Caritas AUSTRALIA
End poverty
Promote justice
Uphold dignity

PROJECT COMPASSION

Record of Receipts Sheet User Guide

To comply with Australian Taxation Office requirements, Parishes must keep a record of all tax-deductible receipts issued on behalf of Caritas Australia. The **Record of Receipts Sheet** must be completed and should include each donor's full name and postal address. If known, please also include their Caritas Australia Supporter ID.

An Excel version of the Record of Receipts Sheet is included in this download and is the preferred format, as it enables more efficient and accurate processing of donor records.

Alternatively, a self-carbonised Record of Receipts Sheet was included in your Parish Kit. One copy should be retained by the Parish and the other returned to Caritas Australia. If you require additional copies, please contact 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. Type 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. ***If applicable, please put any School donations in bold***.
4. Please email the completed Record of Receipts Sheet to help@caritas.org.au.
5. 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.