

# PAC Tips

December 2011



## Holiday Office Closures:

**12/22/11-12/26/11:** Headquarters and Pioneer Accounting Center closed for the holiday.

**12/30/11-01/02/12:** Headquarters and Pioneer Accounting Center closed for New Years.

## Chapter/Council/Club: Deadlines for 2011 Year end

Each of the following items will be needed from the Units in order to close out the 2011 financial year. If these items are not returned to the PAC by the deadlines listed below, we cannot guarantee you will receive your reports by the published deadlines.

### **Urgent! 12/16/2011: Open Advances Past 30 Days**

Please submit all paperwork to close any advances for your unit that is more than 30 days past the event date.

### **Urgent! 12/16/2011: Unknown Deposits**

Please submit a TPF1 for any deposits listed on the monthly unknown deposit report. Any deposits not claimed by 12/16/11 will be transferred to Chapter.

### **Urgent! 12/16/2011: W9 Solicitation**

Please return IRS W9's to the Pioneer Accounting Center. The PAC will be soliciting W9's from anyone who may be subject to a form 1099-MISC for 2011. Per IRS requirements, 1099-MISC must be postmarked by January 31<sup>st</sup> of the tax year.

### **Priority! 01/09/2012: 2011 Transactions**

All reimbursements and deposits for 2011 must be postmarked to the PAC. Items not postmarked by this date will be recorded as 2012 transactions.

### **01/13/2012: 2011 Inventories**

Please submit completed inventories for any items for resale; including, Pioneer Stores and any items in storage for fundraising event sales.

### **To Be Determined: Unit 2012 Budgets**

Additional information will be provided when it becomes available.

## PAC Report Deadlines through Year end

**12/20/2011:** November reports will be distributed

**Note:** December reports **will not** be provided in January due to year end close.

**02/17/2012:** Final 2011 (December) reports will be distributed.

**03/02/2012:** 2011 4<sup>th</sup> quarter percentage (65/35%) reports

**03/20/2012:** January 2012 and February 2012 reports will be distributed.

### Helpful Requests:

- When contacting your PAC Associate via phone or email, please identify which Chapter/Council/Club you belong to. We are each in contact with hundreds of Pioneers during the year, and the PAC handle approx. 30,000+ vouchers per year. It will help us respond to, and resolve, your inquiries more quickly if we are able to identify your Unit without research.
- When filling out TPF1's, please be sure to include your Chapter, Unit Name, and Unit Number at the top of the form. Our mail is open by an assigned individual and envelopes are recycled. The information at the top of the form is how requests are directed to the right associate. It also helps ensure your transactions are recorded and reported correctly.
- The PAC and Headquarters office relocated in July of 2011. We are still receiving a large amount of forwarded mail from both the former Dallas, TX and Denver 15<sup>th</sup> Street locations. The Dallas forwarding has an approximate 1 month delay reaching us, and the 15<sup>th</sup> street forwarding has an approximate 1 week delay. To ensure your vouchers reach us in a timely manner please be sure to mail to:

**Pioneer Accounting Center  
1801 California St.  
44<sup>th</sup> Fl.  
Denver, CO 80202**

## **New Officer Training Sessions**

There have been no updates and no changes to the GL Coding or Finance Basics training sessions. If you have already taken these classes between 11/2010 and 7/2011, you do not need to register for these sessions again.

### **Session Information:**

#### **GL Coding/Finance Basics**

We are combining the GL Coding and Finance Basics presentations into one session that will run approximately 2 hours. Subject to participation, this training program will be available through April 2012. The session will cover the following items:

- Income & Expense general ledger codes
- Project ID and 990 codes
- Voucher TPF1 processing
- Monthly Reports
- Turnaround times
- Document Retention Policy

#### **NEW! Charitable Percentages & Fundraising**

This session was presented at the Centennial celebration in Boston that will run approximately 1 hour. We will be offering this session only for a limited time. This session will cover the following items:

- Better Business Bureau Wise Giving Alliance (aka Percentage Reports 65%/35%)
- IRS 990 requirements
- Fundraising suggestions to help meet the 65%/35% requirement
- General fundraising practices

### **Individual Registration:**

Registration for a session is done through WebEx. You will receive a confirmation within 2 business days of your registration. Trainers will send your materials and class information in a separate meeting request prior to your session.

1. Review the schedule to select the date/time you would like to attend
2. Go to **telecompioneers.webex.com**
  - a. Note: please omit typing http or www in the URL address above
3. Browse the **Monthly** calendar for the session you would like to attend
4. Click on the session from the calendar
5. Click on **Register**
6. Fill in your **name** and **email**. In the **Company** field, please provide your Chapter or Unit Name
7. Click **Register Now**

### **Registration without a Computer:**

If you do not have computer or internet access, please contact the trainer for the session you would like to attend. The trainer will register you for their session, and will send training materials via standard mail. Hardcopy recipients should register at least 7 business days prior to the session to ensure your materials are delivered in time.

## Group/Chapter Registration:

For any groups fewer than 5 people, please follow the individual registration process. For any groups of more than 5 people who would like to train together, please have one person from your group contact Sara Huffman to schedule a meeting time.

## January Training Schedule:

Training times are listed for the **Mountain Time Zone!!!** Please refer to the time map to determine the time difference for your area.

Date	Time (Mountain Standard)	Session	Trainer
01/04/12	10:30 a.m. – 12:30 p.m.	GL/Finance Basics	Tammy Ewing
01/06/12	10:30 a.m. – 12:30 p.m.	GL/Finance Basics	Tammy Ewing
01/13/12	03:00 p.m. – 05:00 p.m.	GL/Finance Basics	Sara Huffman
01/24/12	10:30 a.m. – 12:30 p.m.	GL/Finance Basics	Tammy Ewing
01/25/12	10:30 a.m. – 12:30 p.m.	GL/Finance Basics	Tammy Ewing
01/06/12	03:00 p.m. – 04:00 p.m.	Charitable % & Fundraising	Sara Huffman
01/11/12	03:00 p.m. – 04:00 p.m.	Charitable % & Fundraising	Sara Huffman
01/20/12	03:00 p.m. – 04:00 p.m.	Charitable % & Fundraising	Sara Huffman
01/25/12	03:00 p.m. – 04:00 p.m.	Charitable % & Fundraising	Sara Huffman
01/27/12	03:00 p.m. – 04:00 p.m.	Charitable % & Fundraising	Sara Huffman

## US Time Zones



## Trainer Contact Information:

Tammy Ewing (888) 531-9776 or [tewing@pioneersvolunteer.org](mailto:tewing@pioneersvolunteer.org)

Sara Huffman (888) 929-0434 or [shuffman@pioneersvolunteer.org](mailto:shuffman@pioneersvolunteer.org)