Payments > Family Payment

Last Modified on 03/30/2018 8:37 am EDT

The Payments > Family Payment screen allows users to pull different versions of year-end tax statements. This is most useful if a site will be printing off and mailing or distributing tax statements.

 If a site would like to email a copy of a family's year-end statement, the email can be sent from the Connect > Communication option (be sure to select the option to include the year-end tax statement before sending the email).

Search		-									Busin	ess Level - I	DCW -	Tran	isacti	onal	6
습 Home	Family	Payments	Attendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	۹						
Home Information		Journal															
		Deposit															
i		Third Party	/ Journal	c	om List												
		Add/Edit T	hird Party Ref	und						Classro	oom		м	т	w	Th	F
Informatic	on sc	Third Party	Refund Alloc	ation	insactiona	- Center 1				AM, B	efore So	hool Care	8	7	8	7	8
11		Payments/	Adjustments	9	insactiona	- Center 1				Flexib Regist	le Child ration	Care	0	0	0	0	0
2		Mass Change			insactiona	- Center 1				PM, A	fter Sch	ool Care	2	2	2	2	2
Birthday		Outstanding															
		Autopay Batch															
U		Online/PO	S Payments														
Registratio	ns Cl	Family Payment															
		Summary															

• Parents can self-service from the parent portal.

On the Family Payment screen, select the Search Criteria button to enter detail for the families that should display- then press View.

- Center- REQUIRED this can only be processed for one center at a time
- Category
- Classroom
- Year- year the payment was received in
- Include Email Delivery- if statements should be emailed out to families
- Include All Families with Payments in Year- will allow inactive families with payments to display in batch

Payments Year End Family Payment				
Showing results for: Year: 2017 Include Email Delivery: Yes Include All Famili	es with Payments in Year: Yes			Search Criteria 🗸
Year End Family Payment List	Search Criteria Q			
	Category		Classroom	•
	Year	Include Email Delivery	A Include All Families w	▼ ith Payments in Year
	2017 ▼	⊠ Yes	▼ Yes	-
				View

Once results display in the Year End Family Payment List, select the Actions menu to pull PDF or Excel copies of the statements.

Payments Year End Family Payment							
Showing results for: Center:: DCW Transactional- Center 1 Year: 2017 Inc	clude Email Delivery: No I Include All Families with Payments in Year: Yes	Search Criteria - Actions 📐					
Year End Family Payment List		Basic Year End 🔁					
Family Name	Family Name Center						
Brave Family	DCW Transactional- Center 1	_					
Doolittle Family	DCW Transactional- Center 1	Tax Statement - PDF 🔀					
Frozen Family	Frozen Family DCW Transactional- Center 1						
4		Tax Statement - Excel 🖹					

• Basic Year End- no detail, just an amount paid in the upper right corner



• Detail Year End- specific payment detail by family-

JayCare	Year E McTest Family	nd Tax Statement: 2017 Amt Paid: 100.00									
WORKS	Family Id: 101664 Address I Test City, MI 12345	TAX ID: 123456789									
Central Falls * 151 Hunt Street * Central Falls MI 02863											
Family Name: McTest Family Children Name: Test McTest testing McTest											
Date UserName	Description	Amount									
03/10/2017 ccarline2	Cash Payment -	\$ 100.00									
	Total	\$ 100.00									

• Tax Statement- PDF- displays a breakdown of charges and payments-

		Central Falls 151 Hunt Street Central Falls MI 02863 248-458-9987 Tax ID: 123456789	
McTest Family			
Family ID: 101664			
,			
Charges:			
8	Total Tuition:		0.00
	Total Discounts:		0.00
	Total Fees and Other Charges:		100.00
Total Charges for 2017:			100.00
Payments:			
r dyneno.	Total Payments for contact, test;		0.00
	Total Payments for test test:		0.00
	Total Payments for remainder:		16.90
	Total Bad Debt Recovery:		0.00
	Total Bad Debt:		0.00
Total Payments for 2017:			16.90

• Tax Statement- Excel-displays a breakdown of charges and payments-

	A		В		С	D	E	F	G	н	1	J	к	L
1		Tax Stateme	nt for 2017											
2 3 4 5 6	Central Falls 151 Hunt Street Central Falls, MI 02863 248-458-9987 Tax ID: 123456789													
7 8 9 10	Family Name: Family ID: Address:	McTest Family 101664												
11	Charmen													
12	Citalges.	Total Tuitian:			0.00									
14		Total Discounts:			0.00									
15		Total Fees and Oth	er Charnes:		100.00									
16	Total Charges for 2017		of ondigeo.		100.00									
17														
18	Payments:													
19		Total Payments for	contact, test;		0.00									
20		Total Payments for	test test:		0.00									
21		Total Payments for	remainder:		16.90									
22		Total Bad Debt Red	covery:		0.00									
23		Total Bad Debt:			0.00									
24	Total Payments for 201	7:			16.90									
25														
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	Iavrox - 23522	len Smith - 48788	Johnson-Adams -	23521	Kames - 23520	Kames	- 23520 - 2	Kellendon	k - 103401	Kole -	23519	Lance - 23518	McTest	101664
		40/00	A STATE OF		100000	- Contract				none		20030	marcat	2.004

• Multi-Payer Tax Statement- PDF- a basic statement broken down by payer for split families



DCW Demo 45 Industrial Road Suite 100 Cumberland MI 02864

TAX ID: 123456789

The payments listed below are representative of what we, Central Falls, have credited to your child's account. It is your responsibility to insure that actual amount of tuition payments are reported, following the IRS guidelines, when filing your state and federal income taxes.

Center Name:	Central Falls										
Address:	151 Hunt Street, Central Falls MI 02863	151 Hunt Street, Central Falls MI 02863									
Phone:	248-458-9987	248-458-9987									
Period:	1/1/2017 - 12/31/2017										
Payee: Adams,David	Children: Billy Adams Jillian Adams Mary Adam Randy Adams Rob Adams Sara Adams Theo Adams		Total Amount:	\$ 369.0							
Payment Type	Comments	Period	Payee	Amount							
Family: Adams D Family											
Cash Payment		11/28/2017	Adams, David	\$ 369.0							
			Total Payments:	\$ 369.0							