

Organizations List (Results of a Search)

VIEW is the format appearing on the screen.
It includes and removes columns, places them in the order you choose,
sorts data according to your selection, and allows formatting.

View in this example is Tax Info

Double Click to Open the Organization's Record

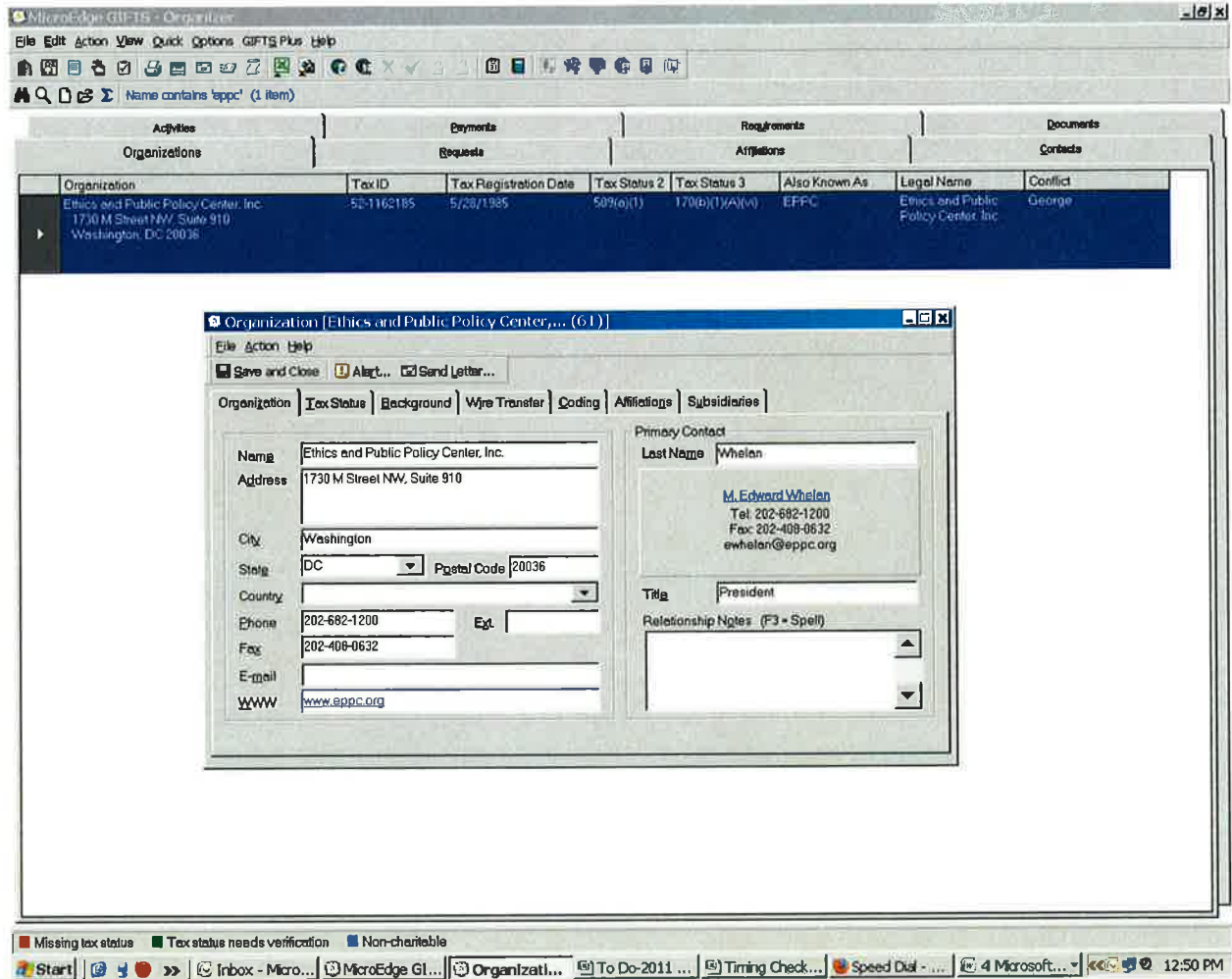
The screenshot shows the MicroEdge GIFTS Organizer application window. The title bar reads "MicroEdge GIFTS - Organizer". The menu bar includes "File", "Edit", "Action", "View", "Quick", "Options", "GIFTS Plus", and "Help". The toolbar contains various icons for file operations and navigation. The search bar shows "Name contains 'epcc' (1 item)".

The main window is divided into several tabs: "Activities", "Payments", "Requirements", and "Documents". The "Organizations" tab is active, displaying a table with the following data:

Organization	Tax ID	Tax Registration Date	Tax Status 2	Tax Status 3	Also Known As	Legal Name	Conflict
Ethics and Public Policy Center, Inc. 1730 M Street NW, Suite 510 Washington, DC 20036	52-1162165	6/28/1985	509(a)(1)	170(b)(1)(A)(v)	EPCC	Ethics and Public Policy Center, Inc.	George

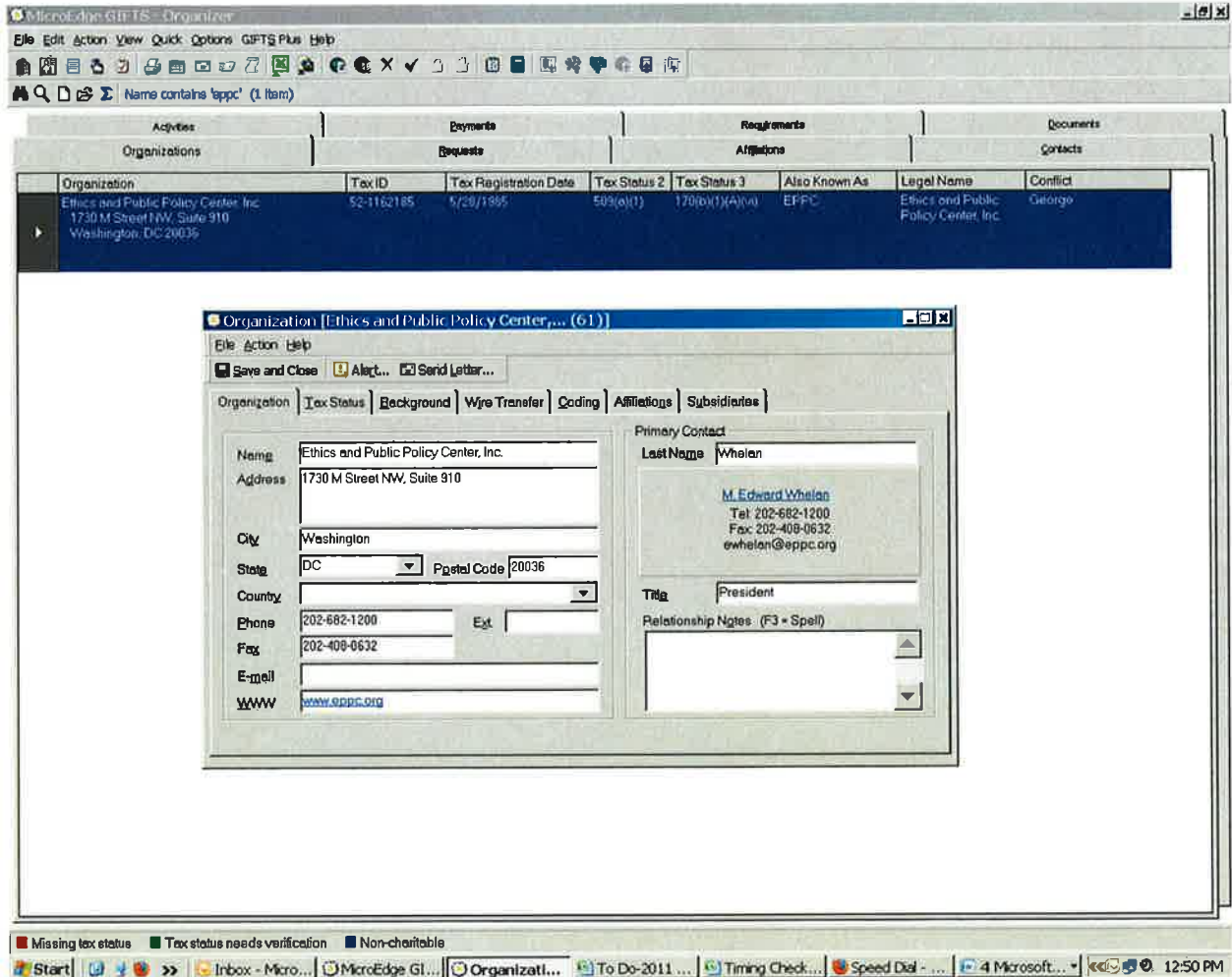
At the bottom of the window, there is a status bar with indicators for "Missing tax status", "Tax status needs verification", and "Non-charitable". The Windows taskbar at the bottom shows the Start button, several open applications (Inbox - Micro..., MicroEdge..., To Do-2011..., Timing Check..., A-2011.xls), and the system clock showing 12:46 PM.

First Screen within Organizations is Organization.
 This tab provides basic information about the organization.



Organization screen provides basic information about the organization.

The left side of this screen includes the name, address, phones, email, website of the organization. The right side of the screen identifies the main contact for the organization.



Second Screen within Organizations is Tax Status.
 This tab provides information concerning tax-exempt status.

The screenshot shows the MicroEdge GIFTS Organizations application. The main window displays a list of organizations with columns for Organization, Tax ID, Tax Registration Date, Tax Status 2, Tax Status 3, Also Known As, Legal Name, and Conflict. The selected organization is Ethics and Public Policy Center, Inc. (Tax ID: 52-1162185, Registration Date: 5/28/1985). A secondary window titled "Organization [Ethics and Public Policy Center, Inc.] (61)" is open, showing the "Tax Status" tab. This window contains fields for I.R.S. information (Legal Name, Tax ID, Registration Date, Financial Report Date, Notes) and Tax Status details (Cumulative Index Revision / Page No., Last Verified By, Last Verified On, Next Verification On, and a table of Tax Status entries).

Organization	Tax ID	Tax Registration Date	Tax Status 2	Tax Status 3	Also Known As	Legal Name	Conflict
Ethics and Public Policy Center, Inc. 1730 M Street NW, Suite 910 Washington, DC 20036	52-1162185	5/28/1985	509(a)(1)	170(b)(1)(A)(vi)	EPFC	Ethics and Public Policy Center, Inc	George

I.R.S.		Tax Status	
Legal Name	Ethics and Public Policy Center, Inc.	Cumulative Index Revision / Page No.	01/856; 02/924; 03/971; 04/990; 05/1004; 07/1057
Tax ID	52-1162185	Last Verified By	Yvonne Engel
Registration Date	05/28/1985	Last Verified On	03/25/2011
Financial Report Date	12/31/2003	Next Verification On	03/25/2012
Notes (F3 = Spell)		Tax Status	As Of
		501(c)3	01/25/1980
		509(a)(1)	05/28/1985
		170(b)(1)(A)(vi)	05/28/1985

Charitable Organization

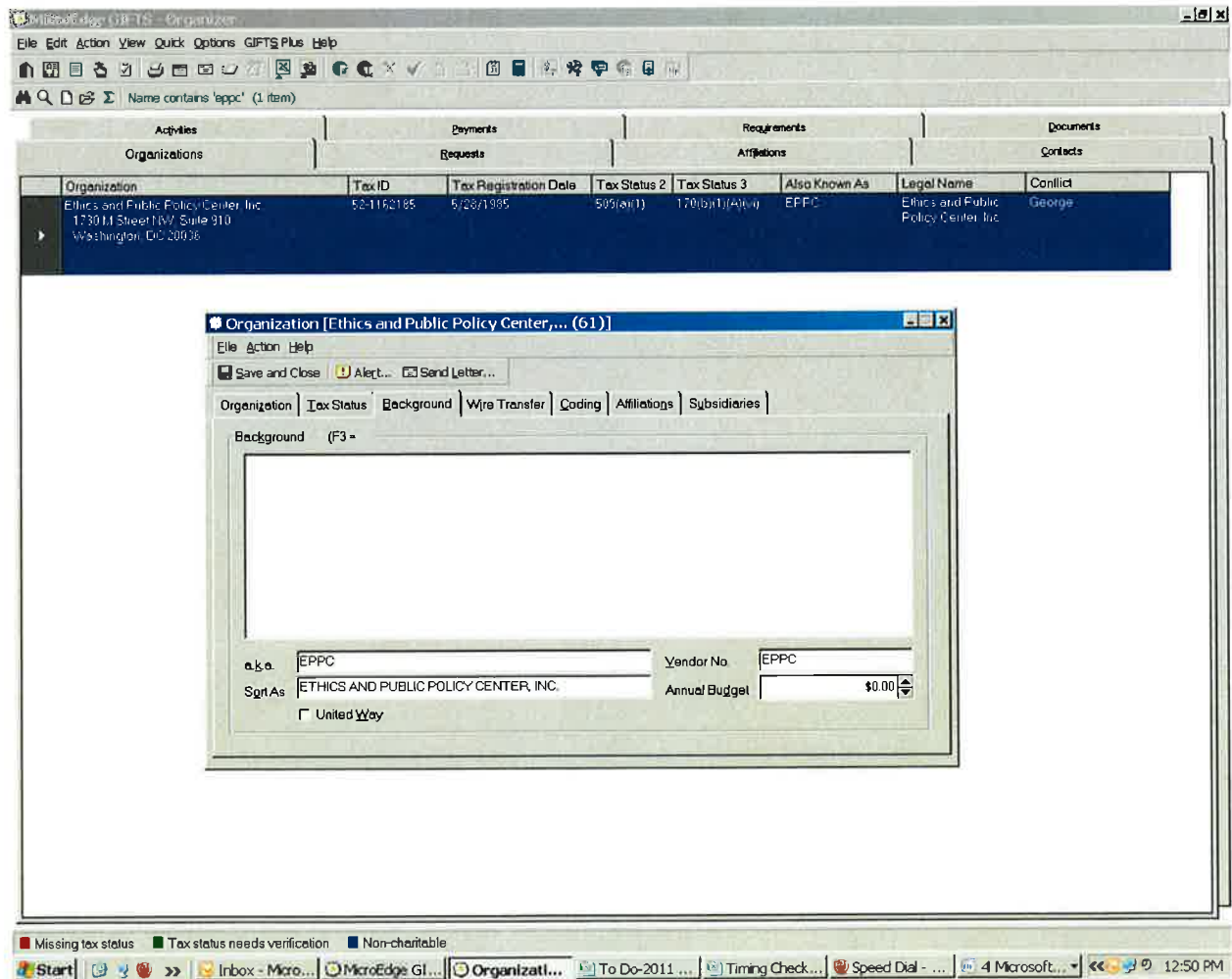
Tax Status screen provides information concerning tax-exempt status.

The name used here is the legal name. The tax id number is the EIN (Employer Identification Number). The registration date is the date of the most recent IRS tax-exempt status form we have on file. A field is available for the date of the most recent financial report from the organizations. Notes can be anything noteworthy.

Be sure the box at the bottom left of the screen (Charitable Organization) is checked. This opens up the tax status fields on the right. Previously, the year/page # where the organization was listed in the cumulative index was recorded on the top line. Currently, Guidestar's Charity Check report is run and printed for each grant made, so this line is no longer used. Last verified by identifies the person who checked the current exempt status (pull-down menu available); the next line indicates on what date it was verified; the third line denotes when the next verification is due (one year from verified on date). Several lines are available for tax status. The first status selected should always be 501(c)(3). Within that status are sub-categories. The 509(a)(1) or 509(a)(2) or 509(a)(3) should be the next status listed. If there is a further delineation, i.e. like frequently used 170(b)(1)(A)(vi), that should be on the third line. The dates next to each of the exempt status should be the date on which the IRS approved the status, if not available, the date of the most recent determination letter on file will suffice.

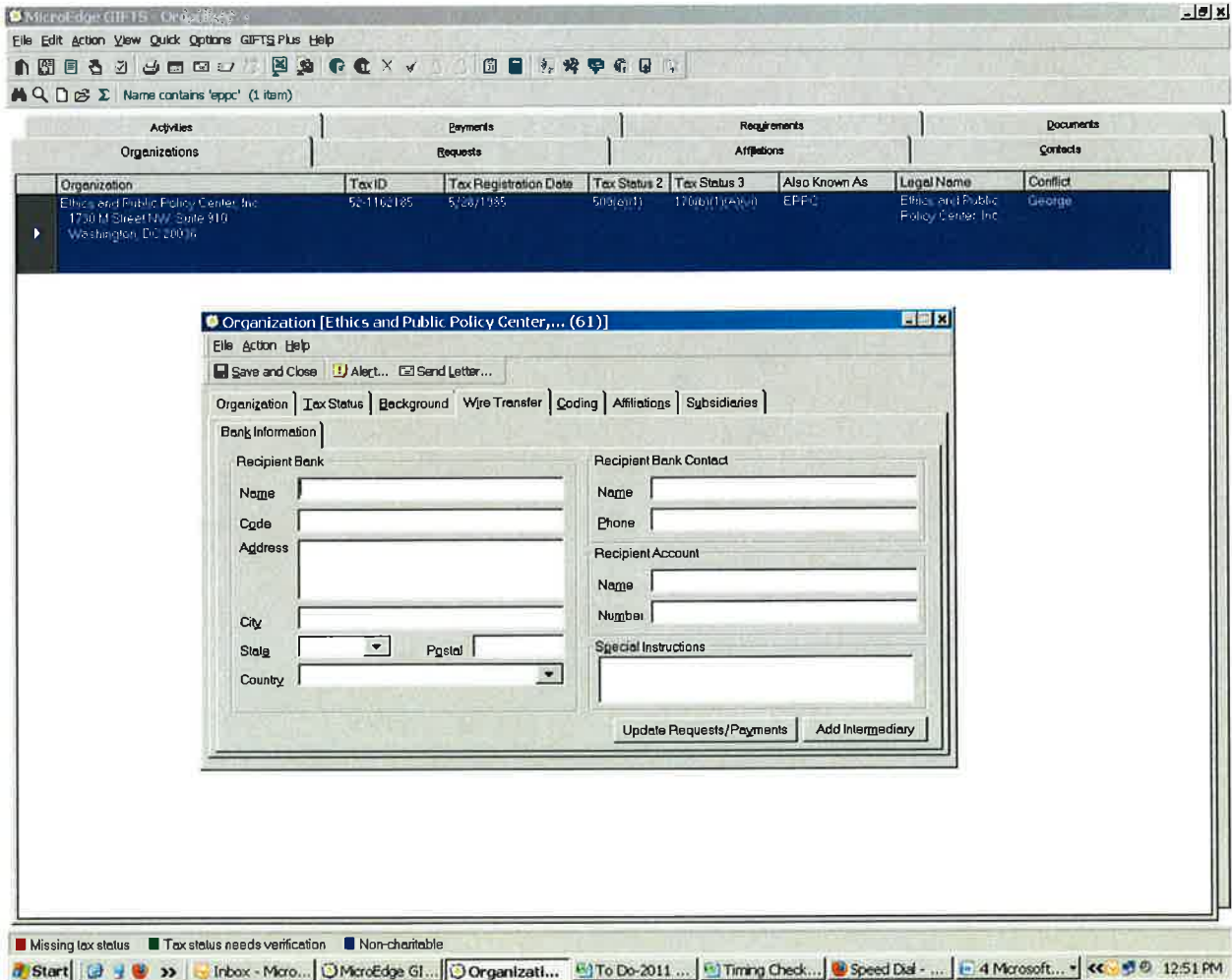
Background screen provides information concerning background and additional names.

The background screen was designed to contain a brief description of the organization and its work; we use it for notes. The a.k.a. (also known as) should contain any other names the organization is know by, or perhaps the organization’s acronym. The Sort As field will populate itself with all capital letters of the name of the organization as listed on page one of the record. However, you should spell out Saint when page one lists St. and move a name starting with “The” to the end, preceded by a comma. Any other alphabetizing should be made clear here. The vendor number will be automatically assigned by the accounting software when the first payment is made. Annual budget is not used.



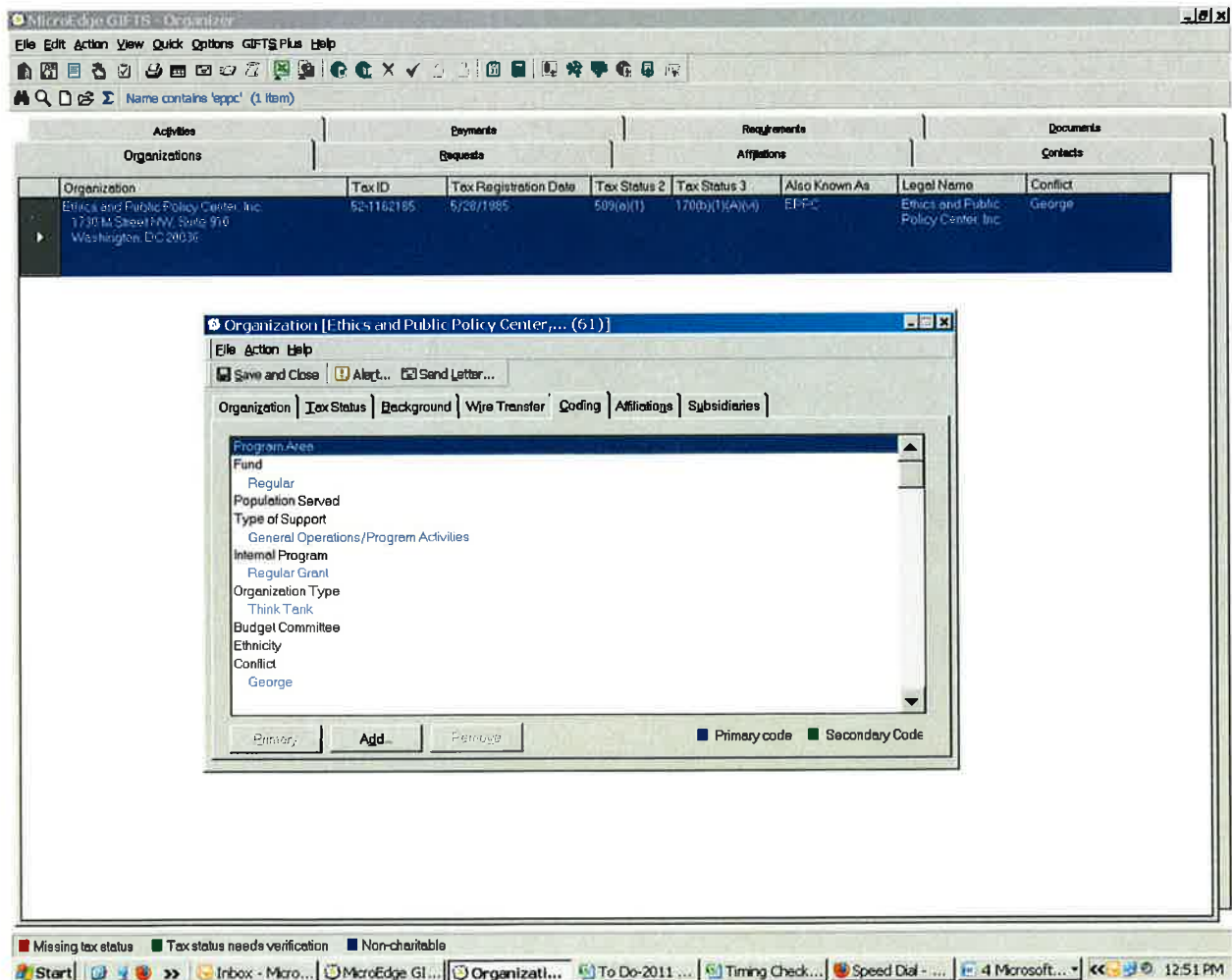
Wire Transfer screen provides information concerning the organization's banking information.

Wire transfer tab is available to record banking information if payment will be made by wire. Currently, the finance department has chosen not to use this record.



Coding screen records information concerning coding categories of the Foundation.

The coding tab is important for searching and retrieving specific types of information. The coding fields used in this organization tab will be the default codes when requests are entered. If any code is used for all requests the organization might have, go ahead and use it. The most important codes for the organization are Conflict and Internal Program. From the Conflict field, select any director affiliated with this organization (information comes from annual Disclosure forms sent by the President and subsequently entered into this field). The Internal Program field is usually Regular Grant, unless the organization is a foreign entity or needs Expenditure Accounting. Note also if the organization is a 509(a)(3)-Type 3 entity. The other codes are not as important in the Organizations tab, but become important when entering a proposal within the Requests tab.



Affiliations screen indicates persons affiliated with the organization in any capacity.

Affiliations are automatically populated by Gifts as names are added to the organization through the Requests or Contacts tabs.

The screenshot shows a software application interface with a main window and a pop-up window. The main window displays a table of organizations with columns for Organization, TaxID, Tax Registration Date, Tax Status 2, Tax Status 3, Also Known As, Legal Name, and Conflict. The pop-up window, titled 'Organization [Ethics and Public Policy Center, Inc. (61)]', shows a detailed view of affiliations for the selected organization. It includes a table with columns for Contact, Request, Affiliation, and Notes. The table lists several affiliations for Elliott Abrams, including roles like Senior Fellow for Middle Eastern Studies and President of the Council on Foreign Relations, with associated request numbers and dates.

Organization	TaxID	Tax Registration Date	Tax Status 2	Tax Status 3	Also Known As	Legal Name	Conflict
Ethics and Public Policy Center, Inc. 1730 M Street NW, Suite 410 Washington, DC 20036	52-1162185	5/28/1985	509(a)(1)	170(a)(1)(A)(ii)	EPFC	Ethics and Public Policy Center, Inc.	George

Contact	Request	Affiliation	Notes
Ab Abrams, Elliott St. Dir. of Near East & No African Affairs 1730 M Street NW, Suite 410		General - 8/27/2010	Primary org this contact
Ab Abrams, Elliott Senior Fellow for Middle Eastern Studies Council on Foreign Relations	[992983] Approved on 11/14/2000 To support general	Original applicant/contact 1/7/2002 - Present	
Ab Abrams, Elliott President Council on Foreign Relations	[961077/961077] Approved on 11/25/1996 To support general	Payee	
Ab Abrams, Elliott Senior Fellow for Middle Eastern Studies Council on Foreign Relations	[981047] Approved on 11/17/1998 To support general	Primary Contact	

Seventh Screen within Organizations is Subsidiaries.
 This tab links related organizations together.

