

# **Instructions for Handling CSA 2016 Pledges & Payments**

Please help ensure that all your CSA16 pledges and payments sent to the diocesan lockbox are processed promptly and accurately:

- Send ALL pledges and payments to the lockbox address: **Charity and Stewardship Appeal 2016; PO Box 82652; Lincoln, NE 68501-2652.**
  - To handle these pledges and payments as efficiently as possible, no CSA16 pledge cards or payments should be sent to the chancery office.
  - Any pledges and payments that are received at the chancery office will be sent back to the parish for correction.
- Do not send blank pledge cards back to the lockbox or the chancery.
  - Any blank or unused cards can be destroyed in the parish after the appeal is complete.
- Before sending the pledge cards to the lockbox please review all cards to ensure that:
  - All cards have been signed.
  - The type and frequency of their payments are clearly noted on all pledge cards that have a balance due.
  - An email address is legibly written on all pledge cards that indicate electronic payments will be made.
  - Failure to do any of this may result in the pledge cards being returned to the parish for correction.
- Pledge cards that do not have a payment with them should be separated from payments with payments.
  - Do not staple anything that is sent to the lockbox.
  - Rubber band or clip all pledge cards without payments together in the same bundle.
- Make sure that all payments are placed with the pledge card that they are associated with.
  - Do not staple anything that is sent to the lockbox.
  - Rubber band or clip all pledge cards and their payments together in the same bundle.
- Make sure that the donor included their Family DUID in the memo line of their check.
  - If the Family DUID is not included on the check, please write it on.
    - This will help to ensure that their payment is posted to their pledge, and helps to eliminate errors.
- When cash is donated, please be certain to follow these guidelines:
  - Deposit the cash in your parish account and write a check for the amount of the cash gift to the CSA.
    - Include the parishioner's name and Family DUID in the memo line of the check.
  - If more than one parishioner's cash gift is included in the parish check, include a list of all parishioners whose payments are included in that check.
    - You should include the amount of the gifts, the names of the parishioners and the Family DUID of each parishioner giving cash in this list.
  - Include the pledge cards for pledges that were paid in cash with the bundle of pledge cards without payments.
  - Clip the list of parishioners to the parish check, keeping this separate from the pledge cards
    - Do not staple anything that is sent to the lockbox.
- When a new parishioner fills out a blank pledge card (on ivory paper) the volunteers or parish staff MUST look up and include the Family DUID on the card.
  - Any handwritten pledge cards which do not include the Family DUID on them will be returned to the parish for correction.
- You do not need to include the Parish ID on any checks or manually filled out pledge cards.
  - Only the Family DUID is needed – this will point the pledge to the correct parish if ConnectNow has been correctly updated.
- If any parishioner notes an address change on their pledge card, the parish MUST update this address in ConnectNow before the pledge card is sent to the lockbox.
  - Chancery staff will not be updating any addresses from the pledge cards. Rather, they will be relying on the parishes to ensure that the address is correct in ConnectNow.

**These two YouTube videos explain this same information in a bit more detail.**

- Video One (Pledge Cards 101): [https://youtu.be/0m6\\_OD3JGUc](https://youtu.be/0m6_OD3JGUc)
- Video Two (Lockbox Instructions): [https://youtu.be/r3\\_xa2VDocI](https://youtu.be/r3_xa2VDocI)