

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 navigation options: Kids, Food Program, Claims, Expenses, eForms, EasyPay (selected), Income, Accounts, Stripe Dashboard, Settings, Reports, Setup, Messages, Get Help, and Logout. The main content area is divided into several sections:

- Participant Account Details:** Shows 'Baby Carrot' as the selected participant.
- Contacts:** Lists 'Fresh Carrot Guardian (789) 555-1233' (marked 'Payer') and 'Edler Carrot Other 7895551234' (marked 'Inactive').
- Agencies:** Shows 'State Texas 9401234567' (marked 'Agency Payer').
- Payment Settings:** Includes a 'Percentage' field set to 100% and a 'Default Rate' of \$15 per hour.
- Contact Details:** A form for 'Fresh Carrot' with fields for Name, Phone, Email, and Billing Address.
- Recurring Invoices:** A table showing invoice history for 'Fresh Carrot'.

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

The 'Actions' dropdown menu is open, showing 'Statement of Account' as the selected option. The 'Recurring Invoices' table includes a 'Display' dropdown set to 3 records and a 'Showing 1 to 3 of 9 entries' indicator.