

SSVP Members Portal

Financial Report



<https://members.ssvp.ca/>

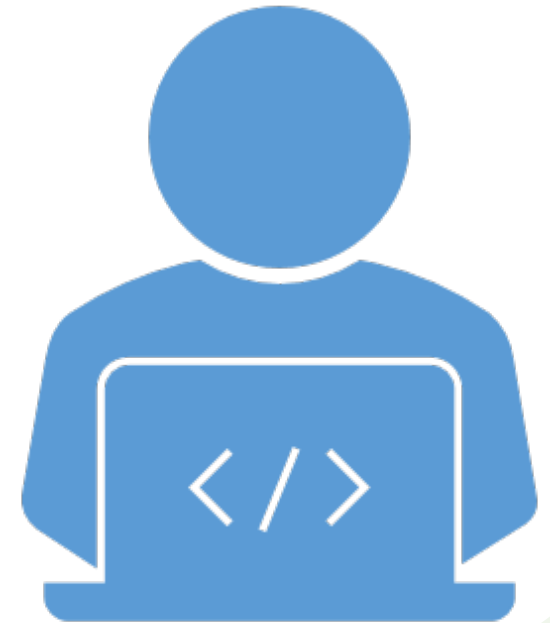
The Duties of Council Administrators

- Oversee annual financial report completion.
- Provide support and training to Administrators under their jurisdiction.
- Check financial reports from councils and conferences under their direct jurisdiction for integrity.
- Questions from councils and conferences should be dealt with by their next higher administrator or the Members Portal Committee Officers.



The Duties of Conference Administrators

- Contact their next higher administrator to ensure they received all relevant training.
- Complete annual financial and statistics reports
- Contact their next higher administrator when the reports are complete.
- Questions from conferences should be dealt with by their next higher administrator or the Members Portal Committee Officers.



What is required :

Each council and conference is required to complete annual reporting that is consolidated with all conferences and councils across Canada.

The information gathered is important for the National Council's report to several areas including the federal government, SSVP International Council General, donors, church authorities and all members of the society.

Who is responsible:

The Administrator is responsible for completing the reporting.

The President is responsible for ensuring information is accurate and complete.



DASHBOARD



Hi, Josee
profile
Log Out

- Dashboard
- Directory >
- Reports >
- Annual Reports >

- Need Help?
- Tech Support
- Tech Support Admin

Welcome to the Members Portal!

Administrators, what are you looking to accomplish today?

- Find a conference, council or member in the directory
- Add administrators and members to the database
- Update my conference or council's information
- Councils: verify list of all reporting councils and conferences
- Enter data in Annual Reports

For questions related to the Members Portal, please refer to the FAQ section at the bottom of the Members Portal information webpage.

<https://ssvp.ca/members/portal/>

If your question is not covered in the FAQ, please contact you next higher Council Administrator.

The Society of Saint Vincent de Paul requires its members to observe the highest level of confidentiality with respect to information about its members and users.

As an SSVP portal user, you share in the responsibility of safeguarding confidential information stored on the members portal. This information may include, but is not limited to, personal contact information (email, telephone, address) and other personal information about members stored in

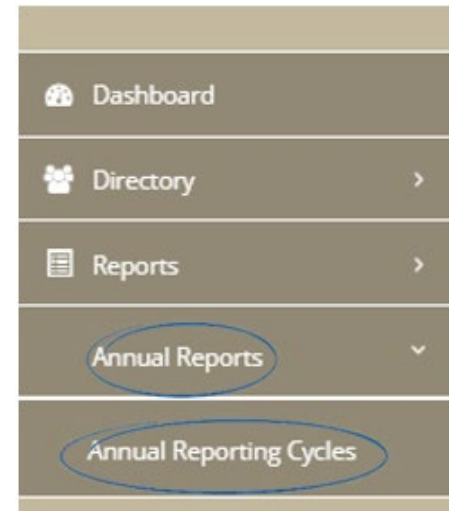
My Contacts [View All](#)

My Groups

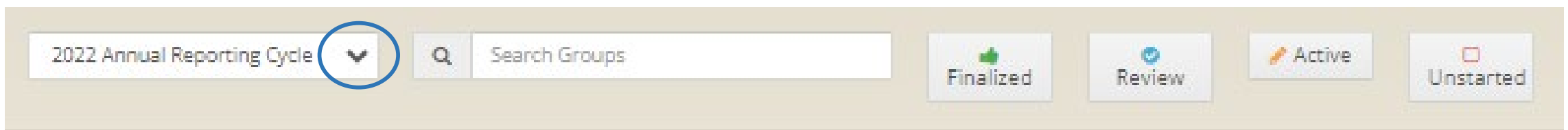
National Council Office

Access online Annual Reports

- Click on ***Annual Reports*** in the navigation panel.
- Click on ***Annual Reporting Cycle***.

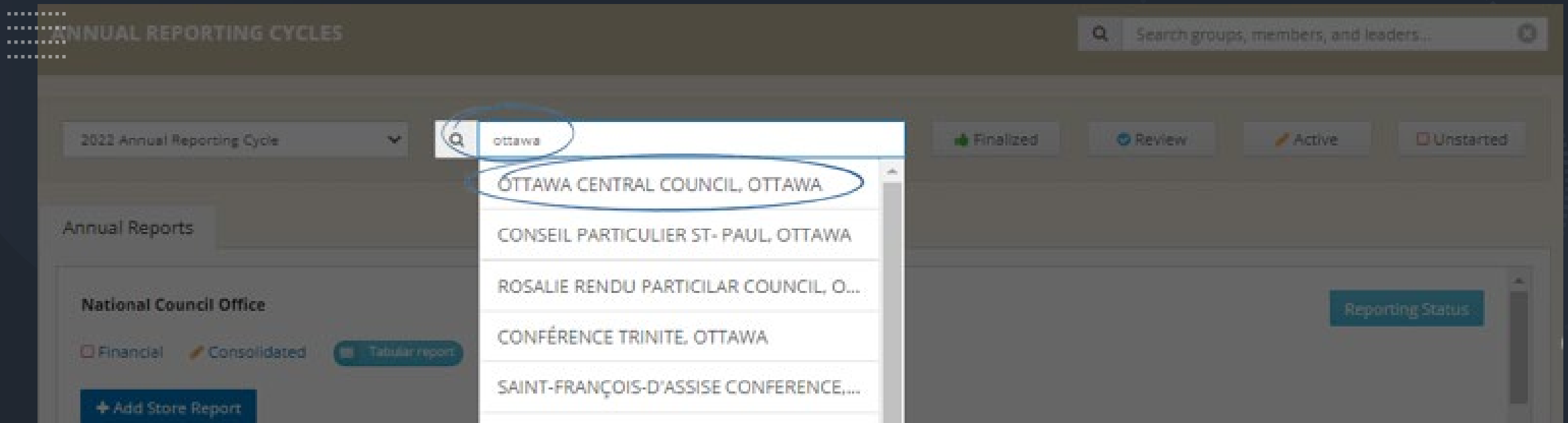


Click on the reporting cycle drop down box to display the reporting cycle you want to view or edit.



Find a conference or council

Enter a key word from the conference or council name, choices will appear, click on the correct name.



The screenshot shows a web application interface for "ANNUAL REPORTING CYCLES". At the top right, there is a search bar with the placeholder text "Search groups, members, and leaders...". Below the search bar, a dropdown menu is open, displaying a list of search results for the keyword "ottawa". The first result, "OTTAWA CENTRAL COUNCIL, OTTAWA", is highlighted with a blue oval. Other results include "CONSEIL PARTICULIER ST- PAUL, OTTAWA", "ROSALIE RENDU PARTICILAR COUNCIL, O...", "CONFÉRENCE TRINITE, OTTAWA", and "SAINT-FRANÇOIS-D'ASSISE CONFERENCE, ...".

Annual Reporting Cycles

2022 Annual Reporting Cycle

Annual Reports

National Council Office

Financial Consolidated Tabular report

+ Add Store Report

Finalized Review Active Unstarted

Reporting Status

Choose Financial or Statistics Report

To open the report, click on the financial link under the conference or council name.




Financial Report –The financial information contained in this report should be the same as the information reported on the T3010 that is submitted to the CRA.

Statistics Report –This report includes non-monetary activities such as # of home visits and neighbours helped. It also includes some of the numbers from the financial report and can also include any non-monetary activity of the conference (e.g. the value of donated goods received).

Financial Report Line Numbers

Financial Report Line Numbers

Revenue	
2001	 Donations and bequests (with receipt) [CRA:4500 / QC:12] <input type="text" value="\$ 0"/>

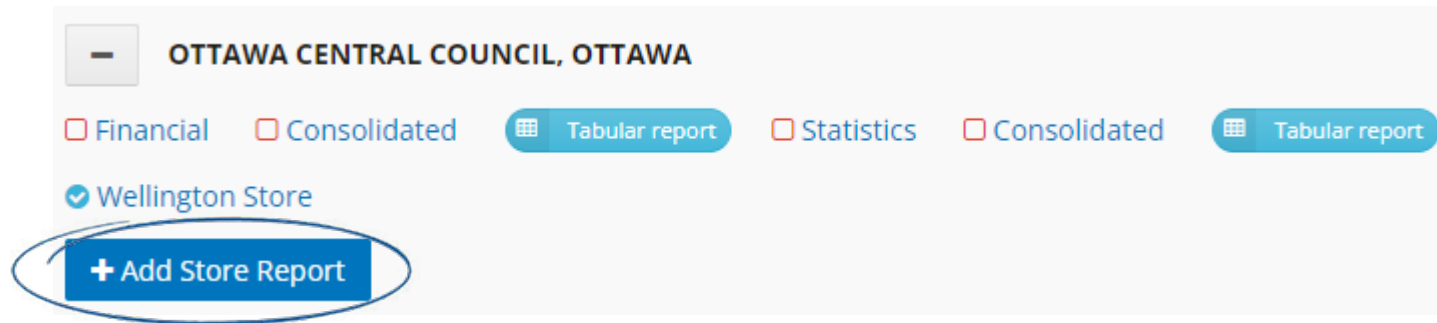
The Annual Financial Report has been structured to facilitate filing the Canada Revenue Agency form T3010. The reference number for each line is indicated after the line title e.g.: [CRA:4500]

The reference number starting with QC is a reference for the conferences and councils in Quebec. These references can be used to complete the Revenue Quebec form TP.985 e.g.: [QC:12]

When completing the online form, click on the  for additional line information.

Financial Report – Stores and Outlets

To add a store or outlet report:
On the main annual reports page, click on +Add Store Report.




Enter relevant information on this form and keep the amount on line 39 handy as this amount will be added in the Financial Report on line 2006.

Total Net		
39	Total Net	\$ 1000

Financial Report – Liabilities and Assets


Once data entry is complete, ensure that lines 2049 Total Liabilities and 2036 Total Assets are equal.


Assets, Liabilities and Fund Balances		
2049	 Total Liabilities + Total Fund Balances (Add lines 2042 and 2048) Line 2049 and line 2036 should be equal to the same amount	\$ 0
2036	Total Assets	\$ 0

If these lines do not balance, and you are not able to identify the cause, please contact your central/regional council's financial advisor.

Save and Print the Report

Before closing the report, click on either **Save for later** or **Save for review**.

Save for later: Save the entered information and the icon  will indicate that the report is can be edited until it is finalized.

Save for review: Save the entered information and the icon  will indicate that the report is completed and is ready to be reviewed by the next higher council.

Print Report

Click on **Print** to print or save as PDF.

In the Destination field, choose the printer or Save as PDF.

REASONABLE RESERVE REPORT		
2050	i Liquidity (Add lines 2030 and 2031)	\$ 0
2051	i Total expenses for the last year (line 2015)	\$ 0
2052	i Planned increase in expenses (25% of line 2015)	\$ 0
2053	Additional expenses planned for next year: Description of the projects: Subtotal: Additional expenses planned for next year	
		\$ 0
2054	i Total planned spending (Add lines 2051, 2052 and 2053)	\$ 0
2055	i Surplus to share (line 2050 minus 2054). Any surplus must be shared with the next higher council which will distribute it to the less fortunate conferences associated to the council and to higher level councils.	\$ 0

Approved on behalf of the members:

_____ Signature	_____ Signature
_____ Name and title in block letters	_____ Name and title in block letters
_____ Date	_____ Date

Exit **Print** Save for Later Save for Review

Print 3 pages

Destination Save as PDF

Pages All

Layout Portrait

Extra fields are added to the printed or PDF document. The president and treasurer can sign the printed copy of the report.



FAQ

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Demo

<https://members.ssvp.ca/Dashboard>

Additional information:

<https://ssvp.ca/members/portal/>

<https://ssvp.ca/members/formationresources/>

- Financial Handbook for conference treasurers
- Webinar recording – Treasurer : Role and Responsibilities, and Annual Reports
- Webinar PowerPoint Presentation
- Sample of Chart of Accounts
- Sample tracking spreadsheet



Questions

