

# Haiti Relief –

## Use CDM+ to help donors comply with IRS guidelines

We have all been touched by the impact of the January 12th earthquake in Haiti. The devastation is horrific and, even in the current economic climate, people across all walks of life have opened their pocketbooks to help however they can.

The IRS recently enacted a law that allows taxpayers to claim monetary gifts specifically given for Haiti earthquake relief Jan. 12 through Feb. 28, 2010 as a charitable donation on either 2009 or 2010 tax returns. Click this link to the IRS website for more information: <http://www.irs.gov/>. Click here to view a **brief video** from the IRS about the new law.

So, if you are collecting gifts to a qualifying charity, how do you track them using CDM+ to enable people to choose when to claim the deduction?

First, it is important to be able to distinguish the Haiti earthquake relief donations received January 12 through February 28 from those received March 1 and after. To keep them separate, **create two giving funds in CDM+** named accordingly. For example, you could identify one giving fund as ‘Haiti Earthquake 1/12–2/28’ and another named ‘Haiti Earthquake 3/1 & after’. The new law gives the donor the option to report Haiti earthquake relief monetary gifts given 1/12/10 through 2/28/10 on either the 2009 tax return or 2010 return. It is the donor’s responsibility to determine which year he or she will claim the deduction. It is the receiving institution’s responsibility to provide the gift information to the donor. Creating two separate giving funds in CDM+ easily accomplishes this.

Secondly, **after March 1 prepare a special giving statement** for all giving units who contributed to the ‘Haiti Earthquake 1/12–2/28’ fund. When

creating this giving statement simply enter the date range of Jan. 12, 2010 to Feb. 28 2010 and select only this fund.

Finally, **next year include both funds when preparing your giving statements.** Since you created separate giving funds,

CDM+ will give separate totals for each period on the statement and the donor will have the information to properly complete their tax returns.

As a final note, remember you can change the name of a giving fund at any time and all of the contributions to that fund

will then reflect the new name. If you have any questions or concerns about this special law, please visit the IRS website links above, or **click here to view the official IRS publication** or consult your tax advisor. If you have questions as to how CDM+ can help you provide the information to donors to comply, please do not hesitate to contact our support team at 800-633-9581 or email us at [support@cdmplus.com](mailto:support@cdmplus.com).



Newspaper headlines paint a grim word picture.

### UPCOMING GROUP ONLINE CLASSES

#### Tues., February 9

- Fundamentals of CDM+
- Getting Started in CDM+ Membership (Overview)
- Getting Started in CDM+ Contributions (Overview)
- CDM+ Contributions Procedures

#### Wed., February 10

- Getting Started in CDM+ Accounting (Overview)
- CDM+ Membership Procedures
- CDM+ Accounting Entries
- Fundamentals of CDM+

#### Thurs., February 11

- Getting Started in CDM+ Event Registration (Overview)
- Archive, Backup and Restore of CDM+ Membership Data
- Getting Started in CDM+ Roommate (Overview)
- CDM+ Enhanced Notices

We will post more classes soon. For the complete class schedule, visit: [cdmplus.com/Training/GroupOnline](http://cdmplus.com/Training/GroupOnline)



The words of the Haitian flag, translated “Union makes strength” (or, “United we stand; divided we fall”) are especially true now as caring people across the world attempt to coordinate relief efforts. The new IRS law should help Americans do even more to help.



TERRY HATMAKER

**Question:**

How do I print a Giving Statement for just one giver?

**Answer:**

It's that time of year again! You have mailed all of your statements, and one person needs another one printed. How do you do that? Well, it's very easy. You open the **Giving Statement** report and set it up as if you were going to print your statements, then enter the **Giver's Code** in the 'To' and 'From' boxes under the **Current Code** area of the setup window.

[Click here for a document that provides a more visual understanding.](#)

**CDM+ Survey**

Spring cleaning time is just around the corner, and that applies to databases as well as homes. Just as you need to clean up your member records periodically, we need to update our records for you, our users.

Please help us by taking a few moments to complete the survey found at this link!

[Click here to enter survey](#)

**Results from last poll:**

Does your church have a Facebook or Twitter account?

**Yes: 38.5% No: 61.5%**

Does it use any social media?

**Yes: 48% No: 52%**



**TIME-SAVER TIP**  
**Link to Address**

CDM+ tracks people as members through **Address** and **Individual** records. It can also track people who are customers, vendors, employees, etc. When an individual has multiple relationships to the church, CDM+ can link these records together and save you time when entering and updating data.

Let's say a member of your church was hired to do some contractual work. Go to **Employee Information** and click **Add**. Enter the first and last name, employee ID and other relevant information. Instead of entering this person's address, however, check **Link To Address Rec.** CDM+ will open a **Select Address** window when you can find this member's

address record. Find the record and click **OK**. You'll notice the address fields can no longer be changed. Instead, as you make changes to this member's **Address Record**, those changes will automatically appear in **Employee Information**.

If you need to disassociate the address record from the employee, simply uncheck the **Link To Address Rec.** box. This would be helpful if the member wants correspondence to them as an employee, like a W-2, sent elsewhere.

This link-to-address feature is available on Customer Records, Employee Information, Vendor Records and Memorial Gifts Given.

*ON A PERSONAL NOTE*

**Meet Paul**

**Full Name:** Paul Robert Manning

**Position:** Senior Application Developer

**How long have you worked for CDM+?**  
19 years

**Family:** Wife Susie and daughters Brittney (22), Katherine (19), Andrea (17) and Emily (11)

**Hometown:** Lancaster, New York (Buffalo area)

**What are your hobbies and talents, and how do you spend your free time?** I'm a percussionist with the Central Kentucky Concert Band and the Lexington Community Orchestra and also the sound designer for the Woodford Community Theater.

**What do you like best about your job with CDM+?** I like helping ministries do their work more efficiently and effectively.



PAUL MANNING

**Back issues of *The CDM+ Connection* are now in searchable html format. Visit [www.cdmpus.com/CDMconnection](http://www.cdmpus.com/CDMconnection) to learn more.**