Volunteer Toolkit (VTK) Finance Tab Step-By-Step Instructions

Troop leaders and troop treasurers will complete the Annual Troop Finance Report using the VTK Finance Tab. This document will provide step-by-step instructions and screenshots showing how to enter your troop financials. If you have questions or need help logging in or completing your Troop Finance Report through the VTK Finance tab, please contact your Membership/Program Specialist or emailing troopsupport@gswrc.org.

PREPARATION:

Make sure you can access the Volunteer Toolkit and are able to add troop financial information into the VTK Finances tab fields. The VTK Finance tab will be available from April 1st through June 30th. After July 1st previously completed finance reports can be viewed from the drop down at the top of the Finances tab page.

Before you enter troop financial information into the VTK Finance tab, you'll want to prepare the following:

- Review the Volunteer Toolkit webpage.
- Gather all income and expense documentation and receipts.
- Download and save a .PDF copy of your April bank statement when it becomes available.
- Enter all your income and expense categories into the Troop Finance Report Tracking Sheet for easy entry into the VTK Finance Tab.

Please note that you'll be **required** to submit the following documents:

- April bank statement

Who can manage the Volunteer Toolkit (VTK) and enter the troop's annual troop finance report information in the VTK Finance Tab?

- Only active GSKWR troop leaders and troop treasurers, with a current membership and an approved background check on file with GSKWR, can enter and submit troop financial information in VTK.
- How you and your troop treasurer choose to organize and track the troop finances throughout the year is up to you. We recommend the troop treasurer and troop leader have discussions in March-May to review and reconcile all income and expense receipts, outstanding checks, payments, and cash on hand with the troop's April bank statement. Use the Troop Finance Report Tracking Sheet to help manage and balance your income and expense categories and financial summary for easy transfer to the VTK Finance tab.
- Share the end of year financials with any additional bank account signers. Once all signers agree, the troop leader and/or troop treasurer can enter the final troop financials into the Volunteer Toolkit Finance tab.

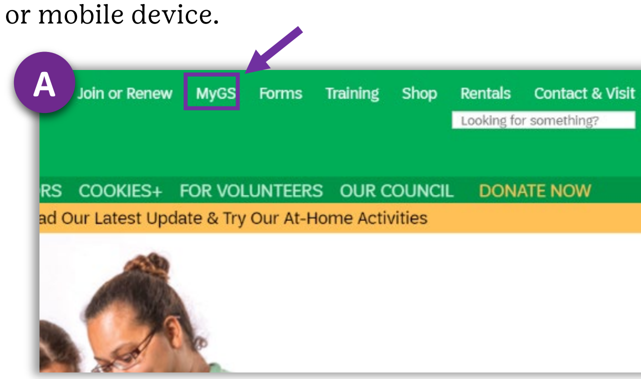
8 Steps to Complete Your Finance Report Through the VTK Finance Tab

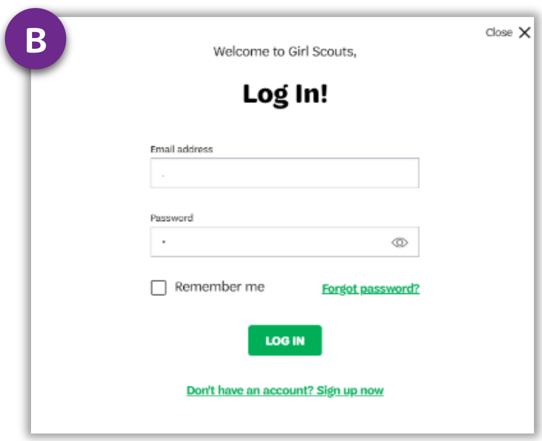
1. Log in to the **VTK** and access the **Finance** tab
2. Review information and download resources
3. Enter "Income" category totals
4. Enter "Expense" category totals
5. Complete financial summary information
6. Enter ALL bank and signer information
7. Review council notes and answer questions
8. Add attachments (April Bank Statement) and submit report to GSKWR

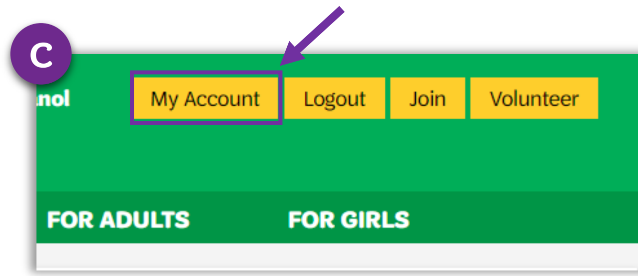
Step 1: Log in to the VTK and Access the Finance Tab

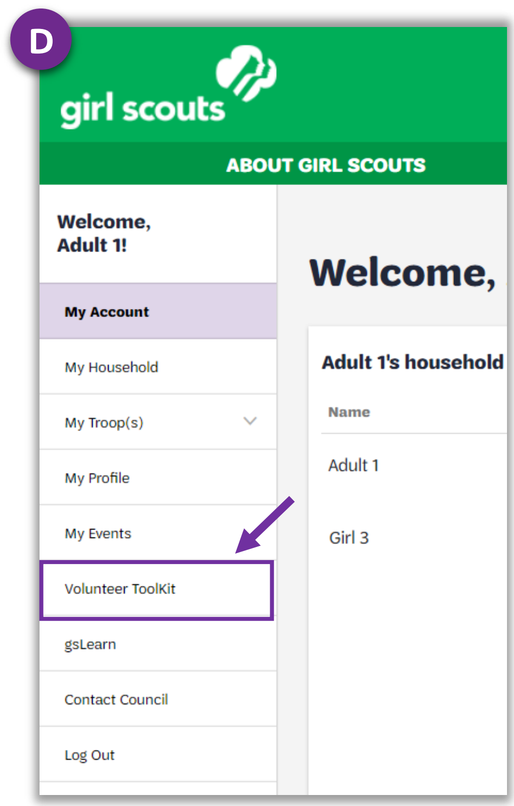
You can access the VTK using any internet enabled computer or mobile device.

A. Begin on the GSKWR website at www.gskentucky.org and click **MyGS** at the top.
B. Log in using the username and password you created when you set up your Girl Scout Member Account.
C. Once logged in, click **My Account** in the upper right-hand corner of your screen.
D. Select **Volunteer Toolkit** from the left side menu.
E. Within the VTK, click the **Finances** tab and familiarize yourself with the income and expense category fields and the troop financial information that you will need to submit by June 30th.









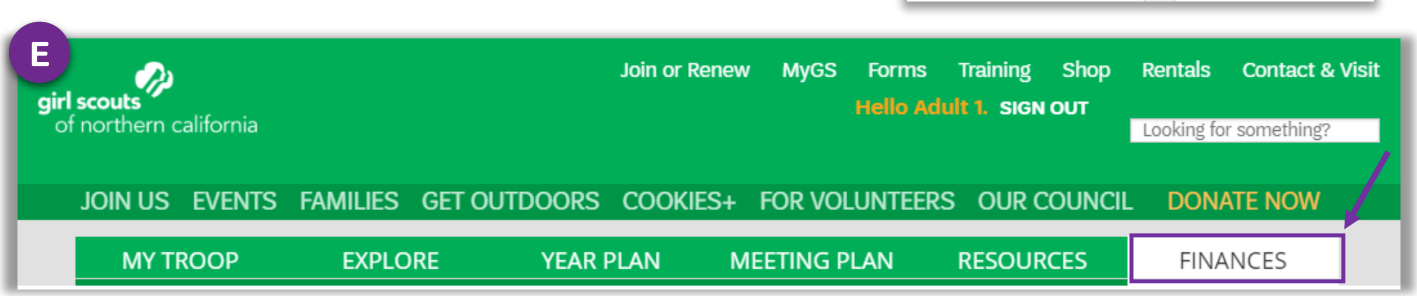
VTK Troubleshooting

For best results, use a VTK-friendly browser such as Chrome, Firefox, or other browser with a cleared cache.

NOTE: ***Avoid using Internet Explorer.***

Steps to resolve VTK access issues on a desktop/laptop:

- Clear browser cache and browsing history
- Ensure cookies are enabled
- Add cdns.gigya.com as a safe URL to any privacy/security extensions or settings on your device and/or browser
- Still need assistance? Contact member services at gswrc@gswrc.org or call 800-475-2621.



Step 2: Review Information and Download Resources

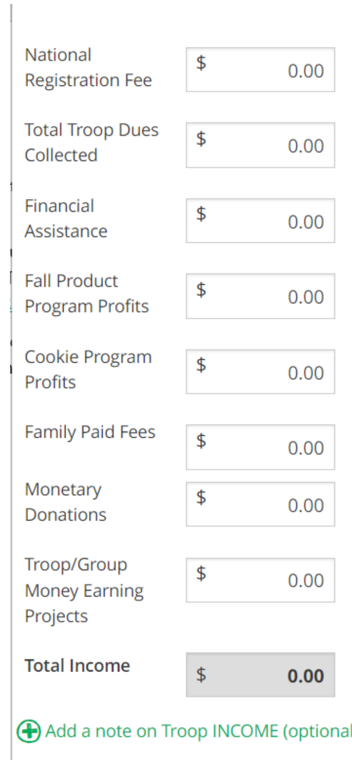
- Read the information from GSKWR at the top of the page.
- Use the Troop Finance Report Tracking Sheet to calculate your income and expense category totals if you haven't already completed.

Step 3: Enter Income Category Totals

- Enter all your Income totals for each category from May 1 – April 30. Enter "0" for any category with no value.

- The following categories are included:
    - National Registration Fee
    - Troop Dues
    - Financial Assistance
    - Fall Product Program Profit
    - Cookie Product Program Profit
    - Family Paid Fees
    - Monetary Donations
    - Troop/Group Money Earning Projects
- Total Income will auto-calculate

- Click **Add a note on Troop INCOME** to explain any totals above 0 in these categories
    - Donations and Contributions
    - Money-Earning Activities
    - Miscellaneous Income.



Step 4: Enter Expense Category Totals

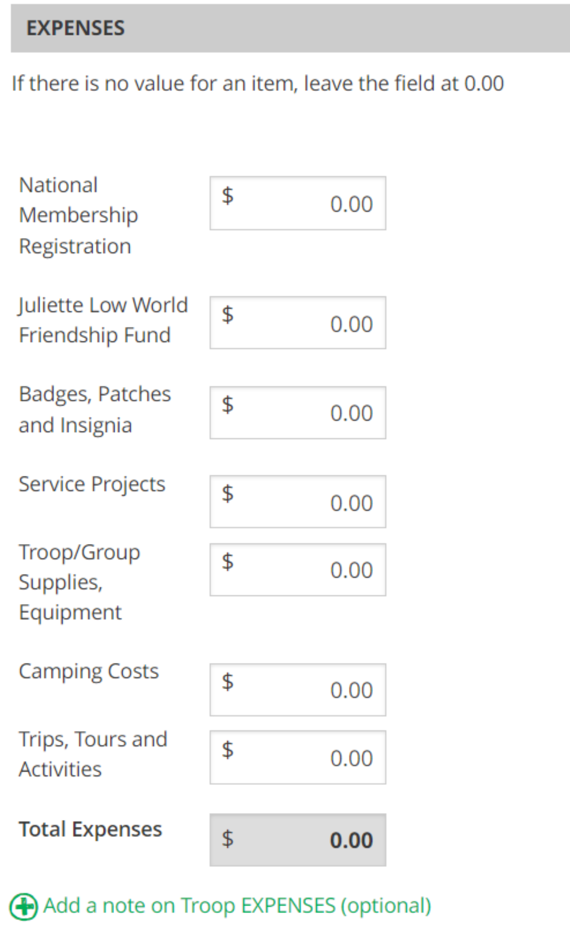
- Enter all your Expense totals for each category from May 1 – April 30. Enter "0" for any category with no value.

- The following categories are included:
  - National Membership Fees
  - Juliette Low World Friendship Fund
  - Badges, Patches and Insignia
  - Service Projects
  - Troop/Group Supplies, Equipment
  - Camping Cost
  - Trips, Tours and Activities

- Total Expenses will auto-calculate

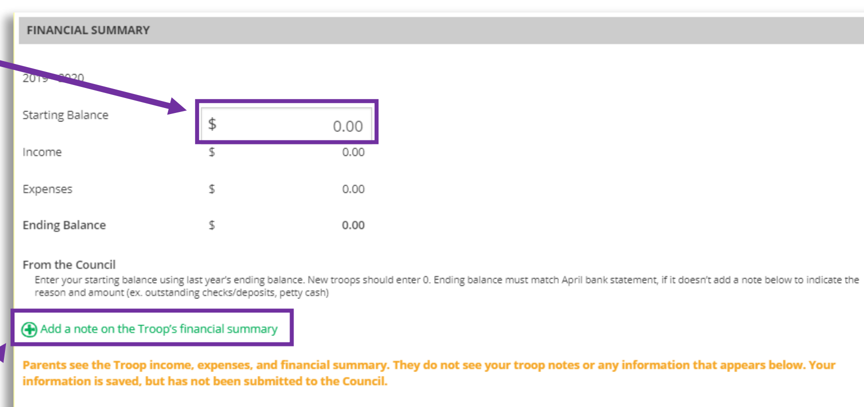
- Click **Add a note on Troop EXPENSES** to explain any totals above 0 in this category.

    - Other Miscellaneous Expenses



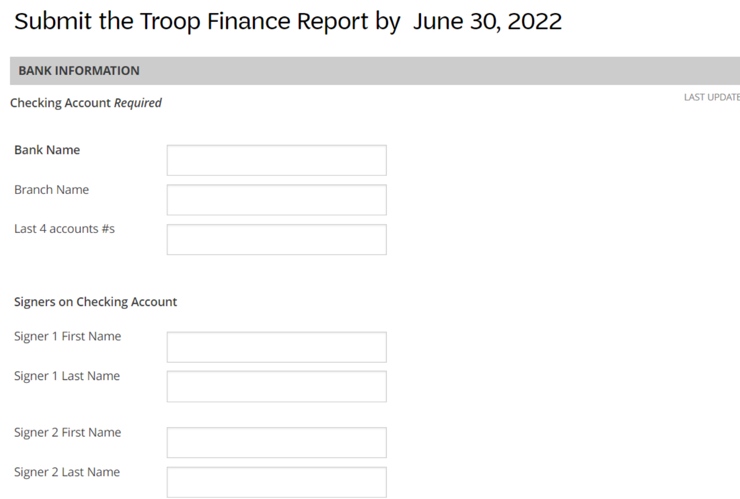
Step 5: Complete Financial Summary Information

- Enter your troop's starting balance for the year.
  - Existing troops, your starting balance will be your ending balance from last year's troop finance report
  - New troops, your starting balance will be $0
- Your income and expenses will auto populate from the income and expense category totals.
- Your Ending Balance should match your April bank statement
- Click **Add a note on the Troop's financial summary** to explain any outstanding checks/deposits or petty cash on hand that is not included in the April bank statement that would enable your financials to balance. Add a note to share any additional information with GSKWR (new troops with bank account in process).



Step 6: Enter Bank and Signer Information

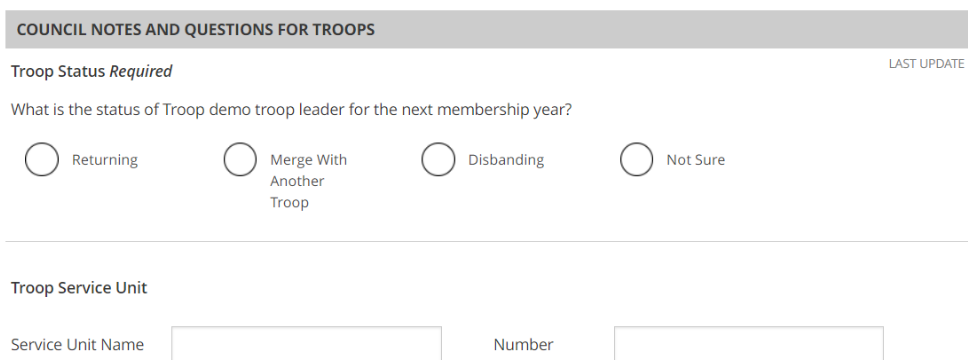
- Enter your bank name, branch name, and last 4 #s of your account number
- Enter the first and last name of **ALL signers** on your troop bank account.
- Once you add the first name, click **Add another signer** to open additional signer fields.
- Most troops only have one bank account, so you can skip over the "Add another Bank Account" link. If you have an additional bank account that you need to add, click **Add another bank account** and enter the bank account information.



Step 7: Review Council Notes and Answer Questions In

this last section, you will answer a few questions.

- Choose the status of your troop for the next membership year
  - Returning
  - Merge with Another Troop
  - Disbanding
  - Not Sure
- Enter your service unit name and number. If you aren't sure call 800-475-2621.



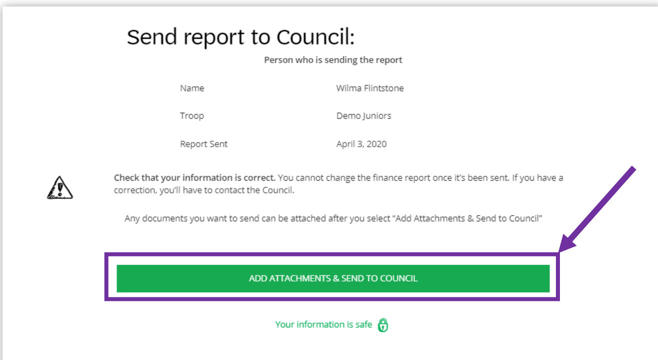
Preview & Edit

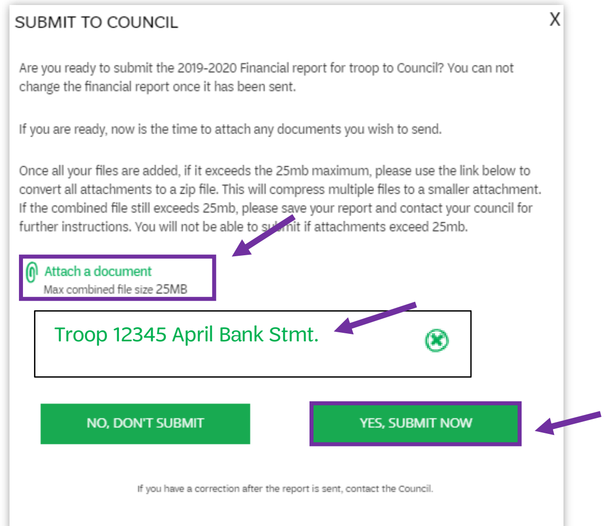
- Your entries are auto-saved so you can do some work and come back to it, but **once you submit you will no longer be able to make changes.**
- Make sure to review all your entries with all the signers on your bank account and make sure your ending balance is the same as your April bank statement or be ready to explain the discrepancy.
- Make sure you have downloaded a copy of your April bank statement and have it saved to your device as you will need to upload/attach it to your submission.
- Remember to submit your financials on time! Make sure you submit your Troop Finance Report through the VTK Finance tab by June 30th.

Step 8: Add Attachments and Submit to GSKWR

Once the troop leader, troop treasurer, and all bank account signers have reviewed and confirmed that the financials are true and correct, you are ready to submit to GSKWR. **You can only submit your Troop Finance Report once-ensure your financials are correct and you have attached your April bank statement before submitting.**

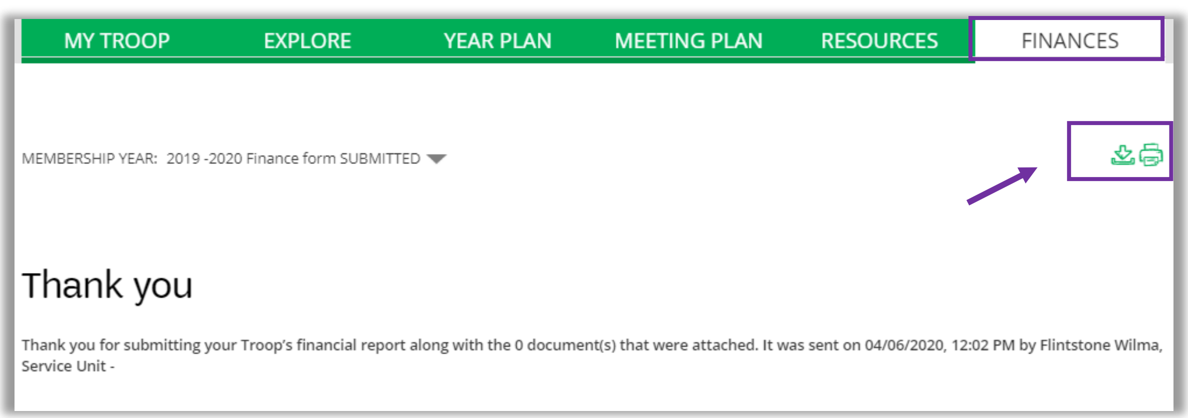
- Click **Add Attachments & Send to Council**
- Click the **Attach a document** link. Browse your computer or device for your saved copy of your April bank statement and attach/upload it.
- Click **No, Don't Submit** to return to the editing page, if you are not ready to submit.
- Once your April Bank Statement is attached and you are ready to submit, Click **Yes, Submit Now** to finalize your submission.





What Happens Next?

- Once submitted, you can download or print a copy of your report for your records using the **Download** or **Print** icons at the top of the page. A copy is also saved within the **Finance Tab**, and can be viewed at any time.
- Once your report is submitted, troop parents will have "View Only" access to view the troop's financial information through the VTK Finance tab. You can also choose to email troop parents the downloaded copy or give them a printed copy when sharing year end financials.
- Make sure to share the troop finances with girls and involve girls in regular discussions on their troop finances and when planning money earning and money spending activities.



If you need to make changes (attaching your April Bank Statement or revising entries) contact Troop Support at troopsupport@gswrc.org or call 800-475-2621.