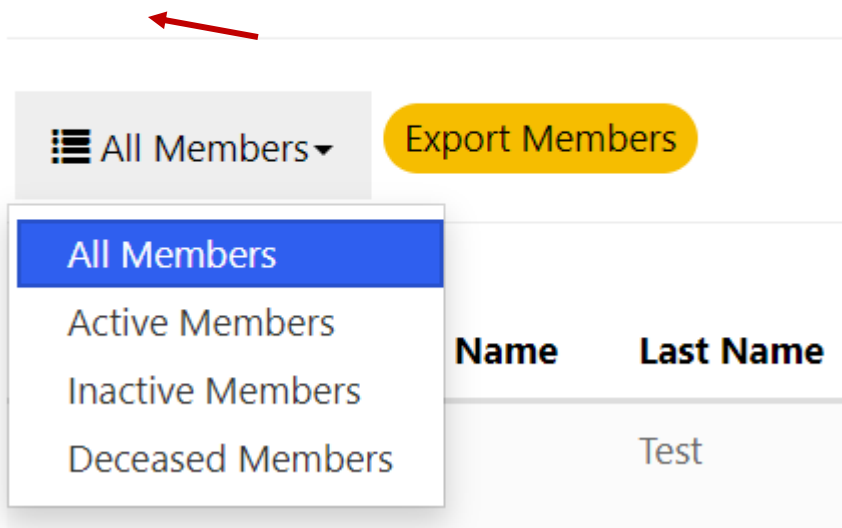
## 7. Members

### 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

# Members

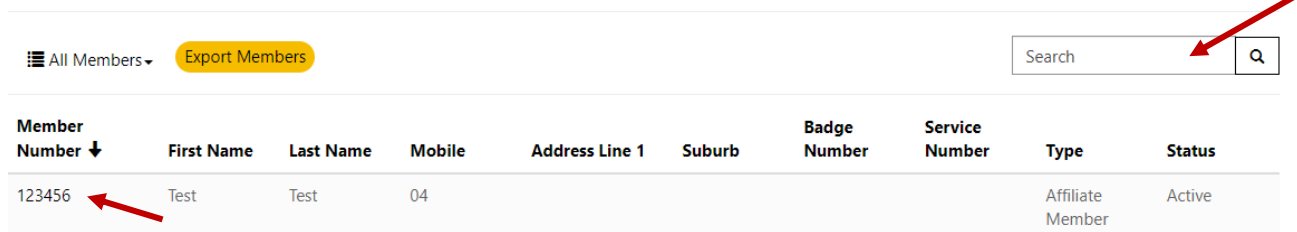


The screenshot shows the 'Members' page interface. At the top left, there is a dropdown menu labeled 'All Members' with a list icon. A red arrow points to this dropdown. To its right is a yellow button labeled 'Export Members'. Below the dropdown, a menu is open, listing 'All Members' (highlighted in blue), 'Active Members', 'Inactive Members', and 'Deceased Members'. To the right of the menu, a table is visible with columns 'Name' and 'Last Name'. A row in the table shows 'Test' under the 'Last Name' column.

### 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

## Members



The screenshot shows the 'Members' page with a search bar in the top right corner. A red arrow points to the search bar. Below the search bar, there is a table with the following columns: Member Number, First Name, Last Name, Mobile, Address Line 1, Suburb, Badge Number, Service Number, Type, and Status. A red arrow points to the 'Member Number' column in the first row of the table.

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

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

## View Membership

### Member Details

<b>Title</b> <input type="text"/>	<b>Member Number</b> 123456	<b>Home Phone</b> <input type="text" value="Provide a telephone number"/>
<b>Full Name</b> Test Test	<b>Member Type</b> Affiliate Member	<b>Mobile Phone</b> <input type="text" value="04"/>
<b>Preferred Name</b> <input type="text"/>	<b>Member Status</b> Active	<b>Email</b> <input type="text"/>
<b>Post Nominals</b> <input type="text"/>	<b>Approve Sub Branch Association</b> <input type="text" value="No"/>	<b>Business Phone</b> <input type="text" value="Provide a telephone number"/>
<b>Middle Name</b> <input type="text"/>	<b>Next of Kin</b> <input type="text"/>	<b>Deceased</b> <input type="text"/>
<b>Date of Birth</b> <input type="text" value="DD/MM/YYYY"/>	<b>Welfare Officer</b> <input checked="" type="radio"/> No <input type="radio"/> Yes	<b>Date Deceased</b> <input type="text" value="DD/MM/YYYY"/>
<b>Gender</b> <input type="text"/>		

You will also be able to view and edit certain Membership Details, as seen below:

### Membership Details

<b>Membership Start Date</b> —	<b>Service Number</b> —	<b>Rank</b> <input type="text"/>
<b>Paid To</b> 31/12/2023	<b>PMKeys Number</b> <input type="text"/>	<b>Unit</b> <input type="text"/>
<b>Receive Reveille</b> <input type="text" value="No"/>	<b>Service Status</b> <input type="text"/>	<b>Enlistment Date</b> <input type="text" value="DD/MM/YYYY"/>
<b>Reveille Copies</b> 0	<b>Service In</b> <input type="text"/>	<b>Discharge Date</b> <input type="text" value="DD/MM/YYYY"/>
	<b>Service Medals</b> <input type="text"/>	<b>RAS Badge</b> <input type="text"/>
	<b>Overseas Service</b> <input type="text"/>	<b>Badge Number</b> —

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.

#### Member Details

<b>Title</b> <input type="text"/>	<b>Member Number</b> 123456	<b>Home Phone</b> <input type="text" value="Provide a telephone number"/>
<b>Full Name</b> Test Test	<b>Member Type</b> Affiliate Member	<b>Mobile Phone</b> <input type="text" value="04"/>
<b>Preferred Name</b> <input type="text"/>	<b>Member Status</b> Active	<b>Email</b> <input type="text"/>
<b>Post Nominals</b> <input type="text"/>	<b>Approve Sub Branch Association</b> <input type="text" value="No"/>	<b>Business Phone</b> <input type="text" value="Provide a telephone number"/>
<b>Middle Name</b> <input type="text"/>	<b>Next of Kin</b> <input type="text"/>	<b>Deceased</b> <input type="text"/>
<b>Date of Birth</b> <input type="text" value="DD/MM/YYYY"/>	<b>Welfare Officer</b> <input checked="" type="radio"/> No <input type="radio"/> Yes	<b>Date Deceased</b> <input type="text" value="DD/MM/YYYY"/>
<b>Gender</b> <input type="text"/>		

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.

#### Members

☰ All Members ▾	<b>Export Members</b>	<input type="text" value="Search"/>	<input type="button" value="Q"/>						
Member Number ↓	First Name	Last Name	Mobile	Address Line 1	Suburb	Badge Number	Service Number	Type	Status
123456	Test	Test	04					Affiliate Member	Active

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.

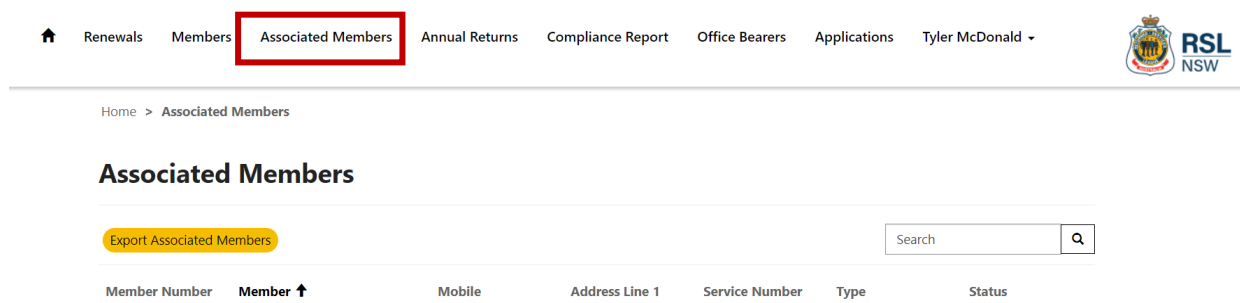
In this tab you are also able to export their data into an excel spreadsheet.

### 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.

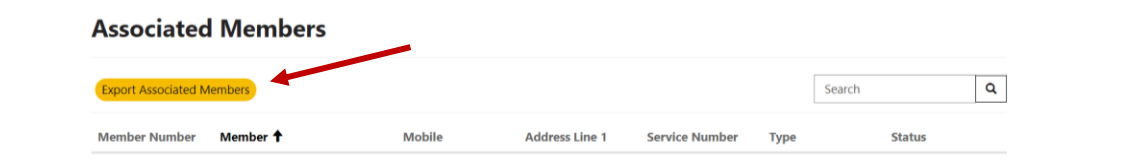
Once you have located the member click on their member number to open their profile.



The screenshot shows the RSL NSW web interface. The navigation menu at the top includes 'Renewals', 'Members', 'Associated Members' (highlighted with a red box), 'Annual Returns', 'Compliance Report', 'Office Bearers', 'Applications', and 'Tyler McDonald'. The page title is 'Home > Associated Members'. Below the title, there is a search bar and a yellow button labeled 'Export Associated Members'. A table header is visible with columns: 'Member Number', 'Member ↑', 'Mobile', 'Address Line 1', 'Service Number', 'Type', and 'Status'.

### 8.2 How to Export Associated Member Data

To export Associated member data, navigate to Associated Members. Click 'Export Associated Members'



The screenshot shows the RSL NSW web interface. The navigation menu at the top includes 'Renewals', 'Members', 'Associated Members', 'Annual Returns', 'Compliance Report', 'Office Bearers', 'Applications', and 'Tyler McDonald'. The page title is 'Associated Members'. Below the title, there is a search bar and a yellow button labeled 'Export Associated Members' which is highlighted with a red arrow. A table header is visible with columns: 'Member Number', 'Member ↑', 'Mobile', 'Address Line 1', 'Service Number', 'Type', and 'Status'.

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'

Home > **Annual Returns list**

### Annual Returns list

Current Year Annual Returns ▾		
Current Year Annual Returns	Date and Time completed	Status Reason
Historic Annual Returns		
2022		Draft

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.

- General Information ✓
- Income ✓
- Expenditure ✓
- Note 1 - Donations ✓
- Net Income/ (Loss) After Donations**
- Note 2 - Land & Buildings
- Note 3 - Grants (Unspent Funds)
- Note 4a - Current Investment Asset (Term Deposit)
- Note 4b - Current Investment Asset (Shares And Equities – Portfolio)
- Assets And Liabilities
- Trustee Declaration
- Insurance Details
- Employee and Volunteer Details
- Preparer Details
- Submit

## Net Income/(Loss) After Donations

**Total Income**

**Total Expenditure**

**Net Income/(Loss) Before Donations**

**Total Donations**

**Net Income/(Loss) After Donations**

**Generate Annual Form PDF**

Previous Next

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

### General Information

Sub-Branch \*

Test Account

sub-Branch name auto populated

Sub-Branch Mailing Address

You can update the sub-Branch address

Sub Branch Main Point of Contact

Search for the relevant person at your sub-Branch

Sub-Branch Main Point of Contact - Phone Number

Provide a telephone number

Insert phone number

Completed By

Search for the relevant person at your sub-Branch

Generate Annual Form PDF

Next

Each time you select 'Next' it saves the information on that page

## 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

The screenshot shows the RSL NSW website navigation menu with 'Compliance Report' highlighted in a red box. Below the menu is the breadcrumb 'Home > My Compliance Reports'. The main heading is 'My Compliance Reports'. A 'Draft' button is highlighted in a red box. To the right is a search bar labeled 'Search Compliance Report'. Below the search bar is a table with columns 'Name' and 'Due Date ↑'. The table is empty, with the text 'There are no records to display.' below it.

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](mailto:support@rslnsw.org.au) to discuss your options.

Home > My Compliance Reports

### My Compliance Reports

Submitted

Name

2022-Compliance Annual Report

## 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

Renewals Members Associated Members Annual Returns Compliance Report **Office Bearers** Applications Tyler McDonald



### 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.

## Office Bearers

Current Office Bearers

- Current Office Bearers
- Pending Office Bearers
- Previous Office Bearers

Office Bearer Role

There are no records to display.

## 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.

### Office Bearers

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

Home > Office Bearers > View Office Bearers

### View Office Bearers

<b>Office Bearer</b> Jim Peterson	<b>Position</b> Honorary Secretary
<b>Appointed Date</b> 11/03/2020	<b>Resigned Date</b>
	<b>Branch</b> ANZAC House RSL Sub-Branch

Submit

- 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

### Office Bearers

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
<input type="checkbox"/>	Mr Test		Test Account	Service Member	Active			01/12/2022
<input type="checkbox"/>	Test Test	123456	Test Account	Affiliate Member	Active			
	<input type="checkbox"/>	Tyler McDonald	Test Account					



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



## 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 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](mailto: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.

Renewals Members Associated Members Annual Returns Compliance Report Office Bearers **Applications** Tyler McDonald ▾



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

Applications Pending Approval ▾

Applications Pending Approval

Applications Approved

Applications Rejected

Application Type

DOB

Email

Created On

---

**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.