

# Running a Gift Aid Claim

The screenshot shows the 'Main Menu' window of the CHARITease software. The window title is 'Main Menu'. The interface includes the CHARITease logo (a piggy bank icon) and the text 'JA Computer Solutions Ltd'. Copyright information states '© Copyright JA Computer Solutions Ltd 2007. Version 7'. The menu is organized into several sections of buttons:

- Top Row:** Maintain Supporters, Event Administration
- Middle Section (Grid):**
  - Row 1: Create Receipt Batches, Print / Close Receipt Batches, Print Letters From Batches
  - Row 2: Post Regular Gifts, Post Batches to Accounts, **Generate / Print Tax Claim!** (highlighted with a dashed border)
  - Row 3: Fund Maintenance, Account Code Maintenance, Source Code Maintenance
- Bottom Section (Grid):**
  - Row 1: Query / Reporting, Enter Tasks
  - Row 2: Account (dropdown), You currently have 1 tasks outstanding! (with a 'View Tasks To Do' button below it)
  - Row 3: Maintain Details, Maintain Users

A warning message is displayed at the bottom: "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." Below the warning, there are two input fields: "Registered To: Demonstration Charity" and "Users: 2".

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## Introduction / before you run the Claim

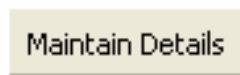
This document is intended as a quick reference guide which should be referred to when creating / printing a Gift Aid Claim in CHARITease / SANCTURease.

Gift Aid Claims can be produced quickly and easily within the database. There are a number of things to check before running the claim:

### 1. CHARITY DETAILS

The R68A form which is produced by the system includes the Inland Revenue tax reference which is assigned to the Charity. This must be entered before any claims can be made. To enter the tax reference use the following procedure:

- a. Return to the Main Menu of the database.
- b. Choose 'Charity Details' from the drop down list above the Maintain Details Button. e.g.



- c. Click the Maintain Details button and the following screen will appear:

**Charity Details**

ID: CHARITY

Charity Name: Demonstration Charity

Address: Unit 3, Compton Business & Craft Centre  
Compton Abdale

Town: Cheltenham

Postcode: GL54 4DL

Charity Telephone Number: 01242 890321

Charity Number: 1051388

Charity Tax Reference: XR21763

Country: UK

Gift Aid Minimum Value: £0.00 Gift Aid Rate: 22

Email Package: Groupwise AFD Postcode

VAT Percentage:

Current Tax Year: 2003 Claims This Year: 1

Administrator/Officer: Mr A Owen

Contact Name: Alan Owen

Use Appointments?  Use Mailings?

Use Regular Gifts?  Use Membership?

Use Education?  Use Coll Tins?

Use Sponsorship?  Use Payments?


Use Sancturease?

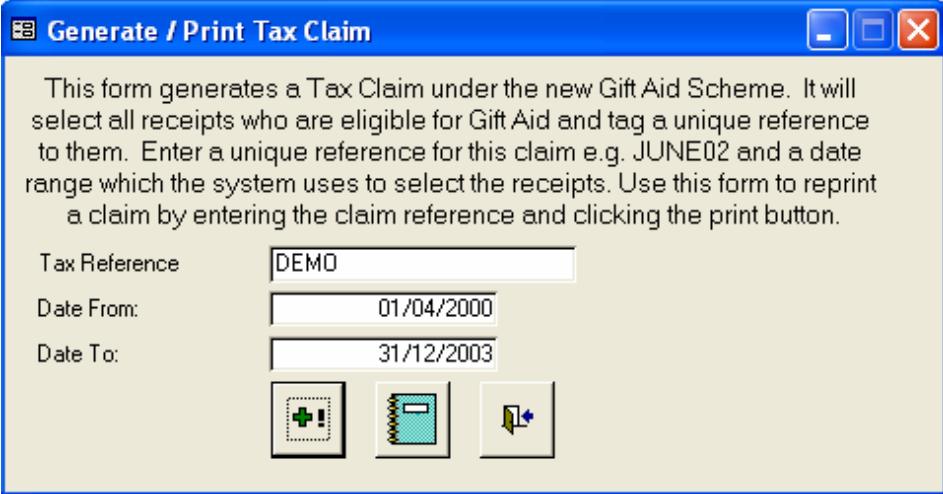
- d. Ensure that the Charity Tax Reference field contains your Inland Revenue reference.
- e. Close the form.

## 2. CLOSE ALL BATCHES


Ensure that all Receipt batches have been closed. The Gift Aid Claim routine will only pick up entries from CLOSED batches.

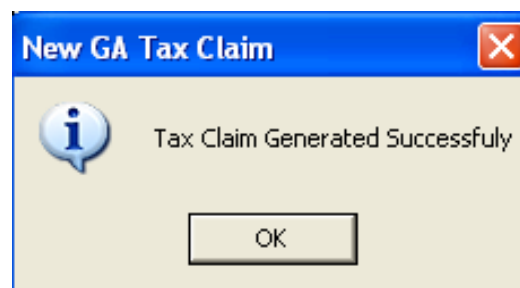
## Creating the Claim

1. To create a Gift Aid Claim, return to the main menu in the database.
2. Click the  button. The following screen will appear:



3. Enter a unique reference for this tax claim. (All claims have a unique reference which is then allocated to all receipts within the claim so that they cannot be claimed twice)
4. Enter a date to run the claim from. (The Inland Revenue will allow you to claim back to 06/04/2000 if your Gift Aid form states that ALL donations made to you can be claimed)
5. Enter a date to run the claim to. (This is usually the end of a quarter or the end of a year)

6. Click the  button. The database will now select all eligible entries.
7. On completion, the following message will be displayed:




8. Your claim has now been prepared and is ready for printing.

## Printing the Claim

The next step in the process is to print the R68A form to present to the Inland Revenue. (You can print a claim at anytime by just returning to the Gift Aid screen and entering the unique reference.)



1. Push the  button to print the form. The R68A form will be displayed on screen. e.g.

SUBSTITUTE		R68A(New Gift Aid)	Schedule to Charity Repayment Claim
			Reference XR21763
Schedule of New Gift Aid donations made by individuals resident in the UK			
Name of donor	Date of payment or last payment in series	Total donation(s) Received	Sheet number 1
Carried Forward from Previous Page		£0.00	
1 Miss K Webster	10/11/2003	£458.00	
2 Mrs J A Owen	10/11/2003	£1,374.00	
3 Mr A J Owen BSC	19/02/2004	£200.00	
<b>Total income</b>		<b>£2,032.00</b>	<b>A</b>
<b>Total tax claimed = A x 22/78 (transfer to Box 2 on form R68(2000))</b>		<b>£573.13</b>	

2. Print the claim to any printer and send to the Inland Revenue.

## Troubleshooting

1. Always remember to keep a note of the reference you assign internally to claims. It is useful to keep the claim references in a standard form. For example: APR03-MAR04, QTR104,QTR204, 2004.
2. When reprinting a claim, do not regenerate the claim again, just print the report. You may inadvertently add further entries to the claim by regenerating it.
3. If you generate the claim and no details are shown, ensure that you have ticked the Gift Aid Received box for all Supporters that have indicated that they are taxpayers and ensure that all Receipt Batches have been closed.
4. If you receive blank entries on the claim or you have a Mr & Mrs listed, check the Supporter record and ensure that the Gift Aid reclaim name is correct. (You CANNOT claim Gift Aid on Joint records, it must be in the name of the person who is the taxpayer, or the person who signed the Gift Aid form)