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# Year End Tax Statement

## User Guide

Last update Jan 5, 2019

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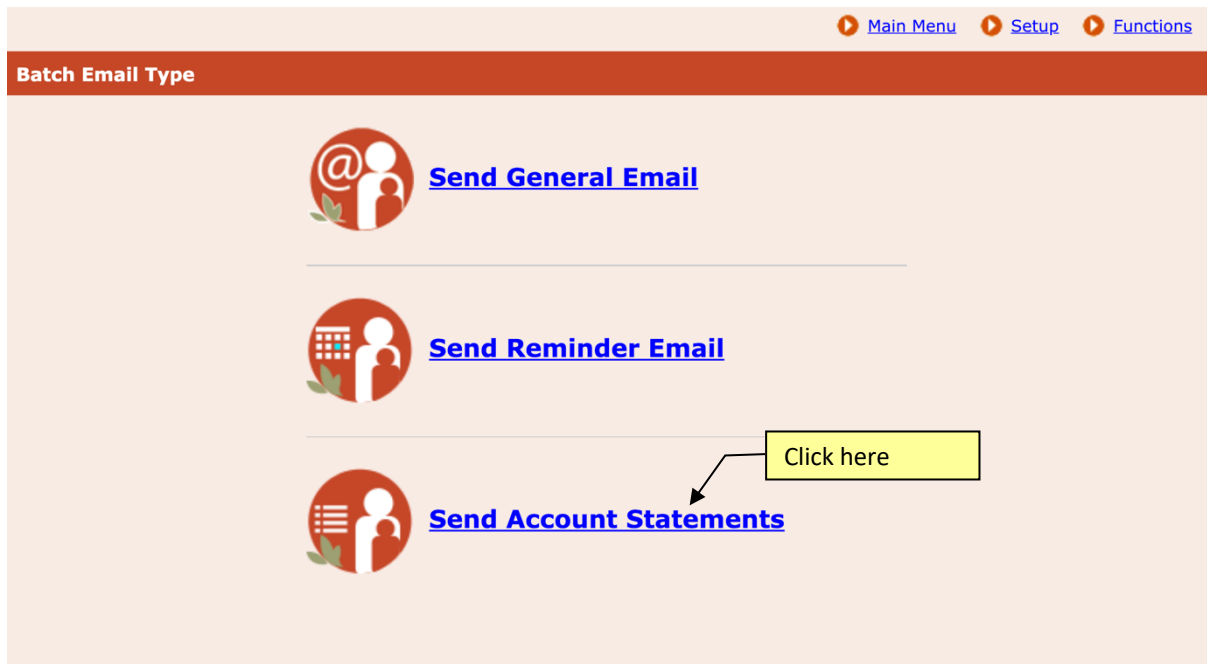
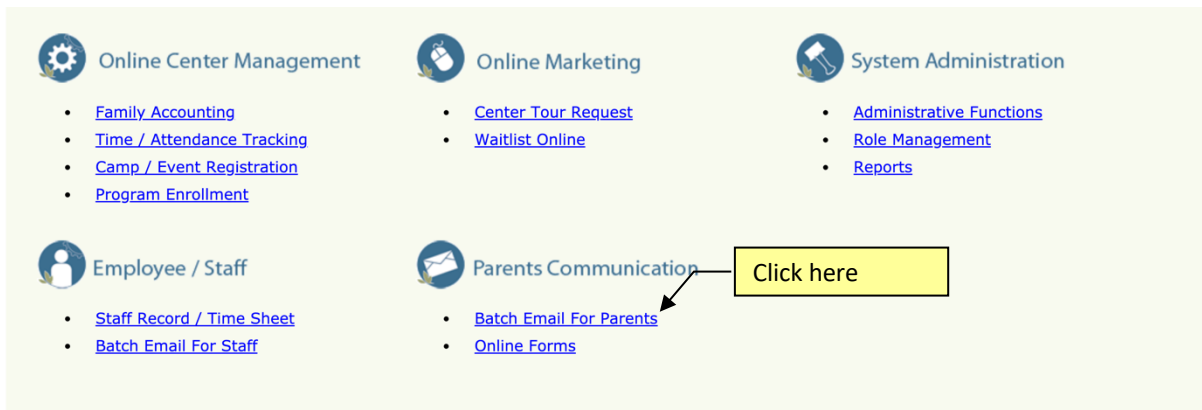
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# 1. Send Year End Tax Statement

OnCare provides an easy way for the providers to send year end statements to all the families by batch email.

Access path: **Batch Email For Parents → Send Account Statements**



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### Account Statement Batch Email

**Select Statement Type**
☐ Family Account Statement
 ☒ Year End Tax Statement

[Next](#)

[Main Menu](#)
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### Tax Statement Batch Email

**Dates** Last Year

**From** 01/01/2018
 **To** 12/31/2018

**Family Status** Active

**Enter Notes to be displayed on the Statements**

This is a year end statement for personal tax preparation purposes. Our records show the total payments for the year. Please print or retain this statement for future reference. If you have any questions regarding this statement, please contact the...  
 (Max 300 Characters)

[Submit](#)
[Cancel](#)

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### Batch Emails

Select Contacts To Email

Select	Family Acct Key▼	Child First Name	Contact Name	Ledger to Email	Contact Type	Email
<input type="checkbox"/>	ALVARADO	Ryan, Samuel	Michelle Alvarado	Sponsor	Parent #1	alvarado@gmail.com
<input type="checkbox"/>	ARNOLD	Savannah, Angela	Allison Kamm	Sponsor	Parent #1	z09parent1@oncareservices.com
<input type="checkbox"/>	BAYHAM	Victoria	Luciana Bayham	Sponsor	Parent #1	z09parent3@oncareservices.com
<input type="checkbox"/>	BURGER	Daniel	Melissa Burger	Sponsor	Parent #1	z09parent5@oncareservices.com
<input type="checkbox"/>	DOSS	Jorge	Kaela Doss	Sponsor	Parent #1	z09parent13@oncareservices.com
<input type="checkbox"/>	SHORT	Jimmy	Kelvin Short	Sponsor	Parent #1	kevindad@oncareservices.com
<input type="checkbox"/>	STEIN	Jonathan	Jennifer Stein	Sponsor	Parent #1	swami.venkat@oncarecloud.com
<input type="checkbox"/>	TEST	Sally	Jennifer Test	Sponsor	Parent #1	js1@ccie.com

[Continue](#)
[Cancel](#)

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**Batch Emails**

**Review Message**

**Note:** It might take up to 2 hours for emails to be generated and sent to families. Thanks for your patience.

**Message**

**Subject:** Your latest Tax Statement from ABC Demo Center

In this email you will find the latest Tax statement. If you have any questions, please feel free to call me at or email at oncare\_cs\_1455.

Thanks  
00 ABC Demo Company


Contact Name	Action
Allison Kamm	<a href="#">Review Attachment</a>
Jennifer Stein	<a href="#">Review Attachment</a>
Jennifer Test	<a href="#">Review Attachment</a>
Kaela Doss	<a href="#">Review Attachment</a>
Kelvin Short	<a href="#">Review Attachment</a>
Luciana Bayham	<a href="#">Review Attachment</a>
Melissa Burger	<a href="#">Review Attachment</a>
Michelle Alvarado	<a href="#">Review Attachment</a>

You can review the Y/E statement before you send

## 2. Child Care Provider Tax ID

The child care Provider Tax ID will be printed on the Year End Tax Statemen as show:

Page 1



ABC Demo Center  
12345 King Street  
Phoenix, AZ - 95123  
Phone : 4088886541

**Provider Tax ID : 12-5623276**

Check this

**Year End Tax Statement**

**Statement Date From 01/01/2018 to 12/31/2018**

Generated on 01/28/2019 5:35 pm PST


**Parent #1 Name :** Allison Kamm  
4502 E. Indian School Rd. #216 Phoenix  
Arizona 85018  
Cell: (480) 313-8336

**Child Name :** Angela Arnold      **Date of Birth :** 10/13/2015      **Classroom :** Cool Kids  
**Child Name :** Savannah Arnold      **Date of Birth :** 05/07/2017      **Classroom :** Butterflies


No	Posting Date	Check #	Description	Comments	Amount
1	11/05/2018	1245	Payment - Check		\$ 500.00
<b>Total Payment</b>					<b>\$ 500.00</b>

**Note :** This is a year end statement for personal tax preparation purposes. Our records show the total payments for the year. Please print or retain this statement for future reference. If you have any questions regarding this statement, please contact the Center Director.


If the Provider Tax ID is empty or incorrect, you can update the Provider Tax ID by following the steps below:

**Online Center Management**


- [Family Accounting](#)
- [Time / Attendance Tracking](#)
- [Camp / Event Registration](#)
- [Program Enrollment](#)

**Online Marketing**


- [Center Tour Request](#)
- [Waitlist Online](#)

**System Administration**

- [Administrative Functions](#)
- [Role Management](#)
- [Reports](#)

**Employee / Staff**

- [Staff Record / Time Sheet](#)
- [Batch Email For Staff](#)

**Parents Communication**

- [Batch Email For Parents](#)
- [Online Forms](#)

Select this

**Administrative Functions**

**Manage Users**

- [Manage Users](#)
- [Manage Centers](#)
- [Manage Parent Account](#)

**Family Accounting**

- [Search Across Centers](#)
- [Add /Edit GL Account](#)

Select this

>> Center Setup

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**Center Information**

Company ID 1455

Company Name 00 ABC Demo Company

\* Location Name ABC Demo Center

Address 12345 King Street

City Phoenix

State Arizona

Zip 95123

\* Time Zone (UTC-08:00) Pacific Time (US & C)

Program Hours From To

Location ID 1

Status ☒ Active ☐ Inactive

Location Number

Regional ID

Accounting ID

Location Tax ID 20-5378246

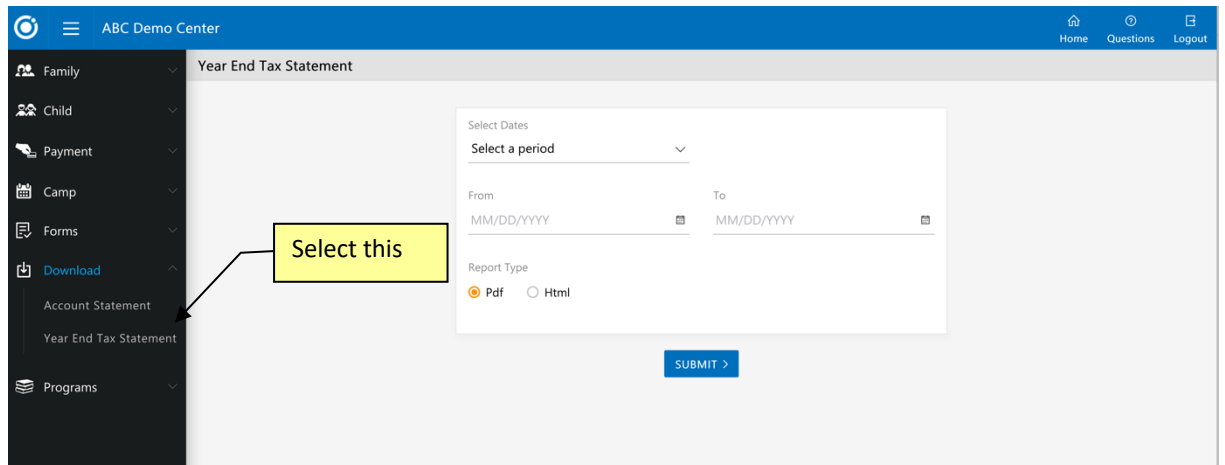
License Capacity

Update this

### 3. OnCare Parent Portal – Download Y/E Tax Statement

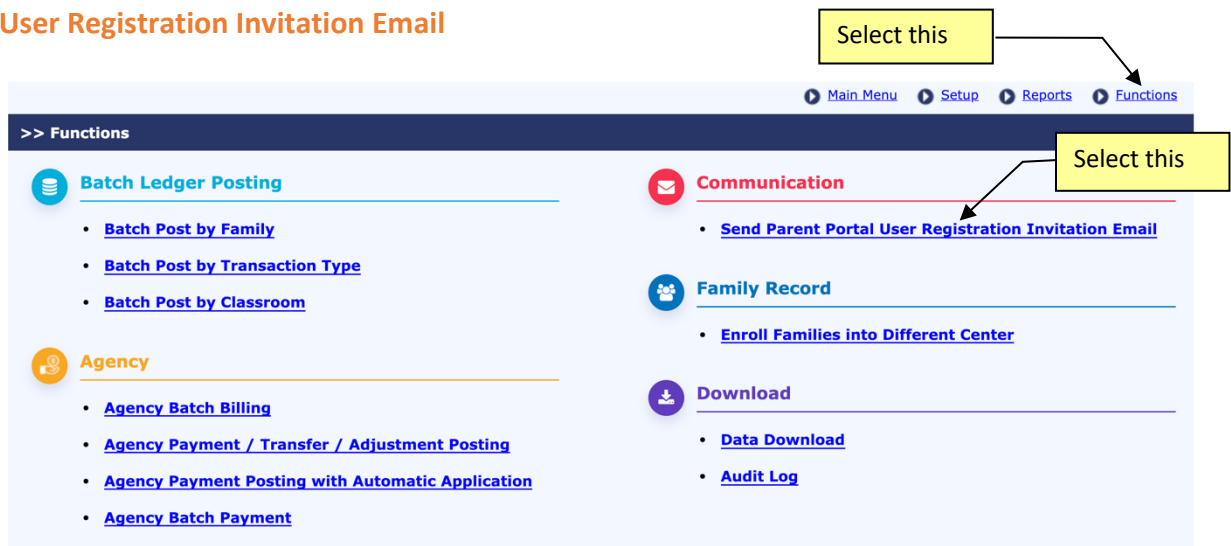
Beside the option of sending the Year End Tax Statement to family by email, provider also has the option for the parents to download their tax statement directly from the OnCare Parent Portal.

After login to their account in the OnCare Parent Portal, parent can click on Download → Year End Tax Statement.



If you haven't activated the Parent Portal for your center, you can do so by inviting the parents to register for an account on the OnCare Parent Portal

Access Path: **Family Accounting → Functions → Communication → Send Parent Portal User Registration Invitation Email**



For additional information and help regarding the OnCare Parent Portal, please contact us at [clientsupport@oncarecloud.com](mailto:clientsupport@oncarecloud.com).