ACNC Annual Information Statement Guideline

Purpose

This guideline outlines the workflow to lodge an Annual Information Statement (AIS) using the ACNC Charity Portal.

Scope

This guideline applies to those entities whose ACNC reporting obligations are managed by the Synod office.

ACNC Charity Portal

The ACNC charity portal can be accessed at: https://www.acnc.gov.au/

The ACNC charity portal is used to bulk lodge for those entities which are linked to the Synod office charity portal. Linking is done by updating the Address for Service email for a charity to be governance@ucaqld.com.au

The ACNC charity portal login details are:

Email address: taunese.aplen@ucaqld.com.au

Password: Located on 1password manager

AIS Lodgement

1. **Log in to the ACNC charity portal**

    Log in to the ACNC charity portal using the log in details above.

2. **Find the charity and launch the AIS form**

    2.1. Under the **My charities** heading on the ACNC charity portal home page, type part of the charity name into the search bar with a * at the front and hit enter e.g. *trinity

    2.2. Select the charity from the search results shown

    2.3. Select the **Manage reporting** icon

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2.4. Select the AIS tab you wish to lodge e.g. Start 2020 AIS

| Start 2020 AIS | Amend 2019 AIS | Amend 2018 AIS | Amend 2017 AIS |

2.5. The AIS will ask you to confirm details – click Start. The AIS form will launch.

3.   Complete the AIS form

3.1. Introduction

3.1.1. Select next to commence

3.2. Information about your charity

3.2.1. Charity details – check the details are correct

3.2.2. Q1 – enter the address for service details: email address below and street address sourced from Sugar

The email address will be governance@ucaqld.com.au. This information will appear on the ACNC website when a search is done of the charity so the street address should be used where possible.

3.2.3. Q2 – select no as our entities should not be incorporated associations.

3.2.4. Q3 – select no as most entities do not fundraise in the traditional sense.

Verbal advice sought from the ACNC was that fundraising relates to formal fundraising activities (lotteries, raffles) which most entities would not undertake.

3.2.5. Q4 – unless the charity has known larger scale activities, select no to all of these questions

a.   Most entities have advancing religion as their only subtype. A search of the current subtypes on the ACNC charity register can be made if in doubt (on the History tab).

b.   Entities should not be incorporated or registered elsewhere.

c.   No entities report as a group.

d.   Only a limited number of entities have DGR status (e.g. the Property Trust). If in doubt, you can search your ABN at https://abr.business.gov.au/Search, and the DGR status will be shown at the bottom.

e.   Entities generally don't receive government funding, and generally not more than $100,000 if they do receive any funding. Exceptions to this would include child care centres or schools.

3.2.6. Q5 – select the charity size, sourced from the annual return data

Most congregations will be small, however the Total Receipts value on the annual return spreadsheet (sourced from Finance) can validate this.

3.3. Charity Programs

3.3.1. Q6 – answer as appropriate (generally yes)

3.3.2. Q7 – for most entities, the activities should be described as follows:

Charitable purposes were pursued through the activities and provision of the services listed. Religious activities in particular were pursued through the coming together and sharing of worship, provision of christian education, nurture, pastoral care and engagement in mission.

Entities which will require bespoke descriptions including child care centres, schools etc.

3.3.3. Q8 –for most entities, the first program should be Uniting Church in Australia, Queensland. Select Add a program to continue. This will launch the entry form – fill out as follows:
- Program name: Uniting Church in Australia, Queensland
- Program Classification: Uniting Church (by selecting Select Classification)
- Beneficiaries: General community in Australia
- Program locations: town/city (by selecting Add Location)

Select Save. Add additional programs applicable to the entity as required, by selecting Add a program.

3.4. People, finance and reporting

3.4.1. Q9 – answer using data from payroll (note the information is for the last pay period in the reporting period)

3.4.2. Q10 – select no to needing help to calculate FTE, then enter the FTE staff (note the information is for the last pay period in the reporting period)

3.4.3. Q11 – answer using data from the Annual Insurance Survey (column titled "Volunteers")

3.4.4. Financial report details – answer no to completing the finance section (for basic religious charities only)

3.5. Responsible People

3.5.1. Q17a – review the current responsible people against the positions shown in Sugar, and update as required

3.5.2. Q17b – add any new responsible people as required

3.5.3. Tick to confirm that the details for all Responsible People are correct.

3.6. Review and Submit

3.6.1. Review the AIS for accuracy

3.6.2. In the Declaration, enter the Corporate Governance Manager details with the email address taunese.aplen@ucaqld.com.au and Position held = Corporate Governance Manager. Select Agent as the declaration type, tick the declaration, date and submit.

3.6.3. Download the submitted AIS and save to SharePoint at Governance > ACNC > Annual Information Statements > ACNC AIS YYYY – MM DD YYYY FYE Preparation > Lodged AIS (naming convention is ABN 12345678901_YYYY AIS), ensuring the necessary metadata is added (e.g. submission date, Submission Type = Annual Information Statement).

Related documents

Nil

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Definitions

Term	Meaning
AIS	Annual Information Statement
ACNC	Australian Charities and Not-for-profits Commission

Revisions

Document number	A/1.8.1.2				
Version	Approval date	Approved by	Effective date	Policy owner	Policy contact
1.1	02/05/2023	Executive Director Shared Services	02/05/2023	Corporate Governance Manager	Corporate Governance Manager
Next scheduled review	04.05.2026				