

Year End Tax Statements - Printing Tax Statements

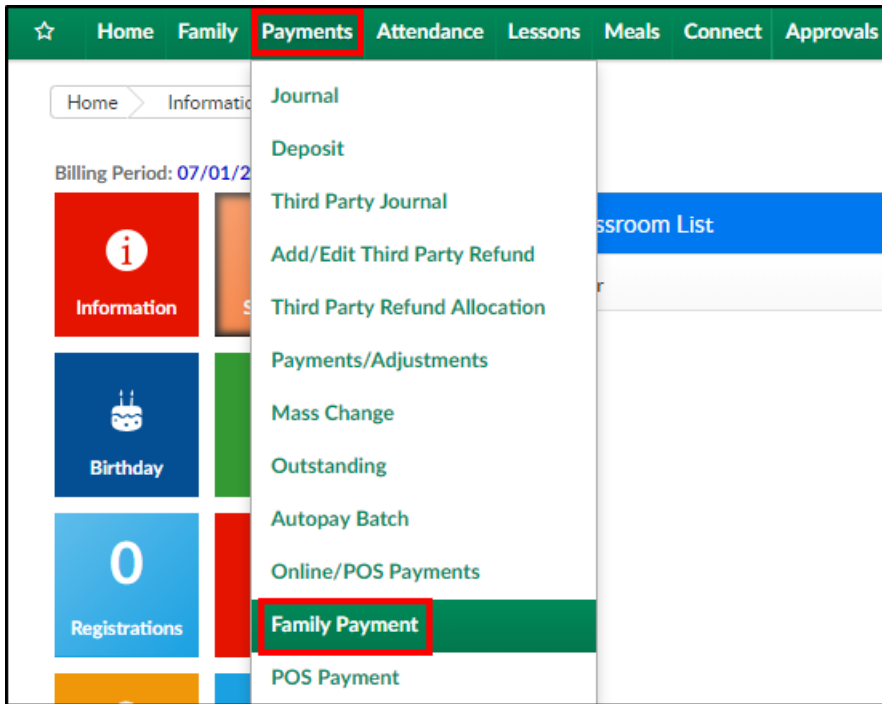
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At the start of the new year most clients will choose to send year end tax statements to their families. Tax statements provide a summary of payments made by families. Ensure the [payment type valid values](#) are setup correctly.

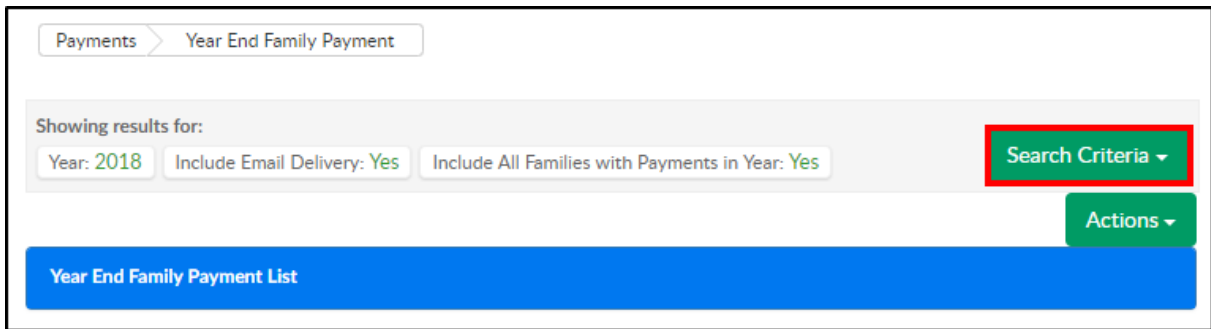
Administrators can print tax statements or [send tax statements](#) to parents through the system via email. Please follow the steps below to print tax statements. **Please Note:** This can only be done for one center at a time, it does not work for the business level.

Printing Tax Statements - PDF

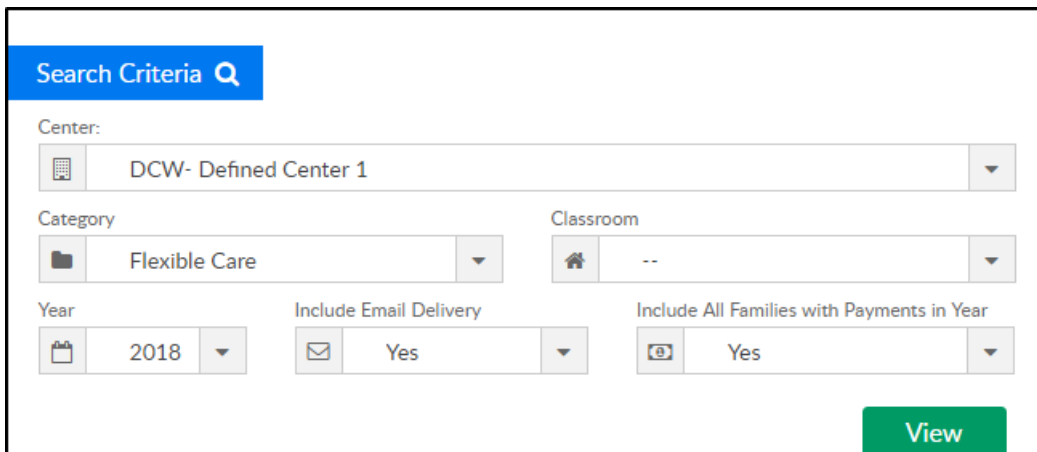
1. From the Payments menu, click Family Payment



2. Click the Search Criteria button



3. Complete the Search Criteria fields



- o Center - select the center from the drop-down. Selecting the Business Level will not populate information
- o Category - choose a category, if applicable
- o Classroom - choose a classroom, if applicable
- o Year - select the year to view
- o Include Email Delivery - Recommended Setting: Yes

- Include All Families with Payments in Year - Recommended Setting: Yes

4. Click View

5. Results will display in the Year End Family Payment List section

Payments > Year End Family Payment

Showing results for:

Center: DCW- Defined Center 1 Year: 2018 Include Email Delivery: Yes

Include All Families with Payments in Year: Yes

Search Criteria ▾

Actions ▾

Year End Family Payment List

Family Name	Center	Total Amount Paid
Blue Family	DCW- Defined Center 1	200.00
Kent Family	DCW- Defined Center 1	300.00

6. To print statements, click the Actions menu

Payments > Year End Family Payment

Showing results for:

Center: DCW- Defined Center 1 Year: 2018 Include Email Delivery: Yes

Include All Families with Payments in Year: Yes

Search Criteria ▾

Actions ▾

Year End Family Payment List

Family Name	Center	Total Amount Paid
Blue Family	DCW- Defined Center 1	200.00
Kent Family	DCW- Defined Center 1	300.00

7. Select one of the reporting options

- Basic Year End 📄
- Detail Year End 📄
- Tax Statement - PDF 📄
- Tax Statement - Excel 📄
- Multi-Payer Tax Statement - PDF 📄

- Basic Year End - displays the paid balance in a sum

Year End Tax Statement: 2018

Blue Family
Blue, Bonnie and Blue, Bill
Family Id: 320390
123 Drive
Rochester, MI 48806

Amt Paid: 200.00

TAX ID: 12-123456

DCW- Defined Center 1 * 445 S. Livernois * Rochester MI 48307

Family Name: Blue Family
Blue, Bonnie and Blue, Bill
Children Name: Bella Blue

- o Detail Year End - displays details of the paid balance

Year End Tax Statement: 2018

Blue Family
Blue, Bonnie and Blue, Bill
Family Id: 320390
123 Drive
Rochester, MI 48806

Amt Paid: 200.00

TAX ID: 12-123456

DCW- Defined Center 1 * 445 S. Livernois * Rochester MI 48307

Family Name: Blue Family
Blue, Bonnie and Blue, Bill
Children Name: Bella Blue

Date	UserName	Description	Amount
12/11/2018	dcw kgass	Cash Payment -	\$ 200.00
		Total	\$ 200.00

- o Tax Statement - PDF - displays charges and payments in PDF format

DCW- Defined Center 1
445 S. Livernois
Rochester MI 48307
248-841-1940
Tax ID: 12-123456

Blue Family
Family ID: 320390
123 Drive
Rochester, MI 48806

Charges:

Total Tuition:	0.00
Total Discounts:	0.00
Total Fees and Other Charges:	0.00
Total Charges for 2018:	0.00

Payments:

Total Payments:	200.00
Total Bad Debt Recovery:	0.00
Total Bad Debt:	0.00
Total Payments for 2018:	200.00

- o Tax Statement - Excel - displays charges and payments in Excel format with each family on a different worksheet. This option is best for internal use

Tax Statement for 2018		
DCW- Defined Center 1		
445 S. Livernois		
Rochester, MI 48307		
248-841-1940		
Tax ID: 12-123456		
Family Name:	Blue Family	
Family ID:	320390	
Address:	123 Drive	
	Rochester, MI 48806	
Charges:		
	Total Tuition:	0.00
	Total Discounts:	0.00
	Total Fees and Other Charges:	0.00
Total Charges for 2018:		0.00
Payments:		
	Total Payments:	200.00
	Total Bad Debt Recovery:	0.00
	Total Bad Debt:	0.00
Total Payments for 2018:		200.00

- Multi-Payer Tax Statement - PDF - displays paid balanced by payer. This option allows for separation of balances paid within a single family
 - This report can also be accessed via Reports > Financials. Select Misc in the Report Category and choose Multi Payer Tax Statement as the Report

DCW - Defined Billing 445 S. Livernois Rochester MI 48307					
TAX ID: 12-123456					
The payments listed below are representative of what we, DCW- Defined Center 1, 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:	DCW- Defined Center 1				
Address:	445 S. Livernois, Rochester MI 48307				
Phone:	248-841-1940				
Period:	1/1/2018 - 12/31/2018				
Payee: Blue Family	Children: Bella Blue	Total Amount:	\$ 200.00		
Payment Type	Comments	Period	Payee	Amount	
Family: Blue Family					
Cash Payment -		12/11/2018	Blue Family	\$ 200.00	
				Total Payments:	\$ 200.00