



## Annual Diocesan Appeal Transmittal Report Form Instructions for Processing Pledge Cards

Place each check on top of the pledge card. **\*PLEASE DO NOT SEPARATE THE CHECKS FROM THE PLEDGE CARDS AND DO NOT STAPLE THE CHECKS TO THE CARDS.**

1. Separate the completed pledge cards into three groups:

- Group A: Cards with a one-time gift.
- Group B: Cards with a pledge and contain a payment.
- Group C: Cards with a pledge without a payment.

2. Process the cards by performing the following steps:

- a. For group A: verify that the information on the front of the card matches the attached payment. Also verify that the check number, date and Diocesan ID (if it was a blank pledge card) are filled in.
- b. For groups B and C: Verify that “My/Our Pledge,” “Attached Payment,” and “Balance” are filled out and correctly. Also verify that the check number and date and Diocesan ID are filled in, if applicable.
- c. Confirm that all checks are signed, dated, and made payable to “Diocese of Des Moines.” If a check is made out to your parish, endorse the check over to the Diocese.
- d. On any pledge card which has not been pre-addressed, please verify the parishioner information: Diocesan ID, Correct Name, Address, City, State, and ZIP Code, and that information is legible.
- e. Add the diocesan constituent ID number to any pledge card that is not pre-addressed. These diocesan ID numbers can be found on the duplicate set of pledge cards which each parish received in the materials packet. It is the number above the name and before the dash. The diocesan constituent ID can also be found by looking in ParishSOFT. The diocesan ID can be found

in the family record as “Diocesan ID” or on the family list screen as the “sDiocesanID.”

3. On the duplicate pledge cards you received from the diocese, you can track gift information, (i.e. Total Gift, Attached Payment, Balance and Payment Plan) for each pledge card returned to the parish. Separate the pledge cards from donors who have made a gift from those with no response so that you can utilize the non-responder cards later.
4. In preparation for completing the Weekly Transmittal Report Form, tally the information necessary for all of the pledge cards.
  - a. Complete a Weekly Transmittal Report form (see enclosed copy). Keep a photocopy for the parish records and send the original to the diocese with the pledge cards and checks.
  - b. Place the payments on top of each pledge card. Please do not staple or paperclip the checks to the pledge card.
  - c. Place a rubber band around “Group A” cards (cards containing a single, one-time gift).
  - d. Place a rubber band around “Group B and C” cards and checks (with pledges).
  - e. Place all completed pledge cards (Groups A, B, & C) and checks in the white transmittal envelope provided.
  - f. Place the appropriate U.S. postage and the return address of the parish on the white transmittal envelope and mail it to the Diocesan Finance Office.

*If you have any questions about this process, please contact Laura Hofstrand at [lhofstrand@dmdiocese.org](mailto:lhofstrand@dmdiocese.org) or 515-237-5009*