

Dear Gift Aid Secretary,

Please follow the instructions below on how to complete the form and when you have completed the form please submit it to the claims inbox; claims@methodistChurch.org.uk instead of emailing them to individual members of the gift aid team. This is to ensure that your forms are processed within our stipulated time. Emailing the forms to individual staff may delay the processing of your claim as the email may arrive when the recipient is on annual leave.

It is important to quote the name of your Church and your unique reference (Church reference ID found in column M) in all enquiries.

In order for us to process your claims without any problem, please use the spreadsheet that we are sending and **DO NOT** use earlier versions that you received in previous years.

Please **DO NOT DELETE ANY ROWS OR COLUMNS** from the form, or leave any gaps between donors

We have produced videos which cover most of the key areas. These can be found at <http://www.methodist.org.uk/giftaid>

Please take some time to read them before completing your gift aid forms. The videos have key important highlights especially the new requirement for submitting a supplementary form for aggregated donations.

How to complete the form:

1. Open the file:

If you receive the attachment as CSV file, please open it and save as it an .xls file (i.e. Excel 97-2003 versions). If you cannot save it as an xls file automatically, follow the steps below:

Click File > Save as > Select the location you want to save it (for example on your Desktop or My Documents) > Type the name you want to save it as then .xls (eg 99999.xls) > change file type to "All Files" > Save.

If the attachment comes as XLS file, this is Excel 97-2003 version and you just need to save it and start completing it following instructions in points 2 – 10.

Please note that the XLS attachment will open if you have Excel on your computer. Please let us know if you cannot open the file.

2. For existing donors:

Complete column G 'net amount' e.g. 1,275.00. Do not use the £ sign in front of the amount.

If the donor did not make any donation in the tax year, leave the cell blank.

Complete column H 'date of donation'. This is the date the donor made the donation for a single payment or the last date.

Where the donor has given on more than one occasion within the current tax year, then the date should be the last date that the donation was made by that donor.

The date **MUST** be in the format dd/mm/yyyy, e.g. for the 3rd April 2018 it should be 03/04/2018.

DO NOT include any amounts for non-taxpayers or amounts donated before 1 September 2013, for claims submitted up to 31 August 2018, or before 1 September 2014 for claims submitted after 31 August 2019.

Where donors have left your Church, change column I named 'left' from 'F' to 'T', i.e. from False to True.

Where donors, who originally signed a declaration, but unfortunately no longer pay income/capital gains tax to enable their donation to be eligible for Gift Aid change column I 'left' from 'F' to 'T', i.e. from False to True.

In this case you will be able to claim under GASDS provided they fulfill HMRC criteria for GASDS.

Where there are donors that are duplicated, with **different** Contact ID numbers or incorrectly included in the list for your Church, change column I 'left' from 'F' to 'T'.

BUT where there are donors that are duplicated with the **same** Contact ID number, then please delete that line.

If a donor has died, please change column J 'deceased' from 'F' to 'T'

3. If you have a claim for an earlier year:

If you have not claimed for a previous year, then please use the same form attached **and save a copy for each separate year**, following the above guidelines for completion and then submit these forms.

4. New donors

Complete all columns, **EXCEPT** column A, 'ContactID' (this is generated by the system).

Complete column K 'start date' to be the date of declaration, if they have ticked the donations for the previous 4 years box, please enter the date 4 years before.

E.g. Declaration completed on 18/06/2016, with previous 4 years box ticked enter "18/06/2012".

5. Change of donor's personal details

If a donor has changed their name through marriage please amend as appropriate.

If a donor has moved and therefore their address has changed please amend the relevant address and postcode columns.

When there is a change in the donor's address and postcode details please obtain a new declaration form from the respective donor.

Where there is a mis-spelt name or incomplete information please amend accordingly.

6. Aggregated Gift Aided Donations (**NB: These are different to GASDS**)

Aggregated donations are donations **from donors with gift aid declarations**, who have donated £20 or less. Do not include donations from anonymous donors or loose offering in this section. Please refer to our guidance notes for details as we have made significant changes to this section to ensure compliance with HMRC rules. If you have aggregated donations, please provide donors' names and other details on "**Aggregated Donations Supplementary Form**" which we have sent you. [We will remove any aggregated donation amount from your claim form if you do not send us the supplementary form. Please read our guidance notes for details.](#)

The Gift Aid envelopes/declarations must be retained by your Church in case of a HMRC inspection, as they will visit your Church and they will expect to see all valid declarations and a complete audit trail of the Gift Aid claimed on the donations e.g. donation being banked, donation cleared on the bank statement.

For Gift Aid, the earliest donation should be dated **01/09/2013 or later if submitted before 31/8/2018**. For donations sent after 31/8/2018, donations should be dated 01/09/2014 or later.

For GASDS, you can only claim for GASDS donations received between 06/04/2016 and 05/04/2017 for 2016/17 tax year(if not yet done so) or between 06/04/2017 and 05/04/2018 for 2017/18 tax year.

7. GASDS

Some basic notes on GASDS (HMRC Requirement):

The donation must be: -

- £20 or less
- in cash only (or contactless donations if collected on or after 6/4/2017)
- banked in the UK ASAP
- Cash cannot be used for covering sundry expenses.
- **A maximum of £8,000 for donations received on or after 06/04/2017.**

How to fill in your form

ID	Surname	Initials	Title	Add	Postcode	£	Date Of Donation	Start Date
	GASDS			Church Address	Church Postcode	Total amount of collection	05/04/20XX	06/04/20XX

At the bottom of your claim forms:

- Under the 'SURNAME' column put GASDS
- **Under the ADDRESS AND POSTCODE column put the CHURCH ADDRESS, POSTCODE and the right tax year. Please use the address of your church building where the charitable activities take place. Without these details, we will not process the GASDS claim.**
- Under the NETAMOUNT column put total cash collected under GASDS
- Under the DATE OF DONATION column put the last day of the tax year that you are claiming for (2016/17 or 2017/18). GASDS for 2015/16 tax year and earlier tax years is out of date and not eligible.

- The START DATE would be the start of the tax year (eg 06/04/2016 for tax year ending 5/4/2017).
- The rest of the columns will remain the same as for the others above.

8. Returning the completed claim form

Once the form is complete, to ensure quick processing of your claim form, please e-mail to: claims@methodistchurch.org.uk instead of emailing individual members of the gift aid team.

Where a new Gift Aid secretary has been appointed, please email details to giftaid@methodistchurch.org.uk in order that we can update the Connexional database. Church Name and your name, address, phone number and e-mail

If you have any queries or comments, please email giftaid@methodistchurch.org.uk

Thank you.

Gift Aid Team