

# SSVP Members Portal

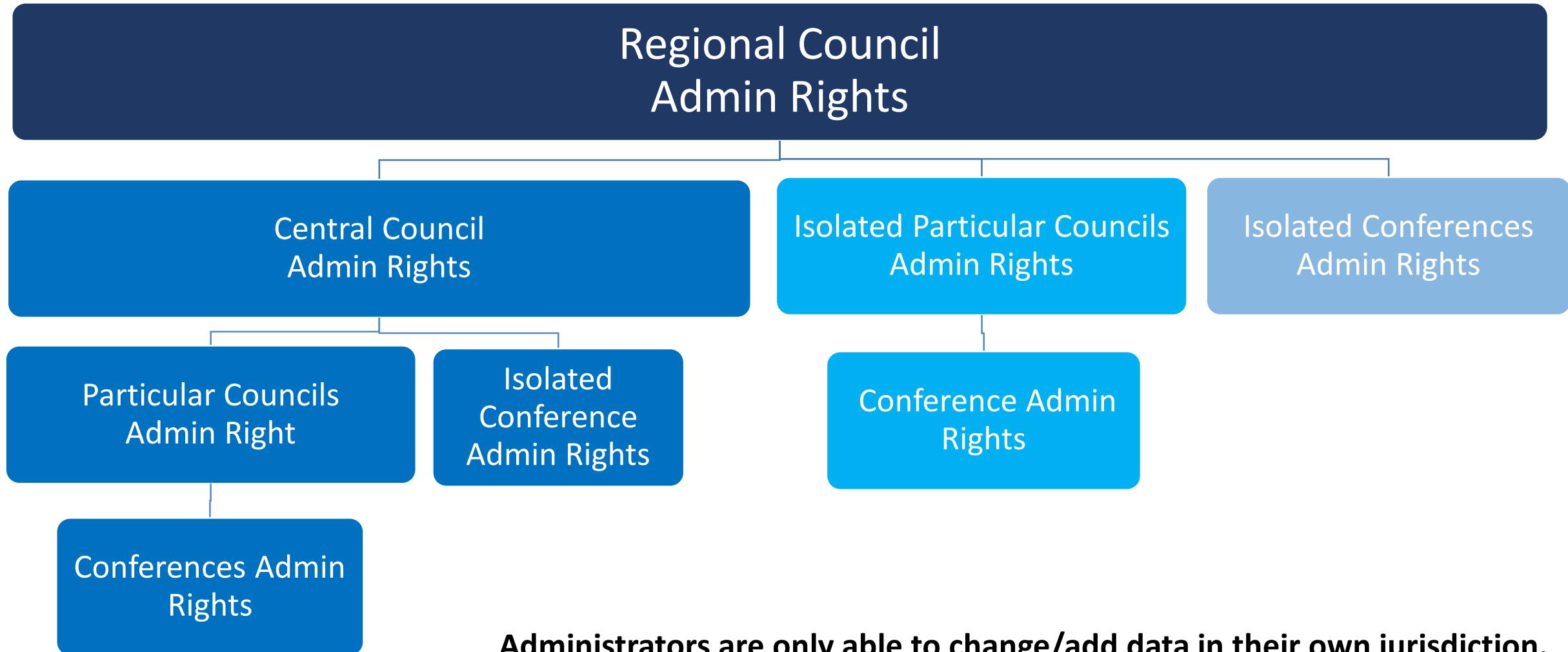
**The Annual Reports**

**For council administrators**

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



# The Portal Administrator Rights Structure



**Administrators are only able to change/add data in their own jurisdiction. Administrators and members are able to view all portal data.**

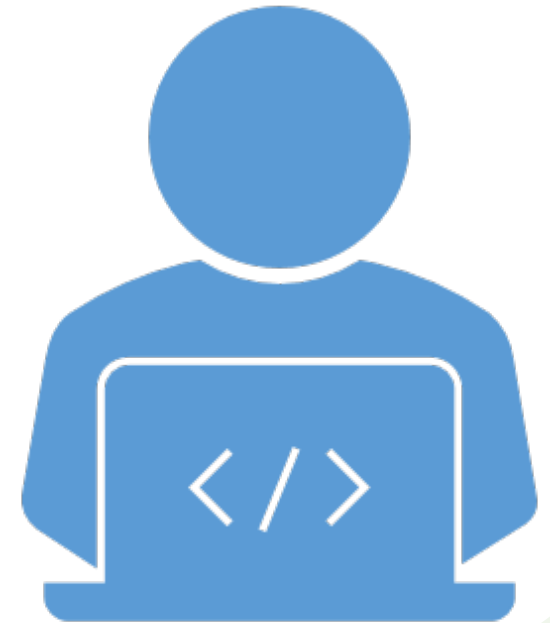
# The Duties of Council Administrators

- Oversee annual financial and statistics reports completion.
- Provide support and training to Administrators under their jurisdiction.
- Check financial and statistics 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*

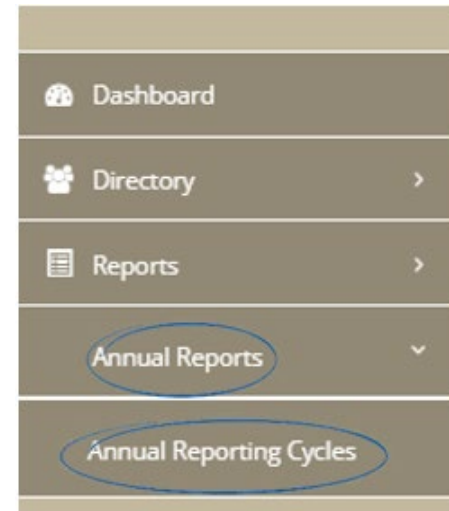
My Contacts [View All](#)

My Groups

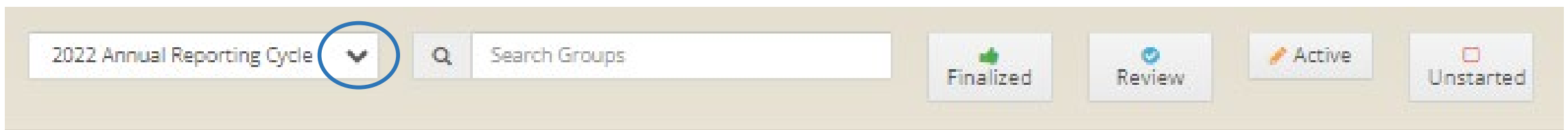
**National Council Office**

# 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.



# Annual Reports : Councils – Review Reported Data

When a conference or council has completed their reports, they will click on **Save for review**. These reports will be ready to be reviewed by the next higher council.

Councils should review all saved data from reporting councils and conferences before saving for review their own reports.

There are three different types of reports to help assess the consolidated data:






The screenshot shows a reporting interface for 'CALGARY SOUTH PARTICULAR COUNCIL, CALGARY'. It features a menu with the following options: 'Financial' (checked), 'Consolidated' (yellow border), 'Tabular report' (green border), and 'Statistics' (red border). There are two sets of these options. A 'Reporting Status' button is highlighted with a red box. A '+ Add Store Report' button is located at the bottom left.

➤ Consolidated reports

➤ Tabular report

➤ Reporting Status

Icon meaning:

-  Has not been started
-  Saved for later (still active)
-  Saved for review







# Annual Reports : Councils – Review Reported Data

## Consolidated Reports

The total of amounts entered by all reporting conferences and councils in the same format as the completed forms.

### Fiscal Period

#### Revenue

4500,2001,12	 Donations and bequests (with receipt)	\$	1785505
4510,2002,13	 Funding from councils or conferences and funding from other registered charities.	\$	1241313
4530,2003,14	 Donations (without receipt)	\$	377891
4570,2004,15	 Government Grants	\$	207143

# Annual Reports : Councils – Review Reported Data

There are three different types of reports to help assess the consolidated data:






– CALGARY SOUTH PARTICULAR COUNCIL, CALGARY Reporting Status

Financial Consolidated **Tabular report** Statistics Consolidated **Tabular report**

+ Add Store Report

Icon meaning:

 **Tabular report**

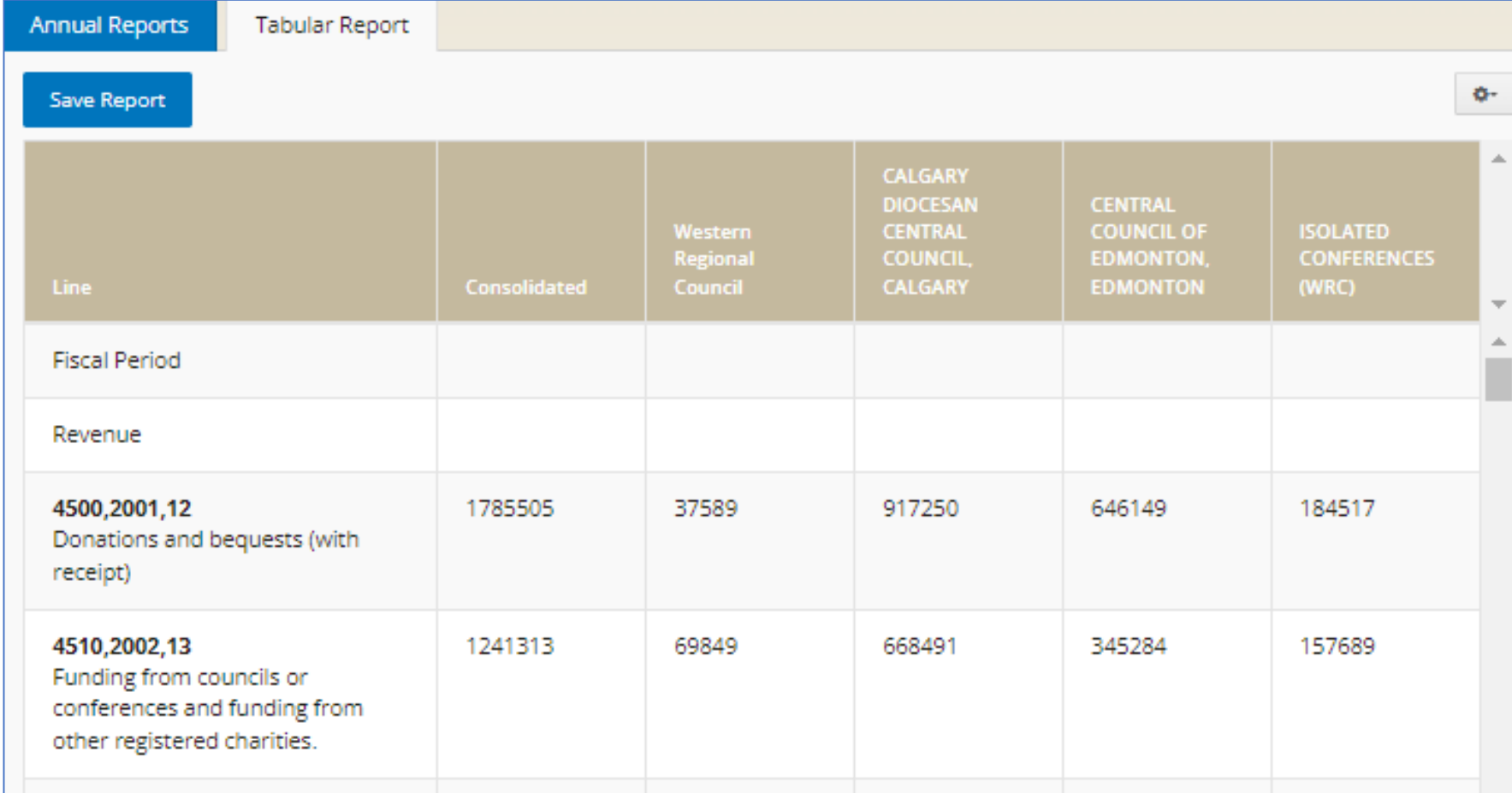
-  Has not been started
-  Saved for later (still active)
-  Saved for review

# Annual Reports : Councils – Review Reported Data

## Tabular Report

Details about the data entered by all reporting conferences and councils.

Click on Save Report to download the data in a csv file (Excel).



Line	Consolidated	Western Regional Council	CALGARY DIOCESAN CENTRAL COUNCIL, CALGARY	CENTRAL COUNCIL OF EDMONTON, EDMONTON	ISOLATED CONFERENCES (WRC)
Fiscal Period					
Revenue					
<b>4500,2001,12</b> Donations and bequests (with receipt)	1785505	37589	917250	646149	184517
<b>4510,2002,13</b> Funding from councils or conferences and funding from other registered charities.	1241313	69849	668491	345284	157689

# Annual Reports : Councils – Review Reported Data

There are three different types of reports to help assess the consolidated data:






CALGARY SOUTH PARTICULAR COUNCIL, CALGARY

Reporting Status

Financial Consolidated Tabular report Statistics Consolidated Tabular report

+ Add Store Report

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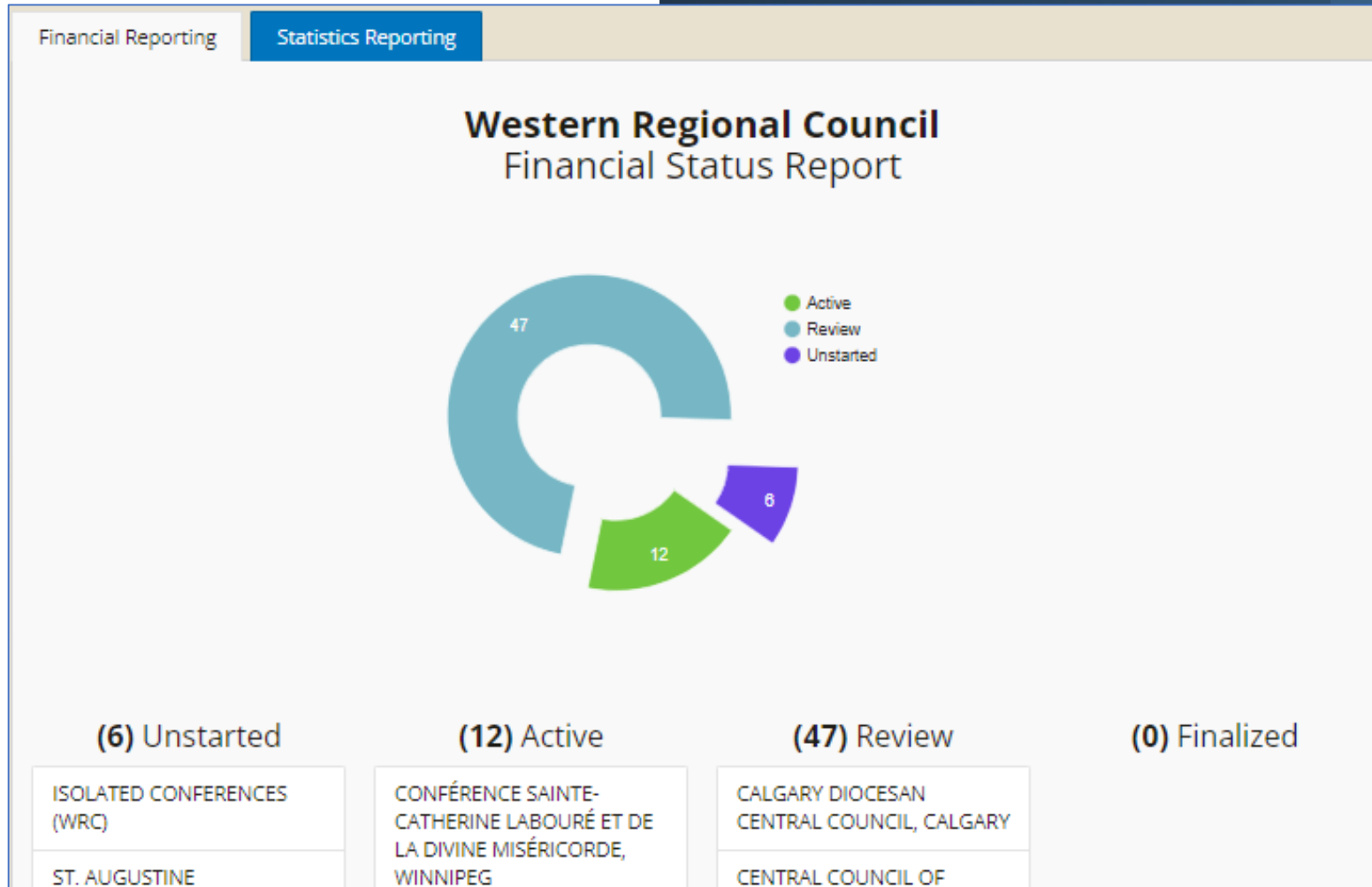
 **Reporting Status**

# Annual Reports : Councils – Review Reported Data

## Reporting Status

A list of all conferences and councils categorized according to their reporting status.

Select either Financial Reporting or Statistics Reporting on the top of the reports.





# FAQ

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

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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

