



ISIDORE USER GUIDE

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Contact Member Engagement

If you have any questions or concerns along the way please contact us. We're here to help!

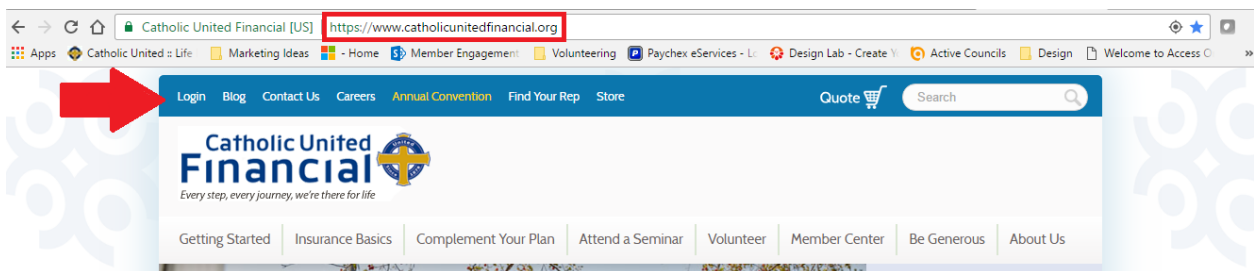
1-800-568-6670

651-490-0170

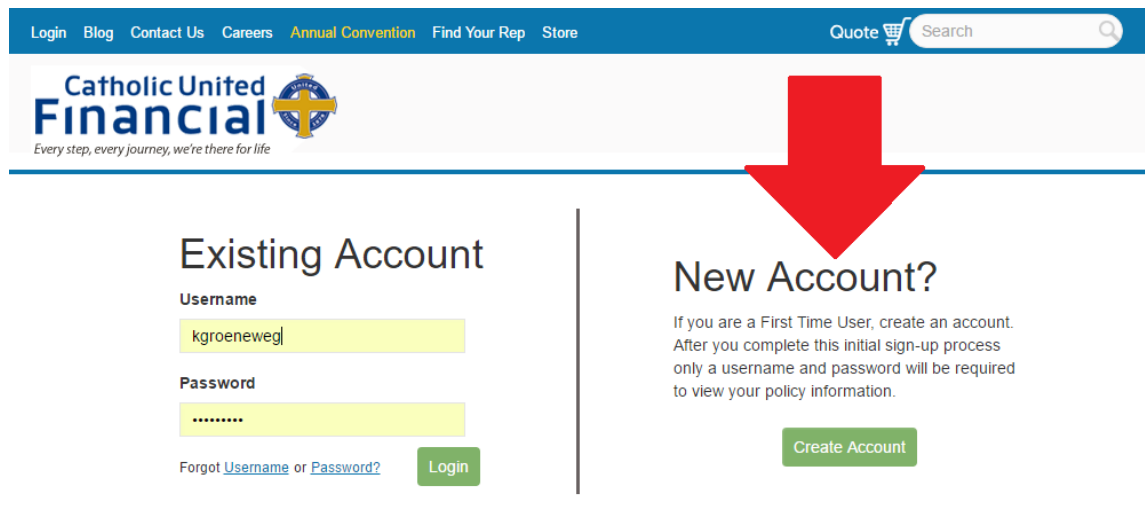
engage@catholicunited.org

Sign up for the Member Portal

1. Navigate to the Catholic United Financial website. Type the following link directly in to your browser to ensure you get to the correct page. www.catholicunitedfinancial.org Click the "Login" button in the top left corner of the page.



2. Select "Create Account" to begin the sign-in process.



3. Select "yes" for Current Policy Holder. Fill in your policy or certificate number, and the last 4 digits of your social security number.

Create an Account

If you do not know your policy number call the home office at 1-800-568-6670 and ask to speak with Member Services.

Existing Member

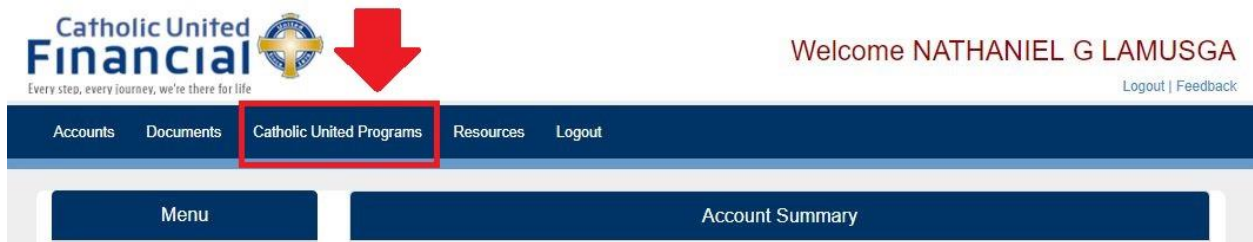
Current Policy Holder? Yes No

Policy Number
Enter one of your existing policy numbers.

SS # (Last 4 digits)

Confirm SS # (Last 4 digits)

4. After you have created your account you will be asked to verify your contact information and create security questions. Once you have completed this step, email engage@catholicunited.org to let us know that your account is complete. We will give you permissions for Isidore at that time.
5. Once you have been granted Isidore access, return to our website and log in. Click the “Catholic United Programs” button on the top navigation bar.



Catholic United Financial
Every step, every journey, we're there for life

Welcome NATHANIEL G LAMUSGA
Logout | Feedback

Accounts Documents **Catholic United Programs** Resources Logout

Menu Account Summary

Program & Activity Overview

Matching Grant

Catholic United Financial will match the proceeds of fundraising events put on to benefit religious education. Funds raised are matched 50 cents on the dollar, with a maximum of \$1000 per Council or Parish Volunteer Team per year.

Assistance Grant

A dollar for dollar match on fundraisers put on for a Catholic United Member in need of financial assistance due to hardship. Maximum of \$1000 in matched funds per member per year.

Grants4Good

Council and Parish Volunteer Teams are able to apply for funds to enhance family, faith, or service events in their parish. Grants are available up to \$500.

Social Event

Brings people together, creates fellowship, and builds a strong relationship between your Parish Volunteer Team and the local faith community.

Ex: pancake breakfast, parish picnic, bingo, holiday party.

Religious Event

Enhances the spiritual life of the Parish Volunteer Team and/or the faith community as a whole.

Ex: Vacation Bible School, May crowning, radio rosary.

Service Event

Unites members and non-members in achieving a goal toward some greater good.

Ex: ditch cleaning, food drives, church/community repairs, serving at a homeless shelter.

Newsletter

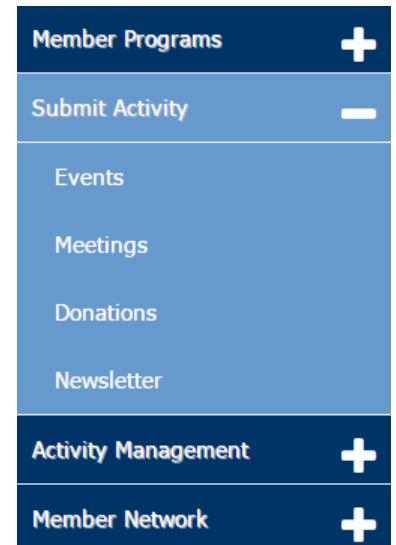
Informs members and the community about the happenings and good works of your Parish Volunteer Team, creating a positive outlet for demonstrating the team's impact.

Submit Activity

The Submit Activity menu is the source for recording your activities in Isidore that **do not require payment from Catholic United**. These activities are separated into four types: Events, Meetings, Donations, and Newsletter. Each menu option opens a submission form specific to that type of activity.

Below you will find the overall submission process:

1. **Click “Submit Activity”** in the side navigation menu. This will display the list of activity types available.
2. **Choose the activity type** (Events, Meetings, Donations, Newsletter) you would like to submit. The system will navigate you to the correct submission form.
 - * If you are submitting a Matching Grant, Member Assistance, or Grants4Good activity, **DO NOT ENTER IT HERE**. Instead, choose the appropriate option from the Member Programs list above.
*See **Member Programs (Page 8)** for more information.*
3. **Complete the form**, filling out all required fields and attaching any relevant documentation you wish to include.
4. **Check the box** to agree that the information you have submitted is accurate to the best of your knowledge.
5. **Click the “Submit Activity” button** at the bottom of the form.



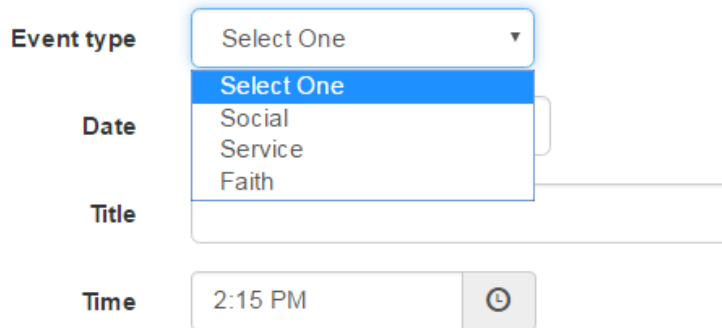
*The system will navigate you to the Activity Details page where the information entered will be displayed. See **Activity Management (Page 14)** for more information about this screen.*

There are several fields on the forms that are specific to each activity type. Outlined on the following pages are those fields that will only appear for certain activity types.

Events

- Event Type (Social, Service, Faith) – You will be prompted to choose a category for the event you held.

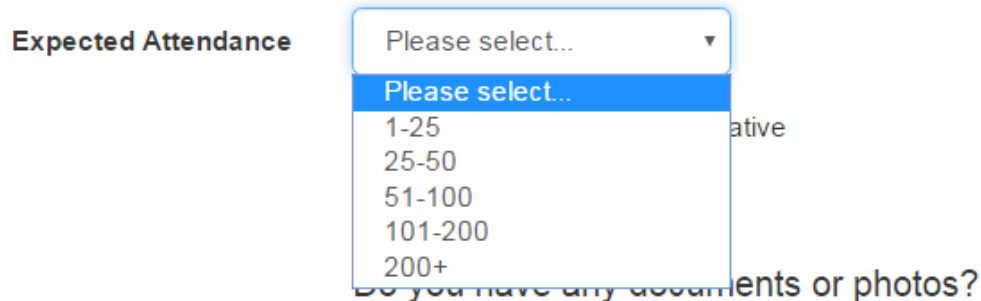
There are three options available to help you do this. Consider the following when determining what category to choose:



The image shows a form with the following fields:

- Event type:** A dropdown menu with "Select One" selected and a list of options: "Select One", "Social", "Service", and "Faith".
- Date:** An empty text input field.
- Title:** An empty text input field.
- Time:** A text input field containing "2:15 PM" and a clock icon.

- Social – The activity was based around a celebration or gathering. The activity provided a chance for family, friendship, or community connection in your parish.
 - Service – The activity created an opportunity for you and/or others to go out and do something good or help in some way.
 - Faith – The activity provided a way to learn or grown in faith together.
- Expected Attendance – Provide an estimate for the number of people you believe will be in attendance at the event (you will have the chance to enter actual attendance information after the event has taken place).



The image shows a form with the following fields:

- Expected Attendance:** A dropdown menu with "Please select..." selected and a list of options: "Please select...", "1-25", "25-50", "51-100", "101-200", and "200+".

Donations

- Recipient – A dropdown list is available with some common donation recipients (parish, school) as well as some organizations with which Catholic United Financial encourages support. A list of these recipients can be found on page 22. Approved Donation List
 - If the donation is made outside of the available list, "Other" may be selected. A field will display asking you to define what/who the other recipient is.

Recipient

Other

Please Define

- Donation Type (Monetary, In-Kind) – Select whether the gift was monetary (a gift of money) or in-kind (a gift of goods, services or time). *The Submit button will not appear until a donation type is selected.*
 - Monetary – Enter the amount of money that was donated.
 - In-kind – Enter the approximate value of the donation (price of items donated, hourly rate for service provided) **and the type of materials.**

Type of donation

Monetary

How much was given?

Select One

Monetary

In-Kind/Materials

Do you have any documents or photos?

If yes, select the files below. If none, leave blank.

File Upload

Choose File No file chosen

I understand that the information submitted is accurate to the best of my knowledge. I understand that Catholic United reserves the right to review and adhere to the final decision regarding star status or declination of a submission.

Submit Activity

Newsletter

- Distributed to (Members Only, Parishioners) – Choose the intended audience, or recipients, of your newsletter.
 - Members Only – Your newsletter was sent primarily to Catholic United members.
 - Parishioners – Your newsletter was distributed to your parish population as a whole.
 - If the newsletter is distributed outside of the available list, “Other” may be selected. A field will display asking you to define what/who the other recipient is.
- Expenses – Include any expenses incurred from the creation, production, printing, or distribution of your newsletter.

Member Programs

The “Member Programs” menu is the place to submit activities in Isidore that **require payment from Catholic United**. These programs include Matching Grant, Member Assistance, and Grants4Good. Activities that receive funding through these programs must be entered through this menu.

Entering these activities ahead of the activity date will help facilitate a quicker turn-around time in processing payments once the activity details have been submitted following the event.

Each program is listed separately and will open a submission form specific to that program. Submitting an activity for any of these programs is similar to a regular activity submission (*see **Submit Activity (Page 5)** for more information*), but will require additional information for approval:

Grants4Good

- Allocation of Funds – Enter a specific explanation of how the funds will be used to support the activity. Be as detailed as possible.

Allocation of Funds

Amount Requested

- Amount Requested – Enter the dollar amount you are requesting in your grant application, up to \$500.
- File Upload – An option to browse documents saved on your computer is available to attach any publicity used to advertise the event.
 - Publicity that includes Catholic United Financial’s role through the Grants4Good program is required in order to be considered for payment.
 - **Any Grants4Good application submitted without publicity will be marked as Incomplete and will not be reviewed until publicity has been attached.**
 - Documents and flyers are most easily uploaded and viewed in a PDF format to ensure limited file sizes and viewing integrity.
 - Images are most easily uploaded and viewed in .jpeg format.

Matching Grant

- Recipient – A dropdown list is available with some common Matching Grant recipients (parish, school) as well as some organizations with which Catholic United Financial has a relationship.
 - If the Matching Grant donation is made outside of the available list, “Other” may be selected. A field will display asking you to define what/who the other recipient is.
 - Matching Grant funds must go to support religious education in some capacity.
- File Upload – An option to browse documents saved on your computer is available to attach any publicity used to advertise the event.
 - Publicity which includes Catholic United Financial’s role in the Matching Grant activity is required in order to be considered for payment.

- **Any Matching Grant submitted without publicity will be marked as Incomplete and will not be reviewed until publicity has been attached.**
- Documents and flyers are most easily uploaded and viewed in a PDF format to ensure limited file sizes and viewing integrity.
- Images are most easily uploaded and viewed in .jpeg format.

Assistance Grant

- **Member** – Click on “Select” and type in the name of the Catholic United member that will be the recipient of the funds raised. If the recipient is a non-member, the person selected here should be the member living within the same household.
 - Whether the recipient of the Assistance Grant is a Catholic United member or a member of their household, a member **must** be selected in order for the grant to be approved.

Member

Recipient Name

Recipient must live in the household of the member selected above.

- **Recipient Name** – In the event that the member selected is not the recipient of the Assistance Grant (but is a member of that household), enter the family member’s name in this field.

Confirm Activity

The process of confirming is the same for all activities that require post-activity information (events, meetings, Matching Grant, Grants4Good, Assistance Grant). Below you will find the overall confirmation process:

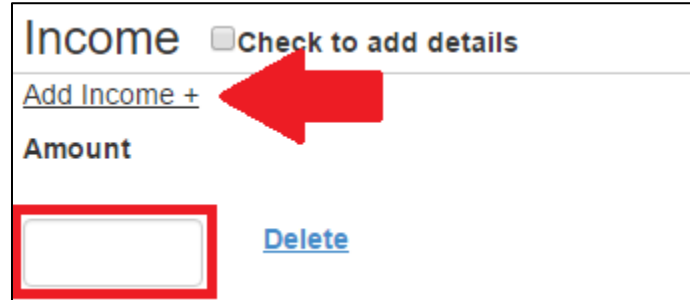
1. **Navigate to the “Activities” list through “Activity Management.”** This is the default display upon logging in to Isidore.
2. **Click the “Confirm” status on an activity to navigate to the post-activity submission form.** Only activities that require post-activity details will display this status.
3. **Complete the form**, filling out all relevant fields (ex: income, expense (page 10), attendance) and attaching any documentation you wish to include.
4. **Check the box** to agree that the information you have submitted is accurate to the best of your knowledge.
5. **Click the “Submit” button** at the bottom of the form.

The system will navigate you to the Activity Details page where the information entered will be displayed. See **Activity Management (page 14)** for more information about this screen.

Outlined on the following pages is information regarding entering income, expenses, donations, volunteers, and attendance associated with activities.

Income and Expenses

- **Income** – If there was money brought in by your activity, add that information by clicking “Add Income +” and entering the dollar amount in the field displayed.



The screenshot shows the 'Income' section of a form. At the top, there is a header 'Income' followed by a checkbox labeled 'Check to add details'. Below this is a button labeled 'Add Income +' with a red arrow pointing to it. Underneath the button is a text input field labeled 'Amount', which is highlighted with a red rectangular box. To the right of the input field is a blue 'Delete' link.


- Your activity’s earnings may be entered as one lump sum or you can enter itemized income by clicking “Add Income +” for each separate entry.
- To enter additional information about the income, click the “Check to add details” box next to the “Income” header.
 - Additional fields will appear, allowing you to enter the following:
 - Date received
 - Description



The screenshot shows the 'Income' section of a form with the 'Check to add details' checkbox checked. A red arrow points to this checkbox. Below the header, there is a button labeled 'Add Income +'. Underneath is a table with three columns: 'Amount', 'Date', and 'Description'. There are two rows of input fields corresponding to these columns. To the right of each row is a blue 'Delete' link.

- **Expenses** – If there were expenses associated with your activity that came from your Council or Parish Volunteer Team checking/savings account, add that information by clicking “Add Expense +” and entering the dollar amount in the field displayed. ***Any donations associated with the activity should not be entered in expenses, but should be included in the “Donations” section below or entered as a separate donation.***

- Your activity expenses may be entered as one lump sum or you can enter additional items to your expenses list by clicking “Add Expense +” for each separate entry.
- To enter additional information about the expenses, click the “Check to add details” box next to the “Expenses” header. This is an additional tool for you, and is not required for entry of expenses.
 - Additional fields will appear, allowing you to enter the following:
 - Date of expense
 - Description
 - Check Number

Expenses Check to add details 

[Add Expense +](#)

Amount	Date	Description	Check #	
\$ 50.00	12/03/16	Parish Center Rental	1057	Delete
\$ 87.93	12/13/2016	Cub Foods - Breakfast Supplies	1058	Delete
\$ 65.00	12/13/2016	Target - Door Prizes	1059	Delete

- **Donations** – If your Council or Parish Volunteer team made any donations associated with this activity (example: donating the matched funds from a Matching Grant activity, or the food collected from a food drive), add that information by clicking “Add Donation +” and entering the dollar amount and selecting the type of donation from the drop down.

- If you made multiple donations associated with the activity, you can enter additional donations by clicking “Add Donation +” for each separate donation.
- To enter additional information about the donations, click the “Check to add details” box next to the “Include any donations you made below” header.

Check to add details

[Add Donation +](#)

Amount	Donation Type	
\$ 90.00	Select	Delete

Financial \$

Select

Select


Monetary

In-Kind/Materials

- Additional fields will appear, allowing you to enter the following:
 - Date of donation
 - Description
 - Check Number

A “Financial Summary” is included at the end of the “Income and Expenses” section. Your entries will be automatically totaled and calculated to provide you with the overall financial information for the activity. This will include any projected grant amount for Matching Grant and Assistance Grant events.

Volunteers

- Add a Volunteer – If you have volunteers who helped at your activity, you can create a volunteer list by adding them individually in the “Volunteers” section. Click “Add a Volunteer” to open the “Volunteer Search.”
 1. Enter the volunteer’s name (only Catholic United members are available for search) and select the member by clicking the circle located next to their name.
 2. Enter the description of what that volunteer did during their time (example: cooked, cleaned, worked registration).
 3. Enter the number of hours that volunteer worked for the activity.
 4. Click “Submit” to add the volunteer to the “Volunteers” section.
- To add additional volunteers, repeat the process outlined above for each new volunteer.

Volunteer Search


JOHAN BOTZ

JOHN ITEN

JOHN WHITE

JOHN DIETZ

JOHN KALAUS



Additional Information

- **File Upload** – An option to browse documents saved on your computer is available to attach any publicity used to advertise the event.
 - Documents and flyers are most easily uploaded and viewed in a PDF format to ensure limited file sizes and viewing integrity.
 - Images are most easily uploaded and viewed in .jpeg format.
- **Sales Rep Attended** – If your Catholic United sales representative did or did not attend your event, enter that information here by selecting “Yes” or “No” from the dropdown.
- **Attendance** – Enter the total attendance of those who attended the activity.
- **Notes** – Include any notes about how the activity went. Examples to include in notes might include:
 - Information about supplies: did you have too much or too little?
 - Special comments from attendees
 - Reminders for future events, should the activity be recreated in the future

Additional Information

Attach a File

No file chosen

Sales Rep Attended?

No ▼

Attendance

12

Notes

Good Turnout. Ordered 4 pizzas and had some leftover. Could go down to 3 next year.

Activity Management

The “Activity Management” menu is where you will find access to all of your submitted activities and your annual report throughout the year. “Activity Management” will be the default menu displayed each time you log in to Isidore. You will automatically land on the “Activities” page.



Activities List

The “Activities” list provides an overview of all the activities you have submitted. The “Activities” list will allow you to track your activities and perform next steps for any activities that require additional information. This page will display the following information:

- Activity information – Title, type of activity (Event, Meeting, etc.), date of activity, date of submission
- Activity Status – The point in the submission and review process for the activity. *See **Activity Status (page 17)** for activity status detail.*
- Star Status – Indicates whether or not the activity was granted star status

Member Programs	+	Network Activities						
Submit Activity	+	2016	Select Activity Type	Select Status				
Activity Management	+	Network	Activity Title	Type	Activity Date	Date Submitted	Status	Star
Activities		1 - SS PETER & CLEMENS	monthly meeting of the council	Meetings	12/21/2016	12/15/2016	Approved	Granted
Annual Report List		1 - SS PETER & CLEMENS	volunteer members serving the homeless	Events	12/18/2016	12/15/2016	Pending	Pending
Member Network	+	1 - SS PETER & CLEMENS	Monthly meeting	Meetings	11/16/2016	11/20/2016	Completed	Granted
		1 - SS PETER & CLEMENS	volunteer members serve homeless	Events	10/16/2016	10/16/2016	Completed	Not Granted
		1 - SS PETER & CLEMENS	funeral honor guard	Events	10/12/2016	11/20/2016	Completed	Granted
		1 - SS PETER & CLEMENS	donation	Donations	09/22/2016	10/01/2016	Completed	Granted

The “Activities” list can be filtered to show only the information you would like displayed. There are three filters available (Year, Activity Type, and Activity Status) and these can be used individually or in conjunction to sort your list.

- Year – Select the year you would like to display activities for. This will filter activities based on the activity date, not the date submitted. The default filter will always be the current year.
- Activity Type – Choose an activity type to view only the selected type. For example, only meetings, or only donations.

- Activity Status – Choose an activity status to filter the list to find certain activities. See **Status Index (Page 16)** for more information.

Activity Details

Clicking on an activity from the list will navigate you to the “Activity Details” page. This page is designed to give you an overview of the important details for your activity. The information included here is drawn from your initial activity submission and from the confirmation of the activity after the event. Information on this page can be edited and changed without approval/request from the Member Engagement Department.

Edit Pre-Activity Details

On the “Activity Details” page you will have the option to edit the general information for the activity. This is the information you initially included on the Submit Activity form. To edit this information, follow these steps:



Activity Date	Submission Date	Review Date
12/18/2016	12/15/2016	

Status Pending

1. Click on “Edit Pre-Activity” link on the right side of the “Pre-Activity” header. This will navigate you back to the “Submit Activity” form with your information pre-populated in the fields.
2. Make any edits to correct the information.
3. Check the box to agree that the information you have submitted it accurate to the best of your knowledge.
4. Click the “Submit Activity” button at the bottom of the form. The new information will now display on the “Activity Details” page.

Edit Post-Activity Details

On the day an event or once an event date has passed and you have taken the necessary steps to confirm your activity (entered financial information, attendance data, volunteer involvement), you will be able to edit the information following the steps below:

1. Click on the “Edit Post-Activity” link on the right side of the “Post-Activity” header, located midway down the “Activity Details” page.
2. Make any edits to correct the information.
3. Check the box to agree that the information you have submitted it accurate to the best of your knowledge.
4. Click the Submit Activity button at the bottom of the form. The new information will now display on the Activity Details page.



Income	Expenses	Donations
	\$16.50	

It is important to note that if the event requires payment from Catholic United Financial, any changes made to the “Post-Activity” details prior to payment being processed will affect the grant amount according to your changes. Any changes made after payment has been processed will not affect the amount provided by Catholic United, but should still be entered to reflect accurate record keeping in Isidore.

Status Index

Activity Status

Every activity submitted will be given an activity status to help you track its progress. Outlined below are the statuses that may appear on an activity once it is submitted. Becoming familiar with the meaning of each status will be beneficial in prioritizing and following up on Isidore entries in a timely manner.

- **Incomplete** – An activity that has been submitted without all required information. This status is most likely to appear for Member Programs (Matching Grant, Member Assistance, Grants4Good) that do not have the required publicity attached.
- **Pending** – The activity has been submitted with all pertinent information and is waiting for approval from the Member Engagement Department. Activities need to be approved before they are confirmed and will remain in a pending status until the Member Engagement Department has completed their review.
- **Approved** – The activity has been reviewed and approved by the Member Engagement Department. If you have entered the activity ahead of the activity date, this status will display until the event date, at which point it will transition to confirm.
- **Confirm** – The activity has been approved and the event has passed. This status displays for any activity that requires follow-up information (financial data, attendance counts, notes on the event, etc.). This status will provide a link to the post-activity submission form to finalize the activity information.
- **Completed** – The activity has been approved and confirmed (where required). No further action is required.
- **Declined** – The activity has been declined by the Member Engagement Department. The reason for declining the event was sent via email for your reference.
- **Canceled** – The activity did not take place for some reason (weather, rescheduled, conflicts) and needs to be canceled. Canceled activities will not display on the “Activities” List, but can still be viewed by filtering the list by canceled status.

Payment Status

Activities that require payment from Catholic United Financial will display information on the process of that payment. Programs like Matching Grant, Member Assistance, and Grants4Good will have this data, providing a clear step-by-step update as to the status of the payment.

- **N/A** – The type of activity you are viewing does not involve payment from Catholic United Financial, or your payment activity has not yet reached the payment process.
- **Pending** – The activity has been approved by the Member Engagement Department and the post-activity information has been confirmed by the Fraternal Secretary or Administrative Coordinator.

- **Processing** – The payment has been approved and the process has begun for distribution of funds.
- **Paid** – The payment method (direct deposit, check) has been processed and funds made available to the recipient.

Star Status

Star Status	Activity Required
Semi-active Team	1 meeting 1 activity
Active Team	2 meetings 4 activities
Silver Team	4 meetings 8 activities
Gold Team	4 meetings 12 activities
Platinum Team	4 meetings 12 activities (including a Gather4Service grant)

All submitted activities are reviewed and deemed eligible for star status based on the following criteria:

- Would the event happen if not for the existence/involvement of the group?
- Were income and/or expenses (if they exist) managed by the group?
- Did the group provide volunteer coordination?
- Did activity promotion include information about Catholic United Financial involvement?

If the answer to the questions above is “yes,” that is a good indicator that the activity will receive star status. If it seems like the activity does NOT fulfill any of these criterion, it is still best to enter the activity in to Isidore to help track your work throughout the year. Just because an activity may not receive star status does not mean it should not still be included in your records.

- **Pending** – The activity is being reviewed by the Member Engagement Department to ensure that it meets the guidelines for receiving star status.
- **Granted** – The activity was granted star status and will count toward the group’s total for the year.
- **Not Granted** – The activity was not granted stars status as the Member Engagement Department was unable to reconcile the nature of the activity with the guidelines for star status.

A Council or Parish Volunteer Team's overall star status is calculated based on a combination of activities completed and meetings held throughout the calendar year. See the table above for more information on each star status level.

Annual Reports

Annual reports are due by February 15th every year in order to receive the Parish Volunteer Team stipend or Fraternal Secretary Stipend.

Before you begin working on your annual report, it will be helpful to gather your bank statements for the year and have records for all of your activities with financial transactions. You can save your progress on the report at any time by clicking either “Previous” or “Next” on the bottom of any page.

Page 1

1. Select “Annual Report List” in the Activity Management Section of the Side Menu.
2. Click the blue status link in the Report Status column to open the report.

Submitted Date	Year	Network	Star Status Assignment	Report Status	Activity Allowance Payment Status
	2016	1 - SS PETER & CLEMENS	Gold Team	Not Started	

3. Verify your beginning balance for the year. If this number is correct, select “yes” from the drop-down menu. If this number is incorrect, select “no”. A new field will appear to enter the correct starting balance for the year –as reflected on your bank statements.

[Annual Report List](#)

Councils and Parish Volunteer Teams must submit a report by February 15th. Submitting a complete and balanced report by this date guarantees payment of stipends and activity allowance. Not submitting an annual report will cause the Council or PVT to become inactive.

Beginning Balance as of January 1, 2016:	\$8,641.23	Beginning Balance Correct?	No
		Total of All Accounts:	\$0.00

4. Click the “Begin” button.

5 Fill in your end of year balances for all accounts. Click the “next” button to move on to page 2 of the report.

Beginning Balance as of January 1, 2016:	\$2,801.50	Beginning Balance Correct?	Yes
--	------------	----------------------------	-----

End of Year Account Balances:	<input type="text" value="\$7,188.65"/>	Checking
	<input type="text" value="\$0.00"/>	Savings
	<input type="text" value="\$0.00"/>	CD
	<input type="text" value="\$0.00"/>	Other
		<input type="text" value="define other here"/>

Ending Balance as of December 31, 2016: \$7,188.65

Page 2

The top of the page shows the ending balance in your accounts as reported by you, and a calculated balance based on your entries in Isidore. If the numbers match, that will be reflected by saying “the report is balanced”.

Year End Balance from Previous Page: \$7,188.65	Calculated Balances: \$7,188.65	The Report is Balanced
--	---------------------------------	-------------------------------

If there is a discrepancy, the amount will be shown. If this is the case, you will want to start by confirming the end-of-year balances from page 1 of the report are correct. Hit the “previous” button on the bottom of the screen to return to page 1.

Year End Balance from Previous Page: \$7,000.00	Calculated Balances: \$7,188.65	Calculated Balance Overstated by: \$188.65
--	---------------------------------	---

Next, return to page 2 to look over all activities entered for the year and make sure all income and expenses are correct and match your bank account activity. If any activity needs to have changes to income or expense, click on the activity title to return to the post-activity details page to make adjustments.

If you had any transactions throughout the year that were not directly related to an activity, they can be entered as additional income or additional expenses below your list of activities. To do this, click “Add Income” or “Add Expense” to enter a description and the amount of the transaction.

Additional Income	Add Income +	Additional Expenses	Add Expense +
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>enter a description</small>	<small>enter amount</small>	<small>Delete</small>	

Once your report is balanced click the “next” button on the bottom of the page to move on to page 3. You will not be able to submit an unbalanced Annual Report.

Page 3

Every Council and PVT is required to have an auditor look over the books annually. The “Download” button on Page 3 allows you to download all of the transactions entered into Isidore for the year in one CSV file to share with your auditor. The download will show the name of the event, the date of the activity, the dollar amount, and the check number (if entered). Make sure the audit happens before February 15th to ensure you are able to submit the annual report on time.

	A	B	C	D	E	F	G	H
1	title	date	amount	checkno				
2	Gather 4 Good	7/27/2016 0:00	90					
3	Net Donation	7/27/2016 0:00	50					
4	Quilt Bingo	7/27/2016 0:00	5682					
5	Convention Abria	8/8/2016 0:00	50					
6	Convention-Schuler Fund	8/8/2016 0:00	50					
7	Marathon	9/28/2016 0:00	250					
8	Abria Walk	7/27/2016 0:00	100					
9	Memorial Mass-R Barthel	7/27/2016 0:00	10					
10	Graduation Lunch	7/27/2016 0:00	500					
11	Memorial Masses	7/27/2016 0:00	40					
12	St Vincent Depaul Walk	9/9/2016 0:00	100					
13	Radio Rosary	9/9/2016 0:00	100					
14	Prayer Books	9/28/2016 0:00	100					
15	Radio Rosary	9/28/2016 0:00	100					
16								

Once your Auditor(s) have reviewed and approved the financials, return to your annual report to fill in the Auditor Review Date. Click the “Submit” button on the bottom of the page.

Autor Reviewed on

Congratulations, you're done! At this point, your report has been submitted to the Member Engagement Department for review.

Approved Donation List

Catholic United Financial Foundation Gather4Good (in the memo line) 3499 Lexington Ave. North St. Paul, MN 55126	http://www.gather4good.org/ 651-490-0170 1-800-568-6670 Gather4Good@catholicunited.org
Msgr. Richard J. Schuler Seminarian Fund c/o Catholic United Financial 3499 Lexington Ave. North St. Paul, MN 55126	Webpage 651-490-0170 1-800-568-6670 foundation@catholicunited.org
Catholic United Financial Foundation 3499 Lexington Ave. North St. Paul, MN 55126	Webpage 651-765-4135 1-877-275-7145 foundation@catholicunited.org
Catholic Defense League 3499 Lexington Ave. North St. Paul, MN 55126	www.cdlnm.org 651-766-7898
Common Hope 550 Vandalia Street Box 14298 St. Paul, MN 55114	www.commonhope.org 651-917-0917
Your Diocesan Family Life Office Consult your local listings	Call the Member Engagement Department
Sharing and Caring Hands PO Box 50657 Minneapolis, MN 55405	www.sharingandcaringhands.org 612-338-4640
NET Ministries 110 Crusader Ave. West West St. Paul, MN 55118	www.netusa.org 651-450-6833
Birthline of Central MN 1411 West Saint Germaine St. #5 St. Cloud, MN 56301	www.birthline.org 320-252-4150

Isidore FAQ

How do I enter payments made for the MinisTREE program?

After MinisTREE cards have been sent in to the home office the Member Engagement Department enters the funds paid into Isidore on behalf of your council or Parish Volunteer Team. If you decide to donate those funds to the parish or a Religious Education program, you should enter this in Isidore as a separate monetary donation.

How do I enter the activity allowance payment?

Your activity allowance for the year is automatically entered into Isidore by Member Engagement.

How many donations can count toward my star status for the year?

In order for donations to count as an activity toward your star status, they must be made to an approved organization (**page 22**). Of the approved organizations, up to two donations will count toward star status every year. In addition to this, donations of \$90 or more to Gather4Good, and donations of \$50 or more to convention outreach can each count as a star status activity. This means that it is possible to have up to four donations be considered star status activities per year.

Do additional donations to our parish, local youth group, or other organizations count toward start status?

No. However, entering every donation your council or Parish Volunteer Team makes during the year is important in order to complete an accurate annual report. You should enter every monetary and in-kind donation (ex. Christmas decorations for the parish, door prizes for school festival, \$100 check for local R.E. program) as an activity in Isidore.

Do I need to enter annual convention attendance?

Attending the convention does not count as an activity and does not need to be entered on Isidore, unless your council sent a young delegate (age 35 or younger). The Member Engagement Department has records of the young delegates in attendance and will enter this activity in Isidore.

If we have a regularly scheduled activity, should I enter it for every activity date?

Activities that occur multiple times a year (ex. monthly parish cleaning, weekly meals on wheels, attending wakes or funerals as a group) will only count toward star status one time, regardless of how many times they occur in the year. You may enter all each individually to report income, expenses, or volunteers for each, **or** enter one activity to account for every occurrence.

How do I enter our Project Bonus, Project Multiply, or Project Volunteer event(s)?

The youth programs (Project Bonus, Project Multiply, and Project Volunteer) were discontinued in 2015. These events are not eligible for funding from Catholic United but can be entered as service or social events to receive star status.

How do I enter Grants4Good activities?

Enter events that have been awarded Grants4Good funding as social, service, or religious activities, according to the grant type requested. The grant amount should be recorded as income on the event and reflected in the expenses line.

Going into 2017, you are able to apply for Grants4Good funding in Isidore, and will not have to enter them separately.

My activity was approved, but was not given star status. Why is this?

Activities that are eligible to receive star status will be determined at the discretion of the Member Engagement Department. The decision will be made by taking the following into consideration:

- Would the event happen if not for the existence/involvement of the group?
- Were income and/or expenses managed by the group?
- Did the group provide volunteer coordination?
- Did activity promotion include information about Catholic United Financial involvement?