

Caritas Australia's Project Compassion 2026 Record of Receipts Sheet User Guide

To comply with Taxation Office regulations, each Parish must keep a record of all receipts issued. The Record of Receipts Sheet must be completed to enable parishioners to claim a tax deduction. The Record of Receipts Sheet **must list the full name and full postal address** of each parishioner. If known, please include their Caritas Australia Supporter ID.

For accuracy and efficiency, we request that you use the Record of Receipts Sheet supplied by Caritas Australia, and not a personalised version.

An Excel version of the Record of Receipts Sheet can be found in this download. Using this helps us to have more accurate and efficient entry of the receipt details into our database (which is required by the Tax Office) and helps us all to be good stewards of the environment.

Alternatively, a self-carbonised Record of Receipts Sheet is available from your Diocesan Director or by contacting Caritas Australia. One copy must be retained by the Parish, and the other sent to Caritas Australia.

User Guide for the electronic Record of Receipts Sheet

1. Save the Excel version of the Record of Receipts Sheet (*included in this download*) to your computer.
2. Fill in all fields for each parishioner receiving a receipt from your Parish, remembering to allocate a receipt number to each parishioner.
3. Please fill in each parishioner's first name, not just an initial, and title.
4. **If applicable, please put any School donations in bold.**
5. Please email the completed Record of Receipts Sheet to help@caritas.org.au copying in your Diocesan Director (you can find your Diocesan Directors details [HERE](#)).
6. Please see below for a guide to using the Record of Receipts Sheet in a mail merge with the Tax Receipts Template document.

User Guide for producing Electronic Tax Receipts

1. Save the Tax Receipt Template (*included in this download*) to your computer.
2. Follow standard mail merging procedures.
 - a. To be valid as an official Caritas Australia receipt, a Parish stamp is required.