

BENEFICIARease – Grant Making

- Beneficiaries
 - Full contact management
 - Contacts assigned to institutions
 - Analysis of grants per Contact
 - Analysis of applications per contact
 - Multiple Roles per contact
 - Keyword analysis
 - Service history
 - Spouse / Dependant processing
 - Eligibility checks
 - History of grants paid

Master Entry : Form

To Do List	Mortgage	Rent/Housing	Holidays	Communication	Pictures	Car/Equipment	Policies
Main Details	Injury/Employment	Almoner Notes	I&E	Family details	HQ Comments	Advice Details	Regular Grants

Code: 4775 Status: C Status Date: 03/09/2001
Title: Mr Forenames: Ronald Surname: Beggans-Smythe
Mailname: Mr R Beggans-Smythe Salutation: Mr Beggans-Smythe
Address: 56 The Road Telephone One: Partners Name: Mobile Number:
Haversham Date Of Death: Marital Status: M
Town: Wilts Date of Birth: Date of Marriage:
Postcode: RG5 6YH Visitor: Age:
Country: Old code: BEGGR Date File Opened: 03/09/2001
Almoner: SM Almoner Status: NI Number:
Department: Partner Record No: Print Label
Email address:

TV License Television SKY TV Electric Gas Water
 Car Expenses Telephone Xmas Grant House Insurance Solid Fuel Council Tax
TV Account Number: Sky Account Number:
Payment Method: BACS

Max Bills Amount:
Spent this Year:
Amount Left:

Date Created: 03/09/2001 Date Updated: 27/09/2001 Last Updated By: MaureenB Mailname: Mr R Beggans-Smythe
Record: 1 of 1295

BENEFICIARease – Grant Making

- Financial Reviews
 - Multiple reviews per beneficiary
 - Progress tab for committee sign off
 - Breakdown of financial commitments (income and expenditure)

Financial Reviews

1009 MR A DAGNALL - 01/01/2006 - 2006

Income (Ben) | Income (Part) | Expenditure | Savings | Assets | Loans

Income	GBP	Amount	Notes	+	^
State Pension	Error 4185.00	£4,185.00		<input checked="" type="checkbox"/>	
Pension Credit/Income Suppc	Error 988.00	£988.00		<input checked="" type="checkbox"/>	
Other DWP	£ 100.00	£100.00	Attendance allowance	<input checked="" type="checkbox"/>	
Trade Pension	Error 0.00	£0.00		<input type="checkbox"/>	
Private Pension	Error 0.00	£0.00		<input type="checkbox"/>	
Other Charities	Error 0.00	£0.00		<input type="checkbox"/>	
Interest	Error 10.00	£10.00		<input checked="" type="checkbox"/>	
Attendance Allowance or DLA	Error 592.00	£592.00		<input checked="" type="checkbox"/>	
Other Income	Error 0.00	£0.00		<input type="checkbox"/>	
Other Income (2)	Error 0.00	£0.00		<input type="checkbox"/>	
Other Income (3)	Error 0.00	£0.00		<input type="checkbox"/>	
	Error 0.00	£0.00		<input type="checkbox"/>	
Re-Sort	Subtotal:	£7,732.80	Total:	£7,732.80	

Income: Ben. Subtotal:	£7,732.80	Expenditure: Subtotal:	£5,725.00	Assets: Subtotal:	£40,000.00
Ben. Total:	£7,732.80	Total:	£5,725.00	Total:	£40,000.00
Part. Subtotal:		Savings: Subtotal:	£1,200.00	Loans: Subtotal:	
Part. Total:		Total:	£1,200.00	Total:	

Compiled By: AKC Date Compiled: 01/01/06 Inc-Exp: **£2,007.80**

BENEFICIARease – Grant Making

- Applications
 - Record full details of applications received
 - Provide committee reports for review
 - Schedule applications per member on committee
 - Full analysis of application requirements
 - Yearly breakdown of requested funds
 - Category breakdown of requested funds
 - Multiple applications per contact
 - Link to application forms / documents (Word / PDF)

Payment Code	Frequency	Amount	Payee Name	Start Date	Next Due	Status
PHR	Quarterly	£36.00	BRITISH-TELECOM	22/08/08	01/10/08	Accepted
TVS	Annual	£51.93	THORN BUSINESS COMMUNI		01/06/04	Declined
xmas	Annual	£100.00	MR ARTHUR DAGNALL		25/12/08	Accepted
Quart	Quarterly	£148.00	MR ARTHUR DAGNALL		01/11/08	Accepted
Dcent	One Off	£50.00	MR ARTHUR DAGNALL		15/07/04	Concluded

- Grants
 - Created from Application
 - Analysis of funds requested and approved
 - Linking of grants for third party payments
 - Multiple categories
 - Committee meetings and designated members per grant
 - Awards and amount outstanding visible per grant
 - Keyword analysis
 - Link to application forms / documents (Word /PDF)
 - Analysis of grant needs including goods
 - Regular grants schedule

Amount	Date	Pay Method	Cheque #	Payee	Payment Code	Purpose
£148.00	01/08/08	Bacs		MR ARTHUR DAGNALL	Quarterly Allowance	
£36.00	01/07/08	BACS		BRITISH-TELECOM	TTBS Telephone Allo	
£100.00	22/05/08	Bacs		MR ARTHUR DAGNALL	'Winter Warmer' fuel g	Winter Payment
£148.00	01/05/08	Bacs		MR ARTHUR DAGNALL	Quarterly Allowance	
£36.00	01/04/08	BACS		BRITISH-TELECOM	TTBS Telephone Allo	
£52.24	31/03/08			MR ARTHUR DAGNALL	Spring Hamper	
£100.00	22/03/08	Bacs		MR ARTHUR DAGNALL	'Winter Warmer' fuel g	Winter Payment
£148.00	01/02/08	Bacs		MR ARTHUR DAGNALL	Quarterly Allowance	

BENEFICIARease – Grant Making

- Caseworkers
 - Assign caseload per caseworker
 - Analysis of beneficiaries by caseworker
 - Review payments made to beneficiaries by caseworker

- Online form integration
 - Link to appforms.org for online integration of application forms
 - Stored in a secure environment
 - Automatically downloaded into BENEFICIARease
 - Analysis screens to check information
 - Automatic upload to create application / grant
 - Forms can be saved for future use
 - No programming needed, forms uploaded automatically

Diabetes UK The charity for people with diabetes

Project Grant

Form Login Account
 New Users / Returning Users [CLICK HERE](#) to setup or return to your account for this form. Creating an account enables you to return to this form and your submitted results. An account will also enable you to partially complete this form and return later to finish the form. The account you establish is only for this form.

Please read the guidance note for each part of the application before completing the form.

Diabetes UK's mission is to *improve the lives of people with diabetes and work towards a world without diabetes*. The Diabetes UK Research Strategy sets out the areas in which Diabetes UK will fund research. Its aim is to underpin delivery of the organisation's mission through an effective programme of research focusing on three key areas of equal importance: CARE & TREATMENT, CAUSE & PREVENTION and CURE of diabetes and its complications. Please refer to our website www.diabetes.org.uk/research when completing this form.

* Please enter your email address for completed results to be sent. Please sign the application form and *send three hard copies (including the signed original)* to the Research Department.

Part 1: Applicant (s) details

	Principal Applicant	Co-applicant 1	Co-applicant 2	Co-applicant 3
Title				
Name				
Position Held				
Tel				
Email				
Total Hours Per Week Worked on Project				

BENEFICIARease – Grant Making

- Committees
 - Multiple Committees
 - Contacts have role on a committee
 - Reports per committee meeting
 - Record meetings and attendees
 - Record minutes
 - Assign key tasks
 - Mass email to committees for reports

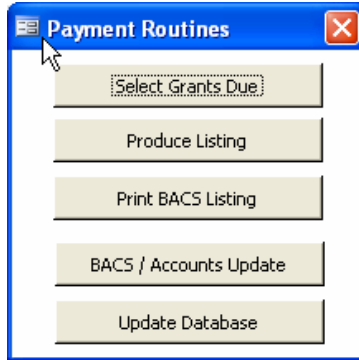
The screenshot shows a software window titled "committee : Form" with a blue header and standard window controls. It has two tabs: "Main" and "Members". The "Main" tab is active, displaying a form for a committee. The "Committee Name" field contains "Medical Research Committee". Below this is a section titled "Committee Meetings (Dbl Click Date for Expenses)" which contains a table with two columns: "Meeting Date" and "Details". The table has one row with the date "03/05/2007" and the detail "Annual Meeting". Below the table is a "Committee Minutes" section with a "Minutes" label and a text area containing the file path "S:\M D C\Operational Procedures.doc". At the bottom of the form, there are navigation controls for records, showing "Record: 1 of 1".

- Reviewers
 - Record reviewers per grant
 - Schedule reviews
 - Linked to task module for reminders
 - Reports linked to the schedule for viewing (Word / PDF)

The screenshot shows a software window titled "Research Grant : Form" with a blue header and standard window controls. It has a menu bar with options: "Main", "Summaries", "Co-Investigators", "People", "Reviewers", "Reports", "Pubs&Conf", "Animals", "Ethics", "Publicity", "Visits", "Equip&Staff", "Awards", "Finance", "Actions", "UKCRC", and "Notes". The "Reviewers" tab is active, displaying a form for a reviewer. The form includes fields for "Reviewer", "Date Contacted", "Outcome", "Date Sent", "Date Required", "Date Received", "Source", and "Score". There is a "Reason" text area and a "Document" section. Below the form, there is a section titled "APPLICANT'S RESPONSE TO REVIEWERS" with fields for "Date Requested", "Date Required", "Date Received", "Document1", and "Document2". At the bottom, there is a "Committee Mtg:" dropdown and three "Committee Member to speak:" dropdowns. At the very bottom of the window, there are fields for "Grant Number: 701", "Date Created: 19/01/2007", "Date Updated: 06/09/2007", and "Updated By: Admin". Navigation controls at the bottom show "Record: 1 of 1 (Filtered)".

BENEFICIARease – Grant Making

- Payment Processing
 - Selection of Grants payable
 - Payment by Cash / Cheque / BACS / Overseas Money Order
 - Full cheque production
 - BACS file output
 - Accounts integration (SAGE etc)

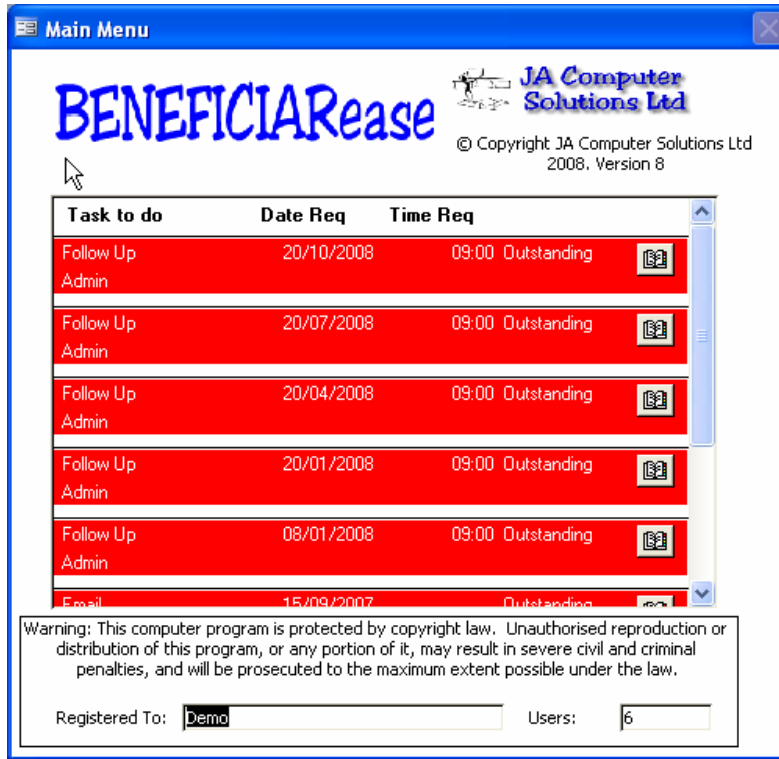


- Financial Breakdown
 - Payment schedule breakdown per year per category
 - Invoice entry
 - Part payment of invoices
 - Link to Accounts package (SAGE etc)
 - Fund analysis to enable forecasting
 - Multiple funds to allow for payment of grant by third party

Beneficiary Cheque Payments						
Cheque No	Code	Mailing Name	Grant Date	Department	Details	Amount
		4806 Mrs M Burford	06/05/2020	268	jhgjghf	£150.00
1234		5357	12/07/2020		DMFDMNFDM	£100.00
Total:						£250.00

BENEFICIARease – Grant Making

- Task Manager
 - Tasks assigned to user or Group
 - Tasks linked to Beneficiary
 - Production of to-do lists
 - Visual to-do list on front menu
 - Tasks can be assigned to other users

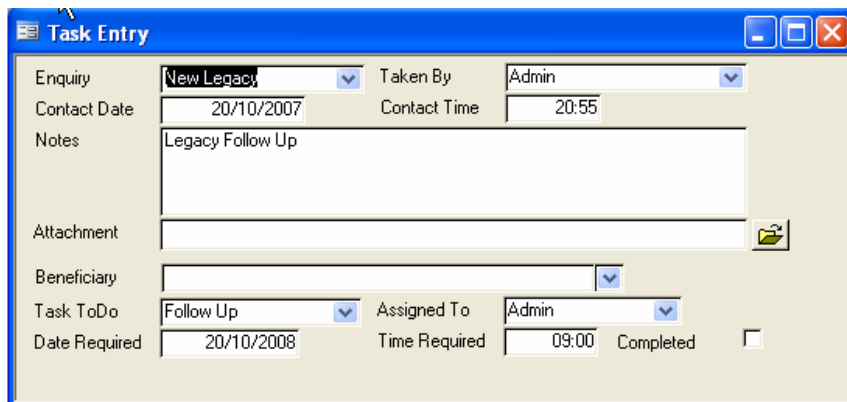


The screenshot shows the 'Main Menu' window of the BENEFICIARease application. The window title is 'Main Menu'. The application logo 'BENEFICIARease' is displayed in blue, along with the logo for 'JA Computer Solutions Ltd' and the copyright notice '© Copyright JA Computer Solutions Ltd 2008. Version 8'. Below the header is a table with the following columns: 'Task to do', 'Date Req', and 'Time Req'. The table contains five rows of tasks, all assigned to 'Admin' and marked as 'Outstanding'. The tasks are 'Follow Up' with dates 20/10/2008, 20/07/2008, 20/04/2008, 20/01/2008, and 08/01/2008, and a 'Email' task with date 15/09/2007. A warning message is displayed below the table: 'Warning: This computer program is protected by copyright law. Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.' At the bottom, there are input fields for 'Registered To: Demo' and 'Users: 6'.

Task to do	Date Req	Time Req
Follow Up Admin	20/10/2008	09:00 Outstanding
Follow Up Admin	20/07/2008	09:00 Outstanding
Follow Up Admin	20/04/2008	09:00 Outstanding
Follow Up Admin	20/01/2008	09:00 Outstanding
Follow Up Admin	08/01/2008	09:00 Outstanding
Email	15/09/2007	Outstanding

Warning: This computer program is protected by copyright law. Unauthorised reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.

Registered To: Users:

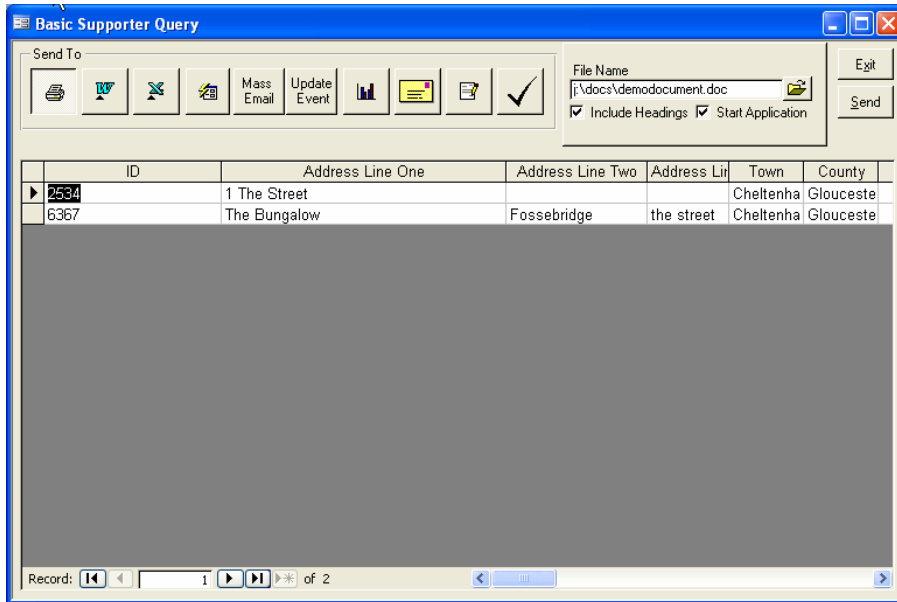


The screenshot shows the 'Task Entry' window of the BENEFICIARease application. The window title is 'Task Entry'. The form contains the following fields:

- Enquiry: (dropdown menu)
- Taken By: (dropdown menu)
- Contact Date:
- Contact Time:
- Notes:
- Attachment:
- Beneficiary:
- Task ToDo: (dropdown menu)
- Assigned To: (dropdown menu)
- Date Required:
- Time Required:
- Completed:

BENEFICIARease – Grant Making

- Mail Merge / Email
 - Standard letters / emails merged to Word
 - From any screen / query
 - Individual merges and Multiple merges available
 - HTML and plain text emails
 - Integrates with Outlook / Exchange



- Full Query / Report Writer
 - Query / Report writer module included
 - Users can create their own queries without programming knowledge
 - Output to Word / Excel / CSV / HTML
 - Produce graphical analysis from queries
 - Simple to use interface
 - Standard reports can be used at any time by any user
 - Produce labels
 - Mass Email using any query

