



RSL

NSW

SUB-BRANCH PORTAL USER GUIDE

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1. Sub-Branch Portal Systems Overview

The RSL NSW sub-Branch Portal is a one stop location for Office Bearers to manage their membership and access all resources needed to successfully operate their sub-Branch, including reporting on membership matters and charitable purpose performance. The Portal provides Office Bearers:

- A one-stop-shop for all sub-Branch administrative functions,
- Streamlined administrative access to update records,
- A Resource Centre providing easy access to a wide range of useful materials such as ANZAC House Communications, SOPs and Policies, Member Recruitment Tools, Branded Materials, Written Directions Framework, Corporate Governance and other Veteran Support and Services resources.

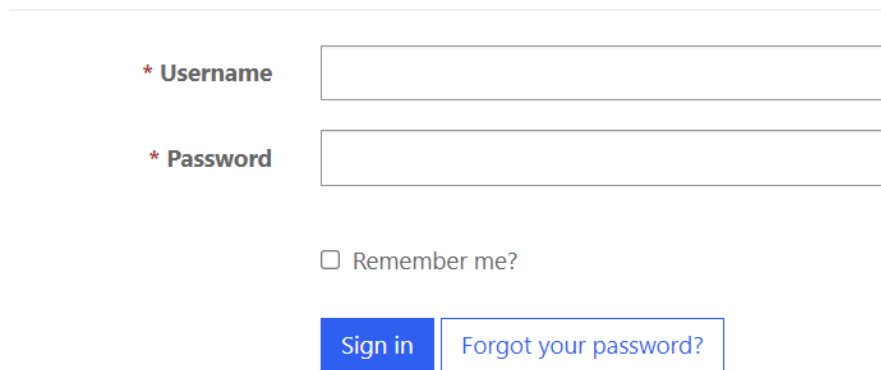
Please note that the portal requires your computer device to have Windows 10 or equivalent.

2. How to Log in

To log into the portal, you must be a sub-Branch Office Bearer, please visit the Member Resources page 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.

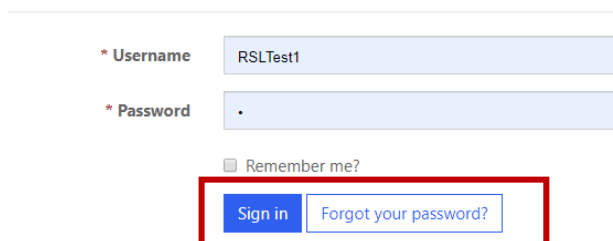
Example: Canterbury-Hurlstone-ParkSB@rslnsw.org.au

2.1 Password Reset

If you have forgotten or need to reset your password, you can do so by clicking the **Forgot your password?** button as seen below. This process will send a password reset link via the nominated sub-Branch email address.

If you have further issues, you can contact ANZAC House, who can reset your password for you.

Sign in with a local account



* Username

* Password

Remember me?

[Sign in](#) [Forgot your password?](#)

3. Portal Navigation

3.1 Site Navigation

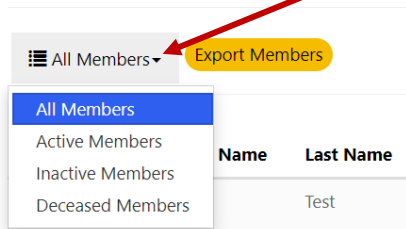


Navigation Item	Description
Home	Will take you to the homepage and Resource Centre
Renewals	Membership Management: In this tab you will be able to perform annual membership renewals
Members	Member management: In this tab you can view/edit a member's personal details such as: <ul style="list-style-type: none"> • Address • Contact details (Phone and Email) • Membership • Reveille preferences • And other details
Associated Members	In this tab you will be able to view your associated members and export their data.
Annual Budget	Instructions how Office Bearers complete the sub-Branch's Annual Budget form online.
Annual Returns	Instructions how Office Bearers complete the sub-Branch's Annual Return form online.
Compliance Report	Instructions how Office Bearers complete the sub-Branch's Annual Compliance Return form online.
Office Bearers	In this tab you can view your past and present office bearers and trustees. You can also add new office bearers and remove previous office bearers.
Training	Status of training assigned to Office Bearers and members can be viewed under this tab.
'Your sub-Branch Name' sub-Branch Profile	In this tab you can view/edit your sub-Branch's details such as: <ul style="list-style-type: none"> • ABN • Address • Contact details (Phone and Email) • sub-Branch meeting details

3.2 Filtering on Views

To change the displayed member list, 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 allows you to filter in ascending and descending order.

3.3 Search functions

The portal has a search window in each tab. The search function allows you to search by name, number (member number, service number, phone number), member status and member type.


Home > Members

Members

☰ All Members ▾ Export Members

Member Number	First Name	Last Name ↑	Mobile	Address Line 1	Suburb	Badge Number	Service Number	Type	Status
---------------	------------	-------------	--------	----------------	--------	--------------	----------------	------	--------

4. Resource Centre

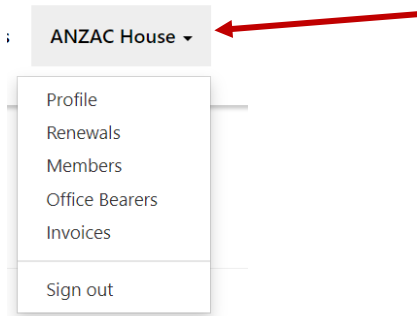
The Resource Centre is the homepage for the sub-Branch Portal and can be navigated to by selecting the  icon in the top left corner. The Resource Centre is the key location for finding relevant information and materials for operation of RSL NSW sub-Branches.

The homepage contains image tiles of the categories in the Resource Centre. On the next page is a breakdown of the categories and subcategories of information within the Resource Centre. There is also a search bar at the top of the left-hand categories column to quickly lookup the information you require.

ANZAC House Communications	Veteran Support Fund	SOPs and Policies	Written Directions Framework	Training	Finance	Be on Brand	Member Recruitment Toolkit
Board Communique Circulars RSL NSW Strategic Plan 2021-2026 Funding the Future Ask ANZAC House	Links directly to the Veteran Support Fund webpage	Standard Operating Procedures Policies Forms VSF Funding Proposal Form	Office Bearer Roles and Responsibilities Handover Guides Guidance Notes Registers and Templates	Governance Training	Annual Reports and Financial Statements Annual Return Forms Budget forms for sub-Branches Support & Assistance Fund Application Veteran Support Fund Contributions	Member Merchandise Store Recruitment and Event Tools Clubs Engagement Toolkit Veteran Services Card Email Signature Block Sub-Branch Stationery RSL NSW Logos RSL NSW Brand Guidelines	Member Recruitment Toolkit
Sport & Recreation Program	General	Commemorations, Ceremonies and Events	Corporate Governance	Veteran Support and Services		Membership Forms	Grants and Fundraising
Planning Activities Funding & Financial Support Activity Promotion & Storytelling Safety & Risk Smartwaiver Resources	Awards and Certificates Application Forms Email access for sub-Branches Replace a lost RSL Badge Veteran's Covenant, Veteran Card and Lapel Pin Wreath and Funeral Poppy Order Form	Commemorations and ceremonies Congress	2020 Board Election Board Documentation Constitution Annual Return Forms Model Constitutions for sub-Branch Incorporation	Advocating for Veterans 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 Resources		Service Membership Affiliate Membership Transfer Membership Auxiliary Membership	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

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 can view the following sub-Branch details:

Home > RSL NSW Branch Profile

RSL NSW Branch Profile

BRANCH INFORMATION

Sub Branch Name *

Test Account

District Council

Main Phone

Provide a telephone number

Meeting Details

Email

—

Meeting Location

ABN

—

Sub Branch Primary Contact

RSL Custodian Trustee

No

5.1 Updating Sub-Branch Profile

Each sub-Branch can 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.

Submit

To edit or update all other details please contact the ANZAC House Support team.

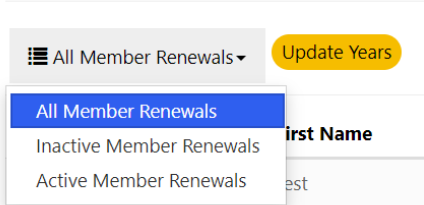
6. Membership Renewals

6.1 Renewals (Views)

On this page you can 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).

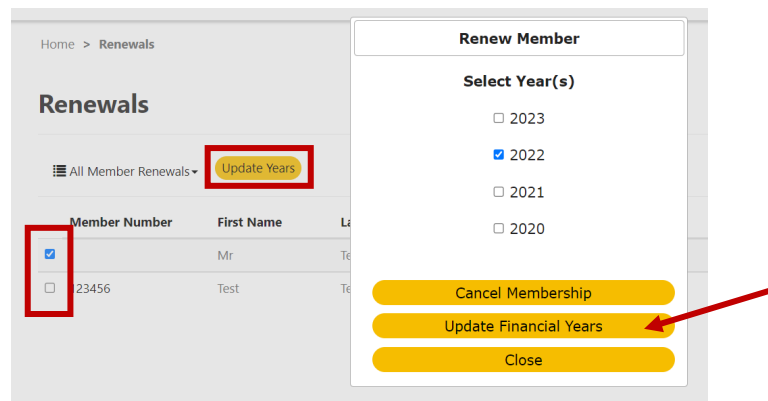
The sub-Branch Secretary is NOT required to update the status of members in the sub-Branch Portal. All 'Active' members will automatically remain 'Active' from 1 January 2023.

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 by highlighting the tick box adjacent to the member's name (as per below), then select 'Update Years'. Then select 'Cancel Membership' from the list of options.



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

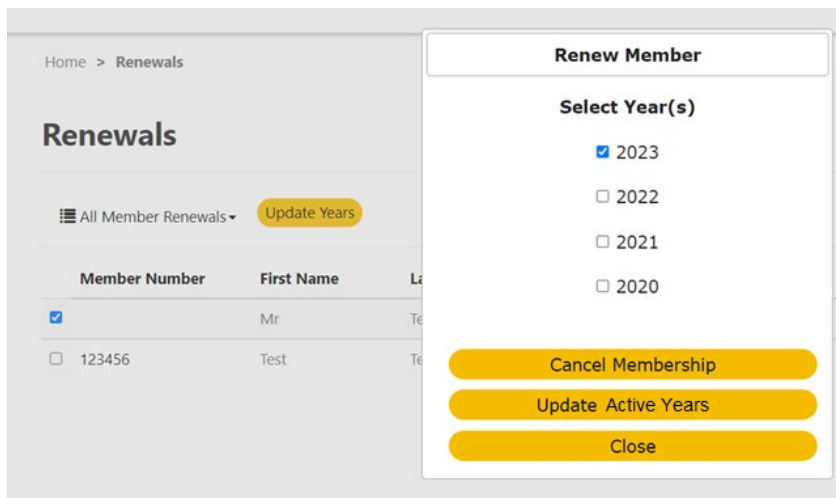
Member Number	First Name	Last Name ↑	Start Date	Member Status	Member Type	Active To
<input type="checkbox"/>	Mr	Test		Inactive	Service Member	31/12/2023

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.

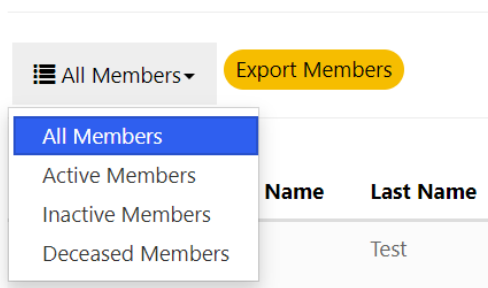
7. Members

7.1 Member (Views)

On this page you can 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



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

All Members Export Members

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 can edit the following fields below:

- Member Details
- Address Details
- Membership Details
- Next of Kin
- Deceased status and date

View Membership

Member Details

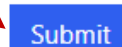
Title <input type="text"/>	Member Number 123456	Home Phone <input type="text" value="Provide a telephone number"/>
Full Name Test Test	Member Type Affiliate Member	Mobile Phone <input type="text" value="04"/>
Preferred Name <input type="text"/>	Member Status Active	Email <input type="text"/>
Post Nominals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

You can also view and edit certain Membership Details, as seen below:

Membership Details

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

Once you have made changes to the member profile, scroll down, and Click Submit to save.



Submit

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)

Clicking 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

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

Click the Deceased Drop down:

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

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

7.5 How to Export a Member Listing

To export member data, navigate to Members, click Export Member Data. You will be provided with an excel sheet with all active, inactive, and deceased sub-Branch members and their membership data.

If your sub-Branch requires any further exports, please contact the Support Team at ANZAC House.

Members

☰ All Members ▾	Export Members	Search	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

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.

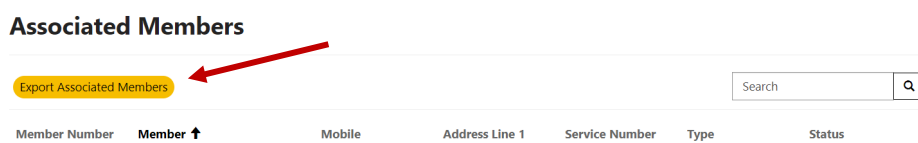
You can search for a member using the search field on the top right-hand corner as per the image below.

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

🏠	Renewals	Members	Associated Members	Annual Budget	Annual Returns	Compliance Report	Office Bearers	Training
Home > Associated Members								
Associated Members								
Export Associated Members		Search	Q					
Member Number	Member ↑	Mobile	Address Line 1	Service Number	Type	Status		

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 sheet containing all sub-Branch associated members and their membership data. If your sub-Branch requires any further exports, please contact the Support Team at ANZAC House.

9. Annual Budget

The RSL NSW Constitution requires that each RSL NSW sub-Branch lodge a sub-Branch Annual Budget with ANZAC House by **30 November** each year for the following calendar year (refer to [SOP07 - Accounts, Financial Management and Expense Reimbursement](#)).

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

An Excel copy of the sub-Branch Annual Budget can be generated at any time before and after submission for review and your sub-Branch records.

Budgeting is the process of preparing a financial plan for future operations with a view to enhancing financial performance, governance, and reporting. It is an estimation of Income and Expenses over a specified period – in this case, the 12-month period from January to December each year.

Budgets are to be used as a management tool, allowing sub-Branches to compare actual Income and Expenses against what they have budgeted or forecasted for at the start of the period.

The sub-Branch budget should reflect the requirements of [POL01 Funding the Charitable Purpose](#) and [SOP01 Funding the Charitable Purpose](#) in determining the net surplus available to donate to the [Veteran Support Fund](#).

Note: If you are planning to purchase capital items, the amounts are not to be included in this Budget (refer to your own sub-Branch policy in relation to capital expenditure). Further, the following information may assist you when preparing your Budget.

*Note: When completing your Budget, all amounts are to be entered in **WHOLE DOLLARS ONLY**.

The annual budget must be presented at a sub-Branch general meeting for approval by the members before it is submitted.

9.1 Site Navigation

Select 'Annual Budget'

Home Renewals Members Associated Members **Annual Budget** Annual Return Compliance Report Office Bearers Training XXX RSL sub-Branch

Home > Annual Budget

Annual Budget

Annual Budget Excel Template 2025

Annual Budget Excel Template 2024

Draft	
Draft	
Submitted	
2025	
Sub-branch	Enter Figures
XXX RSL sub-Branch	Yearly

9.2 Draft Excel template

If you would like to work with a spreadsheet to prepare the sub-Branch's Annual Budget before entering and submitting your final numbers, please select the **Annual Budget** tab then select **Annual Budget Excel Template 2025** (yellow button at top) to download the Excel spreadsheet template. In the spreadsheet, enter the relevant figures for each category and once received member approval for the Annual Budget you can then transfer the information to the online form for submission.

9.3 Completing the Annual Budget online form

Select '**2025**' [the year required to be completed, which will appear as a draft until submitted] under '**Draft**'. This Annual Budget form is aligned to the Australian Charities and Not-for-profits Commission (ACNC) Annual Information Statement.

Home > Annual Budget > Draft Annual Budget

Draft Annual Budget

Download Excel File!

General

Sub-branch *

XXX RSL sub-Branch

Enter Figures *

Yearly

Step 1: Search for the name of the person entering the budget figures.

Who Entered

q

Next

Step 2: Select '**Next**' to save the information on this screen.

Yearly (enter total amount for each item for the full year)

Category	Total
Budgeted GROSS INCOME	
Revenue from government including grants	
Department Veteran Affairs - (including BEST grants)	<input type="text" value="10"/>
Government agency grants (i.e. Federal, State or Local)	<input type="text" value="10"/>

9.4 Category – Budgeted GROSS INCOME

List all sources of Income (recurring and one-off) expected for the upcoming year and classify this income into:

- **Revenue from government including grants** [funding/grants received from government agencies.]
- **Donations and Bequests** [donations received from various sources]
- **Revenue from providing goods or services** [income from the sale of merchandise]
- **Revenue from investments** [income derived from investing activities, i.e. interest received, dividends, rental income etc.]
- **All other revenue** [income received from members contributions or donations]

9.5 Category – Budgeted EXPENSES

List all expenditures forecasted/expected to be incurred for the upcoming year and classify these expenses into:

- **Employee expenses** [all employee related expenses]
- **Interest expenses** [any expenses related to borrowings]
- **Grants and donations made for use in Australia** [any expenses related to applying for grants; Donations figure will auto populate from the information entered in the Donations section for Veteran Support Fund (VSF) below Budgeted EXPENSES]
- **Sub-Branch operating expenses** [any expenses related to the operation of the sub-Branch]
- **Functions and member activities** [any expenses related to conducting events and functions]
- **Appeals and fundraising** [any expenses related to fundraising]
- **Commemorations** [any expenses related to commemorations]
- **Wellbeing services & camaraderie (for ADF veterans & and their families)** [any expenses related to provided wellbeing services and support]

9.6 Category – Budgeted DONATIONS

List of this year's approved initiatives for the RSL NSW Veteran Support Fund (VSF) the sub-Branch can donate to.

To enable the RSL in NSW to take advantage of its scale, demonstrate commitment to working together to achieve its charitable purpose, and through leveraging its resources, sub-Branches will be able to donate to a 'contribution pool' called the VSF. Please click here for more information on the [Veteran Support Fund](#), where you will find the approved Veteran Support Fund initiatives listed on the Veteran Support Fund dashboard.

Apply the provisions of [RSL NSW SOP 1](#) to the Net Income BEFORE Donations calculated in this section to determine the Annual Surplus and upcoming year's charitable purpose Donations and contributions to be made on behalf of the sub-Branch.

9.7 Category – Budgeted NET INCOME

This section is automatically populated for final totals are:

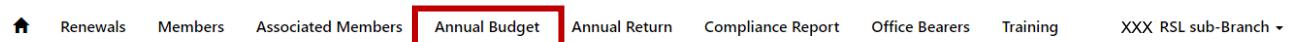
- **Total income**
- **Total expenses (excluding donations)**
- **Net surplus / (deficit) BEFORE donations**
- **Total donations**
- **Total Net surplus / (deficit) AFTER donations**

9.8 Save draft and review Annual Budget

Once you have entered the budget figures, select '**Save as Draft**' to save the budget. Select this button at the bottom of the form anytime you wish to save your work to come back to later.



To review the sub-Branch's Annual Budget, go to **Drafts**, click on the relevant year to re-open on the screen or select '**Download Excel File!**' to download and review from the Excel spreadsheet.



Home > Annual Budget

Annual Budget

Annual Budget Excel Template 2025

Annual Budget Excel Template 2024

Draft		Sub-branch	Enter Figures
Draft		XXX RSL sub-Branch	Yearly
Submitted			
2025			

Home > Annual Budget > Draft Annual Budget

Draft Annual Budget

Download Excel File!

Select '**Download Excel File!**' to download the file to your computer (appears in [Downloads](#) folder) to then save as required.

General

Sub-branch *

9.9 Sub-Branch members must approve the Annual Budget prior to submission

IMPORTANT: The sub-Branch Committee must present the Annual Budget to sub-Branch members for approval prior to submission.

9.10 Submit sub-Branch's Annual Budget

Once the sub-Branch's Annual Budget has been approved by the members, follow 9.8 steps to click on the relevant year to re-open on the screen then select **Next**.

Check the figures are final, edit if required, then at the bottom of the form enter **Date approved by members** before selecting the **Submit** button.

The screenshot shows a form with a grey box labeled "Total Net surplus / (deficit)". Below it is a date field labeled "Date approved by members:" with a calendar icon. A red arrow points from a callout box to this date field. The callout box contains the text: "Step 1: enter date approved by the members. This is a mandatory field for submission, an error message appears if date field is left blank." Below the date field are two blue buttons: "Save as Draft" and "Submit". The "Submit" button is highlighted with a red border. A red arrow points from a second callout box to the "Submit" button. This callout box contains the text: "Step 2: select Submit."

9.11 Download submitted sub-Branch's Annual Budget as an Excel file

Once the Annual Budget has been submitted, go to **Annual Budget** tab, select **Submitted** in dropdown menu and click on the relevant year, then select '**Download Excel File!**'. You will find the file in your Download folder on your computer so that you can then save the Annual Budget accordingly.

Home > Annual Budget

Annual Budget

Annual Budget Excel Template 2025

Annual Budget Excel Template 2024

The screenshot shows a dropdown menu with "Submitted" selected. Below the dropdown is a table with a "Sub-branch" column. The "Submitted" option in the dropdown is highlighted with a red border.

Annual Budget Details

Download Excel File!

Sub-branch

Select '**Download Excel File!**' to download the file to your computer then save as required.

10. Annual Returns (sub-Branch Annual (SBA) 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.

10.1 Site Navigation

Home Renewals Members Associated Members Annual Budget **Annual Returns** Compliance Report Office Bearers Training

Select 'Annual Returns'

Home > Annual Returns list

Annual Returns list

Completed By	Date and Time completed	Status Reason
2024		Draft

Select '**20XX**' [the year required to be completed which will appear as a draft until submitted] under '**Current Year Annual Returns**'

10.2 Annual Returns Submission

The following instructions appear at the top of each section to assist in completing your return.

Instructions to complete the Annual Returns form:

- A user guide is available on the sub-Branch portal with detailed instructions to assist with the completion of the annual return.
- The annual return must be presented to the members before being submitted.
- The annual return due date is 31 May, as outlined in the Constitution.
- 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 does **NOT** have **pop-ups enabled**, the pdf will be blocked and won't generate. You need to turn allow pop-ups in your browser for the pdf to 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>.

10.3 General Information Section

General Information

The screenshot shows a form titled "General Information" with the following fields and callouts:

- Sub-Branch ***: A dropdown menu with "Test Account" selected. Callout: "sub-Branch name auto populated".
- Sub-Branch Mailing Address**: A text input field. Callout: "You can update the sub-Branch address".
- Sub Branch Main Point of Contact**: A search dropdown menu with a magnifying glass icon. Callout: "Search for the relevant person at your sub-Branch".
- Sub-Branch Main Point of Contact - Phone Number**: A text input field with the placeholder "Provide a telephone number". Callout: "Insert phone number".
- Completed By**: A search dropdown menu with a magnifying glass icon. Callout: "Search for the relevant person at your sub-Branch".
- Buttons**: "Generate Annual Form PDF" (orange) and "Next" (blue). Callout for "Next": "Each time you select 'Next' it saves the information on that page".

10.4 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.

10.5 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.

10.6 Note 1 – Donations section

Complete the details for each sub-section:

- RSL LifeCare Veteran Services
- Other Donations
 - Select **+Create** button and add Name and Amount of each donation then select **Submit**, up to 10 options available.

Other Donations

Name ↑	Amount	
VSF - Kokoda	\$2,000.00	▼
VSF - NCVH Liaison Officer	\$2,000.00	▼
VSF - Saltwater Veterans	\$2,000.00	▼

Total Other Donations

\$	6,000.00
----	----------

- Total Donations Paid [calculates automatically and can't be overridden]

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

10.7 Net Income/ (Loss) After Donations section

Calculates automatically and can't be overridden.

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

10.8 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, Valuation Amount** and **Percentage of time the property was used in the pursuit of the charitable purpose** 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.

10.9 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.

10.10 Note 3a – Grants (In Kind Funding) section

In Kind Funding includes any goods and services provided to the sub-Branch which aren't paid for but excludes sub-Branch office bearer volunteer hours.

- Note 3a – Grants (In Kind Funding)
 - Select '**+Create**' button and add details for each grant: **Organisation providing in-kind funding, Description, Amount** then select '**Submit**', up to 10 options available.
- Total In Kind Funding [*calculates automatically and can't be overridden*]

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

10.11 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, Deposit amount**, and **Average interest rate %** 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.

10.12 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, Market Value at 31 December, Annual rate of return (%)**, and **Investment Management fee (%)** 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.

10.13 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
 - Land and Buildings [*auto-populated and can't be overridden from Note 2*]
 - Select '**+Create**' button and add Name and Amount of each non-current asset then select '**Submit**', up to 10 options available.
- 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.

10.14 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.

10.15 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.

10.16 Employee and Volunteer Details section

Full-time and part-time employees are **PAID** employees only that the sub-Branch hires directly.

- Number of Full Time Employees
- Number of Part Time Employees
- Number of Volunteers
- Total volunteer 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.

10.17 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.

11. Compliance Annual Report

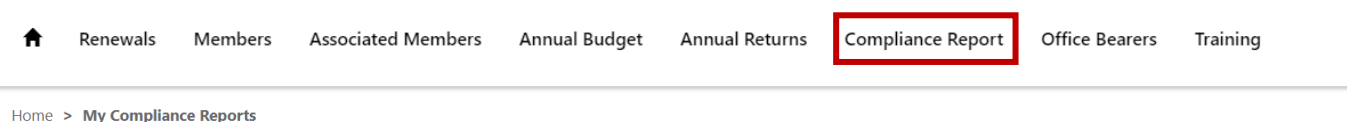
Please provide your answers for the Compliance Annual Report for the previous calendar year.

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 is due by 31 May each year, starting with the report for 2023 calendar year (due date 31 May 2024).

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

11.1 Site Navigation



My Compliance Reports



Select 'Compliance Report'

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

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

There are three sections to complete:

- 1 Finance Processes
- 2 Governance Processes
- 3 Charitable Purpose
- 4 Review

For each section answer each question then 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 'Previous' 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 need to use the 'Previous' button instead.

11.3 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 can 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.



11.4 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.

12. Office Bearers

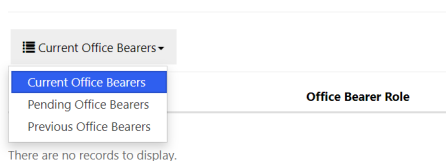


12.1 Office Bearers (Views)

On this page you can see your sub-Branch current and past Office Bearers, their position, start date and end date.

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

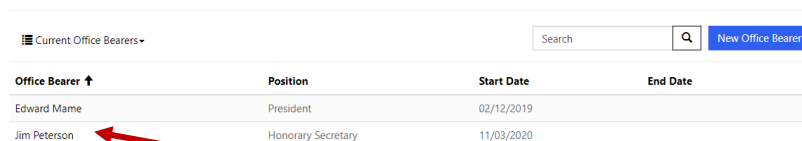
Office Bearers



12.2 Office Bearer and Trustee Resignations

If an Office Bearer or Trustee has resigned, you 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

Office Bearer Jim Peterson <input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/>	Position Honorary Secretary <input type="text"/>
Appointed Date 11/03/2020 <input type="text"/>	Resigned Date <input type="text"/>
	Branch ANZAC House RSL Sub-Branch <input type="text"/> <input type="button" value="x"/> <input type="button" value="Q"/>

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

12.3 Adding a New Office Bearer and 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

<input type="button" value="☰"/> Current Office Bearers ▾	<input type="text" value="Search"/> <input type="button" value="Q"/>	<input type="button" value="New Office Bearer"/>	
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 <input type="text"/> <input type="button" value="Q"/>	Position <input type="text"/>
Appointed Date <input type="text"/>	Resigned Date <input type="text"/>

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

Lookup records

×

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 and 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 *

Position



Appointed Date

Resigned Date

District Council Delegate

 No Yes

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

This comes through to ANZAC House 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 Team at support@rslnsw.org.au.

Once the Support Team has received the supporting documentation, they can confirm the appointment and the Office Bearer will appear in your portal. Please note that they do not appear in the portal until the Support Team has received the paperwork but can be seen under the 'Pending Office Bearer' view.

13. Training

13.1 Site Navigation

Home > Training

Member ID Member Sub-Branch Course ↑ Training Type Course Status Completion Date

13.2 RSL NSW Governance training

All office bearers (President, Vice President, Secretary, Treasurer and Trustees) have been assigned to the following RSL NSW Governance training:

1. Conflicts of Interest
2. Safety, Risk and Wellbeing
3. Governance and Compliance

Under the **Training** section each office bearer will be listed with each course they have been assigned to do and their completion is recorded under the **Course Status** heading.

Office bearers (as assigned in the sub-Branch Portal by the sub-Branch) are pre-registered for the Governance training and course status will be updated monthly by ANZAC House. If office bearers have changed, please refer to **Change of office bearers** section below.

The **Course Status** options are:

- Not attempted – the office bearer has not started the course
- Incomplete – the office bearer has started the course but not completed it
- Completed – the office bearer has successfully completed the course having passed the quiz with 80% or more.

Change of office bearers

If there has been a change to the office bearer, please refer to **Section 12** in this User Guide for instructions on how to retire or add new office bearers. Once the new office bearer has been assigned to their new role in the office bearer section in the portal, please contact the Member Support Team via email at support@rslnsw.org.au or call **1300 679 775** with the name(s) of the retired and new office bearers so that login details can be sent to the office bearer.

To access the RSL NSW Governance training go to <https://rslnsw-elearn.com.au/>.

14. Further Assistance

If you require further assistance, please contact the RSL NSW Member Support Team via email: support@rslnsw.org.au or phone 1300 679 775.