
ParishSOFT End-of-Year Contribution Statements 2013

Steps 1 through 9 below are your checklist for wrapping up 2013 and getting accurate contribution statements to your parishioners.

1. Beginning in early November, put information notices into the parish bulletins and newsletters reminding people about the contribution cutoff for 2013.
2. On December 31st, download your online contributions file from ParishSoft or LPi.
 - a. Post the batch.
 - b. Check on January 2nd for any “late” 12/31 online contributions.
 - c. Download but do not post the entries.
 - d. Print out the batch edit report.
 - e. Delete the batch and manually enter those contributions into the correct year.
 - i. There may be entries for 12/31 and for 1/1 which will require two different batches.
3. Finish posting contributions for 2013 that were received on or before December 31st.
4. Continue to check the US mail for contribution checks that were mailed to the parish.
 - a. Any contributions that are postmarked before 12/31 can be posted into 2013.
 - b. Be sure to keep the envelopes as proof!
 - c. Create separate 12/31 batches for these donations.
5. Update Snowbird Addresses.
 - a. The Snowbird Update applies the most current address information for any families with ‘Other’ addresses and To/From dates.
 - b. From the Family Directory screen, click Utilities > Update Snowbird Mailing Addresses.
6. Review Family Data to make sure addresses are complete. Find and fix any blank names or address fields in your family data—*before* any statements are mailed.
 - a. Reports>ParishSOFT Reports>Census Menu>Family Filtering and Sorting.
 - i. Set Registered filter to Both and Envelopes filter to Both.
 - ii. Click on the ‘Show Results’ Button.
 - (f) Click on the Mailing Name column header to have the list sort by mailing name.
 - a. To find blank Mailing Names, click the Mailing Name column header, then click the Sort Ascending A–Z button (in the tool bar at the top) to sort address alphabetically.
 1. Make a note of any blank records so they can be fixed before the mailing is generated.
 2. Click on the Address_1 column header to have the list sort by address then click the Sort Ascending A–Z button (in the tool bar at the top). Make a note of any families with a blank address.
 3. Do the same for City, then State and then Zip.
 - b. Correct any missing information – be sure to allow adequate time for this step – you may need to contact families for updated information.
7. Review your Offerings setups to verify that new Funds are set up correctly.
 - a. Check the Fund Descriptions to be sure the Fund names are clear and spelled correctly.
 - b. Review each Fund for Tax Deductability.

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- i. (Only Funds with “Yes” should be included on the End-of-Year Statements).
 - ii. Tuition and Fees are NOT contributions.
- 8. Conduct a test run of your End-of-Year Statements.
 - a. Running Your End of Year Statements for Families. From Any ParishSOFT Module:
 - b. Open Reports – ParishSOFT Reports – Contributions Reports – Periodic Contribution Statements
 - c. Click on the purple key icon.
 - d. Start on the upper left side of the window.
 - e. Select the date range desired (typically for End of Year Statements – January 1st through December 31st).
 - f. Select ‘Both’ for the Registration status.
 - g. Select ‘Only Contributors’.
 - h. Select ‘All Families’ for the first time you run the statements. (Recommended!)
 - i. Can choose a specific family for reprints or if only printing for those that requested statements (not recommended).
 - i. Leave the Fund selection at the default. (‘Select Funds’ check box.)
 - i. By default the program selects all Tax-deductible funds so there is no need to click any additional funds.
 - j. Select the Body of Statement (the letter that will appear in the statements).
 - i. This message can be edited from this window and saved by clicking on the save icon (floppy drive). It will only accommodate 3 to 4 sentences.
 - ii. To change the letter that prints on End-of-Year Contribution Statements:
 - 1. Go to Reports, ParishSOFT Reports> Contribution Reports> EOY Contrib Statement for Families.
 - i. In this window, click on “Select Body of Statement”.
 - i. This is where up to 4 letters are stored for you within ParishSOFT Reports.
 - ii. Type in the text that you wish to see in the body of your End of Year Contribution Statement.
 - iii. Before you close this screen, make sure the letter that was just modified for the End of Year Statements is selected from the drop down in the top right.
 - 2. Be sure to close the window using the door icon in the bottom (Do not click Add or Delete).
 - k. Select the Sort Order. (usually zip code or last name)
 - l. Select the number of columns desired on the Detail Statement Columns.
 - i. (2 columns are more easily read than the 3 column format.)
 - m. Select the check box ‘Include Pledge Info’ if desired.
 - i. This will display the full pledge history for the funds selected, not just contributions made during the dates selected.
 - n. Verify the Honor ‘Do Not Send Mail’ Requests is de-selected (No Check Mark).
 - i. Parishioners may request that the parish does not mail bulletins and event fliers to their homes. However, it is recommended that all families that

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- donated receive a year-end contribution statement as a giving reminder and for tax preparation purposes.
- o. Verify the 'Include IRS Disclaimer' in footer is selected.
 - p. Click 'Recalculate'.
 - q. Select the type of statement wanted.
 - i. Detail Family Statement – may generate more than one page per family.
 - r. Click 'Print Statements'.
 - s. After the Print Preview opens print your statements as normal.
 - i. Before closing the window, you may want to print the Pastors Report.
 - ii. Print mailing labels if needed.
9. Print pre-populated registration forms to send with Year-End Statements.
- a. Send populated Registration Forms along with your Contribution Statements to help keep parish information updated.
 - b. Sending them along with the Contribution Statements saves the parish mailing expenses compared to sending the forms in a separate mailing.
 - c. Ask parish families to review their information and communicate any changes to the parish office.
 - d. From any ParishSOFT module, click **Reports > ParishSOFT Reports > Census Menu > Other Reports > Family Registration Forms**.
 - i. Set Registered filter to Both and Envelopes filter to Both.
 - ii. Sort in the same order that was used to print the Year-End Contribution Statements for easy matching.
 - iii. Click on the Print Report button.
 - iv. There will be more Registration forms than Contribution Statements.
 - v. The parish may wish to create a Zero Giving Contribution Statement for these families, with a special message soliciting contributions.
 - 1. Use the instructions for number 8 above. Except substitute:
 - f. Select 'Registered' for the Registration status.
 - g. Select 'Non-Contributors'

Hint: Use window envelopes to avoid the need to print mailing labels.