

Send a Statement of Account

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CST

The Statement of Account lists a payer's current unpaid and paid invoices, any payments made, and any relevant notes. It also includes the total billed, total paid, and total account balance. You can email this report directly to payer contacts.

1. From the menu to the left, click **Accounting**.
2. Click **Accounts**. The Participant Account Details page opens and displays information for the last participant you viewed.
3. Click the drop-down menu at the top of the page and select the participant for whom to add a contact.
4. From the **Contacts** section to the left, click the contact to whom to send the report.
5. Click the **Actions** drop-down menu and select **Send Statement of Account**.

The screenshot displays the 'Participant Account Details' page for 'Baby Carrot'. The left sidebar contains a navigation menu with options like Kids, Food Program, Claims, Expenses, eForms, EasyPay, Income, Accounts, Stripe Dashboard, Settings, Reports, Setup, Messages, Get Help, and Logout. The main content area is divided into several sections: 'Contacts' (listing 'Fresh Carrot' as 'Paid' and 'Edler Carrot' as 'Inactive'), 'Agencies' (listing 'State Texas'), 'Payment Settings' (showing 'Percentage' and '\$ Amount' tabs), and 'Recurring Invoices' (a table with columns for Payer(s), Frequency, Amount, Next Invoice Date, and Status). The 'Recurring Invoices' table shows three entries for 'Fresh Carrot' with frequencies of 'Every Other Week', '2x/Month', and '2x/Month', and amounts of '\$135.00', '\$177.00', and '\$296.10' respectively. The 'Actions' dropdown menu is open, showing options like 'Contact Attributes', 'Role', 'Guardian', 'Payer of invoices for participant care', 'Authorized to pickup participant', 'Notifications', and 'Language'. The 'Statement of Account' option is highlighted.

Payer(s)	Frequency	Amount	Next Invoice Date	Status
Fresh Carrot	Every Other Week	\$135.00	10/06/2020	Active
Fresh Carrot	2x/Month	\$177.00	10/04/2020	Draft
Fresh Carrot	2x/Month	\$296.10	10/07/2020	Deleted