

Memo

Date: January 8, 2013
To: ParishSOFT Administrators
From: Shannon Wiggins, Training Coordinator
Re: ParishSOFT End of Year Contribution Statements

As you prepare to send your Periodic (End of Year) Contribution Statements to your families, here are a few things to remember that will help you create and print the most accurate statements the first time and avoid any reprinting:

BEFORE RUNNING THE STATEMENTS:

Audit Funds: Ensure that all of your funds in ParishSOFT are coded correctly regarding tax exemption status: this is done by a ParishSOFT Administrator in the Offertory module by selecting the **Add/Edit/Delete Funds** button and reviewing the check box labeled **Tax Deduct**. Remember that funds such as Mass Stipends, Christmas or Easter Flowers, All Souls Novena, etc. **ARE** tax deductible.

Update Snowbirds: Is your parish using the **Other** tab in the Family Details screen for snowbirds (families with seasonal or temporary addresses)? If so, don't forget to **Update Snowbird Mailing Addresses** (found in the Family Directory module under Utilities).

Audit Mailing Information: Make sure that you don't have any missing data (addresses, mailing names, zip codes) by using the **Family Filtering and Sorting** option in **ParishSOFT Reports** to create a query you can export in Excel and sort by column headers looking for any blank fields.

Determine Format of Statement: You have two options when choosing which statement type to send your contributors:

1. Print a **Detailed** EOY Statement for contributing families.
OR
2. Print a **Summary** EOY Statement for contributing families **AND** print a **Date Range Report** for families that have given \$250 or more at one time.

Remember that it is the Archdiocesan Stewardship Best Practice that persons who donate **any dollar amount to a parish or mission** should receive a letter acknowledging their contributions at the end of the calendar year.

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ParishSOFT has developed a few instructional videos to assist you with this process and others. Visit this website <http://parishsoft.com/eoy/> to find links for the following videos that will give you a quick demonstration of how to go about printing your End of Year statements. Step by step instructions are listed below.

“Common Settings for End of Year Statements” (2 minutes 21 seconds)

“Edit Your Body of Statement” (53 seconds)

“Setting a Signature File Path” (1 minute 39 seconds)

HOW TO PRINT DETAILED PERIODIC CONTRIBUTION STATEMENTS:

1. Login to ParishSOFT and select **Reports** and then select **ParishSOFT Reports**.
2. When the reports open, select **Contribution Reports Menu**.
3. Select **Periodic Contribution Statements**.
4. Click on the button with the purple Access key icon.
5. Select your *Filters*:
 - a. **Period**: set your date range: January 01, 2012 through December 31, 2012.
 - b. Select **Both** for the registration status (you should provide a statement for anyone who has given money to the parish, not just registered parishioners).
 - c. Check **Only Contributors**.
 - d. **Annual Contribution**: leave the default of *\$0.01* for the **Minimum** range and leave the **Max** field blank.
 - e. Select **Everyone**.
 - f. With the radio button for **Inc** chosen, select **Show** to highlight all of the funds that you have noted to be tax deductible and review to ensure the correct funds are included.
6. **Select Body of Statement** – this will allow you to type a personalized letter from the pastor.
 - a. Ensure that the correct name of the form you wish to work with appears in the **Edit body of form to edit** field (use the drop down arrow to see your choice of forms).
 - b. **Type** the message in the white text area below.
 - c. Click the **Save** icon and exit by using the **Door** button.
7. Uncheck the **Honor ‘Do Not Send Mail’ Requests** checkbox.
8. Leave the **Include IRS Disclaimer in footer box** checked.
9. Select **Recalculate**.

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10. Under the section for Statements, click on **Detail Family Stmt** and then the **Print Statement** button.

11. Your statements are now ready to be sent to the printer!

HINT: If you have a large quantity to print depending on the capacity of your printer, you might want to print the statements in batches by using the print options in Access.

HOW TO PRINT SUMMARY PERIODIC CONTRIBUTION STATEMENTS:

Perform Steps 1 through 9 listed previously.

10. Under the section for Statements, click on **Summary Family Stmt** and then the **Print Statement** button.

11. Your statements are now ready to be sent to the printer!

Remember, if you are using the **Summary** statements that you will need to run a **Date Range Report** as well for any family that has given an increment of \$250 or more at any point during the year.

HOW TO PRINT DATE RANGE CONTRIBUTION REPORT FOR CONTRIBUTION AMOUNTS OVER \$250:

1. From the **Main Reports Menu in ParishSOFT Reports**, select **Contribution Reports Menu**.
2. Select **Date Range Contribution Reports**.
3. Enter your date range in the **Search** fields.
4. Select **Print Statements for one time gifts over \$250.00**.
5. Print your letters. Any contribution amount less than \$250 is not included in this statement. For example, the Abbey family donated \$25.00 every week to the Offertory fund and at Christmas gave \$250.00. This report will only show the one contribution of \$250.00, not ALL of the family contributions.