

# EXTENDED DAY PROGRAM

## Parent Tax Statement Instructions For ProCare V10



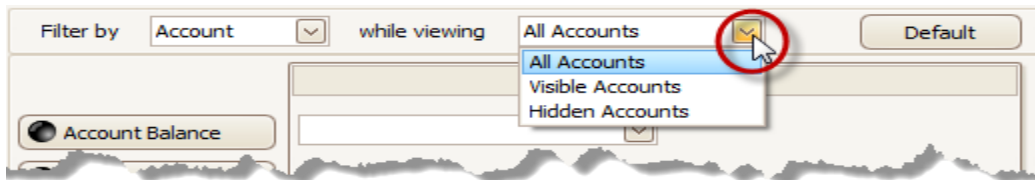
### Email or Print Statements

Choose to [Email](#) or [Print](#) end-of-year statements.

### Email End-of-Year Statements

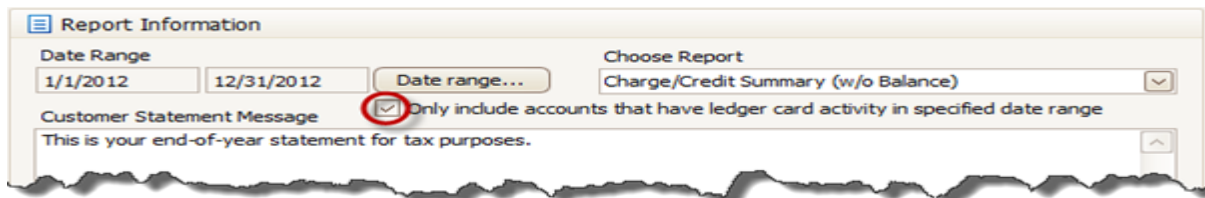
#### Versions 10.2.4611 and up (Email)

1. At the main screen of Family Data & Accounting use the [Select Filter](#) to include *All Accounts*.



Hint: Your email provider may limit the number of emails and attachments you can send at once or per day, etc. Use the *Select Filter* to break your emails into smaller groups, such as a few classrooms at a time.

2. Follow the steps to [Email Statements](#) making sure to:
  - a. Use a *Date Range* for the appropriate year.
  - b. Choose a summary report, such as the *Charge/Credit Summary (w/o Balance)*. This will show totals for the year without unnecessary detail.
  - c. Check the box to "Only include accounts that have ledger activity in the specified date range".



#### Versions below 10.2.4611 (Email)

1. At the main screen of Family Data & Accounting confirm your [Select Filter](#) is set to include just *Visible Accounts*, which in most cases is the default setting.

Hint: Your email provider may limit the number of emails and attachments you can send at once or per day, etc. Use the *Select Filter* to break your emails into smaller groups, such as a few classrooms at a time.

2. Follow the steps on how to [Email Statements](#) making sure to:
  - a. Use a *Date Range* for the appropriate year.
  - b. Choose a summary report, such as the *Charge/Credit Summary (w/o Balance)*. This will show totals for the year without unnecessary detail.

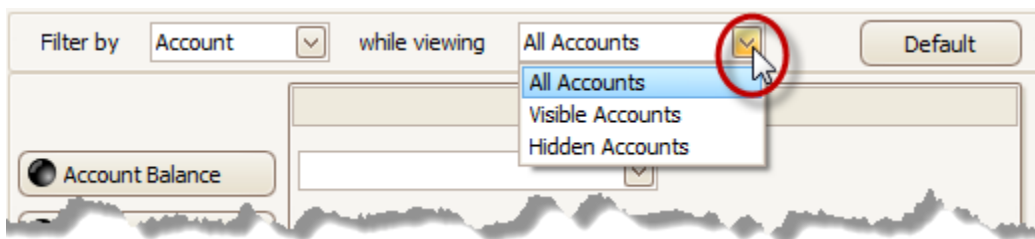
3. After emailing *Visible Accounts*, change your [Select Filter](#) to include just *Hidden Accounts*. This is because some families may have left during the year, but they still need a tax summary.
4. Again, follow the steps on how to [Email Statements](#), but **only check off families who were there during the prior year**. You don't want to send blank statements to very old accounts that did not have any fees charged or payments made during last year.

Hint: You may want to [Print a List of Hidden Accounts with Activity Last Year](#)

## Print End-of-Year Statements

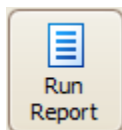
### Version 10.2.4727 and up (Print)

1. From the main screen of Family Data & Accounting go to *Reports > Standard Reports > Family Accounting > Account Statement*.
2. Although you could use any report in this section, it's generally best to choose a summary report, such as the *Charge/Credit Summary (w/o Balance)*. This will show totals for the year without unnecessary detail.
3. Choose a *Date Range* for the appropriate year.
4. Use the [Select Filter](#) to include *All Accounts*.

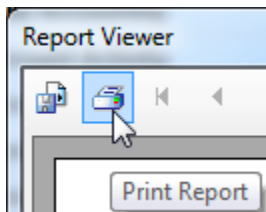


Note: The "summary" reports will automatically include only those accounts that had ledger activity during the specified dates. There is no check box needed to make this selection.

5. Optional: You may include a *Report Message* to appear at the bottom of each summary such as "This is your end-of-year summary for tax purposes. If you have questions, please contact the billing office at 555-1212."
6. Click *Run Report*.



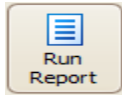
7. At the *Report Viewer* screen (print preview) click the *Printer* icon (upper left) to print the report for everyone at once.



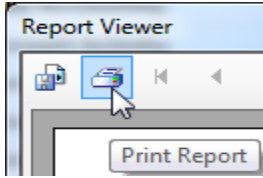
### Versions below 10.2.4727 (Print)

1. From the main screen of Family Data & Accounting go to *Reports > Standard Reports > Family Accounting > Account Statement*.
2. Although you could use any report in this section, it's generally best to choose a summary report, such as the *Charge/Credit Summary (w/o Balance)*. This will show totals for the year without unnecessary detail.
3. Choose a *Date Range* for the appropriate year.
4. Confirm the [Select Filter](#) is set to include just *Visible Accounts*, which in most cases is the default setting.

- Optional: You may include a *Report Message* to appear at the bottom of each summary such as "This is your end-of-year summary for tax purposes. If you have questions, please contact the billing office at 555-1212."
- Click *Run Report*.

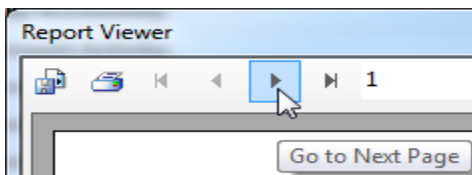


- At the *Report Viewer* screen (print preview) click the *Printer* icon (upper left) to print the report for everyone at once.



- After printing summaries for *Visible Accounts*, change your [Select Filter](#) to include just *Hidden Accounts*. This is because some families may have left during the year, but they still need a tax summary.
- Repeat the steps above, but skip the blank pages. **Print only the pages for families who were there during the prior year.** Use the *Go to Next Page* button to move through the report.

Hint: You could print the whole report and then recycle the blank pages. The pages won't be entirely blank; they'll still include the payer's name and address, etc., but there won't be any accounting information.



tags: tax statements, year end statements, end of year statements, tax summary, tax summaries, family statements, family tax statement, family tax report, parent statement, parent statements, parent's statement, parents statement

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