

Year-End Tax Summary Report

The Year-End Tax Summary report provides a statement of claim reimbursements issued and allowable expenses.

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CDT

Required Permissions: You must have the **Financial Reports** permission enabled on your account to run the Year-End Tax Summary report. This report is for **Sponsored Centers** only. It is not applicable to Independent Centers.

To run the report:

1. From the menu to the left, click **Reports**.
2. On the Reports page, select the following:
 - **Category:** Receipts
 - **Report Name:** Tax Summary
 - **Year:** Select the year for which to run the report. You can also select Custom and set a custom date range in the corresponding From/To boxes, as well as specify whether to run the report as a PDF or XLSX file.
3. Click **Run**. A PDF downloads.