

# Year End Tax Statements - Sending Tax Statements By Email

Last Modified on 01/10/2023 11:20 am EST

At the start of the new year most clients will choose to send year end tax statements to their families. Tax statements provide a summary of payments made by families. Ensure the [payment type valid values](#) are setup correctly.

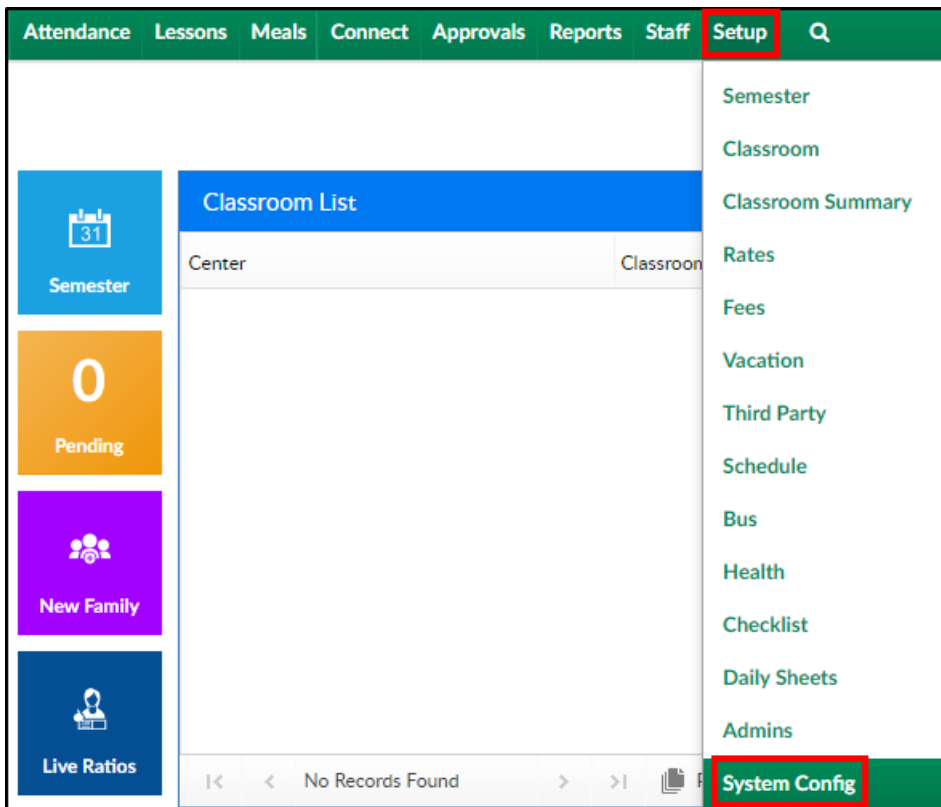
Administrators can [print tax statements](#) or send tax statements to parents through the system via email. Please follow the steps below to email tax statements.

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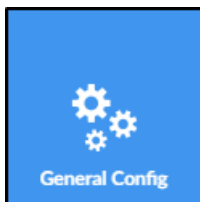
## Review Tax ID

Before running tax, statements make sure the tax ID is correct. This can be done by following the steps below:

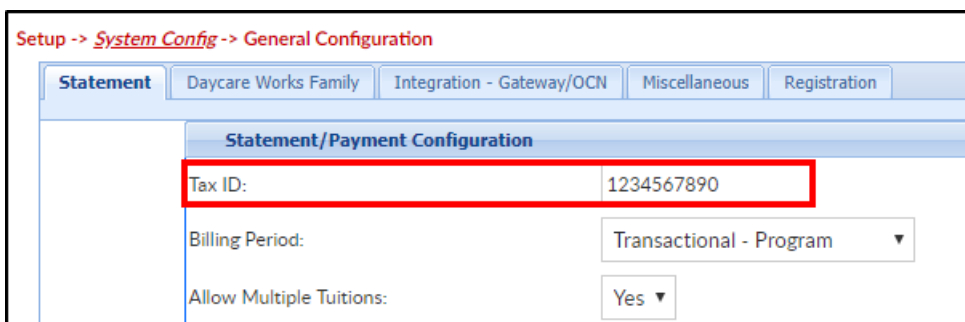
1. From the Setup menu, select System Config



2. Then click the General Config tile

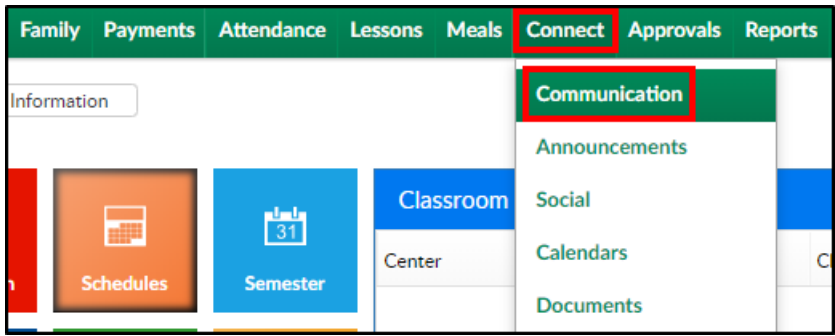


3. The Tax ID will be listed in the first field under the Statement tab

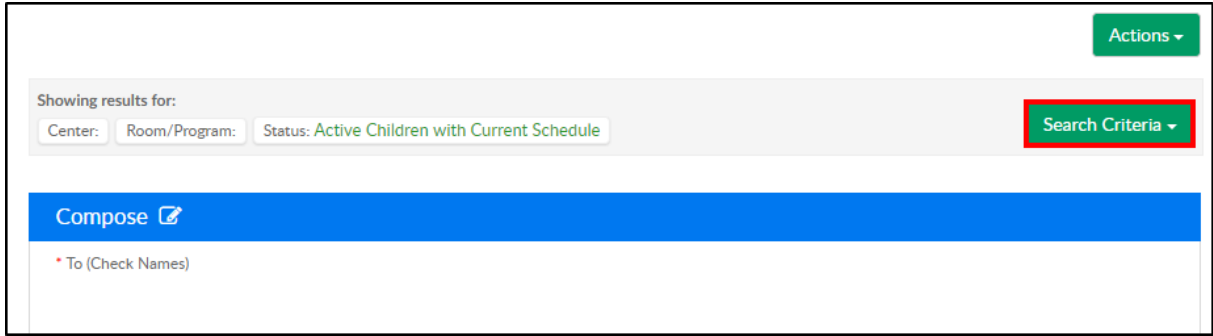


## Sending Tax Statements by Email

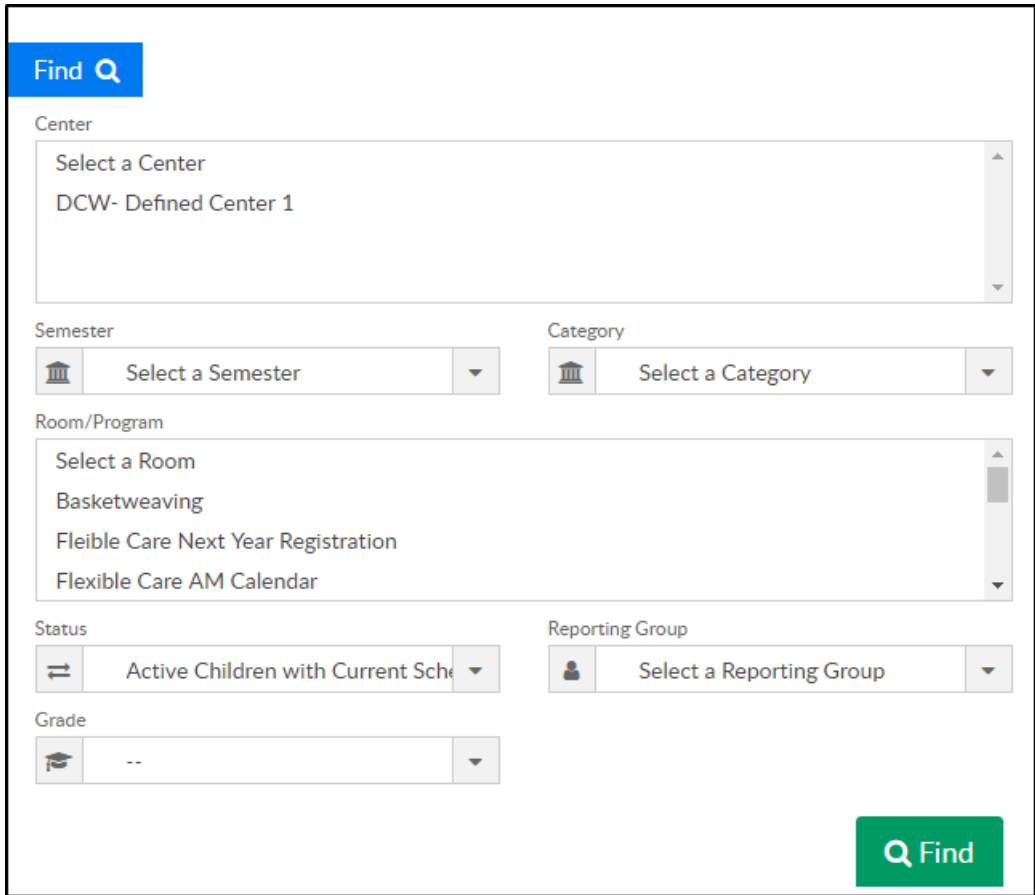
1. Click Connect from the menu, then select Communication




2. Click the Search Criteria button





3. Select any search criteria (Center, Semester, Status, Grade, etc.)



4. Select each parent by clicking the box to the left of the parent's name

Compose 

\* To (Check Names)

<input type="checkbox"/>	Name	Center Name	Email (2)	Text Message (0)	Phone Call (0)
<input checked="" type="checkbox"/>	Blue, Bonnie	DCW- Defined Center 1			
<input type="checkbox"/>	Test, Guardian 1	DCW- Defined Center 1			

5. Complete the following section

Email

Email a copy to sender

Template

\* Content Type

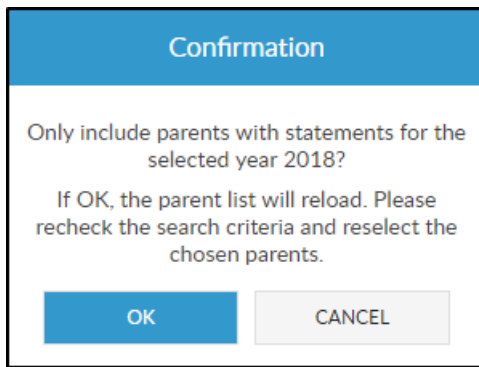
\* Subject

\* Message Body [Show Shortcuts](#)

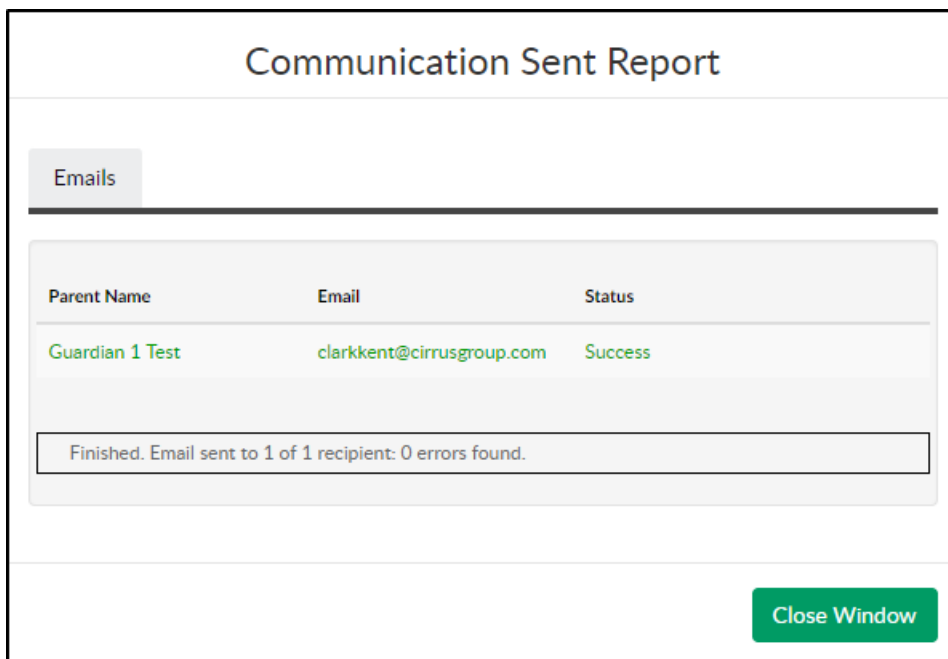
- Email a copy to sender - select this option if a copy of the email communication should be emailed to the sender of the email. The system will use the email address of the user logged into the system
- Template - select a template from the drop-down menu or leave blank to type a custom message
- Content Type
  - HTML - use this option if sending links or using special formatting
  - PLAIN - use this option if only text should be included in the body of the message
- Subject - enter a subject line for the email
- Message Body - enter the text of the message in this field

6. Attachment for Email

- Attach Year End Tax - check this option to attach the year end statement. After selecting this option, the following message will appear



- OK - the list of parents will reload above and options will have to be re-selected
  - CANCEL - use this option if only the originally selected parents should receive the email
- Tax Year - select the year
  - Choose File - click this button if another file needs to be attached
7. Click Send
  8. A popup will appear confirming the email message(s) has been sent. If there were any errors sending the message, they will appear in this window



9. Click Close Window
10. An Email Detail screen will display a summary of the email and a list of recipients

Email Detail

Sender

dcw\_jhennig

Subject

Family Statement

Body

Attached you will find your 2018 year end tax statement.

Opt-out/Unsubscribe from future emails, go to  
<https://dev.daycareworks.com:443/cg/optout.jsp>

Recipients (1)

First Name	Last Name	Email	Sent Status
Guardian 1	Test	clarkkent@cirrusgroup.com	Sent

Export options: [CSV](#) | [Excel](#) | [XML](#)